Project Compass Management Bulletin

December 2008

Message from Project Compass Leadership

It is hard to believe that the PeopleSoft Financials go-live is less than nine months away! I have been looking forward to having one financial system for all of the entities on campus, and it is exciting for me that this change is just around the corner.

For the Woodruff Health Sciences Center, the integration of the Emory Clinic's financials into the rest of Emory Healthcare and the University will provide us with new opportunities, which were not possible on two separate financial systems. PeopleSoft Financials will provide us with better reporting, which means better analysis and ultimately better management and decision-making.

While the PeopleSoft Financial system might change processes and how we do business today, having most, if not all, of the financial information for the University in one financial system will be beneficial to everyone. For all of the units on campus, not just the Woodruff Health Sciences Center, shadow systems and spreadsheet will be reduced if not eliminated.

While the implementation process has meant and will mean great change for everyone, I believe this change is for the better and will only make Emory stronger.

- Carla Chandler,
Director, Financial Services,
Exec VP Health Affairs

PROJECT ACCOMPLISHMENTS

Project Management Updates

- Project Compass welcomes the new Project Manager, Frances O'Neill. Ms. O'Neill joined the project team on December 1. She is employed by CedarCrestone, one of Emory's implementation partners. Ms. O'Neill is responsible for providing oversight of the Project Management Office and ensuring that the project is progressing on target.
- Project Compass Leadership met with the Executive Committee on November 24. The Executive Committee provides strategic direction and vision for the project. The meeting agenda included the health rating of the project, organization highlights, project timeline, and finalizing enhancements which will make the system more Emory friendly.
- Project Compass Leadership continues to monitor and review requests for unexpected increases in scope to ensure the PeopleSoft Financial system includes functionality that supports Emory's critical needs. Enhancements that fall into this category are being considered for future releases.

Functional Teams

- The functional teams continue to develop and review the Business Process Narratives (BPNs) with business owners. The majority of the BPNs are expected to be complete by the end of December.
- The Training Plan has been created and is currently in review with Emory and Project Compass Leadership. More information on training will be available in early 2009.
- The Business Architecture Team (BAT) continues to review business case requests submitted by the team. Several business cases were approved to enhance the PeopleSoft Financial System functionality, including updates to Grants, Human Resources, General Ledger, Accounts Payable/Expenses, Accounts Receivable/Billing, and Reporting functions.
- December team goals include completing system configuration tasks, preparing for the testing phase, and continuing development with owners of systems that will interface with PeopleSoft Financials.
- Chart of Account Department ID Mapping – if you are involved in this process for your unit or have questions/concerns about the process, please work with your unit's Business Officer to gain additional information. The Business Officers are working with each department (as appropriate) to document the structure for the department. The Department ID mapping process is slated for completion by the end of February 2009.
- The additional ChartField values will be defined by December 31, 2008. The additional ChartFields include Account, Fund, Class (NACUBO), Project (Grants), and Operating Unit.

The Project Compass Management Bulletin provides managers and executives with a monthly summary of Project Compass accomplishments and upcoming activities. If you have any questions or feedback, please contact us at compass@emory.edu.

Tips for Staying Involved with Project Compass

- Attend a Project Compass Overview

- Go to the Project Compass Website to learn more about the project (www.compass.emory.edu)

- Complete the Project Compass Overview Self-Paced Guide (available on the Project Compass Website).

- Update your staff at your regularly scheduled meetings providing Q&A or feedback time

- Share your feedback, questions, and concerns with the project team and encourage others to do the same

- Email your feedback and questions to compass@emory.edu

- Disseminate communications from the Project throughout your unit

- Display Project Compass posters in high traffic areas

REMINDER:

Café Montage: A Project Compass Q&A

When:

Every First Friday Morning of the Month from 7:30 – 9 am

Buy a cup of coffee and join **Belva White**, Emory University Associate VP/Controller, and **Byron Nash**, Director, Administrative and Data Services, as they answer your questions. Project Compass Q&A sessions are held in Café Montage located in the 1599 Clifton Road Building.

PROJECT COMPASS AROUND EMORY

Project Compass is dedicated to providing Emory stakeholders with timely and insightful updates regarding Project Compass. Project Compass updates are provided using several different channels, including electronic articles and in-person presentations.

Communications Distributed via E-mail:

- November 3 - The *Compass Directions Spotlight* - summarized road shows conducted and advertised Café Montage: A Project Compass Q&A.
- November 4 – Project Compass Flyer – distributed to key Emory staff to post in high traffic areas around Emory. Have you seen it?
- November 24 – The *Project Compass Management Bulletin* – introduced the initial issue of the Management Bulletin.

Project Compass Overview Road Shows Conducted:

- In November, Project Compass Leadership facilitated the Project Compass Overview for the School of Nursing, Human Resources Representatives, Emory College Department Operations, and the Provost Council.
- During the first week of December, the Project Team met with the Briarcliff Campus to conduct a project overview and hosted a booth at the Research Administration Open House.
- Contact Project Compass (compass@emory.edu) if you are interested in hosting a Project Compass Overview for your department.

Lunch and Learns Conducted:

- Emory Healthcare Finance – Steve Hall provided an overview of the PeopleSoft Financial reporting capabilities. The overview included a demonstration of how to use some of the reporting tools to create queries and return information.
- FYI…Standard Emory reports that are currently in use will be developed in PeopleSoft and made available with go-live. Specific reports will be identified and communicated closer to deployment.

UPCOMING COMPASS ACTIVITIES

Representatives from the Project Compass Team are busy meeting with staff to educate and provide updates about the status of the project. Project Compass will meet with the following group in December:

- December 11 - Emory Healthcare Annual Finance Meeting Lunch & Learn, PeopleSoft Financials Basic Navigation Overview

Do you have a question or comment about Project Compass? Send an e-mail to compass@emory.edu.