

## FINANCIAL SYSTEM COURSES

If you do this...	Financial System	Module	Course Title	Course Description	Course Code	Current Modality
Require access to any Emory University financial system including Compass, Emory Express or Emory Business Intelligence (EBI)	N/A	N/A	<b>Institutional Data Management (IDM)</b>	Institutional Data measures and description of the university and its operations are valuable assets in support of the university's teaching, research, and public service missions. This policy outlines a data management framework designed to maintain the quality of Institutional Data and promote and safeguard the appropriate and effective use of Institutional Data.	410001-9264	Self-Paced eLearning
Require access to Compass	Compass	All	<b>Compass 9.2 Essentials</b>	All Compass users. Participants will learn about fundamental concepts related to Compass that impact most users and is an important prerequisite to module-specific training.	260462	Self-Paced eLearning
Reconcile Purchasing Card (P-Card)	Compass	Purchasing	<b>Compass 9.2 P-card for End Users</b>	Intended for P-Card users. Participants will learn new P-Card purchasing policies and procedures.	260419	Self-Paced eLearning
Approve Purchasing Card (P-Card) transactions	Compass	Purchasing	<b>Compass 9.2 P-card for End Users</b>	Intended for P-Card users. Participants will learn new P-Card purchasing policies and procedures.	260419	Self-Paced eLearning
Travel for Emory business or support business travelers (Proxies)	Compass	Expense	<b>Compass 9.2 T&amp;E Expense Enhancements</b>	Intended for users who create expense reports. Participants will learn about the expense interface and how to complete expense reports, add visa corporate card charges, manage charge card late fees, itemize a hotel bill, split receipts, and add attendees to and expense report.	260454	Self-Paced eLearning
					260450	Instructor-led
					260535	Video Recorded Class
Create payment requests for guest, students or individuals	Compass	Accounts Payable	<b>Compass 9.2 What's New in Accounts Payable</b>	Intended for users who create a payment requests. Participants will learn how to enter payments requests, gain a high-level understanding of vendor federal validations, and understand the workflow and approvals process.	260418	Self-Paced eLearning
					260415	Instructor-led
					260536	Video Recorded Class
Make Deposits	Compass	Accounts Receivable	<b>Compass 9.2 ePay Enhancements</b>	Intended for users who record deposits via ePay. Participants will learn how to receive payments, timelines of delivering payments to the Cashiers office, related reports and about policies and procedures that impact ePay deposits.	260548	Video Recorded Class
Claim Wires	Compass	Accounts Receivable	<b>Compass 9.2 Wire Claims Enhancements</b>	Intended for wire claim users and those in the cash office. Participants will learn about the contract billing process, related reports, and any process and/or policies.	260423	Self-Paced eLearning
					260549-11450	Video Recorded Class
Initiate Invoicing	Compass	Accounts Receivables	<b>Compass 9.2 Collection Workbench and Workcenters</b>	Intended for Billing Specialists and Billing users. Participants will learn how to use Collections Workbench to view customer payment status and payment history, and track and manage customer correspondence.	260550	Video Recorded Class
Dispose of Assets	Compass	Asset Management	<b>Compass 9.2 Asset Disposal Workflow</b>	Intended for department administrators and asset custodians responsible for capital equipment.	260427	Self-Paced eLearning
Manage departmental and/or non-sponsored budgets and available balances	Compass	Commitment Control (Budgets)	<b>Compass 9.2 What's New in Inputting &amp; Processing Budget Journals</b>	Intended for users who create budget journals. Participants will learn how to input budget journals to actual/detail accounts including the ability to post to control accounts, determine available budget & any process & policy changes.	260550	Video Recorded Class
Initiate expense journals, journal transfers or spreadsheet uploads	Compass	General Ledger	<b>Compass 9.2 What's New in General Ledger</b>	Intended for users who create Journal Entries. Participants will learn how to use journal mover tool, workflow changes, and journal spreadsheet upload steps.	260435	Self-Paced eLearning
					260432	Instructor-led
					260547	Video Recorded Class

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Approve Financial transactions in Compass	Compass	Workflow	<b>Compass 9.2 Understanding Workflow &amp; Approving Financial Transactions eLearning</b>	Intended for all users who approve financial transactions (i.e., expenses, accounts payable, budget journals, accounts receivable, and general ledger). Participants will learn how to approve transactions across modules, and where to find resources and assistance.	260552	Self-Paced eLearning	
Route and approve proposals	Compass	Grants	<b>EPEX</b>	Intended for users who route proposals. This course instructs learners on how to use the Emory Proposal Express (EPEX) Routing System, EPEX enables the electronic routing of extramurally funded grant/contract proposals requiring institutional endorsement.	236001	Self-Paced eLearning	
Create & Set-up New Proposals in EPEX, Set-up Proposal Projects, Enter Proposal Budgets, Understand Proposal Workflow & Routing	Compass	Grants	<b>Pre-Award- Grants Only</b>	Intended for all grants users. Participants will learn 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. Participants will also learn about related business processes and procedures.	260543	Video Recorded Class	
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	<b>Award Receipts &amp; Set-Up- Grants Only</b>	Intended for all grants users . Participants will learn functionality relating to value products and templates, date changes, award set-up, activity ID, ENDA with on Base, Value Based billing, fund code fringe, etc. Participants will also learn about related processes and policies.	260557	Video Recorded Class	
Set-up an LOC contract or subaccount, run grants billing process for an LOC contract, reprint LOC reports and identify expiring LOCs.	Compass	Grants	<b>Letter of Credit Management- Grants Only</b>	Intended for all grants users. Participants will learn new functionality relating to letter of credit & contract setup, customers and invoicing, project status control, and how to handle SAM validation error messages. Participants will also learn new related business processes and procedures.	260544	Video Recorded Class	
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	<b>Accounts Receivable- Grants Only</b>	Intended for all grants users. Participants will learn new functionality relating to item maintenance, customer correspondence, account analysis, transaction research, new reports and new processes and policies.	260542	Video Recorded Class	
Work in a RAS unit	Compass	Grants	<b>Compass 9.2 - Grants 101</b>	Intended for Grants. Participants will gain 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. Policies and/or processes will also be covered	260448	Self-Paced eLearning	
Initiate and manage requests for Non-PO payments	Emory Express	Emory Express	<b>Emory Express</b>	Intended for those who need access to online procurement system for purchasing goods and services on behalf of the University. Participants will learn how to order goods and services, receive goods and services online, use the different types of ordering forms and understand how and when to process payments on the Check Request form.	260344	Instructor-led	
						Webinar	
Purchase catalog items and create custom orders	Emory Express	Emory Express	<b>Emory Express</b>	Intended for those who need access to online procurement system for purchasing goods and services on behalf of the University. Participants will learn how to order goods and services, receive goods and services online, use the different types of ordering forms and understand how and when to process payments on the Check Request form	260344	Instructor-led	
						260344	Webinar
						260344-11815	Recorded Webinar

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Approve orders in Emory Express	Emory Express	Emory Express	<b>What's New in Emory Express for Approvers</b>	Intended for approvers of Emory Express. Participants will learn about approver capabilities, forms for surplus disposal and check requests, Asset Ordering and Receiving, Security and Workflow requests process, and Purchase Order closure process.	260533	Self-Paced eLearning
Run reports in EBI including labor reports	Emory Business Intelligence	Emory Business Intelligence	<b>Emory Business Intelligence: Navigation</b>	Intended for users who need to run reports. This is an online course designed to teach participants basic navigation in the data analysis tool called Emory Business Intelligence	260345-7427	Self-Paced eLearning
Run reports in EBI including labor reports and would like a hands-on experience <b>Course Prerequisite: Emory Business Intelligence: Navigation</b>	Emory Business Intelligence	Emory Business Intelligence	<b>Emory Business Intelligence (EBI) Reports</b>	This course provides participants hands-on practical knowledge of how to run and retrieve Emory Business intelligence (EBI) reports, including selecting prompts, saving customizations, drilling to see more specific data, and exporting data in various formats. <b>Prerequisite: Emory Business Intelligence: Navigation</b>	260351	Instructor-led
Run Reports	Compass	Reporting	<b>Compass 9.2 What's New in Compass Reporting?</b>	Intended for all Emory Compass users. Participants will learn where to access the reporting libraries, where to go for what type of data, differences between different reporting tools, reporting tips, and where to find resources.	260449-11447	Recorded Webinar