What’s New with Compass Reporting?

The meeting will start momentarily. Sound will be enabled once the meeting begins.

Recommendations for best audio quality:
1. Connect via Ethernet instead of WiFi.
2. To adjust the volume, click on the green speaker icon in the upper left corner of your screen. Click the arrow and increase or decrease the volume.
3. Refresh your browser if you are experiencing audio difficulties.
Welcome & Introductions

- **Your Hosts:**
  - Larry Goldberg
  - Tony Dipaola, Lori Ronalder, Tiffany Ennis-Henry, Susan Cooper and (Susan’s sidekick) Todd Smith

- University folks: Have you taken the Institutional Data Management Course (IDM)?

- What have you heard about 9.2?
Agenda

- Ground Rules
- Course Objectives
- Reporting Library
- Accessing and Running Reports
- Where to go for help
- Wrap-Up & Next Steps
Course Objectives

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

- Understand the purpose of the **Reporting Library**
  - Access the various sub-libraries
- Run **Queries** and review Results
- Discuss **nVision** reports using Job Aids
- Run **SpeedType Reference** and **Budget Position Summary & Detail Report** in **EBI**
Compass Reporting – Key Changes

- Retrofitting queries/reports for new Compass functionality
- Created new queries/reports needed to support new Compass 9.2 functionality
- Documented query functionality to help users select the right query to meet their needs
- Standardized the naming convention of queries
What’s New in Compass Reporting?

Reporting Library
Reporting Library

- Objectives: at the end of this section, you will be able to:
  - Understand the purpose of the Reporting Library
  - Understand how to use:
    - The Directory
    - EBI Library
    - nVision Library
    - Query Library
    - SQR Library
What is the Reporting Library?

- The Reporting Library is a central repository to find specific reports and queries available in Compass and EBI.

- The Reporting Library is **view only** and is meant for informational purposes only.
From the Reporting Tools menu option, the Emory Reporting Library displays the following components:
The **Directory** allows you to search* by keyword or report type for available related reports in Compass and EBI.

*Reports cannot be executed directly from the library
The **EBI Library** page provides only a listing* of only the EBI reports available along with additional details.

**Note:** EBI reporting remains secured; additional training will still be required for access.

*To generate an EBI report, you must login to EBI separately (using the proper browser and URL provided).
The nVision Library page provides only a listing* of only the nVision reports available along with additional details.

*To generate an nVision report, you must access the applicable nVision Report page separately.
The **Query Library** page provides only a listing* of only the Public queries available along with additional details.

*To generate Query results, you must access the applicable page, Query Viewer or Query Manager separately.
Query Library – New Naming Convention

- If a query was renamed for any reason, the primary way to find the new name is through the Query Library.
- About 40% of queries were renamed to match a new naming convention of the following:
  - EU_”module”_”name of query
  - HC_”module”_”name of query

<table>
<thead>
<tr>
<th>Query Name</th>
<th>Query Folder</th>
<th>Description</th>
<th>Old Query Name</th>
<th>Old Folder</th>
</tr>
</thead>
<tbody>
<tr>
<td>EU_AP_REMIT_DETAIL</td>
<td>COMPLETE</td>
<td>Payment Register</td>
<td>EM_AP_REMIT_DETAIL</td>
<td>PAYABLES</td>
</tr>
<tr>
<td>EU_AP_REVIEW_CANCELLED_PYMNT</td>
<td>COMPLETE</td>
<td>REVIEW CANCELLED PAYMENTS</td>
<td>EU_REVIEW_CANCELLED_PYMNT</td>
<td>(blank)</td>
</tr>
<tr>
<td>EU_AP_SEC VCHR AUDIT</td>
<td>(blank)</td>
<td>SCIQuest Voucher Audit</td>
<td>JRS_SEC_VCHR_AUDIT</td>
<td>(blank)</td>
</tr>
<tr>
<td>HC_GL_SJH_STR_JE_CHECKLIST_ONL</td>
<td>(blank)</td>
<td>SJH and STR JE Checklist - onl</td>
<td>SJH_STR_JE_CHECKLIST_ONL_JRNLS</td>
<td>MONTHEND CLOSE</td>
</tr>
<tr>
<td>HC_GL_SPDYPREF_LISTING</td>
<td>(blank)</td>
<td>HealthCare Smartkey Listing</td>
<td>HC_SMARTKEY_LISTING</td>
<td>HCEHC</td>
</tr>
<tr>
<td>HC_GL_SPECIAL_PROJECT_SPDYPRE</td>
<td>(blank)</td>
<td>(blank)</td>
<td>HCEHC_PCOTH_SPECIAL_PROJECTS</td>
<td>COA</td>
</tr>
</tbody>
</table>
The **SQR Library** page provides only a listing* of only the SQR reports available along with additional details and navigation.

*Note: SQR reports are secured; permission is required to access these reports.

*To generate SQR reports, you must navigate to the proper menu for the report.*
Each library type is provides summary and detail information. The information varies by the type of report library you are searching.
Knowledge Check

Chat your answer....

- What is the primary way to search for a new or renamed query?
Knowledge Check

Chat your answer....

- You can access information for a query from:

  A) only the directory
  B) only the query library
  C) Both A and B
Knowledge Check

Chat your answer....

- Where do you find different types of reports related to a Library search?
What’s New with Compass Reporting?

Accessing and Running Reports
Accessing and Running Queries

- Objectives: at the end of this section, you will be able to:
  - Understand the purpose of Query Viewer
  - Understand the difference between Basic and Advanced search
  - Understand the various Query output options
  - Explain how to schedule Queries
  - Understand how to mark a Query as a Favorite
What is a Compass Public Query?

- Pre-defined inquiries that allow you to retrieve Compass table data online or in ad hoc reports.

- Using **Query Viewer**, you can run any Public query and export the results to Excel for additional manipulation.
Running Queries

Run a Query
- **Basic Search**: enables you to filter on fields one field at a time.
- **Advanced Search**: enables you to filter on multiple fields simultaneously.
- Pre-defined queries and to run to the following:
  - HTML
  - Excel

Download a Query
- After sending the output to the window, you can download to an Excel spreadsheet.
- Manipulate data within Excel.

Schedule a Query
- Queries can be scheduled to run on a routine basis.
- Query output automatically distributed to other Compass users.
There are two ways in which you can access the Query Viewer page:

- From the Reporting Tools > Emory Reporting Library > Directory
- Reporting Tools > Query > Query Viewer
nVision Reports

• nVision reports are formatted Excel documents that can be delivered 1) on screen, 2) on the Web (Report Manager), 3) as a file, 4) to a printer or 5) through email.

• Many of the traditional Campus nVision reports are now also available through EBI.

• nVision reporting for Campus requires the user to create/copy their own private report requests in the Reporting environment (see job aid).
Guided Tour

- Access the Reporting Library
  - View the Directory
    - Query Viewer
  - View the Query Library
  - View the EBI Library
Guided Tours

- EBI
  - Execute the *SpeedType Reference* and *Budget Position Summary & Detail Report*
Knowledge Check

Chat your answer...

- What are some run options for a query?
Knowledge Check

Chat your answer...

- *If I know my Project ID, where in EBI can I find my SpeedType?*
What’s New in Compass Reporting?

Support
Support

- Objectives: at the end of this section, you will be able to:
  - Access Job Aids and Recorded Training
  - Open Labs
  - Contact the Finance Support Center or Emory Reporting Officer
Do you want to know more about the key changes?

Visit the website.
Accounts Receivable/Billing

Billing
- How do I Create an Express Bill?
- What is the Workflow for Non-Grant Invoices?
- How do I Run the Finalize and Print Process?
- How do I Reprint Invoices?
- How do I Upload Invoices from a Spreadsheet?
- How do I Create Credit Invoices?

ePay
- How do I Create Direct Journal Deposits with ePay?
- How do I Create Customer Deposits with ePay?
- How do I Verify an ePay Deposit?
- How do I Reclassify Direct Journal Entries?

Wire Claims
- How do I Claim a Wire for Direct Journal?
- How do I Claim a Wire for Customer Deposit?
- How do I Add Back a Wire for Direct Journal Payment?
- How do I Add Back a Customer Payment Wire?
- How do I Remove Wires from the Wire Claim Page?

Other Payments
- How do I Apply Customer Deposits with Payment Predictor?
- How do I Create an Express Deposit?
- How do I Move the Line Description on the Create Accounting Entries Page?

Customers
- How do I Use the Collections Workbench?
- How do I Add a Customer Note?
- How do I Maintain Corporate Customer Relationships?
- How do I Create Customer Contacts?
What’s Next?

Send emails to compassupgrade@emory.edu
For any questions, comments, concerns

Peer Expert Team
• Peer Experts provide technical expertise on Compass processes and system usage.

Read communications
• Compass T-Minus checklist (weekly)
• Contact compassupgrade@emory.edu if you are not on the Compass Users ListServ
What’s Next?

VISIT. upgrade.compass.emory.edu
• Review key changes
• Keep current with the latest news & events
• Review presentations & recordings of past sessions

ASK. Need Help?
• Call the Finance Support Center @ 77000 or 404-727-7000 (email address will be available at Go-Live)
• Contact the Emory Reporting Officer @ EM_RPTOFFICER@emory.edu
End of Course Assessment (EOCA) & Survey

**In ELMS...**

1. Complete EOCA before midnight tomorrow
2. Complete the Survey

- You will receive email from Compassupgrade@emory.edu with EOCA and Survey instructions after the webinar
- Passing the EOCA (80%) is required to gain transactional access to Compass 9.2
- EBI access requires additional training. Visit ebi.emory.edu for details
Questions

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