

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

Redistributing Operating Budgets due to Conversion Issues

The FY10 Unrestricted Operating Budget was loaded into the new Compass system. The operating budget was developed using the FAS account and subcode structure and as a result, the data conversion into PeopleSoft departments and accounts may need adjustment. This may be necessary if the current fiscal year Original Budget was converted and recorded into unexpected or inappropriate Compass departments, programs, events, or accounts. For FY10 we will permit corrections to the system load to be entered as Original Budget transactions in Compass.

Please note this opportunity for corrections is *not* meant to reclass your budget differently from your submitted EBO load, but merely to allow for *redistribution* of unexpected conversion issues.

Online submission and approval of your FY10 Original Budget redistribution must be completed **no later than October 31, 2009**. For these adjustments, include the following in the journal header description, **“Redistribution of the FY10 Unrestricted Operating Budget.”** Earlier submission is strongly encouraged in order for the Emory Budget Office to review and verify budget journal entries prior to the October close. After October 31, changes to the Original Budget will not be permitted.

Compass Support Center Help Sessions

The next Compass One-on-One session is this **Friday, October 16, from 1:30 pm to 5 pm at School of Medicine – Room 313.**

“Compass One-on-One,” is a series of help sessions designed to provide employees one-on-one help with their Compass questions and transactions. Compass users who bring individual or unit questions and “real life problems” will be provided one-on-one assistance by project team experts.



SmartKey Query Available in Compass

To retrieve the latest SmartKey list for your unit (including any SmartKeys modified since go-live), run the query **EU_GL_OPER_SMARTKEY**. For instructions to run the query, visit the [New ChartField Values](#) page of the Compass web site.

Submitting Expense Reports for Healthcare Employees



Healthcare employees should **ONLY** use Compass to submit Expense Reports. Employees should not use the Payment Request module or any other functionality in the system to pay financial transactions.

Recently, Healthcare announced a process change regarding the approval of expense reimbursements. Manager approval **will not** be done electronically as shown in the training and job aids. To learn more, review the following:

- [Travel/Non-Travel Expense Report Instructions](#)
- [Emory Healthcare Finance Home page](#)

REMINDER

University Users - My Wallet

Can I use the “My Wallet” feature when creating a proxy expense report?

If you already have proxy access for the person, follow these steps:

Navigation: Employee Self-Service > Travel and Expense Center > Expense Reports

1. From the Expense Report menu, select **Create**
2. Choose the appropriate proxy name and click **Add**
3. When you are in the blank report, you will see a drop down midway through the expense report. The default is “New Expense.” Expand the drop down and select **“Expenses from My Wallet”** within the drop down and click **Add**.

Select	Expense Type	Expense Date	Amount Spent	Currency	Payment Type

Copy Selected Delete Selected **New Expense** Add Check For Errors

4. Once you select this option, you will see the charges on the proxy's travel card. Select each charge associated with the trip and “Add” them to the Expense Report.

Please refer to the [Expense Report Setup Job Aid](#) for more information on authorizing a proxy in Compass.