

## New Instructor-led Compass Courses Available in March (University Only)

Two new instructor-led Compass courses will be available in March:

- *Financial Management Using Compass: Accounting Basics*
- *Financial Management Using Compass: Reporting Basics*

**Note:** You can sign up for the new Compass courses through PeopleSoft HR Self Service beginning Thursday, Feb. 25.

In *Accounting Basics* participants learn how to perform basic accounting operations within the system, and how to set up the Compass financial management system to increase productivity.

*Reporting Basics* teaches participants how to use the Compass query, inquiry, and reporting functions.

**Coming soon:** *Financial Management Using Compass: Grants and Sponsored Programs.*

Five sessions of each course will be offered in March, including classes on two Saturdays, in order to make Compass training as accessible as possible.

### Accounting Basics

- Wednesday, March 3, 1:00-5:00 (1599, 1.380)
- Thursday, March 11, 1:00-5:00 (1599, 1.380)
- Tuesday, March 23, 1:00-5:00 (1599, 1.380)

### Saturday Classes

- Saturday, March 27, 9:00-1:00 (1599, 1.380)
- Saturday, March 27, 9:00-1:00 (SOM, 312)

### Reporting Basics

- Thursday, March 4, 9:00-4:15 (1599, 1.380)
- Friday, March 12, 9:00-4:15 (1599, 1.380)
- Friday, March 26, 9:00-4:15 (1599, 1.380)

### Saturday Classes

- Saturday, March 13, 9:00-4:15 (1599, 1.380)
- Saturday, March 13, 9:00-4:15 (SOM, 312)

## Important Reminder!

Journals that are not posted in the month they were created will be deleted on the 15<sup>th</sup> of the following month.

## Compass Online Reference Guide: Your First Stop for Compass Information

The *Compass Online Reference Guide* should be your first stop when you have a question about how to use Compass. It gives you detailed, step-by-step information on how to perform various functions in Compass. You can navigate the *Compass Online Reference Guide* by clicking the links to specific information.

The *Compass Online Reference Guide* is located on the [Compass home page](#).

## Tip of the Week

The following tip of the week will make using Compass easier for you.

### Select at Least One Chartfield When You Run a Delivered Report

When you run a delivered report in Compass, select at least one chartfield to narrow the amount of data that is returned.

If you run a delivered report without any chartfield selections, you are effectively running the report for the entire business unit, which can give you more data than you want to wade through. It also negatively impacts processing time.

In the following example, a department value is entered, and to narrow the slice of data even more, a fiscal year and period are defined.

**Tip:** If you don't see a list of Chartfields from which to select, click **Refresh** and a list will be displayed.

*What the selection screen looks like:*

[Report Manager](#)   [Process Monitor](#)   [Run](#)

Run Control ID: Ledger\_Summary   Language: English

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Report Request Parameters

Unit: EMUNV   Ledger: ACTUALS   Currency Code: USD

Fiscal Year: 2010   To Period: 3

[Refresh](#)

Sequence	ChartField Name	Include CF	Value
1	Department	<input checked="" type="checkbox"/>	720400
2	Account	<input checked="" type="checkbox"/>	
	Fund Affiliate	<input type="checkbox"/>	
	Operating Unit Affiliate	<input type="checkbox"/>	
	Book Code	<input type="checkbox"/>	
	Event	<input type="checkbox"/>	
	Smart Key	<input type="checkbox"/>	
	Class	<input type="checkbox"/>	
	Affiliate	<input type="checkbox"/>	
	Fund Code	<input type="checkbox"/>	
	Adjustment Type	<input type="checkbox"/>	
	Operating Unit	<input type="checkbox"/>	
	Program Code	<input type="checkbox"/>	
	Project	<input type="checkbox"/>	

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