

## ChartField Changes Due to Conversion Issues (University Only)



For ChartField changes submitted (due to conversion issues) the Compass Team is working to transfer the historical data to the proper ChartField.

### Key Points:

- FY09 transactions will be adjusted to reflect the new SmartKeys (beginning balance for FY10).
- FY10 transactions will be reclassified to the new SmartKey.
- The deadline for submitting approved ChartField changes **for this process** is October 31<sup>st</sup>.

Earlier submission is strongly encouraged to ensure all information is received. The Compass Team will not be able to transfer historical data to reflect ChartField changes for any requests received after October 31<sup>st</sup>.

## Emory Proposal Express (EPEX) Enhancements

Several enhancements were recently made to EPEX. If you use EPEX, please review the updates and visit [www.osp.emory.edu/OSP\\_other/EPEX.cfm](http://www.osp.emory.edu/OSP_other/EPEX.cfm) for more information on EPEX.

- *To track the approval process, once a proposal has entered workflow* - on the Proposal Header page (in the Proposal Status section), click the blue hyperlink titled "Pending Approval." This will display the workflow.
- **Due Date** was added to the main EPEX search page.
- The **Department** field was added (next to the Principal Investigator field) to identify which Department to route the proposal.
- Two new questions were added under the **Miscellaneous Information** section, one that triggers workflow for the VA and one that triggers workflow for OCR.
- Updates were made to the **Save**, **Save & Route**, and **Preview Workflow** buttons. The changes impact when the buttons appear for users.
- E-mails generated by EPEX will have **Deadline Date** and **Deadline Type** included in the body of the message.
- The following roles will trigger workflow for EPEX proposals:
  - Principal Investigator (PI)
  - Co-Investigator (COIN)
  - Co-Principal Investigator (COPI)
  - Named Investigator (NINV)
  - Multi Principal Investigator (MPI)
  - Mentor/Sponsor (MENT) - New

## Compass Incident Log

Submit your Compass-related question or issue directly to the Compass Support Team via the **Compass Incident Log**. To access the Incident Log, from the Compass menu, navigate to **Compass Support > Compass Incident Log** from your menu options. After logging your question or request, you will receive an e-mail with an incident number, allowing you to track the status of your question.

For more details, [click here to review the Special Edition Compass Bulletin](#), distributed on October 16, 2009.



## ChartField/SmartKey Requests

Please continue to submit your ChartField/SmartKey Request using the '[Compass ChartField Value/SmartKey Request Form](#)'. The form is available on the Compass web site.

## User Guidance from the University Division of Finance

The University Finance Division recently released the document, "[User Guidance from the University Division of Finance](#)." This document provides user tips/additional assistance for using the Compass inquiry tools and queries to obtain transaction information. The document is intended as a bridge while the project team continues to build out the reporting capability.

## 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.

## Compass Support Center Help Sessions

The next Compass One-on-One session is this **Friday, October 23, from 9 am – 1 pm at Goizueta Business School – Room 304 of the West Wing (Old Building).**

"**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.

