The Compass Readiness Checklist

September 9, 2016

T-10 Weeks to Go-Live

Click here to view last week’s T-11 Compass Readiness Checklist
Click here for a PDF version of this week’s T-10 Compass Readiness Checklist

<table>
<thead>
<tr>
<th>AUDIENCE IMPACTED</th>
<th>TOPIC</th>
</tr>
</thead>
<tbody>
<tr>
<td>TRA INING – UNIVERSITY ONLY</td>
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</table>

Did You Register? Classes Start September 19th!

<table>
<thead>
<tr>
<th>Compass Users</th>
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<tbody>
<tr>
<td>Back Office</td>
</tr>
<tr>
<td>Grants</td>
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| 2016 SEPTEMBER |
| 1 2 3 |
| 4 5 6 7 8 9 10 |
| 11 12 13 14 15 16 17 |
| 18 19 20 21 22 23 24 |
| 25 26 27 28 29 30 |

**COMPASS COURSE TITLES: SEPT 19-23**

- Accounts Receivable- (Grants)
- Accounts Payable Operations (Payment Services Back-Office)
- Pre-Award - (Grants)
- What's New in Compass for ARBI (Back Office)
- Award Receipt & Set-Up (Grants)
- AP for Payment Services – Fin Gateway(Campus & Payment Services)
- What's New in Compass for ARBI (Back Office)
- Letter of Credit Management (Grants)
- Travel & Expense for Payment Services (Back Office)

*If any of the above courses are included in your Compass Upgrade Learning Plan, please register in the ELMS Registration Job Aid

*Healthcare will be conducting their own internal Compass training sessions. Healthcare Compass users are not required to go to any training offered by the University; however, they may attend University sessions with manager approval. For more information on Healthcare training, please contact Lori Ronalder.*
Compass

Users:
- Accounts Payable
- General Ledger
- Asset Mgmt.
- Treasury

**COMPASS COURSE TITLES: SEPT 26-30**
- Journal Mover (Heavy Users)
- Changes in GL (Heavy Users)
- Deal Management & Accounting
- Asset Management (Non-Equip)
- Asset Management (Equip)
- What's New in Accounts Payable (Heavy Users)
  - Bank Reconciliation & Accounting
  - What's New in Treasury

If any of the above courses are included in your Compass Upgrade Learning Plan, please register on the ELMS Registration Job Aid.* Healthcare will be conducting their own internal Compass training sessions. Healthcare Compass users are not required to go to any training offered by the University; however, they may attend University sessions with manager approval. For more information on Healthcare training, please contact Lori Ronalder.

Compass eLearning Courses Coming Soon!

**eLearning courses are not quite ready for viewing yet.**
They are marked as "COMING SOON-DO NOT ENROLL" in the ELMS. Compass users cannot register for them until they are loaded into the ELMS. When they are available, you will receive notice in the Compass Weekly Readiness Checklist. We expect them to be available by end of September.

Click here for a complete list of Classroom, Webinar, eLearning and Module Lead courses.* Healthcare will be conducting their own internal Compass training sessions. Healthcare Compass users are not required to go to any training offered by the University; however, they may attend University sessions with manager approval. For more information on Healthcare training, please contact Lori Ronalder.

How to Drop and Re-Enroll in Compass Courses

**Scenario:** You already enrolled in a classroom or webinar session that you can no longer attend. You drop the course expecting to re-enroll in a different session scheduled for another date/time but there is no Enroll button.

**What should you do?**

1. Drop the course/section that you can no longer attend. The enroll button is now removed and the course must be added back to your learning plan by the Transition Support team.
2. Email Transition Support at compassupgrade@emory.edu and request that they add the course back to your Learning Plan.

3. Transition Support will reply to your email to inform you that the course is back in your Learning Plan and you can go into the ELMS and enroll in a different class date/time (Allow up to 24 hours).

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## TRAINING SCHEDULE (SEPT – DEC)

### Looking Ahead

<table>
<thead>
<tr>
<th>Dates</th>
<th>Module Focus</th>
</tr>
</thead>
<tbody>
<tr>
<td>September 19-23</td>
<td>Back Office and Grants (OSP, Campus)</td>
</tr>
<tr>
<td>September 26-30</td>
<td>Accounts Payable, General Ledger, Asset Management, Treasury</td>
</tr>
<tr>
<td>October 3-7</td>
<td>Travel and Expense</td>
</tr>
<tr>
<td>October 10-14</td>
<td>Grants (FGC and RAS)</td>
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<tr>
<td>October 17-21</td>
<td>General Ledger and Commitment Control</td>
</tr>
<tr>
<td>October 24-28</td>
<td>ARBI, Workflow, Reporting</td>
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<tr>
<td>Oct 31 – Nov 4</td>
<td>Drop in Labs*</td>
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<tr>
<td>November 7-11</td>
<td>Make-up Classes</td>
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<tr>
<td>November 14-18</td>
<td>GO LIVE and Drop in Labs</td>
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<tr>
<td>Nov 28 - Dec 2</td>
<td>Drop in Labs</td>
</tr>
<tr>
<td>December 12-16</td>
<td>Drop in Labs</td>
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<tr>
<td>Nov 2016 – June 2017</td>
<td>Stabilization Period**</td>
</tr>
</tbody>
</table>

*Drop-in Labs – optional labs to allow users who have completed training the opportunity to practice in a lab environment with subject matter experts. Schedule coming soon!

**Stabilization Period – The project does not stop at Go-Live (November 14). During the stabilization period we will continue to refine the system, roll out additional enhancements and continue to provide support to the user community.

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You can meet your course requirements by completing eLearning, attending a classroom or webinar session, or viewing a recorded session.
**Healthcare** will be conducting their own internal Compass training sessions. Healthcare Compass users are not required to go to any training offered by the University; however, they may attend University sessions with manager approval. For more information on Healthcare training, please contact [Lori Ronalder](mailto:lori.ronalder@emory.edu).

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## USER ACCEPTANCE TESTING

### Reminder to Get Out and Play!

1. **CREATE** your own transactions
   - [https://fsclone.emory.edu](https://fsclone.emory.edu)
   - (Use your own log-in and password.)

2. **PROVIDE** feedback on your experience via Survey Monkey
   - [https://www.surveymonkey.com/r/UATPLAY](https://www.surveymonkey.com/r/UATPLAY)

3. **CALL** if you need help.
   - 77000 or 404-727-7000

*The “Play” environment will be open to all users who complete training.*

*Healthcare Compass Users:* If you have any UAT questions, please contact [Lori Ronalder](mailto:lori.ronalder@emory.edu).

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For Questions / Concerns or to Submit Content for the T-Minus Checklist, contact [compassupgrade@emory.edu](mailto:compassupgrade@emory.edu)

Check the website for more Compass Upgrade information: [upgrade.compass.emory.edu](http://upgrade.compass.emory.edu)