

FINANCIAL SYSTEMS ONBOARDING TOOL

If you do this...	Financial System	Module	Course Title	Course Code	Current Modality
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)	410001-9264	Self-Paced eLearning
Require access to Compass	Compass	All	Compass Fundamentals	260728	Self-Paced eLearning
Reconcile Purchasing Card (P-Card)	Compass	Purchasing	Compass P-Card Reconciliation, Policies, and Procedures eLearning	260602	Self-Paced eLearning
Approve Purchasing Card (P-Card) transactions	Compass	Purchasing	Compass P-Card Reconciliation, Policies, and Procedures eLearning	260602	Self-Paced eLearning
Travel for Emory business or support business travelers (Proxies)	Compass	Expense	Compass Introduction to Expense Reports	260613	Self-Paced eLearning
				260612	Instructor-led
Create payment requests for guest, students or individuals	Compass	Accounts Payable	Compass Introduction to Payment Requests	260601	Self-Paced eLearning
				260600	Instructor-led
Make Deposits	Compass	Accounts Receivable	Compass Introduction to ePay Deposits	260696	Video Recorded Class
Claim Wires	Compass	Accounts Receivable	Compass Introduction to Wire Claims	260603	Self-Paced eLearning
Initiate Invoicing	Compass	Accounts Receivables	Compass Collection Workbench and Workcenters	260698	Video Recorded Class

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Dispose of Assets	Compass	Asset Management	Compass Asset Disposal	260604	Self-Paced eLearning
Manage departmental and/or non-sponsored budgets and available balances	Compass	Commitment Control (Budgets)	Compass Introduction to Inputting & Processing Budget Journals	260700	Video Recorded Class
Initiate expense journals, journal transfers or spreadsheet uploads	Compass	General Ledger	Compass Introduction to General Ledger WorkCenter & Entering Journals	260606	Self-Paced eLearning
				260605	Instructor-led
Approve Financial transactions in Compass	Compass	Workflow	Compass Workflow and Approving Transactions	260614	Self-Paced eLearning
Create & Set-up New Proposals in EPEX, Set-up Proposal Projects, Enter Proposal Budgets, Understand Proposal Workflow & Routing	Compass	Grants	Compass Pre-Award-Grants Only	260692	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	Compass Award Receipts & Set-Up- Grants Only	260705	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	Compass Letter of Credit Management- Grants Only	260693	Video Recorded Class
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	Compass Accounts Receivable - Grants Only	260691	Video Recorded Class

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Work in a RAS unit	Compass	Grants	Compass Understanding Grants	260611	Self-Paced eLearning
Submit Requests for Refunds from Grants or Contracts Submit Requests for Refunds from the On-Account Submit Requests for Residual Transfers	Compass	Grants	Using Forms: Requests for Refunds & Residual Transfers Recorded Webinar	260616	Recorded Webinar
Access data from Contracts Workbench	Compass	Grants	Contracts Workbench	260615-11447	Self-Paced eLearning
Purchase catalog items and create custom orders	Emory Express	Emory Express	Emory Express	260344	Instructor-led
				260344	Webinar
				260344-11815	Recorded Webinar
Approve orders in Emory Express	Emory Express	Emory Express	Emory Express For Approvers eLearning	260684	Self-Paced eLearning
Run reports in EBI including labor reports	Emory Business Intelligence	Emory Business Intelligence	Emory Business Intelligence: Navigation	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	260351	Instructor-led