The Compass Readiness Checklist

October 7, 2016

T-6  Weeks to Go-Live

Click here to view last week’s T-7 Compass Readiness Checklist
Click here for a PDF version of this week’s T-6 Compass Readiness Checklist

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TRAINING – UNIVERSITY ONLY

REMEMBER: TRAINING IS REQUIRED FOR COMPASS 9.2 ACCESS- KEY DATES

**October 31**: If training is completed by this date, Compass users will receive transactional access at Go-Live (11/14)

**November 14**: If training is completed between Nov 1st and Nov 14th, Compass users will receive transactional access by noon on November 17th.

**After November 14th**: If training is completed after November 14th, users will receive transactional access within 2 business days after completing training requirements and submitting a Compass security form to the Finance Support Center.

OTHER KEY DATES

**November 10th -14th**: Users will not be able to access Compass or EPEX from Thursday, November 10, 2016 until noon on Monday, November 14, 2016. Please click here for details.

GETTING CREDIT FOR TAKING COURSES

End of Course Assessment (EOCA)

eLearning

- We have experienced some technical difficulties with scoring in the Emory Express eLearning. If you have completed the course, and passed the assessment with a score of at least 80%, please contact compassupgrade@emory.edu and let us know.
If you complete an eLearning course and pass the assessment, your course status will update to **Complete** when you exit the course. You can also click the **Refresh My Score** button prior to exiting the course to confirm the test score (although it is not a necessary step to update the status).

**Classroom**

- If you are in **classroom training** and you complete and passed the assessment, your course status for Classroom training will show as **In Progress** until the **next business day** where it will update to **Complete**. **You must complete the EOCA the same day that you complete the course** or you will be unable to access the assessment. If it is impossible for you to complete the assessment the same day classroom training occurred, you will need to contact **compassupgrade@emory.edu**.

- If you are in **classroom training** and you complete and passed the assessment, your course status for Classroom training will show as **In Progress** until the next business day whereupon it will update to **Complete**.

- If you do not complete the EOCA the same day that you complete the course, you will need to contact the Transition Support team for additional instructions on accessing the EOCA.

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**By the Numbers**

(598 responses from Compass users attending classroom training.)

**Agree/Strongly Agree:** *I am confident that I will be able to perform my specific Compass job functions at Go-Live.*

**Agree/Strongly Agree:** *The job aids will be a valuable reference tool to help me complete Compass transactions.*

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**Managers**

**Course Description:**
The presentation focuses on the Manager’s role in Leading Change. It is structured as a Q&A session addressing frequently asked questions Managers have, and questions Managers will likely get from their teams:

- What should we as Managers be doing now to prepare?
- What can I do to best support my teams knowing that change is hard?
- What questions should I expect from my team?

**Course Details:**
- **Key Presenters:** Belva White and Dave Miller
- **Course Title:** Compass 9.2 Capabilities for Managers
- **Course Number:** 260463-11337 (Access via the ELMS. Search for the course number to enroll)
- **Duration:** 45 minutes

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**Interface Owners**

**ELearning Update**

*Travel & Expense Enhancements* (260454) – Available Now!
*What’s New in Emory Express (User Community)?* (260429) – Available Now!
*What’s New in Accounts Payable?* (260418) – Available Now!
*Asset Disposal Workflow* – (260427) -- Available Now!

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

**Coming Soon:**
All Compass Users

**Hot Questions**

Q. What happens if I don’t complete the Institutional Data Management course?

A. If you are a University employee, you will not have any access to Compass, EPEX, Emory Express or EBI! Register on the ELMS (Course 410001)

*For more background information on data management policies please click [here](#).*

Emory Healthcare (EHC) employees who use any of the Financial Systems (Emory Express, EPEX, Compass and EBI) are **exempt from the IDM course** due to their annual completion of EHC sponsored compliance training.

All University Compass Users

**Congratulations Paul and Doris!**

During each week of training*, 2 Compass users will be selected for a $50 Barnes & Noble Gift Cards.

**Sept 26th-30th Winners:**

*Paul Peterson*, (LITS), **Course:** Compass 9.2 Asset Disposal Workflow (eLearning)

*Doris Muellner*, (ECAS), **Course:** What’s New in Accounts Payable? (Classroom)

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

**Classroom and Webinar Training Schedule**

**COMPASS CLASSROOM DELIVERY: OCTOBER 10-14**

- Pre-Award – Grants (Course # 260446)
- Accounts Receivables – Grants (Course # 260437)
- Award Receipt & Set-Up – Grants (Course # 260438)
- Letter of Credit Management – Grants (Course # 260447)

**Compass 9.2 – Grants Suite 101** (Course # 260448)

Changed from Live Webinar to Recorded Webinar.

**COMPASS CLASSROOM DELIVERY: 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)
If any of the above classroom courses are included in your Compass Upgrade Learning Plan, please register on the ELMS. Registration Job Aid

You can fulfill your course requirement by completing eLearning, webinar, classroom training or by reviewing a recorded classroom session. Click here for a complete list of Classroom, Webinar, eLearning and Module Lead courses.

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.

*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

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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