

FINANCIAL SYSTEM COURSES

If you do this...	Financial System	Module	Course Title	Course Description	Course Code	Current Modality	Job Aids
Require access to any Emory University financial system including Compass, Emory Express or Emory Business Intelligence (EBI)	N/A	N/A	Institutional Data Management (IDM)	Institutional Data measures and description of the university and its operations are valuable assets in support of the university's teaching, research, and public service missions. This policy outlines a data management framework designed to maintain the quality of Institutional Data and promote and safeguard the appropriate and effective use of Institutional Data.	410001-9264	Self-Paced eLearning	
Require access to Compass	Compass	All	Compass 9.2 Essentials	All Compass users. Participants will learn about the Compass upgrade changes that impact most users and is an important prerequisite to module-specific training.	260462	Self-Paced eLearning	
Reconcile Purchasing Card (P-Card)	Compass	Purchasing	Compass 9.2 P-card for End Users	Intended for P-Card users. Participants will learn new P-Card purchasing policies and procedures.	260419	Self-Paced eLearning	
Approve Purchasing Card (P-Card) transactions	Compass	Purchasing	Compass 9.2 P-card for End Users	Intended for P-Card users. Participants will learn new P-Card purchasing policies and procedures.	260419	Self-Paced eLearning	
Travel for Emory business or support business travelers (Proxies)	Compass	Expense	Compass 9.2 T&E Expense Enhancements	Intended for users who create a larger volume of expense reports. Participants will learn what the major changes are to the expense interface and how to: complete expense reports, add visa corporate card charges, manage charge card late fees, itemize a hotel bill, split receipts, and add attendees to and expense report.	260454	Self-Paced eLearning	
					260450	Instructor-led	
					260535	Video Recorded Class	
Create payment requests for guest, students or individuals	Compass	Accounts Payable	Compass 9.2 What's New in Accounts Payable	Intended for users who create a payment requests. Learn how to enter payments requests, gain a high-level understanding of vendor federal validations, and understand the workflow and approvals process.	260418	Self-Paced eLearning	
					260415	Instructor-led	
					260536	Video Recorded Class	
Make Deposits	Compass	Accounts Receivable	Compass 9.2 ePay Enhancements	Intended for Heavy ePay users. Participants will learn the new enhancements for ePay in Compass 9.2, new policies and procedures regarding how to receive payments, timelines of delivering payments to the Cashiers office, and new related reports.	260548	Video Recorded Class	
Claim Wires	Compass	Accounts Receivable	Compass 9.2 Wire Claims Enhancements	Intended for heavy wire claim users and those in the cash office. Participants will learn changes to the contract billing process, related reports, and any process and/or policy updates.	260423	Self-Paced eLearning	
					260549-11450	Video Recorded Class	

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Initiate Invoicing	Compass	Accounts Receivables	Compass 9.2 Collection Workbench and Workcenters	Intended for Billing Specialists and Billing users. Participants will learn how to use the new Collections Workbench to view customer payment status and payment history, and track and manage customer correspondence.	260550	Video Recorded Class	
Dispose of Assets	Compass	Asset Management	Compass 9.2 Asset Disposal Workflow	Intended for department administrators and asset custodians responsible for capital equipment.	260427	Self-Paced eLearning	
Manage departmental and/or non-sponsored budgets and available balances	Compass	Commitment Control (Budgets)	Compass 9.2 What's New in Inputting & Processing Budget Journals	Intended for users who input budget journals. Participants will learn changes in inputting budget journals to actual/detail accounts, ability to post to control accounts, determining available budget, & any process & policy changes.	260550	Video Recorded Class	
Initiate expense journals, journal transfers or spreadsheet uploads	Compass	General Ledger	Compass 9.2 What's New in General Ledger	Intended for users who create Journal Entries. Participants will learn how to use the new journal mover tool, workflow changes, and journal spreadsheet upload steps.	260435	Self-Paced eLearning	
					260432	Instructor-led	
					260547	Video Recorded Class	
Approve Financial transactions in Compass	Compass	Workflow	Compass 9.2 Understanding Workflow & Approving Financial Transactions eLearning	Intended for all users who approve a smaller volume of financial transactions (i.e., expenses, accounts payable, budget journals, accounts receivable, and general ledger). Participants will changes in approving transactions across modules, and where to find resources and assistance.	260460	Self-Paced eLearning	
Create & Set-up New Proposals in EPEX, Set-up Proposal Projects, Enter Proposal Budgets, Understand Proposal Workflow & Routing	Compass	Grants	Pre-Award- Grants Only	Intended for all grants users (who have access to the central grants module). Participants will learn new functionality relating to EPEX, award terms/sub recipient PO activity ID, updates to the grants portal, contract workbench, and fund code and fringe adjustment. Participants will also learn new related business processes and procedures.	260543	Video Recorded Class	
Set-up new awards, complete an award continuation, no cost extension, finalize a PAN, amend an award and other duties associated with award receipt & set-up.	Compass	Grants	Award Receipts & Set-Up- Grants Only	Intended for all grants users (who have access to the central grants module). Participants will learn new functionality relating to value products and templates, date changes, award set-up, activity ID, ENOA with on Base, Value-Based billing, fund code fringe, etc. Participants will also learn new related processes and policies.	260557	Video Recorded Class	
Set-up an LOC contract or subaccount, run grants billing process for an LOC contract, reprint LOC reports and identify expiring LOCs.	Compass	Grants	Letter of Credit Management- Grants Only	Intended for all grants users (who have access to the central grants module). Participants will learn new functionality relating to letter of credit & contract setup, customers and invoicing, project status control, and how to handle SAM validation error messages. Participants will also learn new related business processes and procedures.	260544	Video Recorded Class	

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Grants A/R using of the collection workbench/customer conversation & correspondence including marking items in dispute, splitting items, transferring items, refunding items and apply payments using payment predictor.	Compass	Grants	Accounts Receivable- Grants Only	Intended for all grants users (who have access to the central grants module). Participants will learn new functionality relating to item maintenance, customer correspondence, account analysis, transaction research, new reports and new processes and policies.	260542	Video Recorded Class	
Work in a RAS unit	Compass	Grants	Compass 9.2 - Grants 101	Intended for Grants. Participants will learn overview of changes with Pre-Award, Award Receipt and Set-up, Activity ID and Project Status Control, Grants Billing, Accounts Receivable and Grants Recording. PI Portal, Fund Codes and Fringe process. Changes in policies and/or processes will also be covered	260448	Self-Paced eLearning	
Submit Requests for Refunds from Grants or Contracts	Compass	Grants	Using Forms: Requests for Refunds & Residual Transfers Recorded Webinar	Intended for users who submit Requests for Refunds from Grants or Contracts, Requests for Refunds from the On-Account, and Requests for Residual Transfers.	260616	Recorded Webinar	
Submit Requests for Refunds from the On-Account	Compass	Grants	Using Forms: Requests for Refunds & Residual Transfers Recorded Webinar	Intended for users who submit Requests for Refunds from Grants or Contracts, Requests for Refunds from the On-Account, and Requests for Residual Transfers.	260616	Recorded Webinar	
Submit Requests for Residual Transfers	Compass	Grants	Using Forms: Requests for Refunds & Residual Transfers Recorded Webinar	Intended for users who submit Requests for Refunds from Grants or Contracts, Requests for Refunds from the On-Account, and Requests for Residual Transfers.	260616	Recorded Webinar	
Access data from Contracts Workbench	Compass	Grants	Contracts Workbench	Intended for users who use Compass Contracts Workbench (previously Contract Manager), this course will explore the key data elements previously accesses in Contracts Manager.	260615-11447	Self-Paced eLearning	
Initiate and manage requests for Non-PO payments	Emory Express	Emory Express	Emory Express	Intended for those who need access to online procurement system for purchasing goods and services on behalf of the University. Participants will learn how to order goods and services online, use the different types of ordering forms and understand how and when to process payments on the Check Request form.	260344	Webinar	
					260344-11815	Recorded Webinar	
Purchase catalog items and create custom orders	Emory Express	Emory Express	Emory Express	Intended for those who need access to online procurement system for purchasing goods and services on behalf of the University. Participants will learn how to order goods and services online, use the different types of ordering forms and understand how and when to process payments on the Check Request form.	260344	Instructor-led	
					260344	Webinar	
					260344-11815	Recorded Webinar	

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Approve orders in Emory Express	Emory Express	Emory Express	What's New in Emory Express for Approvers	Intended for approvers of Emory Express. Participants will learn new enhancements with Emory Express including new approver capabilities, new forms for surplus disposal and check requests, changes to Asset Ordering and Receiving, new Security and Workflow requests process, and a new Purchase Order closure process.	260533	Self-Paced eLearning	
Run reports in EBI including labor reports	Emory Business Intelligence	Emory Business Intelligence	Emory Business Intelligence: Navigation	This is an online course designed to teach participants basic navigation in the data analysis tool called Emory Business Intelligence	260345-7427	Self-Paced eLearning	
Run reports in EBI including labor reports and would like a hands-on experience Course Prerequisite: Emory Business Intelligence: Navigation	Emory Business Intelligence	Emory Business Intelligence	Emory Business Intelligence (EBI) Reports	This course provides participants hands-on practical knowledge of how to run and retrieve Emory Business Intelligence (EBI) reports, including selecting prompts, saving customizations, drilling to see more specific data, and exporting data in various formats. Prerequisite: Emory Business Intelligence: Navigation	260351	Instructor-led	
Run Reports	Compass	Reporting	Compass 9.2 What's New in Compass Reporting?	Intended for all Emory Compass users. Participants will learn where to access the new reporting libraries, where to go for what type of data, differences between different reporting tools, reporting tips, and where to find resources.	260449-11447	Recorded Webinar	