



Compass 9.2

November 18, 2016

Grants Activity Status Update

A new feature in Compass 9.2 is the use of **Activity ID Status** to control charges posting to sponsored projects after the end date of the project. We are happy to report that this feature is working as expected and stops transactions from posting to projects with an Activity ID Status of FINAL even if the PROJECT Status is OPEN. As you can see by the graphic below, this status impacts all forms of transactions (Journal Entries, RSTs, and Emory Express).

If you encounter a situation where you have a transaction that needs to post to a project where the Activity ID Status is FINAL, please submit a [Finance Support Center](#) ticket [[Category-Finance Grants & Contracts](#), [Sub-category-Budget Override Unfreeze](#), and [Subject Line-Change Activity Status](#)] requesting to change the Activity ID Status to allow the charge to post. You should include the justification for this transaction to post to a sponsored project that has ended 90 days prior in the Salesforce case.

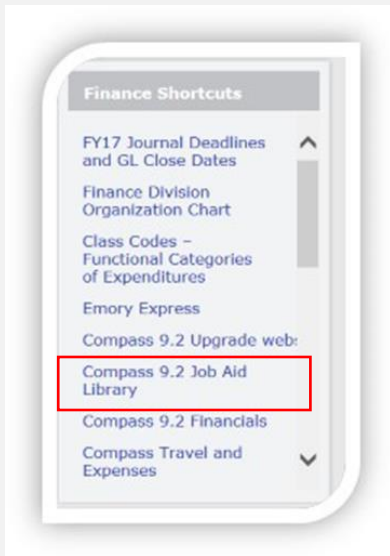
FGC will review the justification and determine if the transaction should be allowed to post to the sponsored project. If approved, FGC will change the Activity ID Status on the sponsored project to allow the transaction(s) to continue through workflow and post for 10 business days at which time FGC will revert the Activity ID Status back to FINAL.

		Project & Activity			
		Status	Level	Transaction	Message
Compass 9.2 Enabling Status Control allows the system to manage based upon Analysis Type (All modules except Treasury)	→	Pending	Activity	Budget	
				All Others	Reject
Compass 9.2 Warning message will provide a status and allow to proceed.	→	Open	Project & Activity	All	
		Ended	Activity	New PO's	Reject
Compass 9.2 Reject message will provide a status and prevents the transaction.	→			All others	Warning
		Closed	Activity	PO, AP, EX, Payroll, RST	Reject
				Journals & Budget	Warning
Activity Status Control Activity Status will control the transactions		Hold & Final	Activity	All	Reject
		Archived	Project	All	Reject

Emory Express Update

The SWAT team closed 5 of the 14 open Emory Express matters that are the root of the tickets submitted to the Finance Support Center.

- Topic: **Workflow step for CBO's** related to check requests and supplier agreements: We've removed this workflow step. Check Requests that have a supplier agreement/contract in place will **no longer route to Business Officers**. They will route directly to the department.
- Topic: **Wire Payments**: In Compass 9.2, **Wire Payments** are now completed using the **Payment Request** Functionality. A job aid is under development.



What Happened to the Compass Online Reference Guide?

It's still there.

New Name: Job Aid Library – organized by topic

Better Tool: New interactive tool allows you to search within the job aid, zoom, print and email.

Still the Same Location on the Finance Homepage

Also available from the homepage of the Compass Upgrade website and the Finance Support Center.

Do I Need to Open A Finance Support Ticket?

Go to: <https://eufinancesupportcenter.force.com/login?so=00D36000000JQII> Tip: [Bookmark this link.](#)

First: Go to **Keyword Search** first to see if any **knowledge articles** exist for your topic of interest.

Next: Look to the far left under “**Additional Resource Links**” and click on **Compass 9.2 Job Aids**.

Finally: After reviewing job aids, if you still feel the need to log a ticket, search in the top left corner for the **Category** you need. (*Scroll down to view all options.*).

Job Aid: [How To Open a Ticket](#)

EBI is Back Online

- All of the new data from the Compass 9.2 upgrade has been incorporated into EBI
- All EBI reports used prior to Compass go-live are still available, and will reflect all upgrade data as applicable
- Changes from Compass 9.2 incorporated into EBI may break existing customizations.
- Prompt sections have been reformatted and moved to the left side of the dashboard for a more consistent look and feel.

[Actions Required](#)

- Rebuild your lost/broken customizations in EBI.
- Consider attending an open lab where the EBI team will be available to answer questions and assist with rebuilding customizations:
 - Tuesday, 11/29/16, 9am-5pm: 1599 Clifton, Rm 1.380
 - Thursday, 12/1/16, 8am-12pm: Woodruff Library, Rm 312
 - Thursday, 12/15/16, 9am-5pm: 1599 Clifton, Rm 1.380

More information is available on the [EBI website](#)

