

Happy Thanksgiving



Compass 9.2

November 23, 2016

Nov
25

Compass and Emory Express will be down for maintenance on Friday, November 25th from 8:00am-8:00pm

Caution for Approvers

Denying Expense Reports = Termination

Do you want to **Deny** or **Send Back** the expense report? There are 4 available workflow actions for expense report **approvers**. In each case, the approver receives an additional prompt before confirming the workflow action.

- **Approve** routes the expense report to the next approver or to payment staging after approval by the final approver in central accounting. Final approval triggers email notification to the submitter (and user if they are not the same person).
- **Send Back** routes the Expense Report **back to the submitter for edits**. Triggers email notification to the submitter and user if different.
- **Hold** stops any further action or escalation. No email notification to submitter.
- **Deny** terminates the transaction. **Denied expense report cannot be edited and resubmitted.** Email notification is sent to submitter and user if different. This also includes my wallet transactions. Consequently, the **Deny** option should be used on **very rare occasions**. Approvers should use the **Send Back** option as an alternative.

JOB AID: [How Do I Use Workflow?](#)

Modify a Returned Expense Report

Main Menu -> Employee Self-Service -> Travel and Expense Center -> Create/Modify -> Find an Existing Value - select the appropriate expense report and you should be able to make your changes.

NOTE: If you click on the link in the notification email, it will only take you to the "View" page. You cannot make changes from the View page.

Reimbursing Guests

Guests are no longer reimbursed through the Travel and Expense module and we no longer use Guest ID's as in the past. To reimburse a guest, you need to use the new **AP Payment Request functionality. It's Easy!** To reimburse them, you'll only need to enter their name and address information and then complete the "invoice line" details of the Payment Request.

JOB AID: [How Do I Submit a Payment Request](#)

Petty Cash

Job Aid will be available Monday, November 28th. The payment request process may be used for many non-purchase order payments including the ability to replenish departmental petty cash funds. The job aids focus is on replenishing cash in an existing petty cash fund. This job aid is not to be used for replenishment of research participant payment funds (RPPFs).

My Favorite Things

"Our department's diagnostic feed used to take 1 hour to run. It now runs in 12 minutes."

"I like the visibility into workflow."

Compass Tips & Tricks archive is available on [Compass Upgrade website homepage](#).

