Summary of Content:

The Compass Readiness Checklist is targeted for University Compass Users. Healthcare users have unique training and UAT requirements. Specific Healthcare questions should be directed to Lori Ronalder

The Compass Readiness Checklist

September 23, 2016

T-8 Weeks to Go-Live

Click [here](#) to view last week’s T-9 Compass Readiness Checklist

Click [here](#) for a PDF version of this week’s T-8 Compass Readiness Checklist

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<tr>
<th>AUDIENCE IMPACTED</th>
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<td>TRAINING – UNIVERSITY ONLY</td>
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eLearning Update

**What’s New in Accounts Payable?** eLearning –Available Now!

**Asset Disposal Workflow** eLearning – Available Now!

Coming Soon:

Classroom and Webinar Training Schedule

Grants Instructor Team: Niketta Jones, Val Rainey, Wanda Francis, Shannon Swoope, Kerrie Hawkins, Joy Floyd and Urvi Patel

End User Instructor Team for University training: John Marnne, Rakesh Gambhir, Amy Jones and Stephen Wheeler.

(Not pictured - David Wright)
Compass Users:

- Central Finance
- Accounts Payable

Travel & Expense (Heavy Users)

Grants (FGC and RAS)

**COMPASS CLASSROOM DELIVERY: SEPT 26-30**

- Journal Entry Engine (Interface Users)
- Changes in GL (Central Finance)
- Deal Management & Accounting (Central Finance)
- Asset Management (Equip) (Central Finance)
- Bank Reconciliation & Accounting (Central Finance)
- What’s New in Treasury (Central Finance)

**Accounts Payable Top 3 Key Wins with Compass 9.2**

1. Central place to Manage Your Payments Request
2. Screens contain major ‘train-stop’ guidance to process a payment request.
3. Simple way to reimburse students and guests

**COMPASS CLASSROOM DELIVERY: OCTOBER 3-7**

- Travel & Expense Enhancements

Travel and Expense proxies from 9.0 will convert over to 9.2. New proxies established after Go-Live will require the employee to go into Compass and set up their proxy.

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

- Pre-Award – Grants
- Accounts Receivables – Grants
- Award Receipt & Set-Up - Grants
- Letter of Credit Management – Grants
- **Compass 9.2 – Grants Suite 101 (Webinar)**

The webinar provides an overview of changes in journal mover, PI Portal, Fund Codes, Fringe process, Vouchers, Emory Express, and T&E that impact Grant’s Compass users. Changes in processes will also be covered in this overview.

If any of the above classroom / webinar courses are included in your Compass Upgrade Learning Plan, please register on the ELMS. Registration Job Aid

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*
**Hot Questions**

Are students still going to be reimbursed through the Expense module?

**NEW!**

1. Student Reimbursements is a new Request Type in the Payment Request Center. **Student activity-related expenses** should be submitted through Accounts Payable.

2. **Student Employee expenses related to their jobs** should be submitted through Travel & Expense for reimbursement.

**Managers**

**Course: Compass 9.2 Capabilities for Managers**

Coming the Week of October 7

Along with a quick look at the overall project status, the presentation will focus on the **Manager's role in Leading Change**. **Presenters:** Belva White, Dave Miller, Erin Mackenzie and Ellen Pautler.

Due to the logistical limitations around providing this training to thousands of managers, the course will be an Adobe Connect recorded presentation accessible through the ELMS. Check for an update in the T Minus 7 Weeks Checklist.

**Peer Experts**

**Course: Peer Expert Readiness Webinar**

For Peer Experts who could not make it to the September 20th webinar, an Adobe Connect recording is available in the ELMS. Search for Course Code 260464-11278.

**TRAINING SCHEDULE (SEPT – DEC)**

**Compass Users:**

**Looking Ahead**

You can meet your course requirements by completing eLearning, attending a classroom or webinar session, or viewing a recorded session.

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<th>Dates</th>
<th>Module Focus</th>
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<td>September 19-23</td>
<td>Back Office and Grants (OSP, Campus)</td>
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<td>September 26-30</td>
<td>Accounts Payable, (Central Finance: General Ledger, Asset Management, Treasury)</td>
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<td>October 3-7</td>
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<td>October 24-28</td>
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<td>Oct 31 – Nov 4</td>
<td>Drop in Labs*</td>
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<td>November 7-11</td>
<td>Make-up Classes</td>
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<td>November 14-18</td>
<td>GO LIVE and Drop in Labs</td>
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<td>Nov 28 - Dec 2</td>
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<td>December 12-16</td>
<td>Drop in Labs</td>
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<td>Nov 2016 – June 2017</td>
<td>Stabilization Period**</td>
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*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** – “Go-Live” is not a single day. It is a period of time starting on November 14th and lasting through a user adjustment period of approximately 6 months (often referred to as the “Stabilization Period”). During the stabilization period we will continue to refine the system, roll out additional enhancements and continue to provide support to the user community.

*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)