Frequently Asked Questions – Prior to Go-Live

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**Why Don’t I Have Access to a Module?**

Access is determined by a variety of factors.

**Did you have access to the module in Compass 9.0?** If the answer is No and you still feel that you need access, you need to complete a Compass [Online Access Request](#) form which must then be approved by your Chief Business Officer.

**Did you complete training?** If the answer is Yes, proceed to next question. If the answer is No, you need to complete the training. Check the website homepage for course options.

**Did you pass the End of Course Assessment?** If the answer is Yes, proceed to the next question. If the answer is No, you must pass in order to have a Complete status. Go into the ELMS and relaunch the course. Complete the lessons and take the EoCA.

**Did you go into the ELMS and check your course status?** Please send an ELMS screenshot showing the course completion date and course status.

**Course Status Update Questions**

[Compass email box auto-reply](#) (11/7/2016): *We are working diligently to update assessment scoring and course completion in the ELMS. We are responding to your ‘course status’ and ‘assessment scoring’ emails as quickly as we can; but please expect up to 48 hour response time while we audit and manually update the ELMS. Typically, the course status will update until the next business day.*

**Email:** compassupgrade@emory.edu  **Website:** www.upgrade.compass.emory.edu
Frequently Asked Questions – Prior to Go-Live

Why is my webinar course status listed as *In Progress*?

Webinar participants received a follow-up email from *Compass 9.2 upgrade communications* with instructions to complete the End of Course Assessment (EOCA) and survey before midnight of the next calendar day.

**Scenario 1:** You completed the webinar, received the follow-up email and followed the outlined steps, passed the end-of-course assessment with an 80% or better **BUT** your course status did not update to COMPLETE.

**Action Required:** Contact the Transition Support team at *compassupgrade@emory.edu* and let us know the course name, date, time and score so that we can check it against our ELMS data and update your course status to Complete.

**Scenario 2:** You attended a webinar session, received the follow-up email but did not pass the end-of-course assessment (EoCA). (80% minimum)

**Scenario 3:** You attended the webinar and never received the follow-up email or took the assessment.

**Action Required:** The access to the EOCA expired at midnight of the next calendar day following the webinar; therefore, you will need to complete the attached EOCA and return it to *compassupgrade@emory.edu*.

Why is my eLearning course status listed as *In Progress*?

**Scenario 1:** You completed eLearning and passed the assessment and, for some reason, the score did not refresh in the ELMS.

**Action Required:** Check the ELMS the next business day to see if the status was updated. If it is not updated, contact the Transition Support team at *compassupgrade@emory.edu* and let us know the course name, date, time and score so that we can check it against our ELMS data.

**Scenario 2:** You launched the eLearning course but did not complete all of the lessons **and** then take the assessment.

**Action Required:** Go into the ELMS and relaunch the course. Complete the lessons and take the EoCA.

**Scenario 3:** You completed all eLearning lessons, but did not pass the end-of-course assessment.

**Action Required:** Go into the ELMS and relaunch the course. Complete the lessons and take the EoCA.
Frequently Asked Questions – Prior to Go-Live

What training is required versus recommended? Are there exceptions?

In order to complete transactions for a module (i.e., expenses) in Compass 9.2, you must complete training; however, there are some exceptions including the following recommended but not required courses.

**University:**
- Emory Express for End Users (recommended, not required)
- Institutional Data Management for Emory Express Only users. (Recommended but not required if all you use is Emory Express.)
- Compass 9.2 Essentials (recommended, not required)
- Compass 9.2 for Managers (recommended, not required)
- **NOTE:** Module course training is required but you do not have to complete prior to Go-Live if you don’t need immediate access. You can take the eLearning or view the recorded sessions when you need to complete a transaction. You will have view only access until you complete the training.

**Healthcare:**
- Institutional Data Management is not required for Healthcare users.
- Expense Report Training- Required versus Recommended
  - [Not Required] If you are an Emory Healthcare employee and only enter Expense Reports for Healthcare departments then you are not required to go to training for T&E.
  - [Required] If you are an Emory Healthcare and enter Expense Reports for University employees, you must complete Expense training. (Course 260454) [Required]

Please contact Lori Ronalder if you have any questions about which Healthcare Compass courses are required.

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How do I know if I’ve taken all of the training that I am supposed to?

Ask yourself: How do you use Compass? What modules do you use? What type of transactions do you complete daily, weekly, monthly, a few times per year? Focus on the training that corresponds to the type of transactions that you do most frequently. Those are your ‘mission critical’ courses.

If you believe that you need access to a module that your currently don’t have access to, you need to follow these steps: 1) discuss with your manager; 2) Register on the ELMS and complete module, and 3) submit a Compass Online Access Request.
Frequently Asked Questions – Prior to Go-Live

What training should I complete before Go-Live?

Complete ‘MISSION CRITICAL’ TRAINING as soon as possible

October 31st was the training completion deadline that guaranteed transactional access on November 14; however, the sooner users complete their module training, the sooner they will receive access. (see schedule below).

What is Mission Critical training? Each Compass user has specific Compass transaction types that they must complete in order to do their job. The training associated with those transactions is ‘mission critical’ for that user and they should complete that training prior to Go-Live. For example, if submitting journals is a daily or weekly activity for the user, the user should focus on completing the “What’s New in General Ledger?” course. If, on the other hand, a user rarely submits expense reports, they can complete the T&E training when they actually need to enter an expense report. That can be anytime between now and August 30, 2017.

How long do I have to complete the training that is not ‘Mission Critical?’

You have until August 30, 2017 to complete module training. Most Compass users will complete their non-critical training as they find the need to have module access. If a user rarely submits expense reports, they can complete the T&E training when they actually need to enter an expense report. Users are strongly encouraged to take advantage of the Instructor-led classroom sessions in November 2016.

I didn’t complete my training by October 31st. When will I get access to Compass?

October 31st: If training is completed by this date, Compass users will receive transactional access by Go-Live (11/14)

November 14th: If training is completed between Nov 1st and Nov 14th, Compass users will receive transactional* access by noon on November 17th, if not before.

After November 14th: If training is completed after November 14th, users will receive transactional access within 2 business days after completing training requirements.

New Hires will receive access within 2 business days after completing training requirements and submitting a Compass Online Access Request form.

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Frequently Asked Questions – Prior to Go-Live

What is the timing for Compass and EPEX cutover? When will I be blocked from the system?

- Check website homepage for link to more detailed information

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Do I Have to Take the Institutional Data Management Course?

Emory Healthcare (EHC) employees who use any of the Financial Systems (Emory Express, EPEX, Compass and EBI) are exempt from the IDM course due to their annual completion of EHC sponsored compliance training.

Emory University (EU) employees who use any financial system (including Compass, EPEX, Emory Express and EBI) must complete the IDM eLearning course. The IDM course is required for you to have any access to Compass.*

98* For more background information on data management policies please click here. Register on the ELMS (Course 410001)

Do I get to keep my SmartKey?

Yes. Current SmartKey numbers will still be the post-Go-Live SpeedType number. The SpeedType will be used when entering transactions into Compass much like SmartKeys are used today. The difference is that the SpeedType numbering convention has changed:

- The new SpeedType schema include the first 6 digits of the Department.
- This configuration will be effective for new SpeedTypes requested after Go-Live.
- For Emory Healthcare, existing SmartKey configuration rules will not change

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The New SpeedType Format

![SpeedType Diagram]

What if I want to take another Course that is not on my Learning Plan?
Check the website for information on registering for classes. There are Job Aids available to walk you through the steps you need to take. [www.upgrade.compass.emory.edu](http://www.upgrade.compass.emory.edu)

How do I Drop and Re-Enroll in Compass Courses?

**Scenario:** You already enrolled in a classroom or webinar session that you can no longer attend. You drop the course expecting to re-enroll in a different session scheduled for another date/time but there is no Enroll button. **What should you do?**

1. **Drop the course/section** that you can no longer attend. The enroll button is now removed and the course must be added back to your learning plan by the Transition Support team.

2. **Email Transition Support** at [compassupgrade@emory.edu](mailto:compassupgrade@emory.edu) and request that they add the course back to your Learning Plan.

3. **Transition Support will reply to your email** to inform you that the course is back in your Learning Plan and you can go into the ELMS and enroll in a different class date/time (Allow up to 24 hours).

*Healthcare will be conducting their own internal Compass training sessions. Healthcare Compass users are not required to go to any training offered by the University; however, they may attend University sessions with manager approval. For more information on Healthcare training, please contact Lori Ronalder.*

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Frequently Asked Questions – Prior to Go-Live

If you dropped a course because you wanted to change section date and times, you need to contact the Compass Transition Support Team to allow you to re-enroll.

I am a Healthcare Employee. Where do I go for training?

*Healthcare* will be conducting their own internal Compass training sessions. Healthcare Compass users are not required to go to any training offered by the University; however, they may attend University sessions with manager approval.

**Healthcare:**
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