Unified Workflow

Smart.Logical.Flexible

*Workflow is the tool that allows required transaction approvals to be performed within the Compass system. The new **Unified Workflow** solution provides additional flexibility, visibility and consistency to improve the workflow process and increase efficiency.*

Three notable changes that affect the workflow for all transactions:

❶ Workflow Routings will be based on Department
❷ New Roles for Accounting Checker and project-level approvers will be available
❸ There will be flexible dollar-level approval assignments

Current Challenges

- Online Journal Entries and Budget Transfer Journals route differently from Accounts Payable and Expenses (this makes it possible for online journal entries to route and post without all of the affected departments having visibility into the dollar amounts that will hit their departments).
- Lack of uniformity creates confusion and increases rework.
- Emory incurs an additional third party cost for SmartERP.

Key Benefits

- Consistent workflow is available for all transactions (you may still elect to add levels to workflow for some transactions and not others)
- Validation of data accuracy at system entry points (this is the role of the NEW Accounting Checker)
- Local transactions are visible to all affected Departments
- Reduces rework
- Eliminates license fees from 3rd-party vendor who provides workflow function today