

Onboarding Steps for Financial System Access Employee's Guide



Pre-Training Preparation

- **Identify Necessary Systems Access & User Permissions:** Managers will identify and communicate which financial systems you need access to, such as Compass and Emory Express, and the appropriate level of access.
- **Expectation Setting:** Discuss expectations for course completion (e.g., deadlines) with your manager. Be cognizant of competing onboarding requirements, such as required HR elements and RAE Program expectations.

Online Training Completion

- **Training Modules (BRAINIER):** Employees must complete the manager's identified required training modules in Brainier, ensuring all course steps are finished. Incomplete steps may prevent managerial approval for subsequent steps.
- **Resources and Reference Aids:**
 - How to Log Into Brainier (video)
 - How to Search for Courses in Brainier (video)
 - How Do I Obtain Access to Emory Proposal Express (EPEX)
- **Notification of Completion:** Notify your manager immediately after completing the required courses.

Post-Training Verification & System Access

- **Employee's EPEX Access:** Following notification of successful course completion, managers provide access for systems such as EPEX.
- **Approval Notification:** Managers will receive an email notification regarding the approval's status. Verify the approval status with your manager.

Support and Follow-Up

- **Emory Finance Support Center:** The Finance Support Center's community website allows you to quickly and easily open a support ticket. Each ticket request will have a few required fields so that we can route your inquiry to the proper team.
 - [Website / 404-727-7000 / finance.support.center@emory.edu](#)
- **Finance System Video Library:** The video library contains quick tips and tutorials about new features and common transactions. It offers information when you need it outside of longer formal training courses.
 - [Emory Express \(order search\), Grants \(closing an award in Compass\), General Ledger \(journal mover\), and Workcenters \(Compass\).](#)
- **Finance System Job Aid Library:** Index of all Emory Finance Job Aids
 - [Job Aid Library](#)



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Finance Support Center

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us.

How Do I Obtain Access to Emory Proposal Express (EPEX)?





Obtaining EPEX Access



How Do I Obtain Access to EPEX?

Overview

The Emory Proposal Express (EPEX) system is used to enter proposals in Compass. Access to the EPEX system requires the completion of the [Compass: Emory Proposal Express \(EPEX\)](#) in Brainier. Please follow the steps in the next section to access the hyperlink above.

For more information on creating proposals, see the Job Aid: [How Do I Create and Manage a Proposal](#)

Navigation

HR - Self-Service > Learning Management > Learning Management - Brainier

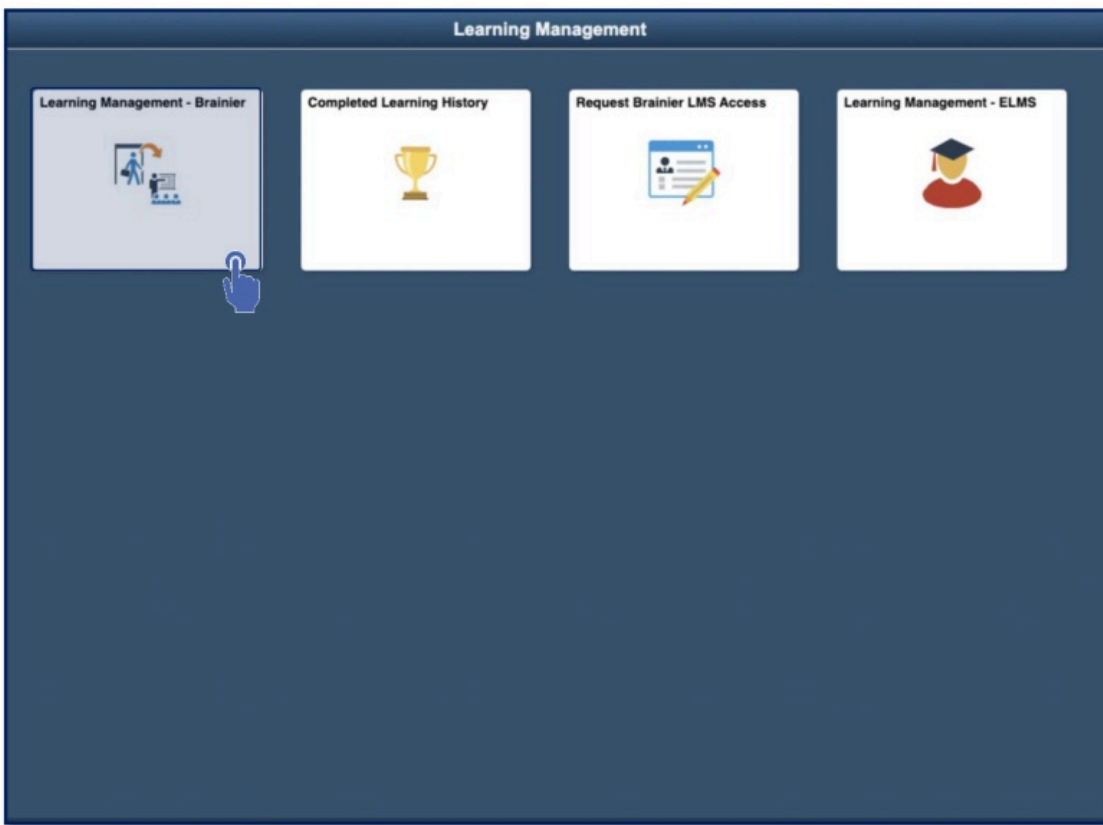


Figure 1



Obtaining EPEX Access



Complete the Brainier Course

The steps listed below are for completing the required training course as a new user. Please note that the Brainier homepage will be displayed.

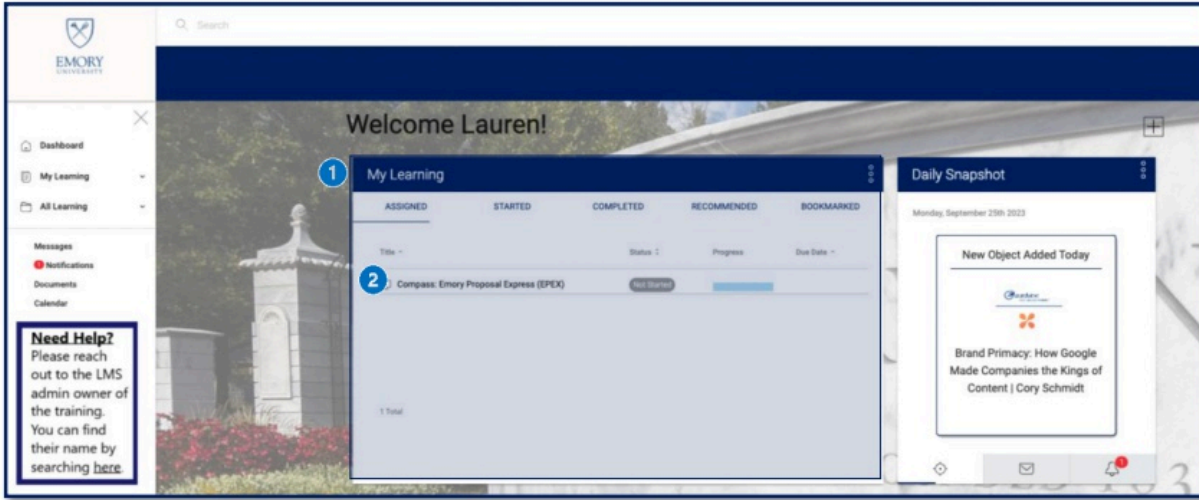


Figure 2

Steps	Actions
1.	Navigate to the My Learning section.
2.	Click on the assigned course Compass: Emory Proposal Express .

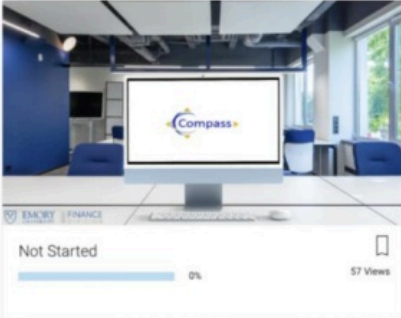


Obtaining EPEX Access



Compass: Emory Proposal Express (EPEX)

Author: Lauren Ross
 Length: 1 Hour 10 Minutes
 LegacyCourseNumber: 236001
 Tags: Software
 Description: This eLearning course is a required training to gain access to Emory Proposal Express (EPEX), a Grants proposal development system.



Not Started

0%

57 Views

Object Details

STEP 1 1

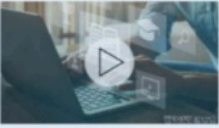
Compass: Emory Proposal Express (EPEX) - eLearning

Type: SCORM
Length: 0001:10:00

0%

Complete

Start



STEP 2 2

Compass: Emory Proposal Express (EPEX) - Survey

Type: Survey
Length: 5 minutes

0%

Complete

Start




Figure 3

Steps	Actions
1.	Complete Step 1 by selecting the first Learning Object Compass: Emory Proposal Express (EPEX) - eLearning .
2.	Complete Step 2 by selecting the second Learning Object Compass: Emory Proposal Express (EPEX) - Survey .



Obtaining EPEX Access

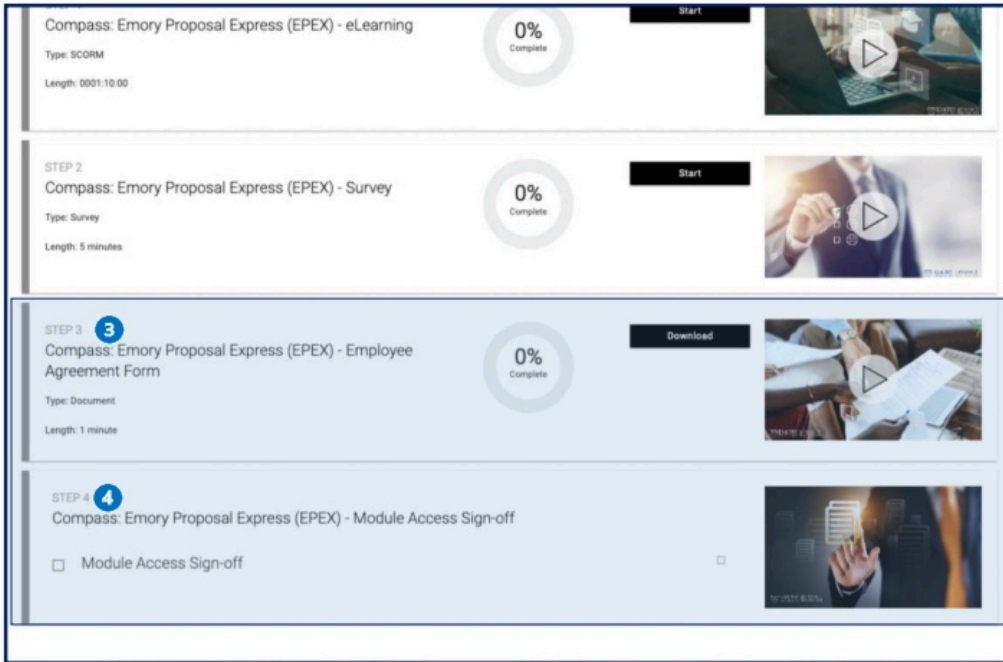


Figure 4



Figure 5

Steps	Actions
3.	Complete Step 3 by selecting the third Learning Object Compass: Emory Proposal Express (EPEX) – Employee Agreement Form (Figure 4).
4.	Complete Step 4 by clicking the checkbox of the last Learning Object Compass: Emory Proposal Express (EPEX) – Module Access Sign-off (Figure 4).
5.	Click Confirm (Figure 5). <u>Note: The step should now reflect blue for pending.</u>



Obtaining EPEX Access



The course must signify 100% completion before the employee's manager can complete the Module Sign-off. Please see the Job Aid: [How Do I Approve an Employee's EPEX Access](#) for the outlined process.

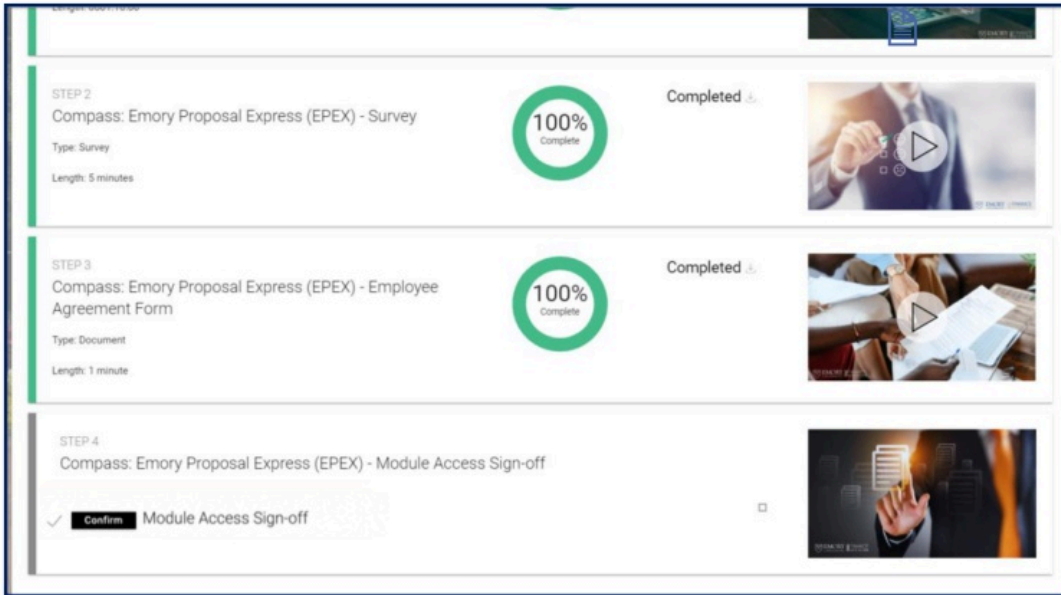


Figure 6

Additional Support



For additional support:

- Visit us at the [Finance Support Center](#)
- Call us at 404-727-7000
- Email [Finance Support](#).

Per [Emory Policies](#), do not copy, screenshot, or share this information.



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Finance System Job Aid Library



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<http://ebi.emory.edu/>

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