

Submitting Expense Reports Efficiently (University Only)

You are creating an Expense Report in Compass. You've entered your expenses, their details, and SmartKey. You have checked for errors and have no red flags. What next?

- Be sure to select **Save for Later**. Without this, your **Submit** button will not appear.
- Once saved, select the **Submit** button, which transmits it electronically to Payment Services.
- Payment Services is now waiting on your paperwork before it proceeds to the next step.
- Select **Print Report with Barcode** so you will have your Transmittal Form.
- Tape all receipts *securely* down onto 8 ½ X 11 sheets of paper.
- Paperclip (no staples, please) your Transmittal Form and receipts and send to **Payment Services, 1599 Clifton Road**.
- Once the paperwork is received and approved, your departmental Approver(s) will receive the Expense Report electronically along with the images of the receipts.
- Receiving the Expense Reports electronically allows the approver(s) to see everything they need. No need for paperwork to travel around the offices for signature. Your Approvers have the ability to approve or deny your Expense Report electronically.
- Remember that at any time, you can go in and view the current approval status of your Expense Report.
- Once your departmental approval(s) is completed, payment(s) will be made accordingly.

Do you have additional questions? Contact Procurement and Payment Services Customer Care at 7-5400.

Journal Approval Deadlines (University Only)

Journals must be submitted to Central Finance for approval by **November 30** in order to be posted in November.

Interfaces (OIT, Facilities Management, Animal Resources, etc.) must be completed by **December 2**.

November close information will be available in Compass on Monday, **December 14**.

Compass 1-on-1 Help Sessions

The following 1-on-1 help sessions will be held at 1599 Clifton Road in the computer training room on the first floor:

- ✓ Monday, December 7, 2009 (9-11:00 am)
- ✓ Monday, December 14, 2009 (9-11:00 am)
- ✓ Monday, December 21, 2009 (9-11:00 am)
- ✓ Monday, December 28, 2009 (9-11:00 am)

Reviewing Your Budget: Finding Information in Compass

You can get detailed step-by-step procedures on how to review your budget in Compass by clicking [Reviewing Your Budget: Finding Information in Compass](#) or going to the [Compass](#) website.

In addition to the help sessions, **Managing Your Budget Workshops** will be coming soon! Check your *Compass Bulletin* for dates, times, and locations.

Tip of the Week

The following **Tip of the Week** shows you the procedure for viewing your unrestricted operating budget.

E&G/Unrestricted Operating Budget (Revenue and Expenses)

What this option gives you: The ability to drill down to various documents.

Recommended for: Detail analysis and a quick view of your available budget.

Tip: Like most things in Compass, a little time invested on the front end for setting up inquiry templates will save you time in the long run.

Drill down:

1. Click on [Commitment Control](#) in the left menu bar.
2. Click on [Review Budget Activities](#).
3. Click on [Budgets Overview](#).
4. Click on the tab [Add a New Value](#).

Note: Once you have set up and saved an inquiry using the [Add a New Value](#) tool, you can simply click [Search](#) on the [Find an Existing Value](#) link and select your inquiry.

1. In the **Inquiry Name** box, type something that will remind you of what you want to analyze.
2. Click [Add](#)
3. Complete each section of the **Budget Inquiry Criteria/Budget Overview** screen.
4. Click [Save](#) at the bottom left below Chartfield Criteria.
5. Click [Search](#)
6. You should see the results of your criteria search.

For more details, see the [Reviewing Your Budget](#) document on the [Compass website](#).

Compass Support Toolbox



Available via the [Compass web site](#) as your one-stop for support and materials. In it you will find links to job aids, frequently asked questions, forms, support information and Help Desk contact numbers. **Make it your first stop for help information.**