Project Compass Management Bulletin

November 2008

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

Big changes are ahead for the way the University and Healthcare conduct business. In September 2009, the new PeopleSoft Financial System will replace Emory's 20-year-old FAS and 11-year-old CODA systems.

With the new financial system, we are stretching our imaginations. If we are going to be among the best research universities, we have to have systems, tools, and administrative infrastructure that will support more robust financial management and decision-making.

It is an understatement to say that installing a new financial system for the Emory enterprise is a major undertaking. Ensuring that the system meets the many business needs of Emory, while at the same time not complicating the system with too much customization, is the primary objective of Project Compass. The system itself is just part of the solution; University and Healthcare employees are the key to the project's success.

Project Compass team members represent many different areas of Emory University and Emory Healthcare. They have been working fast and furiously on this initiative while giving up their regular routines. Their daily work life is now very complex and intense, but they persevere.

We would like to take this opportunity to thank the Project Compass Team for their many hours of hard work and continued commitment to ensure our success. Without them, this would not be possible!

-Jimmy Hatcher, CFO
Emory Healthcare

-Edie Murphree, VP for Finance
Emory University

PROJECT ACCOMPLISHMENTS

Functional Team

- The Project Team has officially moved into the Build Phase of the project. During this phase, the team will focus on configuring and developing technical components (e.g., interfaces, conversion, etc.) in the PeopleSoft Financials system to meet Emory needs and to prepare for the testing phase.
- The individual functional teams (e.g., Accounts Payable, General Ledger, etc.) continue to develop and review the Business Process Narratives (BPNs) with business owners. The BPN reviews will continue through December 2008.
- The Security Team was established to design the security approach structure for the PeopleSoft Financials system.
- The Business Architecture Team (BAT) reviewed the conversion approach for the Project Costing and Grants modules. The team reviewed and approved several business case requests to add functionality that will enhance end users' experience with PeopleSoft (e.g., create a page to allow users to update all dates for Grants in a central location).
- The University budgeting tool, EBO, will be retro fitted to work with the PeopleSoft Chart of Accounts.

Reporting

- The Reporting Approach was presented to the Project Compass Steering Committee and Emory Healthcare. The presentation focused on educating stakeholders on the ease of report generation and the process for validating and verifying data.
- Sample reports were developed and shared with financial project leads to illustrate the primary financial statements that the PeopleSoft Financials system will generate.

Chart of Account (Department ID) Mapping

- Belva White and the Controller's Office are currently hosting working sessions to educate and identify the future structure of the Chart of Account Department ID numbers with campus Business Officers. The sessions focus on explaining the purpose and use of the Department ID ChartField.
- The Controller's Office is meeting with the Business Officers of the major campus units to develop a Department ID prototype for the unit. After conducting the initial working session, the Business Officers are working with each department (as appropriate) to document the structure for the department.
- In October, the Controller's Office met with several Business Officers including Campus Life, University Libraries, Yerkes, GBS, Law School, School of Theology, and the School of Medicine to facilitate the working sessions.
- The Department ID mapping process will continue over the next several months, until the Department ID structure is identified for the entire campus.

Project Compass Management Bulletin
November 2008

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)

- 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:

- October 6 – The *Compass Directions Newsletter* - featured general information on the project, Chart of Accounts, and SMARTKEY; re-introduced the Champions of Change Advisory Group, the advisory team to the Organizational Change Management Team.
- October 20 – The *Compass Directions Spotlight* - introduced the Project Compass Online Self-Paced Overview. Visit the Project Compass website (www.compass.emory.edu) to complete the overview.
- October 27 – Distributed the *Emory Leadership Communication Memo* to Emory managers and executives, outlining the communication activities and events that staff can expect over the next year.
- November 3 - The *Compass Directions Spotlight* - summarized road shows conducted and advertised Café Montage: A Project Compass Q&A, hosted on the first Friday of every month, from 7:30 - 9 am, in Café Montage, in the 1599 Clifton Road Building.

Project Compass Overview Road Shows Conducted:

- Project Compass Leadership facilitated the Project Compass Overview for the Student Enrollment Management Council, Office of Sponsored Programs, Office of Grants and Contracts Accounting, School of Nursing, Human Resources Representatives, and Emory College Department Operations.
- Belva White visited the Oxford Financial Services Team and the Office of Development and Alumni Relations to provide a Project Compass overview and status update.

Lunch and Learns Conducted:

- Emory Healthcare Finance – Liz Daunt-Samford provided an introduction to the PeopleSoft Chart of Accounts and ChartFields.

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 November and December:

- November 24 - Provost Council Meeting, Project Compass Overview/Update
- December 3 - Briarcliff Campus, Project Compass Overview
- December 5 - Research Administration Open House, Project Compass Information & More
- December 12 - 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.