The Compass Readiness Checklist

October 13, 2016

T-5 Weeks to Go-Live

Click here to view last week’s T-6 Compass Readiness Checklist
Click here for a PDF version of this week’s T-5 Compass Readiness Checklist

Required versus Recommended

As a reminder, in order to complete transactions for a module (i.e., expenses) in Compass 9.2, you must complete training; however, there are some exceptions including the following recommended but not required courses.

University:
- Emory Express for End Users (recommended, not required)
- Institutional Data Management for Emory Express Only Users (recommended, not required if Emory Express is all you use)
- Compass 9.2 Essentials (recommended, not required)
- Compass Capabilities for Managers (recommended, not required)
- NOTE: Travel & Expense training is required but you do not have to complete prior to Go-Live if you don’t need immediate access. You can take the eLearning or view the recorded sessions when you need to complete a transaction. You will have view only access until you complete the training.

Healthcare:
- Please contact Lori Ronalder if you have any questions about which Healthcare Compass courses are required.

AUDIENCE IMPACTED | TOPIC

TRAINING – UNIVERSITY ONLY

Need Assistance? Register for an Open Lab

Open Labs are available to all Compass Users who completed module training but still would like to ask questions, complete an eLearning or practice in the Play environment with an expert nearby.

There are 2 weeks of Open Labs and they are scheduled by module and/or topic within a module. Open Labs are not a substitute for training and they are optional. Register on the ELMS and drop in anytime during the Open Lab four to eight hour session.
### Recorded Classroom Sessions – Currently Available

If you were assigned to eLearning for *Travel and Expense Enhancements* or *What’s New in Accounts Payable*, and would prefer a different option to complete the course requirements, there are video-recorded classroom sessions now available.

- **Compass 9.2 T&E (Heavy Users) Class**room Recording (Course # 260535-11383)
- **Compass 9.2 What’s New in Accounts Payable (Heavy Users)** Classroom Recording (Course # 260536-11384)

Click [here](#) for instructions for launching a Classroom Recorded Session.

### eLearning Courses Currently Available

- **What’s New in General Ledger? – New!** (course # 260435)
- **Understanding Workflow & Approving Financial Transactions – New!** (course # 260461)
- **Travel & Expense Enhancements** (course # 260454)
- **What’s New in Emory Express (User Community)?** (course # 260429)
- **What’s New in Accounts Payable?** (course # 260418)
- **Asset Disposal Workflow** – (course # 260427) –

**Coming Soon:** P-Card, Emory Express for Approvers

Click [here](#) for instructions how to launch the eLearning course from your Learning Plan.

### eLearning Tips & Tricks

- **Mute the audio** if you would rather not listen to the automated voice. All of the audio narration is included as text on the screen.

- Use the Pause and Back buttons to **moderate the pace of the course**.

- **Remember:** There are **job aids** for all of the eLearning content. You don’t have to memorize the steps needed to complete a transaction. **Click on the icon to the right and view the library of Job Aids.**

- Have a pen and paper on hand when you take the end-of-course-assessment (EOCA) and **note which questions you answer incorrectly**. Review the job aid or eLearning lesson before you attempt the EOCA a second (or third) time.

  1. Use the **Pause** button if you want to stop and take notes
  2. Use the **Back** button to go back one slide

You may also click on the **Lesson name in the Table of Contents** to go back and review the entire section.
Hot Questions

Q. What if I missed my scheduled Travel & Expense classroom training?

A. You can still fulfill your course requirement in any of the following ways:

1. Enroll in the Travel & Expense eLearning. (Course # 260454)

2. Enroll and attend one of the make-up classroom sessions scheduled November 7th -11th (Course # 260450)

3. Enroll in the recorded T&E classroom session. (Course # 260535-11383)

All of the options above include the End of Course Assessment component.

All module courses delivered in a classroom will be recorded and available in the ELMS 1-2 weeks after the classroom sessions for the module end. Many courses will also have a recorded Adobe Connect webinar option available on the ELMS.

Parking Lot [Questions & Answers from Classroom Sessions]

Visit the Home Page of the website for a link to an excel spreadsheet with all of the questions logged during classroom sessions. Subject Matter Experts provided the answers and you can filter by date, class name and module to search for a particular question and answer.

Classroom and Webinar Training Schedule

**OCTOBER 17-21**

What’s New in General Ledger? (Course # 260432)
- What’s New in Inputting and Processing Budget Journals? (Course # 260428)
- Changes in General Ledger (Back Office) (Course # 260434)

**OCTOBER 24-28**

What’s New in Compass Reporting? - webinar (Course # 260449)
- Wire Claims Enhancements (Course # 260459)
- Collection Workbench and WorkCenters (Course # 260421)
- Asset Management for Healthcare Users *
- Accounts Payable for Healthcare Users *
- Accounts Receivable/Billing for Healthcare Users *
- General Ledger for Healthcare Users *
- Treasury for Healthcare Users *

*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 Ronald.*

If any of the above classroom courses are included in your Compass Upgrade Learning Plan, please register on the ELMS. [Registration Job Aid]
Reminder to Get Out and Play!

After you complete an eLearning or classroom course you will have access to a practice environment so that you can continue to prepare for Go-Live and become more comfortable with Compass 9.2.

Congratulations Jackie and Brian!

During each week of training*, 2 Compass users are selected to receive a $50 Barnes & Noble Gift Card.

October 3rd – 7th Winners:
- Jackie Andrews, (SOM), Course: Compass 9.2 Healthcare-General Ledger (Classroom)
- Brian Neal Hogan, (SOM), Course: Travel & Expense Enhancements (Classroom)

*The winners will be selected from those who either 1) attended class or 2) completed eLearning from Monday-Friday of that week.

By the Numbers

91% of the respondents agree/strongly agree that training was a valuable use of their time.

After training 86% of the respondents think the new functionality is an improvement over the current functionality.

(670 responses from Compass users attending classroom training or completing eLearning.)

Important Links

- Training Schedule
- Compass Upgrade Website
- ELMS
- Key Dates
- How to Launch an eLearning Course
- How to Register for Training
- Important Announcement – Research Proposals
- End of Course Assessment information

For Questions / Concerns or to Submit Content for the T-Minus Checklist, contact compassupgrade@emory.edu
Check the website for more Compass Upgrade information: upgrade.compass.emory.edu