

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.

Message from Project Compass Leadership

Project Compass will bring about many positive changes for those involved in the administration of research and other sponsored projects at Emory. The new PeopleSoft Financial system will handle all OGCA processes currently handled by FAS and all OSP processes currently handled by the limited and dated OSP system. Expanded pre- and post award data will be captured together in the PeopleSoft Financial system, providing a higher level of data integrity and efficiency, as well as streamlined and expanded reporting capabilities.

One area that currently causes delays in processing proposals is budget preparation and routing. The implementation of the new system will include an electronic budget tool. This tool will handle the preparation of all budgets for sponsored programs. Currently, some departments and schools use tools that were built using Excel or similar shadow systems to develop budgets. Our new tool will provide one comprehensive tool for use throughout the University. The tool will include functions such as calculators for fringe benefits, facilities and administrative costs, and salary caps. The tool and the rates within the tool will be maintained by OGCA. This tool is anticipated to significantly streamline the budget routing and review process.

The PeopleSoft Financial System will capture further information beyond what is captured in our current systems. This information will provide Emory researchers and administrators with additional tools to monitor their awards. While there will be an adjustment period as people become acclimated with the new financial system, it is anticipated that this system will significantly improve the way research is administered at Emory.

Kerry Peluso,
AVP for Research Administration
Office of Sponsored Programs
Office of Grants and Contracts Accounting

PROJECT ACCOMPLISHMENTS

Project Management Updates

- The Project Compass Steering Committee met Monday, December 15. The Steering Committee discussed the conversion process, cash management, HR/Finance interfaces, the endowment system, and utilizing forms with the PeopleSoft Financials system.
- The Conversion team welcomes Matt Carpenter as the new Conversion Team Lead. During December, the Conversion team focused on the General Ledger conversion process and tasks.
- As the Project Compass Team continues to push forward to the September 2009 go-live, the team has added new team members to help Emory reach its goals. New team members joined the Accounts Payable, General Ledger, Technical, Cutover, Testing, and Training teams.

Functional Teams

- The Project Team is currently collecting a list of all forms (including current forms and future suggestions) that will be required to continue the timely and accurate processing of financial transactions. Project Leadership will review the list and determine the appropriate build and implementation approach.
- The functional teams continue to develop and review the Business Process Narratives (BPNs) with business owners.
- The Testing Team continues to prepare the team for the System Test Phase of the project. The team will utilize several testing tools that will help manage and streamline the testing process.
- In January, the Testing Team will focus on test script development, unit test development, and building the test environments.
- The Conversion team is currently working on converting General Ledger data into the PeopleSoft Financial system. The team will convert 2008 ending balances and existing 2009 transactions into the new system.
- The Project Team hosted a meeting to review the Organizational Change Management strategy, including the Communication and Training approaches, as well as the Organizational Impact Analysis process. The Organizational Impact Analysis is the process of identifying how business will change for Emory staff. Once these changes have been identified, you will learn more about the changes, prior to training, to prepare you and your staff for what to expect from the PeopleSoft Financial system.

Project Compass Launches Website Updates!

Check out the updates to the Project Compass Website (www.compass.emory.edu).

The website features a new Training page, Project Communication Archive, and an Overview of the PeopleSoft Financial Modules.

Check the site frequently for updates about the project!



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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

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 in December:

- The *Project Compass Management Bulletin* (December Edition)
- The *Compass Directions Newsletter*
- Project Compass article appearing in the *Research Administration News at Emory* newsletter

Note: Project Compass communications are available on the Project Compass website (www.compass.emory.edu) under News and Events.

Project Compass Overview Road Shows:

- During the first week of December, the Project Team met with staff located at the Briarcliff Campus to conduct a project overview and hosted a booth at the Research Administration Open House.

Lunch and Learns Conducted:

- Emory Healthcare Finance – Christopher Uher facilitated a demonstration of PeopleSoft Basic Navigation Tips for Healthcare Financial Staff.

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 groups in January:

- January 13 - Office of Business Management, Project Compass Overview
- January 27 - Emory School of Medicine, Project Compass Overview

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.



The Project Team will host several Project Compass Town Hall Project Overviews in January and February.

ALL STAFF ARE INVITED TO ATTEND ONE OF THE FOLLOWING OVERVIEWS:

- **January 28** - Dobbs University Center (DUC) - Winship Ballroom (10 - 11:30 am)
- **February 3** - Winship Cancer Center - WCI 5012 (2 - 3:30 pm)
- **February 10** - Dobbs University Center (DUC) - Winship Ballroom (1:30 - 3 pm)

This is the Project's opportunity to meet with staff who have not attended a Project Compass Overview. Please plan to attend. Check your e-mail and the Project Compass website to RSVP if you can attend.

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