Compass 9.2 Training

RAS – What’s New for Grants?
Welcome & Introductions

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

- Ground Rules
- Course Objectives
- Value of Compass 9.2
- Pre-Award changes
- Award Receipt and Set-Up
- Fund Code/Fringes, Activity ID & Project Status Control
- Grants Billing
- Accounts Receivable
- Grants Reporting
- Where to go for help
- Wrap-Up & Next Steps
Ground Rules
Webinar Objectives

At the end of this webinar, you will become familiar with the following topics:

- Pre-Award
- Award Receipt and Set-Up
- Fund Code/Fringe, Activity ID & Project Status Control
- Grants Billing
- Accounts Receivable
- Grants Reporting
Pre-Award
Grants Management

- Objectives: In this section, you will learn about:
  - EPEX Custom Entry Pages
  - Subrecipient PO
**Custom Entry Pages – Emory Proposal Express**

**Improved Approval Workflow**

- Additional questions added in Compass 9.2 to facilitate workflow
- Guided User Experience
- Add an Approver and Reviewer to the workflow
- Preview Workflow when somebody has been adhoc’d
- Capture Proposal Comments for review by RAS
Subrecipient PO

- Select Subrecipient vendor ID to the Award.
- Select Subrecipient PO to the Award & Project.
- Drill down capabilities to Invoices
  - Grants > Awards > Award Profile > Resources Tab > Subrecipient Section
  - View Balances: Purchase Order, Invoices
Knowledge Check

On your worksheet....

- What are the new workflow capabilities added to EPEX?

- True or False: Users will have the ability to drill down into PO information without having to log into Emory Express?
Award Receipt and Set-up
Objectives: In this section, you will learn about:

- Award Set-Up Pages/Process
- Award Terms and Conditions
- SpeedType Creation
- ENOA Reports and Output
Award Set-Up Page/Process

Award Information
- Demographics
- PI and Employee Data
- Budgets
- Award Terms
- Additional Information
- Certifications
- Attachments

Award Entry Pages
- Consolidates Information
- Simplify Data Entry and Setup
- Proposal
- Award
- Contract
- Integrated Workflow
Key Benefit: You don’t have to search into the documentation to review Award Terms. A look at the Award in Compass could provide insight into key terms of an award.
Fund Code

5700 – New Award/Project Set-up

- 5700 indicates that it is Research funds
- Move the Federal/Non-Federal attribute to the project (using project type field)
  - If change occurs, there is no need to do a transfer from one chartfield string to another, only the project type attribute changes.
  - Added an audit stamp to the attribute so that we capture when a change occurs to the project type value. Will also capture who made the change.
- Having a single fund code will reduce the effort to change it after initial setup if it is incorrect or insufficient date was known during setup.
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
Activity ID Usage - Overview

Activity ID = Budget Year

- Eliminate the creation of new project IDs to separate budget periods when there is no carryover.
- Grants with carryover authority will have one Activity ID, YRALL, 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.

“Project ID Usage”

- Restrictions on Budgets
- Manage Project Budget Years (for awards with no carryover)
- Collaborative Splits (Dept. A, Dept. B)
- Billing Methods (splits)
- *Project ID will not change each year (stays the same throughout the life of most Awards).*
- *Project Type will be the identifier for Federal or Non-Federal (no longer at the transactional level).*
- *Activity ID will be used to indicate budget year for the award (grants).*
- *No need for a new Project ID for an award w/ no automatic carry over.*
- *Existing awards will not convert over to the new fund code mid-stream (still working through details of impact when new budget funding is received).*

### FEDERAL (award w/ no automatic carry over)

<table>
<thead>
<tr>
<th>Current State</th>
<th>Acme-Yr1</th>
<th>Acme-Yr2</th>
<th>Acme-Yr3</th>
</tr>
</thead>
<tbody>
<tr>
<td>Begin Date:</td>
<td>01/1/15-12/31/15</td>
<td>01/1/16-12/31/16</td>
<td>01/1/17-12/31/17</td>
</tr>
<tr>
<td>Fund Project (ID) Activity</td>
<td>5100 (Fed) 00022137 Grant</td>
<td>5100 (Fed) 00022145 Grant</td>
<td>5100 (Fed) 00022158 Grant</td>
</tr>
<tr>
<td>Future State</td>
<td>Acme-Yr1</td>
<td>Acme-Yr2</td>
<td>Acme-Yr3</td>
</tr>
<tr>
<td>Fund</td>
<td>5700 Grants</td>
<td>5700 Grant</td>
<td>5700 Grants</td>
</tr>
<tr>
<td>Project (ID)</td>
<td>00022137</td>
<td>00022137</td>
<td>00022137</td>
</tr>
<tr>
<td>Project Type*</td>
<td>FED</td>
<td>FED</td>
<td>FED</td>
</tr>
<tr>
<td>Activity</td>
<td>YR001</td>
<td>YR002</td>
<td>YR003</td>
</tr>
</tbody>
</table>

### FEDERAL (with carry over)

<table>
<thead>
<tr>
<th>Current State</th>
<th>Acme-Yr1</th>
<th>Acme-Yr2</th>
<th>Acme-Yr3</th>
</tr>
</thead>
<tbody>
<tr>
<td>Begin Date:</td>
<td>01/1/15 – 12/31/17</td>
<td>01/1/15 – 12/31/17</td>
<td>01/1/15 – 12/31/17</td>
</tr>
<tr>
<td>Fund Project (ID) Activity</td>
<td>5200 00031268 Grant</td>
<td>5200 00031268 Grant</td>
<td>5200 00031268 Grant</td>
</tr>
<tr>
<td>Future State</td>
<td>Acme-Yr1</td>
<td>Acme-Yr2</td>
<td>Acme-Yr3</td>
</tr>
<tr>
<td>Fund</td>
<td>5700 Grants</td>
<td>5700 Grants</td>
<td>5700 Grants</td>
</tr>
<tr>
<td>Project (ID)</td>
<td>00031268</td>
<td>00031268</td>
<td>00031268</td>
</tr>
<tr>
<td>Project Type*</td>
<td>FED</td>
<td>FED</td>
<td>FED</td>
</tr>
<tr>
<td>Activity</td>
<td>YR001</td>
<td>YR002</td>
<td>YR003</td>
</tr>
</tbody>
</table>

*Project Type Attribute is now going to designate Federal vs Non-Federal. This is not part of the ChartField string.*
### SpeedType Creation

<table>
<thead>
<tr>
<th>GL Business Unit</th>
<th>Operating Unit</th>
<th>Dept ID</th>
<th>Fund Code</th>
<th>Class Program Event</th>
<th>PC Business Unit</th>
<th>Project</th>
<th>Activity</th>
</tr>
</thead>
</table>

**SpeedType Request**

**Peer Approval**

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Changes to Electronic Notice of Award Report

**Project Information**
- Project ID
- Project Type
- Project Dates
- Budget and SpeedType

**Cumulative Information**
- Project Activity Status
- Activity Dates = Budget Period
## Administrative Data

<table>
<thead>
<tr>
<th>Title:</th>
<th>B and T Cell Biology of Protection from and Eradication of SIV/SHIV Infection</th>
</tr>
</thead>
<tbody>
<tr>
<td>Agency:</td>
<td>NIH NATL INSTITUTE OF HEALTH</td>
</tr>
<tr>
<td>Award Date:</td>
<td>04/01/2016 - 03/31/2021</td>
</tr>
<tr>
<td>Purpose:</td>
<td>Research</td>
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</table>

### Project Information

<table>
<thead>
<tr>
<th>Project ID: 00059982</th>
<th>Project Type:</th>
<th>FED</th>
<th>Project Dates: 04/01/2016 - 03/31/2017</th>
<th>Rate / Base</th>
<th>Direct Amt</th>
<th>Indirect Amt</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Activity ID: YRALL</td>
<td>SpeedType Ref</td>
<td>Project Title</td>
<td>School/Department</td>
<td>Budget Dates</td>
<td>78.50 / MTDC</td>
<td>$284,838.00</td>
<td>$223,596.00</td>
</tr>
<tr>
<td></td>
<td></td>
<td>SILVESTRI: B and T Cell Biology</td>
<td>YR: Microbiology &amp; Immunology</td>
<td>04/01/2016 - 03/31/2017</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Project Totals:
- Project Totals: $284,838.00 $223,596.00 $508,436.00

<table>
<thead>
<tr>
<th>Project ID: 00059983</th>
<th>Project Type:</th>
<th>FED</th>
<th>Project Dates: 04/01/2016 - 03/31/2017</th>
<th>Rate / Base</th>
<th>Direct Amt</th>
<th>Indirect Amt</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Activity ID: YRALL</td>
<td>SpeedType Ref</td>
<td>Project Title</td>
<td>School/Department</td>
<td>Budget Dates</td>
<td>78.50 / MTDC</td>
<td>$216,982.00</td>
<td>$170,331.00</td>
</tr>
<tr>
<td></td>
<td></td>
<td>WRAMMERT: B and T Cell Biology</td>
<td>SOM: Peds. Infectious Disease</td>
<td>04/01/2016 - 03/31/2017</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Project Totals:
- Project Totals: $216,982.00 $170,331.00 $387,313.00

### Totals:
- Totals: $501,820.00 $393,929.00 $895,749.00
ENOAs will be stored within OnBase; OnBase is a Third Party system that integrates with Compass.

Primary and Secondary Departments will receive notification and view the eNOA documents.

Historical ComSquared data will be converted
Knowledge Check

On your worksheet....

- Who can create an award setup request?
- What does a SpeedType replace?
- How has the eNOA report/layout been updated?
- What pages will you be able to find links to Onbase in Compass?

- **True or False**: The new award setup process eliminates the need for manual completion of checklist, logging of receipt and completion of files.
- **True or False**: When a term or condition is selected for the award or project, the information will print out on the eNOA.
- **True or False**: The Post-Go-Live SpeedType number will be the current SmartKey number.
- **True or False**: Comsquared will still be used for storing eNOAs.
Project Status Control
Objectives: In this section, you will learn about:

- Project/Activity Status Control
- Project Dates
Project status control is used to gate transactions at the point of entry with warnings or reject messages.

Status Control is at the Project ID & Activity ID level.

Gives us the ability to Hold or Freeze activity.

Emory use Project Status for all transactions.
Enabling Status Control allows the system to manage based upon Analysis Type (All modules except Treasury).

Warning message will provide a status and allow to proceed.

Reject message will provide a status and prevents the transaction.

<table>
<thead>
<tr>
<th>Status</th>
<th>Level</th>
<th>Transaction</th>
<th>Message</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pending</td>
<td>Activity</td>
<td>Budget</td>
<td>Reject</td>
</tr>
<tr>
<td>Open</td>
<td>Project &amp; Activity</td>
<td>All</td>
<td></td>
</tr>
<tr>
<td>Ended</td>
<td>Activity</td>
<td>New PO's</td>
<td>Reject</td>
</tr>
<tr>
<td></td>
<td></td>
<td>All others</td>
<td>Warning</td>
</tr>
<tr>
<td>Closed</td>
<td>Activity</td>
<td>PO, AP, EX, Payroll, RST</td>
<td>Reject</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Journals &amp; Budget</td>
<td>Warning</td>
</tr>
<tr>
<td>Hold &amp; Final</td>
<td>Activity</td>
<td>All</td>
<td>Reject</td>
</tr>
<tr>
<td>Archived</td>
<td>Project</td>
<td>All</td>
<td>Reject</td>
</tr>
</tbody>
</table>
Activity end date will be used by HR/Payroll to determine if a SpeedType is valid (Invalid SpeedTypes will be moved to Used to Be Grant “UTBG”)

Third party interface expense transactions will use the project/activity status control as an Accounts Payable transaction

Custom validation process that will update the activity ID to the correct value if the activity id receives an error. If no open Activity ID then transaction will post to suspense.

Example:
• Activity ID of YR002 has dates of 6/1/2015 to 5/31/2016
• Activity ID of YR003 has dates of 6/1/2016 to 5/31/2017
  – An HR/Payroll transaction with Activity ID YR002 for July 31, 2016 will post to “UTBG”
  – A third party interface transaction with status of CLOSED will look for other Activity ID based on dates and thus transaction would post to Activity ID YR003
Date Change

- Modify the custom page to add Activity Status, Activity Dates and Project Teams.

- Remove Commitment Control dates. (Final Activity Status replaces)
Knowledge Check

On your worksheet....

- What Fund Code will be used for new research awards and projects setup after go live?
- After the Compass upgrade, what will Activity ID represent?
- How has the Emory custom Date Change page been updated?

- **True or False:** Project Type will be used to identify Federal/Non Federal funds
- **True or False:** Changing Project Type will require a new SpeedType number
- **True or False:** A new Project ID is required for an award with no automatic carry over
- **True or False:** The Generate Award process systematically assigns the project and activity statuses
Grants Management

- Objectives: In this section, you will learn about:
  - Fixed Fee Billing
  - Clinical Trial Invoice Process
  - Invoice Generation
Fixed Fee Billing

- PeopleSoft Fixed Fee billing functionality to replace Clinical Trial Prepaid lines. Should only be used with contract types of Clinical Trial and Dept to Invoice.
- Revenue is recognized at the time the invoice is billed
- Eliminates deferred revenue and unbilled AR on Clinical Trials
- Utilize Product and Bill Plan Templates
- Reduces data entry points and contract setup
Clinical Trial Invoice Process

Clinical Trial Database ↔ PeopleSoft Billing

**Automate** the Billing Process by developing a **billing interface**

Add a customization to **update the Contract Module** for: billing event, pending event, OCR invoice & protocol.

Custom Other Billing Process will be required for OCR data to update PeopleSoft invoice number.

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Invoice Generation

Custom Tables ➔ Invoice created in XML

New Functions

Electronic Signature
Attach to Award or Contract
Send via Email

OR

Print and use Postal delivery

We are also adding remittance to the invoice to assist with payment predictor match
Knowledge Check

On your worksheet....

- What Contract Types will use Fixed Fee Billing?
- How will Clinical Trials billing data get into Compass?

- **True or False:** There will be a conversion for moving active Clinical Trials away from Prepaids to Fixed Fee billing.
- **True or False:** After the upgrade, the budget for Clinical Trials will be based on cash received.
- **True or False:** During the Invoice Generation process, Invoices can be automatically emailed to sponsors when configured.
Accounts Receivable
Objectives: In this section, you will learn about:

- Direct Journal Payment
- Payment Predictor
- Item Maintenance
- Collections Workbench
- Refund & Residual Transfer Form
- Condition Monitor
- Customer Correspondence
Direct Journal Payment

- Cost Collect from AR
- New Analysis Type of EXP
Payment Predictor

Invoice

Contract
Customer ID

Amount
Item

MICR ID

Matched Payment

Payment

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Item Maintenance

Groups Impacted

Finance Grants & Contracts (FGC)
Grants Accounts Receivable
Accounts Payable

Transfer worksheets
Maintenance Worksheet – absolute value sort
Mass Change
Doubtful Receivables
Auto Maintenance
Unpost Payments
Dispute Codes
Refund to AP
Item Split

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Condition Monitor

Collection Item
(Automated Dunning Letters)

Past Due Item > 60 Days
Conversation Follow Up

Risk Score
Disputed Item
Credit Items
Collections Workbench

Customer Correspondence  Item History  Aging  Alerts  Customer Balances  Conversations

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Refund & Residual Transfer Form

Compass Request Form with workflow

Email, Manual or Sam Kiosk

Form Request

- AWARD & ITEM DETAILS

- WORKFLOW FOR APPROVALS
  - DEPARTMENT
  - FGC
  - CASH
Knowledge Check

On your worksheet....

- What does Analysis Type ‘EXP’ represent in Project Costing?
- What Item Maintenance functionalities have been implemented?
- Name some common activities performed within Collections Workbench:
  - **True or False**: The Payment Predictor functionality automatically matches deposit data to open Account Receivables.
  - **True or False**: Refund and Residual request will continue to be entered in the SAM kiosk.
  - **True or False**: Condition Monitor can generate alerts on Past Due Item > 60 Days
Grants Reporting
Objectives: In this section, you will learn about:

- Grants Portal
- Contract Workbench
Grants Portal

- Additional online pages that provide more features. Provides summarized data along with drill down capabilities.

Custom “Grants QuickView” pages + PeopleSoft Grants Portal

- Ability to drill down from an award to a project and transaction

- Same or more information available than on grant’s QuickView” page.

- Only RAS, Central & PI will have access — pilot for future roll out
### Award Summary

Hello, Shannon K Swopes. You have 14 new items in your worklist. To change your search criteria, click Set Search Criteria.

#### Financial Calculating Option
- **Balances**: Both
- **Include FA**: Yes
- **Date Selection**: As of Date

#### Burn Rate Indicator
- Potential Under Spending
- Average Rate Spending
- Potential Over Spending

#### Detail

**Demographics**

<table>
<thead>
<tr>
<th>Award ID</th>
<th>Short Title</th>
<th>Primary Project</th>
<th>Project Title</th>
<th>Award Begin Date</th>
<th>Award End Date</th>
<th>Sponsor</th>
<th>Reference Award Num</th>
</tr>
</thead>
<tbody>
<tr>
<td>000000148</td>
<td>GERIATRIC MEDICINE SEMINAR -- AUGUST 18, 2005</td>
<td>G6378720</td>
<td>GERIATRIC MEDICINE SEMINAR --</td>
<td>08/15/2005</td>
<td>07/31/2006</td>
<td>NOVARTIS PHARMACEUTICALS CORPORATION</td>
<td></td>
</tr>
<tr>
<td>000001588</td>
<td>IMPROVING SLEEP IN NURSING HOMES</td>
<td>G5407400</td>
<td>IMPROVING SLEEP IN NURSING HOM</td>
<td>09/01/2005</td>
<td>08/31/2010</td>
<td>NIH NATL INSTITUTE OF HEALTH</td>
<td>5R01AG0287600:</td>
</tr>
<tr>
<td>000002455</td>
<td>NOCTURNAL POLYURIA AND SLEEP DISORDERED BREATHING</td>
<td>G5208700</td>
<td>NOCTURNAL POLYURIA AND SLEEP DISORDERED BREATHING</td>
<td>09/01/2005</td>
<td>04/30/2010</td>
<td>NIH NATL INSTITUTE OF HEALTH</td>
<td>5K23AG02566030:</td>
</tr>
<tr>
<td>000007205</td>
<td>COMPREHENSIVE TRAINING TO STRENGTHEN PHYSICIAN TRAINING IN GERIATRICS</td>
<td>000000723</td>
<td>COMPREHENSIVE TRAINING TO STRENGTHEN PHYSICIAN TRAINING IN GERIATRICS</td>
<td>01/01/2009</td>
<td>12/31/2012</td>
<td>UNIVERSITY OF ALABAMA BIRMINGHAM</td>
<td>00333820.001</td>
</tr>
</tbody>
</table>

#### Total Amount of Selected Items

<table>
<thead>
<tr>
<th>Selected</th>
<th>Expired</th>
<th>Invoiced</th>
<th>Paid</th>
<th>Remaining Balance</th>
</tr>
</thead>
<tbody>
<tr>
<td>20</td>
<td>3,658,309.12</td>
<td>3,576,613.69</td>
<td>4,063,565.48</td>
<td>265,256.36</td>
</tr>
</tbody>
</table>

**Funded**

- 4,063,565.48

**Budgeted**

- 4,063,565.48

- Pre-Encumbered: 0.00

- Encumbered: 0.00

- Unpaid: 173,397.01

- Update Total Amount
Delivered functionality that will replace the custom Contract Manager page.

- Same plus more information available than on Contract Manager with a different look and feel.
- Ability to drill down from an award to a project and transaction.
- Related content leveraged for additional info plus link to Onbase (system where eNOAs will be stored).
## Contract Workbench

### Summary of Amounts

<table>
<thead>
<tr>
<th>Billing Amounts</th>
<th>Revenue Amounts</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fixed Billing</td>
<td>Fixed Revenue</td>
</tr>
<tr>
<td>Discounts/Refunds</td>
<td>Discounts/Refunds</td>
</tr>
<tr>
<td>Non-Inclusive Prepayments</td>
<td>Non-Inclusive Prepayments</td>
</tr>
<tr>
<td>Subtotal</td>
<td>Subtotal</td>
</tr>
<tr>
<td>As Incurred Billing (Less Prepaid)</td>
<td>As Incurred Revenue (Less Prepaid)</td>
</tr>
<tr>
<td>Recurring Billing</td>
<td>Recurring Revenue</td>
</tr>
<tr>
<td>Total</td>
<td>Total</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th></th>
<th>Amount</th>
<th></th>
<th>Amount</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Fixed Billing</td>
<td>0.00</td>
<td>Fixed Revenue</td>
<td>0.00</td>
<td></td>
</tr>
<tr>
<td>Discounts/Refunds</td>
<td>0.00</td>
<td>Discounts/Refunds</td>
<td>0.00</td>
<td></td>
</tr>
<tr>
<td>Non-Inclusive Prepayments</td>
<td>1,156,140.00</td>
<td>Non-Inclusive Prepayments</td>
<td>1,156,140.00</td>
<td></td>
</tr>
<tr>
<td>Subtotal</td>
<td>1,156,140.00</td>
<td>Subtotal</td>
<td>1,156,140.00</td>
<td></td>
</tr>
<tr>
<td>As Incurred Billing (Less Prepaid)</td>
<td>0.00</td>
<td>As Incurred Revenue (Less Prepaid)</td>
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<tr>
<td>Recurring Billing</td>
<td>0.00</td>
<td>Recurring Revenue</td>
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</tr>
<tr>
<td>Total</td>
<td>1,156,140.00</td>
<td>Total</td>
<td>1,156,140.00</td>
<td></td>
</tr>
</tbody>
</table>

### Grants Data

#### Award Details

<table>
<thead>
<tr>
<th>Award Details</th>
<th>Award Number</th>
<th>Reference Award Number</th>
<th>Begin Date</th>
<th>End Date</th>
<th>Award Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>Business Unit</td>
<td>Grant</td>
<td>W81XWH-15-1-0576</td>
<td>09/01/2015</td>
<td>09/30/2018</td>
<td>Grant</td>
</tr>
</tbody>
</table>

#### Award Funding Periods

<table>
<thead>
<tr>
<th>Award Number</th>
<th>Business Unit</th>
<th>Project</th>
<th>Budget Period</th>
<th>Reference Award Number</th>
<th>Begin Date</th>
<th>End Date</th>
<th>Funded Amount</th>
<th>Cost Share Direct</th>
<th>Currency Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>0000303131</td>
<td>Grant</td>
<td>0045825</td>
<td>1</td>
<td>0000303131</td>
<td>09/01/2015</td>
<td>09/30/2018</td>
<td>1156140.00</td>
<td>USD</td>
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</tbody>
</table>
Contract Workbench - Related Content

**Award Summary**

- **Title:** Diabetes Training Tennessee
- **Ref Award No:** 34352-06215
- **Principal Investigator:** Blais, Linelle Marie
- **Sponsor:** TENNESSEE DEPARTMENT OF HEALTH
- **Purpose:** OTHER
- **Award Status:** ACTIVE

**Balances as of:**

<table>
<thead>
<tr>
<th>View</th>
<th>Project</th>
<th>Status</th>
<th>Title</th>
<th>Budget</th>
<th>Expenses</th>
<th>Encumbrances</th>
<th>Available Balance</th>
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<td>00045841</td>
<td>OPEN</td>
<td>Diabetes Training Tennessee</td>
<td>44,000.00</td>
<td>30,236.34</td>
<td>0.00</td>
<td>13,763.66</td>
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**Award Totals:**

- Awarded Amount: 44,000.00
- Direct: 34,921.00
- Indirect: 9,079.00

**Billing Summary**

- **Contract:** 0000030142
- **Title:** Diabetes Training Tennessee

**Cost Reimbursable**

- **Billed Amount:** BLD 30,236.34
- **Prepaid Utilization (Billing):** UTL 30,236.34

**Prepaid/Scheduled**

<table>
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<th>View</th>
<th>Event Status</th>
<th>Count</th>
<th>Amount</th>
</tr>
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<tr>
<td>View</td>
<td>Pending</td>
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</table>
Knowledge Check

On your worksheet....

- What will the Grants Portal allow users to do?

- **True or False:** The Contract Manager page be available after the Compass upgrade.
Support
Support

- Objectives: at the end of this section, you will be able to:
  - Use In Context Help
  - Access Job Aids and Recorded Training
  - Contact Client Support & Navigate and Submit Requests through SalesForce
Questions
Course Wrap Up
Where are we in the process?

Testing builds confidence that the system & users are ready to Go Live

**USER ACCEPTANCE TESTING**
- 12 weeks:
  - June 20, 2016 – September 9, 2016

**FINAL LAP - TRAINING**
- 10 weeks:
  - Sept. – Nov. 2016

**GO-LIVE**
- November 14

**STABILIZATION PERIOD**
- December 2016 – June 2017

**Test Moves**
- **Test Move 3**
  - Test *communications with external applications*, and allow users to put ‘hands to keyboard’ via *Interactive labs*.

- **Test Moves 1 and 2**
  - Test core existing *functionality, new features, customizations* and determining if approved business cases can be supported by the system.

*TM - Test Moves: A series of tests to ensure the system functions correctly, works with external systems, and supports business processes and policies accurately.

*Final Evaluation*
- *Final stanhdown* 12/11/16

*Final: Users receive live training for the month of December and start using the system on 1/1/17.*
End of Course Assessment

Recommended Browser: Internet Explorer

1. https://elmprod.emory.edu

2. From Main Menu, select My Learning

3. Locate the RAS What’s New in Grants 9.2 – University course title

4. Click Launch

5. Click Launch again

6. The RAS What’s New in Grants 9.2 – University EOCA will open in a new window. (Press the F11 key to expand the window).

7. The play button is in the lower left corner.
Help us help you!

Please complete an evaluation before leaving.

In ELMS:

1. Select the **RAS What’s New in Grants 9.2 – University** course title

2. Select the **Compass Survey** link