Compass Bulletin

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Need Help with Compass? Check out these resources:

Web: www.compass.emory.edu
E-mail: compass@emory.edu
Help Desk: 7-7000

Compass Support Toolbox: www.compass.emory.edu/pstoolbox
ChartField and SmartKeys: www.compass.emory.edu/smartkeys
Super Users: www.compass.emory.edu/superuser

Compass Alerts

As urgent Compass updates arise, the Compass Team will inform users via Compass Alerts. The Compass Bulletin provides a summary of recent alerts. Click here to view the full alert.

ALERT: Status of ChartField Requests
The Compass Team is currently processing the ChartField Requests received since September 1. We have received a number of requests and are working through them as quickly as possible. You will be notified when your request is completed. We ask for your patience, as it may take up to 15 business days (after the request is received) to complete the request. To submit a ChartField or SmartKey edit request, **click here** to download and complete the appropriate request form.

REMINDER

Looking for information related to your budget, YTD expenses, encumbrances, and balances?

- If you previously used data found on FAS Screens 14 (GL) or 15 (SL), use the following navigation path to find the equivalent data in Compass:

Commitment Control > Review Budgets > Activities > Budget Overview

Interested in more detail?

- If you previously used data found on FAS Screen 19, use the following navigation path to find the equivalent data in Compass:

General Ledger > Review Financial Information > Ledger

Looking for attribute or ChartField data?

- If you previously used data found on FAS Screens 5 (GL) or 2 (SL), use the following navigation path to find the equivalent data in Compass:

Emory Custom> Legacy COA Mapping > FAS to PS COA Map

SmartKey Query Available in Compass

To ensure that all employees are using valid SmartKeys (including any SmartKeys modified since go-live), employees can now run the query, **EU_GL_OPER_SMARTKEY**, to retrieve the latest SmartKey list for their units.

To run the query, navigate to **Reporting Tools > Query > Query Viewer** and input query name.

1. Click HTML or Excel.
2. Enter Operating Unit.
3. *If more detailed department results are desired:* Enter Dept ID Range (Start and End); otherwise, leave blank
4. Click View Results.

Where Do I Record FY09 Transactions?

The chart below summarizes the proper recording of FY09 transactions based on the transaction type. If you have any additional questions, please contact the Compass Help Desk (compass@emory.edu or 7-7000).

<u>FY09 Journal Entries and Invoices</u>

Activity	Grants	Non-Grants
Journal Entries	• Record in FAS via eJournal as you normally do using your grant account number. • OGCA and Controller's Office will process the transaction after it posts to FAS. • The transaction will not be visible in your grant account until FY10.	• Record in FAS via eJournal (as you normally do).
Invoices	• Record in Emory Express, making a notation on the scanned copy or in the notes field that the transaction is "Old Year." • Controller's Office will process the transaction, accruing into FY09 and reversing in FY10.	• Record in Emory Express, making a notation on the scanned copy or in the notes field that the transaction is "Old Year." • Controller's Office will process the transaction, accruing into FY09 and reversing in FY10.

<u>FY10 Journal Entries and Invoices</u>

Activity	Grants and Non-Grants
Journal Entries	• Record in Compass.
Invoices	• Record in Emory Express.

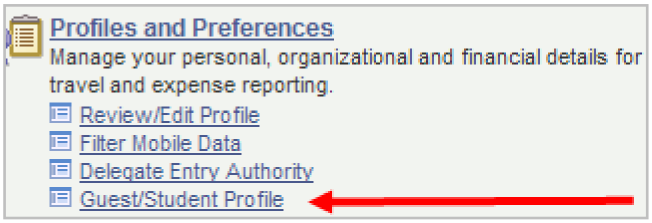
The **"Emory Express Account Quick List"** was recently added to the Compass web site (New ChartField Value page) to help researchers quickly identify the appropriate account numbers to use in transactions. The Account Quick List takes the guess work out of identifying which account number to use.

Click here to access.

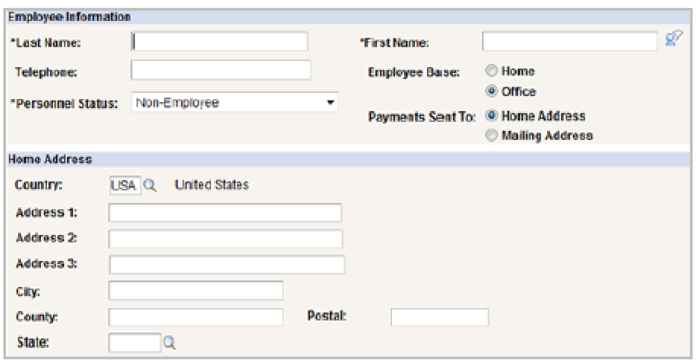
Creating an Expense Report for a Guest or Non-Employee

Use the following steps to create an Expense Report for a guest or non-employee.

1. Log on to Compass (https://compass-login.emory.edu).
2. From the main page, select **Employee Self Service.**
3. Select **Travel and Expense Center.**
4. Select **Profiles and Preferences** and then **Guest/Student Profile.**



5. From the Employee Profile (Edit) page, select the **"Add a New Value"** tab.
6. The Employee ID will show as "Guest" and will be grayed out. Click **Add.**
7. Enter the guests name and address information. Click **Save.**



Note: You are now a proxy for the guest and can enter Expense Reports on his or her behalf. Complete the remaining steps to enter the Expense Report.

8. Return to **Employee Self Service.**
9. Select **Travel and Expense Center.**
10. Select **Expense Report: Create.**

11. Select the **Look Up button** (magnifying glass) next to **EmplID.** The results should display the guest you created.
12. Click on the guest ID and select **Add.** The Expense Report opens for the guest.

Now you can complete the Expense Report on behalf of the guest or non-employee.

For additional support, refer to the [Expense Report Setup Desktop Reference Guide](), available in the Compass Support Toolbox.