

Onboarding Steps for Financial System Access Manager's Guide



Pre-Training Preparation

- **Identify Necessary Systems Access & User Permissions:** To ensure employees can effectively complete their daily tasks, it is essential to identify which financial systems they will need access to, such as Compass and Emory Express.
 - Financial Systems Onboarding Matrix (Refer to column 1 "if you do this")
 - Recommended Training Paths by Emory Finance Division (based on common role responsibilities)
- **Determine Corresponding Required System Access Training:** Determine the appropriate level of access within each system to align with the employee's job responsibilities. *Note that the required training will be unique to each employee's necessary system access level.*
 - Financial Systems Onboarding Matrix
 - Recommended Training Paths (based on common role responsibilities)
 - Custom Training Plan Questionnaire (If you prefer to customize your training programs)
 - Brainier Crosswalk (ELMS to Brainier Course Codes)
- **Notify Employee:** Inform the employee about the required online training and provide access details. (Resources for logging into Brainier and searching for a course are listed in the **Employee Section**.)
- **Set Expectations:** Communicate the training's objectives, benefits, and requirements to the employee. Share completion deadlines. Be mindful of competing onboarding requirements, such as required HR elements and RAE Program expectations.
- **Notification of Completion:** Instruct your employee to notify you immediately after completing the required course via e-mail, Microsoft Teams chat, or other communication method.

Post-Training Verification & Requesting Access

- **Training Completion Verification:** Confirm with your employee that all specified, required training has been successfully completed.
- **Approve an Employee's EPEX Access:** As a manager, you must approve your employee's EPEX access.
 - How Do I Approve an Employee's EPEX Access?

System Access Request

- **Submit Access Request:** Submit a formal request for system access on behalf of the employee/user.
 - [How Do I Submit a Request for EPEX Access?](#)
 - [How Do I Submit a Request for Emory Express Access?](#)
 - [How Do I Submit a Request for Emory Business Intelligence \(EBI\) Access?](#)
- **Approval Process:** Check the approval status and, if needed, modify an existing request.
 - [How Do I View the Status of My Request?](#)
- **Approval Notification:** The employee/user will receive an email notification regarding the form's status, or it can be viewed directly in Compass (see above "How Do I View the Status of My Request").

Support and Follow-Up

- **Emory Finance Support Center:** The Finance Support Center's community website lets you open a support ticket quickly and easily. Each ticket request will have a few required fields so that we can route your inquiry to the proper team.
 - [Website / 404-727-7000 / \[finance.support.center@emory.edu\]\(mailto:finance.support.center@emory.edu\)](#)
- **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](#)

FINANCIAL SYSTEMS ONBOARDING MATRIX

If you do this...	Financial System	Module	Take this Course	ELMS Course Code	Modality	Frequency	Form Required?
Require access to any Emory University financial system including Compass, Emory Express or Emory Business Intelligence (EBI)	N/A	N/A	Institutional Data Management	410001-9264	Self-Paced eLearning	On-Demand	NA
Require access to Compass	Compass	All	Compass Fundamentals	260728	Self-Paced eLearning	On-Demand	NA
Reconcile Purchasing Card (P-Card)	Compass	Purchasing	Compass P-Card Reconciliation, Policies, and Procedures eLearning	260602	Self-Paced eLearning	On-Demand	NA
Approve Purchasing Card (P-Card) transactions	Compass	Purchasing	Compass P-Card Reconciliation, Policies, and Procedures eLearning	260602	Self-Paced eLearning	On-Demand	email credit.cards@emory.edu
Travel for Emory business or support business travelers (Proxies)	Compass	Expense	Compass Introduction to Expense Reports	260613	Self-Paced eLearning	On-Demand	NA
				260612	Instructor-led		
Create payment requests for guest, students or individuals	Compass	Accounts Payable	Compass Introduction to Payment Requests	260601	Self-Paced eLearning	On-Demand	NA
Make Deposits	Compass	Accounts Receivable	Compass Introduction to ePay Deposits	260696	Video Recorded Class	On-Demand	Compass Access
Claim Wires	Compass	Accounts Receivable	Compass Introduction to Wire Claims	260603	Self-Paced eLearning	On-Demand	Web-Wire Claim Access
Initiate Invoicing	Compass	Accounts Receivables	Compass Collection Workbench and Workcenters	260698	Video Recorded Class	On-Demand	Compass Access
Dispose of Assets	Compass	Asset Management	Compass Asset Disposal	260604	Self-Paced eLearning	On-Demand	Compass Access
Manage departmental and/or non-sponsored budgets and available balances	Compass	Commitment Control (Budgets)	Compass Introduction to Inputting & Processing Budget Journals	260700	Video Recorded Class	On-Demand	Compass Access
Initiate expense journals, journal transfers (recharges, accruals, FNA) or spreadsheet uploads	Compass	N/A	Compass Introduction to General Ledger	260606	Self-Paced eLearning	On-Demand	Contact ctrl@emory.edu
Reclasses (Journal Mover)	Compass	N/A	Compass Journal Mover	260767-18465	Self-Paced eLearning	On-Demand	Compass Access
Approve Financial transactions in Compass	Compass	Workflow	Compass Workflow and Approving Transactions	260614	Self-Paced eLearning	On-Demand	Compass Access Modify Workflow Access
Create & Set-up New Proposals in EPEX, Set-up Proposal Projects, Enter Proposal Budgets, Understand Proposal Workflow & Routing	Compass	Grants	Emory Proposal Express (EPEX)	236001	Self-Paced eLearning	On-Demand	NA
Understand about functionality relating to EPEX, award terms/sub recipient PO activity ID, updates to the grants portal, contract workbench, and fund code and fringe adjustment.	Compass	Grants	Compass Pre-Award-Grants Only	260692	Video Recorded Class	On-Demand	Compass Access

BRAINIER

Crosswalk



Overview

This document presents the updates made in the transition from ELMS (Legacy) to Brainier. It includes changes to the course number and name. Courses can be searched in Brainier by course number or name. Please note that courses marked with an asterisk (*) are currently not visible on the front end in Brainier. These courses require approval from the Controller's Office before they can be assigned by the LMS Administrator in Brainier.

Instructions

To effectively use this guide, search for the course number or name (use CTRL +F).

Axiom

Legacy Course No.	ELMS (Legacy) Course Name	Brainier Course No.	Brainier Course Name
260778	Academic Units: Web Budget Detail	1115	Axiom: Academic Units - Web Budget Detail
260773	Administrative & Infrastructure Units: Web Budget Detail - Non-compensation	1111	Axiom: Administrative & Infrastructure Units - Web Budget Detail (Non-Compensation)
260774	Administrative & Infrastructure Units: Web Budget Detail - Compensation	1113	Axiom: Administrative & Infrastructure Units - Web Budget Detail (Compensation)
260771	Administrative & Infrastructure Units: Web Budget Request Form	1106	Axiom: Administrative & Infrastructure Units - Web Budget Request Form
260772	ALL UNITS: Introduction to Web Budget Detail	1108	Axiom: Introduction to Web Budget Detail (All Units)
260768	Web Budget Forecast Kickoff	1101	Axiom: Introduction to Web Budget Forecast
260769	Web Budget Forecast Training	1103	Axiom: Web Budget Forecast

Compass: Accounts Administrator

Legacy Course No.	ELMS (Legacy) Course Name	Brainier Course No.	Brainier Course Name
260766	Compass Account Administrator for Data Managers	1077	Compass: Account Administrator for Data Managers

Compass: Accounts Payable

Legacy Course No.	ELMS (Legacy) Course Name	Brainier Course No.	Brainier Course Name
260601	Compass Introduction to Payment Requests Webinar	1059	Compass: Introduction to Payment Requests
260602	Compass P-Card Reconciliation, Policies & Procedures eLearning	976	Compass: P-Card Reconciliation, Policies & Procedures

Compass: Accounts Receivable | Billing

Legacy Course No.	ELMS (Legacy) Course Name	Brainier Course No.	Brainier Course Name
260691	Compass Accounts Receivable - Grants Only Classroom Recording	1035	Compass: Accounts Receivable - Grants Only
260622	Compass Introduction to ePay Deposits Webinar	1023	Compass: Introduction to ePay Deposits
260603	Compass Introduction to Wire Claims eLearning	990	Compass: Introduction to Wire Claims

Compass: Asset Management

Legacy Course No.	ELMS (Legacy) Course Name	Brainier Course No.	Brainier Course Name
236604	Compass 9.2 Asset Disposal Workflow eLearning	999	*Compass: Asset Management, WorkCenter, and Disposals

Compass: Fundamentals

Legacy Course No.	ELMS (Legacy) Course Name	Brainier Course No.	Brainier Course Name
260728	Compass Fundamentals	1556	Compass: Introduction to Compass Fundamentals

Compass: General Ledger

Legacy Course No.	ELMS (Legacy) Course Name	Brainier Course No.	Brainier Course Name
260606	Compass: Introduction to General Ledger WorkCenter & Entering Journals - Live Webinar	1001	*Compass: Introduction to General Ledger WorkCenter & Journals
260700	Compass Introduction to Inputting & Processing Budget Journals Classroom Recording	1040	Compass: Introduction to Inputting & Processing Budget Journals
260767	Compass Journal Mover	1079	Compass: Journal Mover

Compass: Grants

Legacy Course No.	ELMS (Legacy) Course Name	Brainier Course No.	Brainier Course Name
260705	Compass Award Receipts & Set-Up- Grants Only	1083	Compass: Award Receipts & Set-Up - Grants Only
260732	Emory Grants Forms: ClinCard and RPPF Cash Requests	1073	Compass: ClinCard and RPPF Cash Requests
260770	CAS Exception Training	1588	Compass: CAS Exception
260698	Compass Collection Workbench and Workcenters Classroom Recording	1056	Compass: Collection Workbench and Workcenters
260615	Compass Contracts Workbench	1021	Compass: Contracts Workbench
260731	Emory Grants Forms	1070	Compass: Grants Forms
260729	Compass Grants Project Activity Status Recorded Webinar	1067	Compass: Grants Project Activity Status
260693	Compass Letter of Credit Management - Grants Only - Classroom Recording	1039	Compass: Letter of Credit Management - Grants Only
260692	Compass Pre-Award- Grants Only Classroom Recording	1037	Compass: Pre-Award - Grants Only
260611	Compass Understanding Grants eLearning	1003	Compass: Understanding Grants
236001	Emory Proposal Express (EPEX) Online	870	Compass: Emory Proposal Express (EPEX)
236010	Effort Reporting System/ERS	1607	Finance Division: Effort Reporting System (ERS)

Compass: Security (Access) and Workflow

Legacy Course No.	ELMS (Legacy) Course Name	Brainier Course No.	Brainier Course Name
260614	Compass Workflow and Approving Transactions eLearning	1011	Compass: Workflow and Approving Transactions
260736	Tableau Reporting for Expense Report Monthly Review Process	1312	Compass: Tableau Reporting

Compass: Travel & Expense

Legacy Course No.	ELMS (Legacy) Course Name	Brainier Course No.	Brainier Course Name
260613	Compass Introduction to Expense Reports eLearning	1007	Compass: Introduction to Expense Reports

Compass: Treasury

Legacy Course No.	ELMS (Legacy) Course Name	Brainier Course No.	Brainier Course Name
260708	Compass Deal Management & Accounting Recording	1063	*Compass: Deal Management & Accounting
260636	Compass Introduction to Treasury	1034	*Compass: Introduction to Treasury

Emory Business Intelligence (EBI)

Legacy Course No.	ELMS (Legacy) Course Name	Brainier Course No.	Brainier Course Name
260744	Introduction to Emory Business Intelligence	1014	EBI: Introduction to Emory Business Intelligence
260351	Emory Business Intelligence (EBI) Course	1309	EBI: Fundamentals to Emory Business Intelligence

Emory Express

Legacy Course No.	ELMS (Legacy) Course Name	Brainier Course No.	Brainier Course Name
260684	Emory Express For Approvers eLearning	1026	Emory Express: Approvers
260747	Introduction to Emory Express	1043	Emory Express: Introduction to Emory Express

Kronos

Legacy Course No.	ELMS (Legacy) Course Name	Brainier Course No.	Brainier Course Name
260776	Kronos Web-Based Clocking: Hourly Employees and Hourly Paid Student Workers	1581	Kronos: Web-Based Clocking - Timekeepers
260777	Kronos Web-Based Clocking: Hourly Employees and Hourly Paid Student Workers	1585	Kronos: Web-Based Clocking - Hourly Employees & Students



Training | Support

For Further Inquiries, visit the [Finance Website](#).



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FINANCIAL SYSTEMS ONBOARDING MATRIX

If you do this...	Financial System	Module	Take this Course	ELMS Course Code	Modality	Frequency	Form Required?
Set-up new awards, complete an award continuation, no cost extension, finalize a PAN, amend an award and other duties associated with award receipt & set-up.	Compass	Grants	Compass Award Receipts & Set-Up- Grants Only	260705	Video Recorded Class	On-Demand	Compass Access
Set-up an LOC contract or subaccount, run grants billing process for an LOC contract, reprint LOC reports and identify expiring LOCs.	Compass	Grants	Compass Letter of Credit Management- Grants Only	260693	Video Recorded Class	On-Demand	Compass Access
Grants A/R using of the collection workbench/customer conversation & correspondence including marking items in dispute, splitting items, transferring items, refunding items and apply payments using payment predictor.	Compass	Grants	Compass Accounts Receivable - Grants Only	260691	Video Recorded Class	On-Demand	Compass Access
Work in a RAS unit or need to understand an overview of Pre-Award, Award Receipt and Set-up, Activity ID and Project Status Control, Grants Billing, Accounts Receivable and Grants Recording, PI Portal, Fund Codes and Fringe process.	Compass	Grants	Compass Understanding Grants	260611	Self-Paced eLearning	On-Demand	Compass Access
Submit Requests for research study participants to receive compensation via ClinCard (a reloadable debit card) or cash.	Compass	Grants	Emory Grants Forms: ClinCard and RPPF Cash Requests	260732	Recorded Webinar	On-Demand	NA
Submit Requests for Refunds from Grants or Contracts Submit Requests for Refunds from the On-Account Submit Requests for Residual Transfers	Compass	Grants	Emory Grants Forms	260731	Recorded Webinar	On-Demand	NA
Change Project Activity Status of Closed in Compass	Compass	Grants	Compass Grants Project Activity Status Recorded Webinar	260729	Recorded Webinar	On-Demand	Compass
Access data from Contracts Workbench	Compass	Grants	Contracts Workbench	260615-11447	Self-Paced eLearning	On-Demand	Compass Access
Create and modify queries within the Compass financial management system.	Compass	Reporting	Query Manager	260402	Instructor-led	Once a Quarter	Compass Access
Purchase catalog items and create custom orders	Emory Express	Emory Express	Emory Express	260344-11815	Recorded Webinar	On-Demand	Emory Express Access
Approve orders in Emory Express	Emory Express	Emory Express	Emory Express For Approvers eLearning	260684	Self-Paced eLearning	On-Demand	Emory Express Access/ Emory Express Workflow
Run reports in EBI including labor reports	Emory Business Intelligence	Emory Business Intelligence	Introduction to Emory Business Intelligence	260744	Self-Paced eLearning	On-Demand	EBI Access
Run reports in EBI including labor reports and would like a hands-on experience Course Prerequisite: Emory Business Intelligence: Navigation	Emory Business Intelligence	Emory Business Intelligence	Emory Business Intelligence (EBI) Reports	260351	Instructor-led	Once a month	NA



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us.

How Do I Approve an Employee's EPEX Access?





Approving EPEX Access



How Do I Approve an Employee's EPEX Access?

Overview

The Emory Proposal Express (EPEX) system requires manager approval before a user can submit or approve proposals. The Approvals occur within the [Brainier](#) (Learning Management System). The employee must have completed the required training course [Compass: Emory Proposal Express \(EPEX\)](#).

For more information on completing the course, see Job Aid: [How Do I Obtain Access to Emory Proposal Express \(EPEX\)?](#)

Navigation

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



Figure 1



Approving EPEX Access



Approving an Employee's EPEX Access

After the employee completes the required training course their manager must complete the Module Sign-off to permit access to the system.

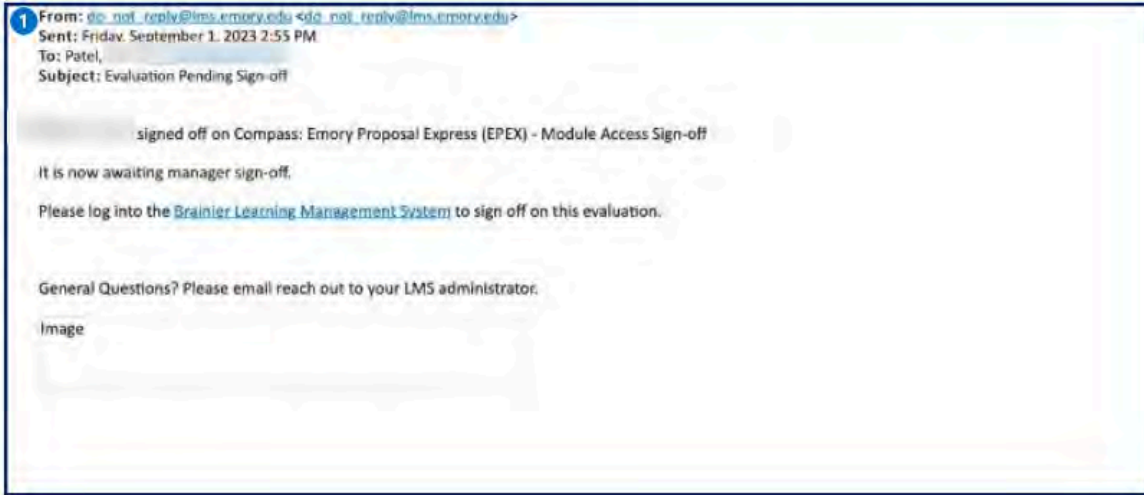


Figure 2

Steps	Actions
1.	Once the employee completes the required training, the manager receives an email stating they need to complete a sign-off in Brainier. <i>Note: Please follow the steps in the previous section to log into Brainier.</i>



Approving EPEX Access



Brainier



Figure 3

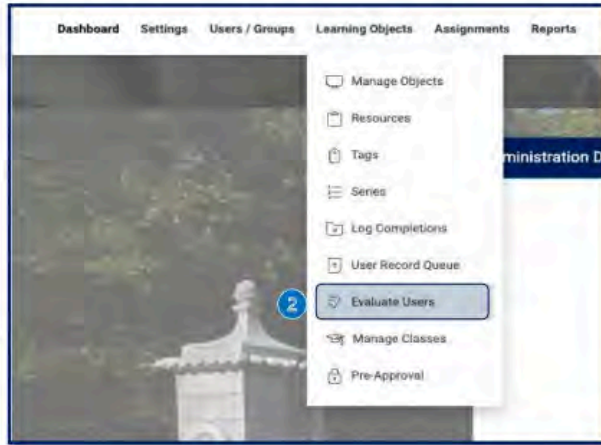


Figure 4

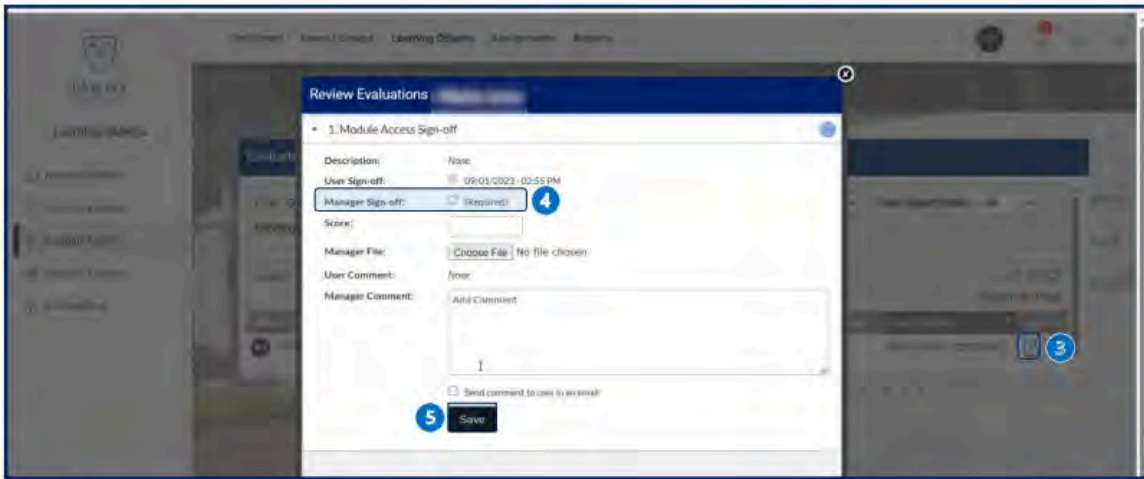


Figure 5

Steps	Actions
1.	Once you are logged into Brainier, select the Administration (Tools) icon in the top right-hand corner (Figure 3). <i>Note: If you do not see this icon, please reach out to your LMS Admin.</i>
2.	Go to the Learning Objects – Select Evaluate Users (Figure 4).
3.	Select the Action (Pencil) icon next to the Evaluation (Figure 5).
4.	Select checkbox on the Manager Sign-off field (Figure 5).
5.	Click Save (Figure 5).



Approving EPEX Access

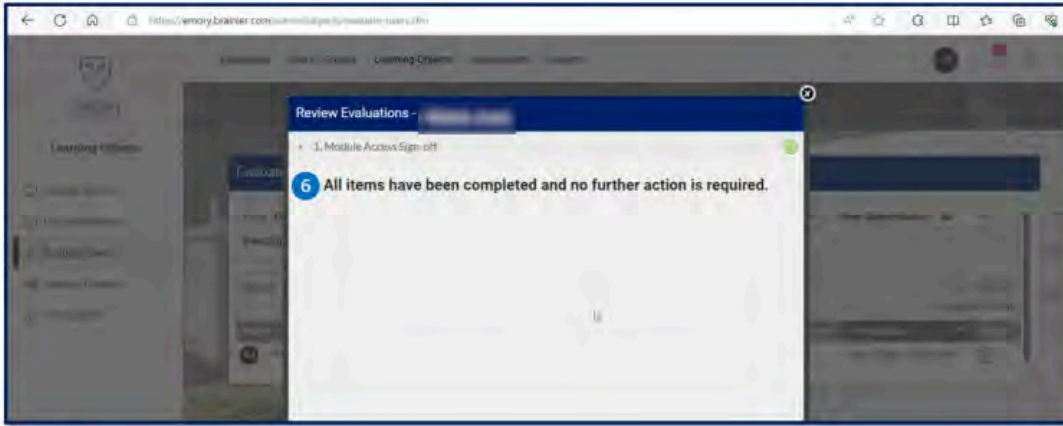


Figure 6

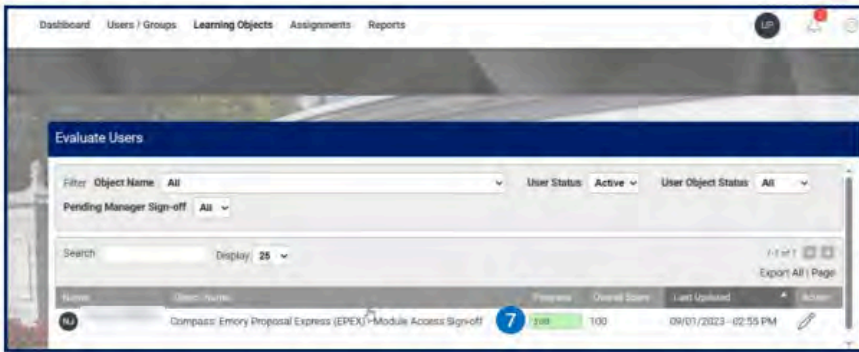


Figure 7

Steps	Actions
6.	The Module Access Sign-off completion message will display (Figure 6).
7.	The Compass: Emory Proposal Express (EPEX) Module Access Sign-off progression should signify 100 (Figure 7). <u>Note: Once the training course is completed, no further action is needed. The employee's access is permit within 2 business days.</u>



Approving EPEX Access



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 Support Center

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us.

How Do I Submit a Request for Compass Access?





Compass Access Request Forms



How Do I Submit a Request for Compass Access?

Overview

The Online Access Request allows you to complete and submit a form for changes to an existing user's access.

To access the form, log into Compass, you can log into Compass directly to complete the [Online Access Request Form](#). If you are unable to log into Compass, please request access by sending an email to [Finance Support](#).

Additional Resources

- Modify Access:
 - For users who need to make modifications to their current access, refer to the Job Aid: [How do I Submit a Request to Modify an Existing User](#)
- Disable Access:
 - For users who need access disabled, refer to the Job Aid: [How do I Submit a Request to Disable Compass Access](#)

Navigation

Navigator > Employee Self-Service > Online Access Request



Figure 1

Adding a New User Access Request

The steps listed below are for submitting a request for a new user. Please note that the Search/Fill a Form page will display.



Figure 2

Steps	Actions
1.	Select the Form Type – Compass Access Request . <u>Note: The Add a New Value tab defaults.</u>
2.	Click the Add button. <u>Note: The Compass Access Request Form page displays.</u>



Compass Access Request Forms



Online Access Request Form

For additional information, the question mark to the right of the field provides field descriptions.

Figure 3

Steps	Actions
1.	Select a Subject – Add a New User to the System .
2.	Select the appropriate Priority level from the drop-down menu. The following options that are available: <ul style="list-style-type: none"> ▪ <u>1: Critical</u> – access granted within 1 hour. ▪ <u>2: Urgent</u> – access granted within 3 hours. ▪ <u>3: Standard</u> – access granted within 1 business day (defaulted option). ▪ <u>4: Low</u> – access granted within 2-3 business days.
3.	Enter the NetID in the Requested For field or click the Look Up (magnifying glass) icon to select the NetID of the person you are requesting access for.
4.	Press the Enter button (not shown).



Compass Access Request Forms



Before proceeding, the user must acknowledge they attended the required training for the Employee Type and Employee Information (following) sections to display.

Message

Has the Requested For individual completed all of the required training? (29000,72)

1

2

Policy:

Access is limited until required training is completed. You can still complete the form, but training must be verified prior to receiving transaction initiation privileges.
www.emory.edu

Figure 4

Steps	Actions
1.	Select Yes button when the required training has been completed.
2.	Select No button when the required training has not been completed, the message “Please go to Brainer and complete the required training”. To complete the required training, please go to https://emory.brainer.com/
3.	Click the Ok button (not shown).

Employee Type

Employee Type ? 1

Emory Temporary Svcs Employee

Emory Healthcare Employee

Emory University Employee

Non-Emory Employee

Assignment End Date ?

*Assignment End Date

Figure 5

Steps	Actions
1.	Select the Employee Type of the individual you are requesting access for, <u>Note: This is based on the employee’s relationship with Emory. Multiple Employee types can be selected.</u>



Compass Access Request Forms



Employee Information

1 Employee Information

Employee ID <input type="text" value="0400322"/>	Name <input type="text" value="Fisher, Effie D"/>
First Name <input type="text" value="Effie"/>	Department <input type="text" value="110015"/>
Last Name <input type="text" value="Fisher"/>	Description <input type="text" value="Office of Finance Systems & Da"/>
Business Telephone <input type="text" value="###-###-####"/>	Email <input type="text" value="effie.fisher@emory.edu"/>

Figure 6

Steps	Actions
1.	The Employee Information section defaults with the employee information. <u>Note: The Email field is editable.</u>

Requesting Access Types

Lists the type of functions that the employee can perform in Compass. This list varies based on the Employee Type selected.

Requested Access Types

<input type="checkbox"/> Enter Payment Request <input type="checkbox"/> Create Journal Entries <input type="checkbox"/> Create Budget Entries <input type="checkbox"/> Clear Suspense Transactions <input type="checkbox"/> Process Department Deposit <input type="checkbox"/> View Web Wires <input type="checkbox"/> Standard Reporting <input type="checkbox"/> nVision <input type="checkbox"/> EBI <input type="checkbox"/> Other 2	<div style="border: 1px solid gray; height: 100px; width: 100%;"></div> <p style="text-align: center; font-size: 24px; font-weight: bold; color: blue;">1</p>
--	---

Figure 7

Steps	Actions
1.	Select the appropriate Requested Access Type(s) . <u>Note: The list of types (above) are the functions that the employees can perform in Compass and varies based on the Employee Type previously selected.</u>
2.	When Other is selected, you are required to manually enter the type of Compass Access needed that is not listed above. <u>Note: This includes the ability to reimburse students through the Payment Request Center.</u>

Supervisor Information



Compass Access Request Forms



Depending on the Requested Access Type(s) selected, the Additional Approver Information section displays above the Requested Access Type section. Scroll up the page to complete this section for workflow routing.

1 Supervisor Information

*Supervisor Network ID <input type="text" value="DOVERBY"/>	Name <input type="text" value="OVERBY,DAVID L"/>
First Name <input type="text" value="David"/>	Department <input type="text" value="110015"/>
Last Name <input type="text" value="Overby"/>	Description <input type="text" value="Office of Finance Systems & Da"/>
Supervisor ID <input type="text" value="0383934"/>	Business Telephone <input type="text" value="###-###-####"/>
Email <input type="text" value="doverby@emory.edu"/>	

Figure 8

Steps	Actions
1.	<p>The Supervisor Network ID field may auto-populate based on the NetID entered in the Requested For field.</p> <p><u>Note: When the NetID does not populate. Enter or search for the Supervisor’s NetID. The email field is editable.</u></p>

Additional Approver Information

1 Additional Approver Information

Additional Approver <input type="text"/>	Name <input type="text"/>
First Name <input type="text"/>	Department <input type="text"/>
Last Name <input type="text"/>	Description <input type="text"/>
Employee ID <input type="text"/>	Business Telephone <input type="text" value="###-###-####"/>
Email <input type="text"/>	Job Title <input type="text"/>

Figure 9

Steps	Actions
1.	<p>Complete this section if you want the form to route to an Additional Approver. Otherwise, the form will route to the Business Officer or Finance Controller.</p>



Compass Access Request Forms



Using Model User ID

Optional: The Model User field allows you to request access to include the same access as an existing Compass user. You can run a query to view the security roles held by that person.

Figure 10

Figure 11

Steps	Actions
1.	Click the Go to Query link to run the query (Figure 9). <u>Note: The EU_SECU_ROLES_BY_OPRID – User Roles page displays in a new window (Figure 10).</u>
2.	Enter the Model User ID of the Compass user.
3.	Click the View Results button.

The Compass user Security Role list displays.

	User ID	Role Name	Descr
1	DOVERBY	EMORY_PO_PROD_SPEEDCHART	Emory PO Speedchart
2	DOVERBY	EMORY_GM_RQST_FORM	EMORY_GM_RQST_FORM
3	DOVERBY	EMORY_WF_GL_ADHOC	Workflow GL ADHOC Approvers
4	DOVERBY	EMORY_EX_WKCTR	EMORY_EX_WKCTR
6	DOVERBY	EMORY_GL_CST_CHG_JNL_DT	Em GL Custom Chg Jnl Dt [XS]

Figure 12

Steps	Actions
1.	Review the security roles and return to the Compass Access Request Form to enter the Model User ID .



Compass Access Request Forms



Save and Submit the Request

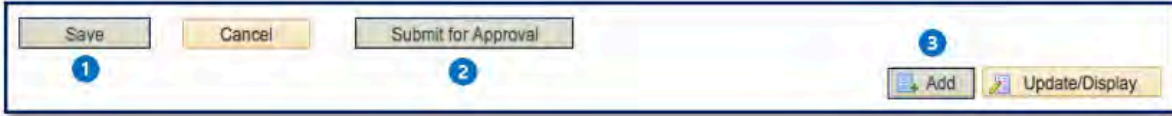


Figure 12

Steps	Actions
1.	Click the Save button to return to the request if changes need to be made or if you would like to submit it at a later time. <u>Note: The system generates the Request Number at the top of the page.</u>
2.	Click the Submit for Approval button to send the request into workflow. <u>Note: The request routes to workflow for approval.</u>
3.	Optional: Click the Add button to submit a new request. This option takes you back to the Search/Fill a Form page instead of starting from the beginning to initiate a new request.



Compass Access Request Forms



Reviewing the Approval Tab

After submission, you cannot make any changes, you can only view the form. However, you can include additional information on the Approval tab. Adding comments to the form is optional.

Figure 9

Steps	Actions
1.	Click the Approval tab.
2.	Enter the Comments in the Comments window.
3.	Click the Add Comments button.
	<u>Note: The system returns to the Online Access Request Form page. You can return to the Approval tab to review the comments.</u>

Figure 10

Steps	Actions
1.	Click the View/Hide Comments link or the right arrow next to Comments to view your comments.
	<u>Note: You will receive email notification regarding the status of the form, or you can view the form's status directly in Compass.</u>



Compass Access Request Forms



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.



Emory Business Intelligence Access Request Form



How do I Submit a Request for Emory Business Intelligence (EBI) Access?

Overview

The **Emory Business Intelligence Access Request Form** allows you to complete and submit a request for Emory Business Intelligence (EBI) reporting access. EBI is a data analysis and reporting tool which consists of the data warehouse and a business intelligence user interface. EBI is the official institutional source for Emory data available and delivered reports that will ultimately include Financial, Student, Human Resources and other additional data.

If you already have access to Compass, you can log into Compass directly at <https://compass-login.emory.edu/> to complete the request form. If you do not have access, or if you are locked out of the system, you can still complete an online form, by logging in as a guest on the **Online Access Request Login** page.

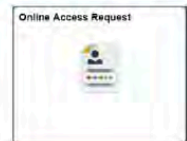
Navigation

[Employee Self Service](#)



Navigator > Employee Self Service > Online Access Request

Tile:



Adding a New User Access Request

To submit a request for EBI access, perform the following steps:

The Search/Fill a Form page displays. The Add a New Value tab defaults.

1. Select Form Type – Emory Business Intelligence.

2. Click the Add button.

The Emory Business Intelligence Access Request Access Form page displays.



mor us ess te e ce Access Request Form



Field descriptions are provided when you see a question mark to the right of the field.

1. Select a Subject - Add a New User to the System.

If the user currently has access, but needs to make a change to existing access, refer to the [How do I Submit a Request to Modify an Existing User job?](#) aid.

If you need to disable a user’s access, refer to the [How do I Submit a Request to Disable Compass Access?](#) job aid.

2. Select the appropriate Priority level from the drop down menu. The following options are available:

- **1-Critical** – access granted within 1 hour.
- **2-Urgent** – access granted within 3 hours.
- **3-Standard** – access granted within 1 business day. This is the default option.
- **4-Low** – access granted within 2-3 business days.

3. *Enter the NetID in the Requested For field or click the Look up icon to select the NetID of the person you are requesting access for.

If you are the Requester, then the **Requested By** will contain your NETID. If you are completing the form as a guest, then the **EM_GUEST** NETID will appear in the **Requested For** field.

4. Press the Enter key on your keyboard.

Selecting an Employee Type

1. *Select the appropriate Employee Type of the individual you are requesting access for, based on the employee’s relationship with Emory. Multiple Employee types can be selected.



mor us ess te e ce Access Request Form



⚠ If you select **Emory Temporary Svcs Employee** or **Non-Emory Employee shown above**, you are required to enter an **Assignment End Date**.

Viewing Employee Information

Employee Information	
Employee ID	0400088
Name	Kerzie, Todd Andrew
First Name	Todd
Department	191100
Last Name	Kerzie
Description	CS VICE PRESIDENT OFFICE
Business Telephone	###-###-####
Email	todd.a.kerzie@emory.edu

1. The **Employee Information** section defaults with the employee information. The **Email** field is editable.

Supervisor Information

Supervisor Information	
*Supervisor Network ID	DOVERBY
Name	OVERBY, DAVID L
First Name	David
Department	110015
Last Name	Overby
Description	Office of Finance Systems & Da
Supervisor ID	0383934
Business Telephone	###-###-####
Email	doverby@emory.edu

1. The **Supervisor Network ID** field may auto-populate based on the **NetID** entered in the **Requested For** field. If the NetID doesn't populate, then you will be required to enter the Supervisor's NetID or choose it from the Look-up icon. The **Email** field is editable.

Additional Approver Information

Additional Approver Information	
Additional Approver	<input type="text"/>
Name	<input type="text"/>
First Name	<input type="text"/>
Department	<input type="text"/>
Last Name	<input type="text"/>
Description	<input type="text"/>
Employee ID	<input type="text"/>
Business Telephone	###-###-####
Email	<input type="text"/>
Job Code	<input type="text"/>

1. You can complete this section if you want the form to route to an Additional Approver. Otherwise, the form will route to the Business Officer or Finance Controller.



Emory Business Intelligence Access Request Form



Requesting Access Types

The type of functions that the employee can perform in EBI is listed.

⚠ When an **Employee Type** is selected, the **Requested Access Types** section displays.

1. The Requested Access Types defaults to Consumer (Basic Navigation).

2. Complete the questionnaire regarding BI Navigation training.

- If you click the **Yes** button, you will return to the **Emory Business Intelligence Access Request Form** page to continue completing the request. Go to the next step.
- If you click the **No** button, you will have to exit out the Compass system and register for the required training before completing the request.

Policy: Training is required before access is granted. You can still complete the form, but training will be verified. www.emory.edu

⚠ Compass will not allow you to complete the request and displays the message *“Please note if you respond Yes, completion of BI training will be verified before access is granted.”* Click the **Ok** button and then **Cancel** to cancel the request. You can still complete the form if you click **Yes**, but before EBI access is granted, training will be verified.

Saving and Submitting the Request

1. You can click the Save button if you want to return to the request to make changes or submit it at a later time. The system generates the **Request Number** at the top of the page.

2. Click the Submit for Approval button to send the request into workflow.

The request routes to workflow for approval.

3. Optional: Click the Add button to submit a new request. This option takes you back to the **Search/Fill a Form** page instead of starting from the beginning to initiate a new request.



Emory Business Intelligence Access Request Form



Reviewing the Approval Tab

After submission, you cannot make any changes, you can only view the form. However, you can include additional information on the **Approval** tab. Adding comments to the form is optional.

1. Click the **Approval** tab.

1. Enter your comments in the **Comments** window.
2. Click the **Add Comments** button.

The system returns to the **Online Access Request Form** page. You can return to the **Approval** tab to review the comments.

1. Click the **View/Hide Comments** link or the right arrow next to **Comments** to view your comments.
 - You will receive email notification regarding the status of the form, or you can view the form's status directly in Compass.

Need Additional Help?



For additional help, please contact the **Finance Support Center** in one of two ways:

Online: <https://eufinancesupportcenter.force.com/login?>

Phone: **404-727-7000** Mondays | 9:00 am – noon; Tuesday – Friday | 9:00 am – noon and 1:00 pm – 3:00 pm



Access Request Form Status



How do I View the Status of My Request Form?

Overview

The Online Access Request allows you to view the status of a request form or make changes to your existing request form. If you already have access to Compass, you can log into Compass directly at <https://compass-login.emory.edu/>. If you do not have access, or if you are locked out of the system, you can still view the status of an online form, by logging in as a guest in the Online Access Request Login page.

Navigation

[Employee Self Service](#)



Navigator > Employee Self Service > Online Access Request

Tile:



Viewing the Status of Request Form

To view the status of the request, perform the following steps:

The **Search/Fill a Form** page displays. The **Add a New Value** tab defaults.

1. Click the **Find an Existing Value** tab.

The **Search/Fill a Form** page displays the fields that allow you to enter search criteria.



Access Request Form Status



Find an Existing Value Add a New Value

Search Criteria

Request Number begins with

Form Type =

Priority =

Expected By =

Request Status =

Requested For begins with

Date Submitted =

Requested By begins with

Case Sensitive

Search **Clear** Basic Search Save Search Criteria

Search Results

View All First 1-2 of 2 Last

Request Number	Form Type	Priority	Expected By	Request Status	Requested For	Date Submitted	Requested By
0100000175	Compass	3-Standard (blank)		Pending	EFISHE3	09/08/2016	SLOWER3
0100000012	Compass	3-Standard (blank)		Pending	TKERZIE	07/13/2016	SLOWER3

1. Enter your search criteria to locate your request form.

In this example, the **Form Type** and **Requested By** was selected.

2. Click the **Search** button.

The **Search Results** display if you did not enter specific criteria, such as a **Request Number**.



View the Request Form

Access Request Form Status



Online Access Request Form **Approval** 1

Compass Access Request Form

Request Number 0100000175 Date Submitted 09/08/2016
 Request Status Pending Approval Datetime Modified 09/08/16 11:34PM Requested By SLOWER3

Compass Access Request Form

Subject Add a New User to the System Expected Completion Date
 Priority 3-Standard

Requested For EFISHE3 Description Fisher, Effie D

Employee Type

- Emory Temporary Svcs Employee
- Emory Healthcare Employee
- Emory University Employee
- Non-Emory Employee

Employee Information

Employee ID 0400322 Name Fisher, Effie D
 First Name Effie Department 110015
 Last Name Fisher Description Office of Finance Systems & Da
 Business Telephone ###-###-#### Email effie.fisher@emory.edu

Approver Information

Supervisor Network ID DOVERBY Name Overby, David L
 First Name David Department 110015
 Last Name Overby Description Office of Finance Systems & Da
 Supervisor ID 0383934 Business Telephone ###-###-####
 Email doverby@emory.edu

1. Review the information on the request for and click the **Approval** tab to review the status.



Access Request Form Status



Reviewing the Approval Tab

After submission you can only view the form.

1. Review the status of the request form. In this example, the **Request Status** is **Pending Approval**.
2. You can click the **View/Hide Comments** link or the right arrow next to **Comments** to view your comments.
 - You will receive email notification regarding the status of the form, or you can view the form’s status directly in Compass.



Access Request Form Status



Modifying an Existing Request Form

If you Saved the form but did not click the Submit for Approval button, your form will be in **Initial Status**. Once your form is in **Initial Status**, then you will be able to access the form again to make changes.

Search/Find a Form

Enter any information you have and click Search. Leave fields blank for a list of all values.

1 **Find an Existing Value** **Add a New Value**

Search Criteria

Request Number begins with

Form Type =

Priority =

Expected By =

Request Status = 2

Requested For begins with

Date Submitted =

Requested By begins with

Case Sensitive

Search **Clear** Basic Search **Save Search Criteria**

Search Results

Request Number	Form Type	Priority	Expected By	Request Status	Requested For	Date Submitted	Requested By
0100000207	Compass	3-Standard (blank)	Initial	BTURN22	(blank)		EFISHE3
0100000181	Compass	3-Standard (blank)	Initial	RPATZER	(blank)		EFISHE3
0100000180	Compass	3-Standard (blank)	Initial	BTURN22	(blank)		EFISHE3
0100000166	Compass	3-Standard (blank)	Initial	EFISHE3	(blank)		EFISHE3
0100000159	Compass	3-Standard (blank)	Initial	RPATZER	(blank)		EFISHE3
0100000157	Compass	3-Standard (blank)	Initial	MMENDIC	(blank)		EFISHE3

1. Click the **Find an Existing Value** tab.
 2. Enter your search criteria, but in the **Request Status** field, select **Initial** to locate your request form.
- In this example, the **Form Type** and **Requested By** was selected.*
3. Click the **Search** button.

Compass Access Request Form

Request Number 0100000157 Date Submitted

*Request Status initial Datetime Modified 09/09/16 2:10PM Requested By EFISHE3

Compass Access Request Form

*Subject Expected Completion Date

*Priority 1

*Requested For MMENDIC Description Aaron,Mania Elizabeth Mendic

Employee Type

Emory Temporary Svcs Employee

Emory Healthcare Employee

Emory University Employee

Non-Emory Employee

Employee Information

Employee ID 0098796 Name Aaron,Mania Elizabeth Mendic

First Name Mania Department 734500

Last Name Aaron Description SIOM: Ophthal: Admin

Business Telephone Email mmendic@emory.edu

Model User ID

By specifying a model user here, you are certifying that you are aware of the security roles currently held by that person. To see those security roles, run query EU_SECU_ROLES_BY_CPRID.

Go to Query

Model User

Save **Cancel** **Submit for Approval** 2

1. Review and modify the request form. The fields are editable.
2. Once you have completed the changes, click the **Submit for Approval** button.

Need Additional Help?



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Online: <https://eufinancesupportcenter.force.com/login?>

Phone: 404-727-7000 Mondays | 9:00 am – noon; Tuesday – Friday | 9:00 am – noon and 1:00 pm – 3:00 pm



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[Finance Support Center](#)

We are here to support you.
Contact us at the Support Center.

Finance System Job Aid Library



Table of Contents

Finance System Support

[How Do I Open a Ticket?](#)

[How Do I Track my Ticket?](#)

[How Do I use the My Bookmarks and Additional Resources Sections?](#)

[How Do I use the Search Function?](#)

[How To Clear Internet Explorer Cache](#)

[How To Clear Chrome Cache](#)

[How To Clear Mozilla Firefox Cache](#)

Compass Fundamentals

[How Do I Use the Compass Homepage?](#)

[How Do I Turn on Autocomplete?](#)

[How Do I Use Search Pages?](#)

[How Do I Use Operators, Wildcards and the Find Feature?](#)

[How Do I Set Up and Use Favorites?](#)

[How Do I Use Data Entry Fields?](#)

[How Do I Navigate Between Pages in a Component?](#)

[What is a SpeedType?](#)

[How Do I Add Data To Compass?](#)

[How Do I Assign a Temporary Workflow Approver](#)

[How Do I Change the Tabbing Order?](#)

[How Do I Define User Preferences?](#)

[How Do I Open a New Window?](#)

[How Do I Sign In and Out of Compass?](#)

[How Do I Update Data in Compass?](#)

[How Do I Use Actions Types?](#)

[How Do I Use Additional Navigation Features?](#)

[How Do I Use Compass Database Organization?](#)

[How Do I Use Effective Dated Rows?](#)

[How Do I Use Hot Keys?](#)

[How Do I Use Keys and High-Level Keys?](#)

[Understanding and Using Chartfields](#)

Security (Access) and Workflow

Security

[How Do I Submit a Request for Compass Access?](#)

[How Do I Submit a Request for Compass Workflow Access?](#)

[How Do I Submit a Request for Emory Business Intelligence \(EBI\) Access?](#)

[How Do I Submit a Request for Emory Express Access?](#)

[How Do I Submit a Request for Labor Data Access?](#)

[How Do I Submit a Request for Web Wires Claim Access?](#)

[How Do I View the Status of My Request Form?](#)

[How Do I Submit a Request to Disable Compass?](#)

[How Do I Submit a Request to Modify Existing Compass, Labor, EBI, Emory Express, & Web Wires Claim Access?](#)

[How Do I Approve an Employee's EPEX Access](#)

[How Do I Obtain Access to EPEX](#)

Workflow

[How Do I Use Workflow?](#)

[How Do I Submit a Workflow Change Request \(Emory Express\)?](#)

[How Do I Submit a Request to Modify Compass Workflow Access?](#)

[Setting up Workflow Approval Email Notifications?](#)

[How Do Determine Why my Compass Transaction Was Denied or Sent Back?](#)

[Tips and Tricks: Workflow](#)

Account Administrator

Account Administrator

[How Do I View Account Administrator Assignments?](#)

[How Do I Perform a Mass Add or Change to Account Administrator Assignments?](#)

[How Do I Run Reports for Account Administrator Assignments?](#)

Accounts Payable

Payment Request

[How Do I Submit a Payment Request?](#)

[How Do I Submit a Foreign Wire Payment Request?](#)

[How Do I Reimburse Guest Expenses?](#)

[How Do I Reimburse Student Expenses?](#)

[How Do I Fund a Research Participant Payment Fund \(RPPF\) for First Payments or Increases?](#)

[How Do I Replenish a Research Participant Payment Fund \(RPPF\)?](#)

[How Do I Replenish a Petty Cash Fund?](#)

[How Do I Close a Research Participant Payment Fund \(RPPF\)?](#)

[How Do I Check the Status of my Payment Request?](#)

[How Do I Search for AP Vouchers Submitted Prior to November 14, 2016?](#)

[How Do I Search for Payment Requests for My Department and Direct Reports?](#)

[How Do I Search for AP Payment Requests Within My Department?](#)

[How Do I Print a Payment Request Summary?](#)

[Tips and Tricks: Accounts Payable](#)

Purchasing Card

[How Do I Approve a P-Card? \(Reconcile Statement\)](#)

[How Do I Reconcile a P-Card Statement?](#)

Central Finance

[How Do I Manually add a Regular Voucher Online?](#)

[How Do I Review a Supplier Financial Sanctions Status?](#)

[How Do I Search for a Supplier?](#)

[How Do I Track Supplier Name History?](#)

[How Do I Update a Regular Voucher Online?](#)

[How Do I Verify a Supplier's SAM Status?](#)

[How Do I View Supplier Attachments?](#)

[How Do I View the Accounts Payable \(AP\) Dashboard?](#)

Guidelines

[Payment Request Guidelines](#)

Accounts Receivable/Billing

Billing

- [How Do I Create an Express Bill?](#)
- [What is the Workflow for Non-Grant Invoices?](#)
- [How Do I Run the Finalize and Print Process?](#)
- [How Do I Reprint Invoices?](#)
- [How Do I Upload Invoices from a Spreadsheet?](#)
- [How Do I Create Contract Invoices?](#)
- [What are the AR/Billing Scheduled Processes?](#)
- [How Do I Review Email Logs?](#)

ePay

- [How Do I Create Direct Journal Deposits with ePay?](#)
- [How Do I Create Customer Deposits with ePay?](#)
- [How Do I Verify an ePay Deposit?](#)

Wire Claims

- [How Do I Claim a Wire for Direct Journal?](#)
- [How Do I Claim a Wire for Customer Deposit?](#)
- [How Do I Add Back a Wire for Direct Journal Payment?](#)
- [How Do I Add Back a Customer Payment Wire?](#)
- [How Do I Remove Wires from the Wire Claim Page?](#)

Deposits - General

- [How Do I Apply Customer Deposits with Payment Predictor?](#)
- [How Do I Create an Express Deposit?](#)
- [How Do I Reclassify Direct Journal Entries?](#)
- [How Do I Move the Line Description on the Create Accounting Entries Page?](#)
- [How Do I Partially Unpost Payments?](#)

Maintenance

- [What is the Workflow for Write-Offs?](#)

Customers

- [How Do I Add a Customer Note?](#)
- [How Do I Maintain Corporate Customer Relationships?](#)
- [How Do I Create Customer Contacts?](#)

Correspondence

[How Do I Use Statement Groups?](#)

[How Do I Create Customer Statements?](#)

[How Do I Create Dunning Letters?](#)

[How Do I Create Follow Up Letters?](#)

[How Do I Put Correspondence on Hold?](#)

[How Do I Review Email Logs?](#)

Collections Workbench and Workcenters

[How Do I Use the Collections Workbench?](#)

[How Do I Use WorkCenters?](#)

[How Do I Personalize WorkCenters?](#)

[How Do I Edit WorkCenters?](#)

Aging/Audit

[How Do I Run Mass Change for Bad Debt Items?](#)

Asset Management

Asset Management

[How Do I Dispose of an Asset?](#)

[How Do I Ensure Purchase Orders Integrate with Asset Management?](#)

Central Finance

[How Do I Enter a Leased Asset with Warranty/Maintenance Contract?](#)

[How Do I Enter a Child Asset?](#)

Axiom

Axiom

[How Do I Use Web Budget Forecast?](#)

[How Do I Use Budget Request Forms?](#)

[How Do I Navigate the Web Detail Budget Tool?](#)

[How Do I Navigate the Web Detail Budget Labor Roster?](#)

[How Do I Navigate the AIU Allocation Dashboard](#)

[How Do I Use the Endowment Planning Report](#)

Guidelines

[IFP Budget Request Guidelines](#)

[IFP Web Detail Budget Guidelines](#)

[IFP Transfer Guidelines](#)

Commitment Control

Commitment Control

[What is my Available Department Budget?](#)

[What is my Available non-Sponsored Project Budget?](#)

[What is my Available Capital Project Budget?](#)

[How Do I Input Budget Journals to Departments?](#)

[How Do I Input Budget Journals to non-Sponsored Projects?](#)

[How Do I Input Budget Journals to Capital Projects?](#)

Emory Express

Approvers

- [How Do I Approve an Emory Express Transaction?](#)
- [How Do I Approve Legal Invoices?](#)
- [How Do I Add an Approver \(Ad-Hoc\) to a Requisition in My Approval Inbox?](#)
- [How Do I Assign a Substitute Approver?](#)
- [How Do I Edit Account Codes on Requisitions Pending My Approval?](#)
- [How Do I Search for Emory Express Orders?](#)
- [How Do I Submit a Workflow Change Request?](#)
- [How do I Approve Check Requests?](#)
- [How Do I Setup the Jaggaer Mobile App in Emory Express](#)

Shoppers

- [How Do I Setup Shipping Addresses and SpeedTypes in My Profile?](#)
- [How Do I Order Using the PunchOut Ordering Function?](#)
- [How Do I Order from an Emory Express Catalog?](#)
- [How Do I Order a Non-Catalog Item?](#)
- [How Do I Submit a Non-Catalog Form? \(New Suppliers, special PunchOut requests\)](#)
- [How Do I Order Radioactive Materials?](#)
- [How Do I Order a Single/Sole Source Item?](#)
- [How Do I Order Capital Equipment?](#)
- [How Do I Submit a Procurement Contract Request?](#)
- [How Do I Submit a Lab Coat Laundering Request?](#)
- [How Do I Setup or Change My of Biological Waste Disposal Service \(Submit Stericycle Form\)?](#)
- [How Do I Edit Items in My Shopping Cart?](#)
- [How Do I Complete the Checkout and Place Order Process?](#)
- [How Do I Check the Status of my Requisition?](#)
- [How Do I Resubmit a Returned Cart?](#)
- [How Do I Manage My Draft and Assigned Shopping Carts?](#)
- [How Do I Request an Off-Site Shipping Address in Emory Express?](#)
- [How Do I Create a Blanket Purchase Order?](#)
- [How Do I Change the Price or Quantity for Items on My Purchase Order?](#)
- [How Do I Request a New Supplier or Update an Existing Supplier?](#)
- [How Do I Submit an Independent Contractor Request](#)

Payments and Settlement

[How Do I Receive Capital Equipment?](#)

[How Do I Create a Receipt for My Purchase Order \(Quantity & Cost\)?](#)

[How Do I locate Payment Information?](#)

[How Do I Check Payment Status on a Requisition or Purchase Order](#)

[How Do I Submit a Check Request?](#)

[How Do I Submit a Foreign Wire Payment Request?](#)

[How Do I Change Receivers \(Owners\) of a Purchase Order?](#)

[How Do I Approve an Invoice?](#)

Miscellaneous

[How Do I Request Access for Emory Express?](#)

[How Do I Submit an Item to Surplus Property?](#)

[How Do I Close a Purchase Order?](#)

[How Do I Check the Change Request Status](#)

Guidelines

[Procurement Contract Request Guidelines](#)

General Ledger

General Ledger

[How Do I Request New Departments](#)

[How Do I Request New Events, Programs, and Projects?](#)

[How Do I Request New SpeedTypes?](#)

[How Do I Create an Online Journal Entry?](#)

[How Do I Use GL Journal Mover?](#)

[How Do Use the GL WorkCenter to Identify Journals Needing Approval?](#)

[How Do I Enter a Journal Spreadsheet for Uploading to Compass?](#)

[How are Fringe Benefits Calculated on a Fed/Non-Fed Grant?](#)

[How Do I View a SpeedType and the Associated Chartfield Combination?](#)

[How Do I Copy an Online Journal Entry?](#)

[How Do I Mark Journals for Posting?](#)

[How Do I Approve Chartfield Requests in GL WorkCenter?](#)

[How Do I Print a Journal with a Barcode?](#)

[Correcting Suspense Items Using the Correct Suspense Entries Tool](#)

[How Do I Correct Suspense Items Using an Online Journal Entry?](#)

[Copying a Journal Entry Using the Copy Journal Entry Page](#)

[How Do I Delete a Journal Entry Prior to Posting?](#)

[How Do I Find a Specific Journal?](#)

[How Do I Correct a Journal Entry?](#)

[How Do I Determine the Status of a Journal?](#)

[Determining a Journal's Budget Check Exceptions](#)

[How Do I View Suspense Cross Reference Information?](#)

[What Kind of Journals are Processed in Compass](#)

[How Do I Inactivate a Non-Sponsored Project? \(Emory Project Close Request\)](#)

[Understanding Recurring Journal Entries](#)

[Compass Journal Deadlines](#)

[Journal Suspension Overview](#)

[Copying a Journal Entry Using Run Control](#)

[Tips and Tricks: General Ledger](#)

[Frequently Asked Questions](#)

Grants

Accounts Receivable

- [Overview - How Do I Create Direct Journals?](#)
- [How Do I Use the Collections Workbench?](#)
- [How Do I Create Deposits for Direct Journals?](#)
- [How Do I Create Accounting Entries for Direct Journal Payments?](#)
- [How Do I Apply Payment to an Invoice?](#)
- [How Do I Close a Research Participant Payment Fund \(RPPF\)?](#)
- [How Do I Split an Item?](#)
- [How Do I Request a Residual Transfer?](#)
- [How Do I Request a Refund?](#)
- [How Do I Request a Refund from the On-Account?](#)
- [How Do I Transfer an Item from One Customer to Another?](#)
- [How Do I Enter Dispute Codes?](#)
- [How Do I Update Limits by Processing Contract Amendment?](#)
- [How Do I Add/Update a MICR ID?](#)
- [Refund and Residual Transfer Forms Frequently Asked Questions](#)

Award Modifications

- [Overview - How Do Change the Department for an Award?](#)
- [Overview - How Do I Create a Continuation?](#)
- [How Do I Change the Dates on an Award?](#)
- [How Do I Change the Department for an Award?](#)
- [How Do I Change the Effort for an Award Team Member?](#)
- [How Do I Create a Project?](#)
- [How Do I Change the PI on an Award?](#)
- [How Do I Create a No Cost Extension?](#)
- [How Do I Create a Budget Adjustment for an Award \(RAS\)?](#)
- [How Do I Create a V102 Version of a Proposal?](#)
- [How Do I Update the V102 Version of a Proposal to Reflect a Continuation?](#)
- [How Do I Submit the V102 Proposal?](#)
- [How Do I Add an Activity?](#)
- [How Do I Update an Award to Reflect a Continuation?](#)
- [How Do I Document Clinical Trial Awards Managed by the Office of Clinical Research?](#)
- [How Do I Close an Award in Compass?](#)

Award Modifications – Training Vignettes

- [How Do I Close an Award in Compass? \(Training Video\)](#)

Award Setup

[Overview - How Do I Create a NEW or RENEWAL Award?](#)

[Overview - How Do I Create an Award Request - Initial PAN?](#)

[Overview - How Do I Create an Award Request – Full PAN?](#)

[How Do I Initiate an Award Setup Request?](#)

[How Do I Approve an Award Setup Request?](#)

[How Do I Create a Proposal Version V102?](#)

[How Do I Update and Submit Proposal Version V102?](#)

[How Do I Generate an Award from Proposal Version V102?](#)

[How Do I Setup an Award?](#)

[How Do I Request a SpeedChart?](#)

[How Do I Finalize Budgets?](#)

[How Do I Generate an ENOA?](#)

[How Do I Setup a Fixed Contract?](#)

[How Do I Setup a LOC, NONLOC and Prepaid Contract?](#)

[How Do I Setup a Hybrid Contract with More Than One Product \(Fixed, non-LOC, etc.\)?](#)

[How Do I Setup Initial PAN Project and Activity?](#)

[How Do I Setup SpeedChart?](#)

[How Do I Add Contract Prepaid Lines to an Existing Contract?](#)

[How Do I Add Additional Information?](#)

[How Do I Update a Contract?](#)

[How Do I Remove Out-Year Budgets and Budget Periods on a Proposal V102?](#)

[How Do I Use the Contracts Workbench?](#)

Billing

[How Do I Add Attachments to an Invoice?](#)

[How Do I Change the Existing Contract Type to LOC?](#)

[How Do I Invoice a Fixed Contract?](#)

[How Do I Finalize Award Budgets – Department?](#)

[How Do I Locate the Invoice ID and Review Billing History?](#)

[How Do I Manage Billing Worksheets?](#)

[How Do I Reprint Non-Letter of Credit Invoices?](#)

[How Do I Review the Email Status on an Invoice?](#)

[How Do I Run the Retrieve Billing Items Process?](#)

[How Do I Run the Billing Interface?](#)

[How Do I Run the Billing to PC/CA Interface?](#)

[How Do I Run the Contract Aging Report?](#)

[How Do I Run the Contracts to Billing Interface for Other Billing Methods?](#)

[How Do I Run the Contracts to Billing Interface Process for As Incurred?](#)

[How Do I Run the Single Action Invoice Job?](#)

[How Do I Setup an Email Address to Receive Invoices for an Existing Customer?](#)

[How Do I Setup a Department Billing Invoice?](#)

[How Do I Update Billing Limit by Process Contract Amendment?](#)

EPEX (Emory Proposal Express)

[How Do I Create and Manage a Proposal in EPEX?](#)

[How Do I Setup Proposal Projects in EPEX?](#)

[How Do I Create Proposal Budgets in EPEX?](#)

[How Do I Create Adhoc Approvers and Reviewers in EPEX?](#)

[How Do I Use the Return to RAS functionality for OSP?](#)

eNOA

[How Do I Generate an ENOA and Upload to Onbase?](#)

[How Do I Search an eNOA Document in Onbase?](#)

[How Do I Print from OnBase?](#)

Forms

[How Do I Submit a Cost Accounting Standards \(CAS\) Exception Request?](#)

[How Do I Submit a ClinCard Request?](#)

[How Do I Submit a Research Participant Payment Fund Cash Request?](#)

Miscellaneous

[Tips and Tricks: Grants](#)

[How Do I Resolve Exception Query Errors?](#)

[How Do I Pushback an Award Approval Request?](#)

[How Do I Add a PO to an Award Subrecipient?](#)

[How Do I Setup Milestones?](#)

[How Do I Use the Contracts Workbench?](#)

[How Do I Inactivate a SpeedType?](#)

[How Do I Archive or UnArchive a Project?](#)

[How Do I update Project FA Department Distribution?](#)

[How Do I Run a Subcontract Report?](#)

Reporting

Axiom Reporting

[Syntellis User Reports](#)

Compass Reporting

[How Do I Use the Reporting Library?](#)

[How Do I Clone and Run a nVision Report? *\(Coming Soon\)*](#)

nVision Reporting

[How Do I Request a Recurring Report?](#)

[What's New in nVision Reporting?](#)

[How Do I Create and Run Private Reports?](#)

[How Do I Use a Report Request to Create Reports By Changing Scopes?](#)

[Appendix for nVision Reporting](#)

Emory Business Intelligence (EBI)

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

Travel & Expense

Travel & Expense Center

- [How Do I Create an Expense Report?](#)
- [How Do I Create an Expense Report? \(HealthCare\)](#)
- [How Do I Withdraw an Expense Report?](#)
- [How Do I Create an Expense Report User Template?](#)
- [How Do I Authorize Users to Manage My Expense Reports?](#)
- [How Do I Split an Expense Receipt?](#)
- [How Do I Itemize a Hotel Bill?](#)
- [How Do I Add Attendees to an Expense Report?](#)
- [How Do I View the Expense Report Summary?](#)
- [How Do I Manage Corporate Card Late Fees?](#)
- [How Do I View My Wallet Items for my Proxies?](#)
- [How Do I View Assigned My Wallet Transactions?](#)
- [How Do I Reconcile a Cash Advance?](#)
- [How Do I Check the Status of an Expense Report?](#)
- [Pre-Paid/Direct Billed Airfare Process within Compass?](#)
- [How Do I add Ad-Hoc Approvers as a Submitter?](#)
- [How Do I add Ad-Hoc Approvers as an Approver?](#)
- [How Do I View Expense Reports Charged to My Department?](#)
- [How Do I View Expense Reports for My Employees?](#)
- [Expense Type Categories](#)
- [Tips and Tricks: Travel and Expense](#)
- [How do I Adjust Paid Expenses \(Coming Soon\)](#)

Treasury

Banking

Bank Reconciliation

[How Do I Configure BSP NO GL or BSP BLOCKEXTRNL for Bank Reconciliation?](#)

Bank Fee Analysis

[How Do I Run Emory Business Intelligence \(EBI\) Bank Fee Analysis Reports?](#)

Cash Management

Cash Positioning

[How Do I Update User Preferences for Cash Forecast Results?](#)

[How Do I Use the Cash Positioning Worksheets-Drill Down Source?](#)

[How Do I Update Cash Positioning Saved Search?](#)

[How Do I Add a Manual Position for Cash Positioning Worksheet?](#)

[How Do I Create a Search for Cash Positioning Worksheets?](#)

Settlements

[How Do I Complete a Cash Management EFT Request?](#)

[How Do I Manage Net Deal Settlements?](#)

Treasury Accounting

[How do I Enter and Approve TR Accounting Entries?](#)

[How do I Run the Deal Automated Accounting Process?](#)

Deal Management

[How Do I Manage Interest and Payments?](#)

[How Do I view the Mark to Markets Values?](#)

[How Do I Run Emory Business Intelligence \(EBI\) Debt Portfolio Reports?](#)

Oracle Business Intelligence

[How Do I Run Oracle Business Intelligence \(OBI\) Bank Free Analysis Reports?](#)

[How Do I Run Oracle Business Intelligence \(OBI\) Debt Portfolio Reports?](#)

Workcenters

Workcenters

[How Do I Use WorkCenters?](#)

[How Do I Personalize WorkCenters?](#)

[How Do I Edit WorkCenters?](#)

Process Maps

Security

[Self Certification Process Map](#)

[Transferee Access Process Map](#)

Accounts Payable

[Procurement Card Process Map](#)

[Financial Gateway Process Map](#)

Asset Management

[PO to AM Integration Process Map](#)

[Leased Assets Process Map](#)

Accounts Receivable/Billing

[Statements Dunning Process Map](#)

[Express Bill Template Process Map](#)

[ePAY and CORE Enhancements Process Map](#)

Emory Express

[PO export Process Map](#)

[Department PO Close Process Map](#)

[AIMS Integration Process Map](#)

General Ledger

[Journal Entry Engine Process Map](#)

[Journal Mover Process Map](#)

Grants

[Account Analysis and Item Maintenance Process Map](#)

[Date Change Process Map](#)

[Project Status Controls Process Map](#)

[Fund Code & Fringe Process Map](#)

[Value Based Billing Process Map](#)

[EPEX Process Map](#)

[Award Setup Process Map](#)

[Activity ID Process Map](#)

Travel and Expense

[Student Profile Setup Process Map](#)

Treasury

[Foreign Currency Plan B Process Map](#)

[Foreign Currency Process Map](#)

[Treasury Accounting Process Map](#)

[Financial Gateway Process Map](#)

[Deal Management Process Map](#)

[Bank Recon Process Map](#)

[Payroll Net Pay Interface Process Map](#)

[Routing Plan Process Map](#)

Workflow

[Routing Plan Process Map](#)

[GL Chartfield Request Process Map](#)

Payroll

Kronos

[How Do I Use the Kronos Webclock](#)

Out-of-State Employment

[How Do I Submit the Out-of-State Employee Form \(Submitters\)](#)

[How Do I Process the Out-of-State Employee Form \(Approvers\)](#)

Controller's Office

[How Do I Check for Active HR Distribution for a Non-Grant Project](#)

[How Do I Process the Project Balance to Inactivate a Non-Sponsored Project](#)