Compass 9.2 Training

Grants Pre-Award

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Welcome & Introductions

- About me
- What have you heard about 9.2?
Agenda

- Ground Rules
- Value of Compass 9.2
- Essentials Review
- Course Objectives - Grants Pre-Award
  - ChartField Updates
  - Review various “Day in Life” scenarios for entering Proposals in EPEX for New, Continuation and Renewal Awards
  - Review EPEX Functionality – Setting up a Proposal and Proposal Projects
  - Return to RAS and Award Setup Request
  - Award terms and Subrecipient PO
  - Grants Portal and Contract Workbench

- Compass Ca$h
Agenda – Cont.

- Where to go for help
- Wrap-Up & Next Steps
Value of Upgrading to Compass 9.2

Key Organizational Benefits

- Provide continuous operation improvements
- Optimize investment in system
- Take advantage of improved PeopleSoft functionality
- Reduce cost of ownership through less customizations
- Evaluated opportunities for process improvements

Key User Benefits

- Shared ownership through collaboration
- Improved processes
- Greater insight
- Ease-of-Use
- Expanded functionality
Compass 9.2 Essentials Review

Attendees of Compass 9.2 courses are strongly encouraged to complete this webinar before taking Compass 9.2 courses because there have been changes in:

- General Navigation
- Speedtype/Speedchart
- Chartfield Updates
- Reporting

If you haven’t already taken course, please take the time to complete the webinar.
Course Objectives

At the end of this course, you will be able to:

- Identify major changes to Grants Processing in Compass
- Understand Fund Codes & Project Types
- Understand Activity ID
- Setup a New/Renewal and Continuation Proposal
- Understand workflow
- Initiate an Award Setup Request
At the end of this course, you will be able to:

- Navigate to Grants Portal and Contract Workbench and perform basic functions
- Access and use support
Let’s Get Logged In

- Launch your Internet Explorer browser – Instructor to announce version
- URL: https://fstrng.emory.edu
- ID: userID
- PW: your password
Grants Pre-Award

ChartField Updates
Fund Code, Project Type, Activity ID
ChartField Updates - Fund, Project, Activity

- Objectives: at the end of this section, you will be able to:
  - See three changes in ChartField
  - Understand the new Fund Code
  - Understand Project Types
  - Understand Activity ID

Why is this relevant to me? I’m in Pre-Award!
- (Compass Ca$h is Available!)
PeopleSoft Chart of Accounts – Current Structure

All Transactions
- Business Unit (5)
- Operating Unit (5)
- Dept ID (6)
- Fund (4)
- Class (5)
- Account (5)

Projects Only
- Project Costing Business Unit (5)
- Project (8)
- Activity (5)

Optional
- Program (5)
- Event (4)

ChartFields that are changing

Changing for Grants only
ChartField Change #1 - Fund Code

1. **5700** – New Award/Project Set-up

- **5700** indicates that it is Research funds.

- Having a single fund code will reduce the effort to change it after initial setup if it is incorrect or needs to be updated.
ChartField Change #2 - Project Type

2

Federal / Non-Federal

- The Federal/Non Federal attribute moved to the **project type** field.
  - If change occurs, there is no need to do a transfer from one chartfield string to another, only the attribute changes.
  - An **audit stamp** was added to the attribute so that we capture when a change occurs to the project type value.
Old World (Current Compass)

5100 & 5200> Federal Funding

5300 & 5400> Non-Fed Funding

PROBLEM: Fund Code embedded/hardcoded into SK

Coded incorrectly = Nightmare Cleanup

New World (Compass 11/14/16)

Federal & Non-Fed Funding

will use NEW FUND CODE

5700 > Sponsored Research

NOT A PROBLEM:

Only one code

Will distinguish at the project level

Fed or Non-Fed – moves it out of chartfield string – automatically calculate fringes
ChartField Change #3 - Activity ID Usage

3

Activity ID = Budget Year

- Eliminates the creation of new project IDs to separate budget periods when there is no carryover.

- Grants with carryover authority will have one Activity ID to represent the entire 5 year award segment.

- Allows users to tie the years of a project together with Project ID yet segregate when appropriate by viewing the Activity ID (reduces the need to externally track the project id to the year)
ACTIVITY ID = BUDGET YEAR

Old World (Pre-Compass Upgrade)
FLOYD
- SPH - Proj 000123 - 2014
- SPH - Proj 000124 – 2015
- SOM - Proj 000125 - 2014
- SOM - Proj 000126 - 2015

New World (Compass Upgrade)
FLOYD
SPH – Proj 000123
- YR001
- YR002
SOM – Proj 000125
- YR001
- YR002

Project will keep same SpeedType (formerly SK) for duration of grant
1. **Fund Code** for all research dollars = 5700

2. **Federal / Non-Federal** attribute is moved to the **Project Type**.
   - Changes in the **Project Type** will **not** require a new SmartKey/SpeedType number
   - Changes in the **Project Type** will **automatically** process correcting fringe entries

3. **Activity** = Project’s Budget Year rather than Grant
Knowledge Check

What is the new Fund Code?

What are the project types?

What will ACTIVITY ID reflect?
Create and Manage a New/Renewal Proposal
Create and Set up a Proposal in EPEX

- Objectives: at the end of this section, you will be able to:
  - Create a Proposal in EPEX
  - Enter basic information when creating a V101 Proposal
  - Answer multiple YES/NO questions and identify impact on workflow
  - Save the Proposal and generate a Proposal ID
Knowledge Check

On your worksheet....

- How do you navigate to EPEX?

- Which Proposal value can’t be changed after the Proposal is saved?

- When is Proposal ID generated?

- The EPEX proposal routes directly to the sponsor/agency. TRUE or FALSE?
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Setting up Proposal Projects
Setting up Proposal Projects

- **Objectives:** at the end of this section, you will be able to
  - Setup Proposal Project
  - Enter F&A revenue distributions
  - Enter Project Professional Data
  - Attach documents to the proposal
Knowledge Check

On your worksheet….

- Which field associated with project will determine what department is used in the chartfield string of your SpeedType/SpeedChart?

- All F&A Revenue distribution percentages should add to 100. TRUE or FALSE?

- Employee Effort percentages in the professional section should add to 100. TRUE or FALSE?

- If I have a Collaborative Split, can I just distribute funds to another department? If not, how do I reflect the split in EPEX?
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EPEX Proposal Workflow and Routing
Understanding Workflow and Approvals

- Objectives: at the end of this section, you will be able to:
  - Understand the impact of your Proposal Inputs on Workflow Routings
  - Identify seven (7) workflow roles
  - Preview Workflow
  - Save and Route the Proposal
Knowledge Check

Group Discussion:

- What are the seven roles that trigger workflow?

- How would I correct workflow errors before routing? After routing?
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EPEX Continuation Proposals
Continuation Proposals in EPEX

- Objectives: at the end of this section, you will know how to:
  - Copy an Awarded Proposal to a Continuation Proposal
  - Manage the Continuation Proposal
  - Understand Activity ID
Knowledge Check

Group Discussion:

- What is the Proposal Type for a Continuation Proposal?

- What fields need to be updated on a Continuation Proposal?
Coffee Break
10 mins
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Return to RAS in EPEX
Return to RAS in EPEX

- Objectives: at the end of this section, you will be able to
  - Use Return to RAS in the workflow
Knowledge Check

Group Discussion:

- Why is the custom comment field different from all the other fields in the Return to RAS feature?

- You may add multiple comments when Returning to RAS? TRUE or FALSE?
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Award Setup Request
Award Setup Request

- Objectives: at the end of this section, you will be able to:
  - Understand the New/Renewal Award process
  - Initiate an Award Request based on an EPEX proposal
Knowledge Check

Group Discussion:

- What should be completed/submitted prior to creating an Award Setup Request?

- The attachment(s) should be emailed to the Post Award Setup Team (PAS).
  TRUE or FALSE?
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Award Terms & SubRecipient PO
Award Terms & Subrecipient PO

- Objectives: at the end of this section, you will be able to:
  - Review and add available Terms and Conditions
  - Link a Subrecipient and PO to an Award
Award Terms

Old World Compass

- Award Terms entered for each project (can have 100s projs on 1 award)
- Agreement Terms between Sponsor & Emory generally @ Award level where all projs assoc to award have same terms

PROBLEM:
- Emory has configured terms but too many to be useful (e.g., 10 options for FDP)

New World Compass

SOLUTION:
- Can now add Terms and Conditions at Award level by checking “Copy Terms” - allows default on each Project.
- Can still add terms to individual projects, if needed.

**Award Terms configured down from 100s to 48**

- RAS/FGC has at a glance specific guidelines to manage award & won’t have to refer to original documentation when inquiry is made and/or at closeout.
- Proactive approach to award management
Old World Compass

• OSP & Dept/RAS contact are notified of PO# via email
• OSP includes PO in sub document for subcontract issuance
• OSP adds PO to Subrecipient Page in free-text field

PROBLEM:
• POs not captured in Award Profile – hard for RAS/FGC to see # of subawards on each award to verify F&A being calculated correctly

New World Compass

SOLUTION:
• Link subrecipient listed on resources tab of Award Profile to PO# received when creating encumbrance of award
• Link on Subrecipient Page reduces number of clicks to add the PO to the Award

PO number and amount shows under name of subrecipient on Award Profile Resource Page.
Knowledge Check

Group Discussion:

- In the new world, Award Terms have 100s of values to select from? TRUE or FALSE

- What values are required to select a Purchase Order?

- If I go to Award from the Sub contract Administration page it takes me to the correct award page. TRUE or FALSE?
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Grants Portal, Contract Workbench & OnBase
Objectives: at the end of this section, you will be able to:

- Learn new delivered online reporting pages (Grants Portal)
- Understand the new workbench (Contract Workbench)
- Understand how the eNOA will be stored and distributed in the future
Grants Portal

- Grants Portal is a new tool that will be piloted by Central and RAS

- It allows users to view Award, Projects & Transaction info for Awards and Project related to a PI

- Users can search awards using multiple criteria and search can be used later

- Two search criteria must be used (Business Unit required and/or PI and/or Contract ID))

**Navigation:**

Grants>Grants Portal>Award Information>Award Summary
Contracts Workbench

- Contracts Workbench is replacing Contract Manager
- Relevant to Pre-Award to see health of an award and all projects in one place
- Contracts Workbench shows data specific to Grants, Contracts, and Projects

**Navigation:**
Main Menu>Customer Contracts>Contracts Workbench
OnBase

• OnBase will be replacing ComSquared

• 3rd Party - may be accessed in Compass or at

• eNOAs will be converted from ComSquared to OnBase by Go-Live

Navigation:
Imagingtest.emory.edu
Knowledge Check

Group Discussion:

- Everyone have access to Grants Portal? TRUE or FALSE
- Contract Workbench replaces Contract Manager? TRUE or FALSE
- What documents can users view in OnBase?
Project Types, Program Income, PAN

- **What are the Project Types? Fed and Non-Fed**

- **Where can I find Project Type?**
  Grants>Award>Project (Project Type field)

- **Where can I find Program Income?**
  Grants>Awards>Project
  Click on Supplemental Data tab

- **Where can I find whether proposal is PAN?**
  Grants>Awards>Project
  Click on Supplemental Data tab
Where can I find Program Income & PAN Project?

Grants>Awards>Project
Click on Supplemental Data tab
Questions
Grants Pre-Award

Course Wrap Up
Course Wrap Up

- What’s Next?
  - Drop-In Labs
  - November 14th – Go Live!
What’s Next?

**VISIT.**

*upgrade.compass.emory.edu*

- Review key changes
- Keep current with the latest news & events
- Review presentations & recordings of past sessions

**PLAY.**

*https://fsclone.emory.edu*

- Use your normal User ID and Password to log-in
- Provide feedback via Survey Monkey

**Need Help?**

- Call the Finance Support Center
- 77000 or 404-727-7000
- Finance Support Center email address will be available at Go-Live
How to Launch the End of Course Assessment & Survey

1. Log into ELMS https://elmprod.emory.edu/.

2. From the Main Menu, select My Learning.

3. From My Learning, locate the course title.

4. Click Launch.

5. Click Launch again.
6. The End of Course Assessment will open in a new window  
   (Press the F11 key to expand the window).

7. After completing the survey, click the X in the top right corner to close this browser window or tab to exit the course.

8. From the original ELMS window, click the Refresh Your Score link.

9. Click the Return to Activity Progress link.

10. Click the Launch link next to the End of Course Survey

CLASS SECTION #: 260446-10366
Help us help you!

Please complete an evaluation before leaving.

In ELMS:

1. Select the Pre-Award course title
2. Select the Compass Survey link