

## The Building Blocks of the PeopleSoft Financials System



If you were building a house, would you start nailing together boards without a blueprint or a plan? Probably not! Well, the Project Compass Team is not developing the PeopleSoft Financials system without a plan either. The Project Team recently wrapped up the Interactive Design Protocol (IDP) and Design phase of the project. During the design phase, the team completed several key milestones, including:

- Conducted the Interactive Design Protocol sessions
- Developed and reviewed the Business Process Narratives
- Established the conversion strategy/specifications
- Outlined the functional specifications

Each milestone contributed to the development of the plan or blueprint of the PeopleSoft Financials system. Now that the plan is finalized, what is next?

The Build and Configure Phase, the next phase in the Project Compass lifecycle, is when the project turns its attention from

gathering design requirements to development of the system and preparation for testing and training. The team will focus on the following tasks from now until spring 2009:

- Document new business processes
- Configure the PeopleSoft Financials system to meet Emory's business needs
- Develop test scripts, scenarios, and expected results
- Develop approved Emory specific functions
- Convert legacy data for all modules
- Design and develop training materials

During the Build and Configure phase, Subject Matter Experts (from your business area) who contributed to the IDP and Design phase will be consulted as business process changes are confirmed and the team prepares to test the system. Subject Matter Experts will also participate in testing the new system. Stay tuned to the *Compass Directions Newsletter* for detailed updates about how Project Compass will impact you.



## Planning for Change: One Stakeholder at a Time

How do you prepare over 3,500 Emory University and Healthcare staff to use the new PeopleSoft Financials system in September 2009? By assessing and identifying stakeholders and the impacts of the new system on their current responsibilities.

The Organizational Change Management Team recently completed the Stakeholder Analysis, which identifies the Emory stakeholder groups impacted by Project Compass, along with information that each stakeholder group will need from the project and information the project team will need from them. To complete the analysis, the team interviewed leaders from areas across Emory, as well as Project Compass Team Leads; gathered information from meetings and road shows; and identified the users of current financial systems, e.g., FAS, CODA, Emory Express, eJournals, etc. The

Stakeholder Analysis will ensure understanding and inclusion of all impacted stakeholders and provide the basis for business readiness, communications, involvement, and training design and development.

Leading up to September 2009, stakeholders will receive information designed to prepare them for the change in systems and in some cases, processes. Currently, all staff receive the *Compass Directions Newsletter* and bi-weekly *Compass Directions Spotlight*. These tools help to keep all staff informed about Project Compass progress and accomplishments. In the near future, staff can expect to receive detailed information regarding system functions and how the new system will impact their daily roles.





## Accounts Payable/Travel and Expense Modules

The PeopleSoft Accounts Payable and Expense modules offer Emory staff a streamlined process for recording vouchers and expenses. With the implementation of the PeopleSoft Financials system, some users will change from using **four** systems to **two** systems to enter vouchers.

The Accounts Payable process will introduce new functionality, while maintaining some of Emory's existing functions. For the **University**, vendor invoices and purchases requiring a Purchase Order will be entered into Emory Express (SciQuest). The University made the decision to use PeopleSoft Financials for voucher entry of utilities and other payments that **do not** require a Purchase Order. The vouchers will be interfaced (or pushed) from Emory Express into PeopleSoft Financials for payment. The types of payments that will be entered into PeopleSoft are:

- Utilities
- Tax payments
- Business licenses
- Honorarium
- Payments to individuals or non-incorporated companies for services
- Other payments that require 1099 or 1042 reporting
- Study Participants
- Recurring Payments

**Emory Healthcare** will not use the PeopleSoft Financials voucher entry functionality. All vendor invoice and payment requests will continue to be entered into PMM and interfaced into PeopleSoft Financials for payment.

All **University** and **Healthcare** employees will use the PeopleSoft Travel and Expense modules to request reimbursements for travel or other expense purchases. Reimbursements to employees will not be entered into the Accounts Payable module.

All travel expenses (e.g., airfare, lodging, meals, ground transportation) for guests of Emory will also be entered into the PeopleSoft Expense module.

## On the Road (Show) with Project Compass

With thousands of stakeholders, how are we spreading the word about Project Compass? The Project Compass Leadership Team is conducting Overview Road Shows for staff across Emory. The road show provides a general overview of the project and allows staff to ask questions.

So far, the team has met with the following groups:

- Department of Medicine
- Alumni and Development Records
- Campus Life
- Oxford Financial Services
- Student Enrollment Management Council
- Office of Sponsored Programs
- Office of Grants and Contracts Accounting
- School of Nursing
- Human Resources Representatives
- Emory College Department Operations
- Briarcliff Campus (various departments)

The hour long session allows staff to talk directly with project leadership, while learning about the basics of Project Compass. According to one attendee, "I always like first contact to be personal like your group did yesterday with our department."

All staff are encouraged to attend the road shows. If you cannot attend the road show, review the online *Self-Paced Guide: Project Compass Overview*, to learn more about why Emory is implementing the new PeopleSoft Financials system. You can find the overview at [www.compass.emory.edu](http://www.compass.emory.edu).

The Leadership Team will continue to provide overviews through the end of the year. Beginning in 2009, the team will start conducting "Lunch & Learns" geared towards providing specific details about functional changes.



November 12, 2008—Emory staff wait for the HR Representative Road Show to begin. Project Director, Christopher Uher, provided an overview of the PeopleSoft Financials system during the Project Compass Road Show.



# LOOKING FOR DIRECTIONS?

## Project Compass Frequently Asked Questions



**How will the new PeopleSoft Financials system impact how employees are reimbursed for expenses? Will reimbursements be managed by Payroll?**

Currently, travel and employee reimbursements are processed using the Expense Report and Payment Request function via the Finance Website (University only - Healthcare submits paper forms). With the new financial system, travel and employee reimbursements will be entered on the PeopleSoft Expense Report via the PeopleSoft Financials Employee Self-Service section. (Note: This is not the same as the HR Employee Self-Service.) Using the PeopleSoft Financials system, employees can track their expense reports online, through approval and payment.

**When payments are submitted, will the PeopleSoft Financials system allow users to view immediate updates online?**

For the University, most purchases will continue to be made by entering a requisition into Emory Express. The process for entering requisitions into Emory Express will not change. However, PeopleSoft Financials will change how payments are issued. Instead of interfacing with FAS, Emory Express will interface with the PeopleSoft Accounts Payable (A/P) module to issue a payment. When a voucher is interfaced into PeopleSoft A/P, the charge will post to the General Ledger and employees will be able to see the charge on the ledger.

For the items that do not require a purchase order (see Spotlight On... for a detailed list), the team is developing a new payment request function that will be accessible via the PeopleSoft Financials Employee Self-Service section. (Note: This is not the same as the HR Employee Self-Service.) After the payment request is submitted, employees can view the payment as it is approved and paid. The transaction will post to the General Ledger after the transaction is approved.

**Do you have a question about Project Compass?  
E-mail us at [compass@emory.edu](mailto:compass@emory.edu).**

## Navigating Project Compass

Test your knowledge of Project Compass!

Submit the correct answers to the questions below by December 19, 2008, and be entered into a drawing to win a prize from Project Compass!

Fax the completed puzzle to 404-727-2310. Include your name, e-mail address, department, and phone number in the fax.

1. When is the PeopleSoft Financial system going live?
2. Name the nine modules included in the PeopleSoft Financial system.
3. Name two communication vehicles that all staff receive to stay informed about Project Compass progress and accomplishments.
4. True or False: Will Emory Healthcare staff use PeopleSoft to enter vouchers?
5. Name three tasks that the project team will focus on from now until Spring 2009.
6. Where will University staff enter purchase orders?
7. Who are the Project Sponsors for Project Compass? (Hint: They are listed as the Co-Chairs of the Executive Committee in the online Self-Paced Guide: Project Compass Overview.)
8. What did the October 2008 edition of the *Compass Directions Newsletter* feature in the "Spotlight On" section?
9. If you currently use \_\_\_\_\_ or \_\_\_\_\_ (or data from these systems), the PeopleSoft Financial system impacts you.
10. What is the Project Compass website address? Stay tuned, the Project Compass website will feature new sections beginning this month.

### Training Update:

The Project Compass Training Team is currently developing the plans for PeopleSoft instructor-led classes and on-line simulations. More details will be provided in early 2009.