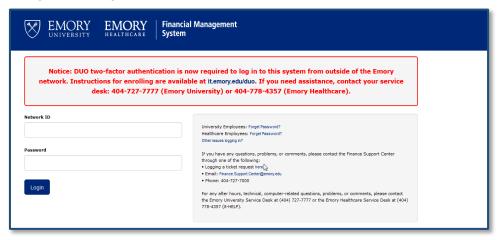


# **Closeout Milestone Query**

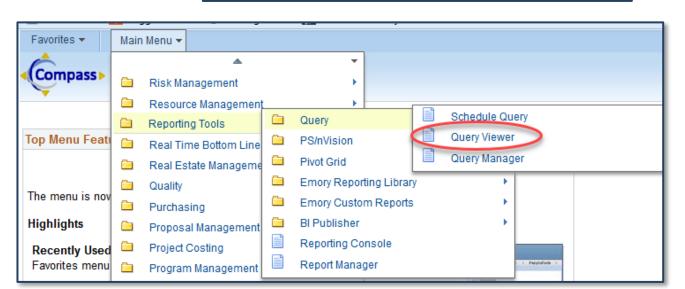
### **Running the Query in Compass**

1. Navigate and log in to the Compass Production Environment: <a href="https://compass-login.emory.edu">https://compass-login.emory.edu</a>



Main Menu 🕶

2. In Compass navigate to:



> Reporting Tools ▼ > Query ▼ > Query Viewer

3. Add **Query Viewer** to your **Favorites** by using the link at the top right of your screen:







4. In Query Viewer, Search for the Closeout Workload Query: EU\_GM\_CLOSEOUT\_MILESTONES



\*NOTE: Using the % before and after key words will return all items with that search parameter

5. Click the **Favorite** link associated with the Query to add it to your Favorites.



- 6. Select Desired Results: HTML, Excel, or Schedule.
  - a. \*For this job aid we are using Excel as the output.
- 7. Enter the dates for the Closeout Milestones that you would like to review for your assigned units by using the calendar or manually typing the dates into the cells.

Enter Closeout Due Date **From**: 01/01/2017
Enter Closeout Due Date **To**: 03/31/2017

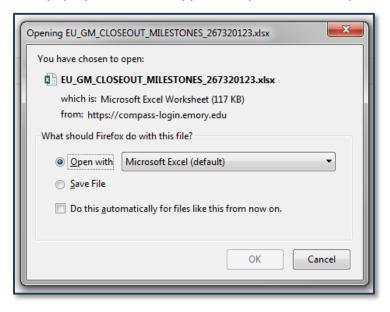


8. Click View Results Button.

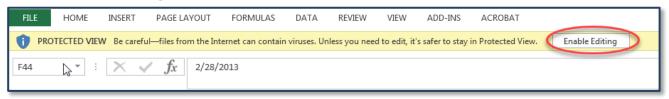




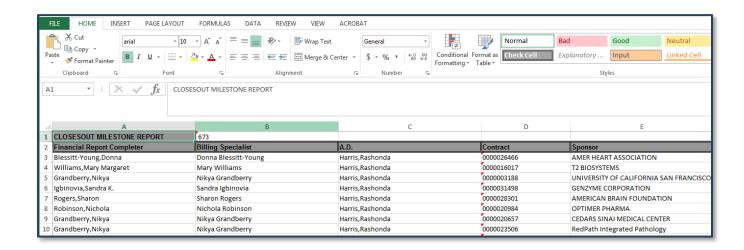
9. A pop-up window will appear to open the Excel spreadsheet.



- 10. Click **OK**.
- 11. Click on Enable Editing button.



#### The Excel spreadsheet opens...



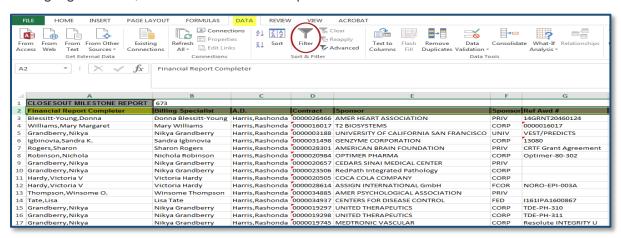




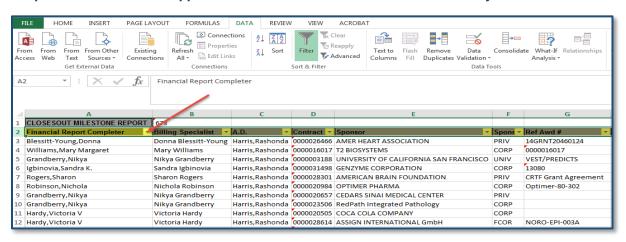
### **Sorting & Filtering the Data:**

Note: You must sort the entire population of data to look at the specific awards pertaining to your unit.

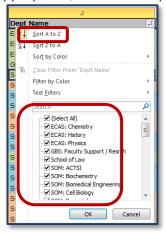
12. Highlight Row 2, and select the 'Filter' Option under the Data tab in Excel.



\*Drop down tabs will now appear on the column headers in row two so that you can sort/filter.



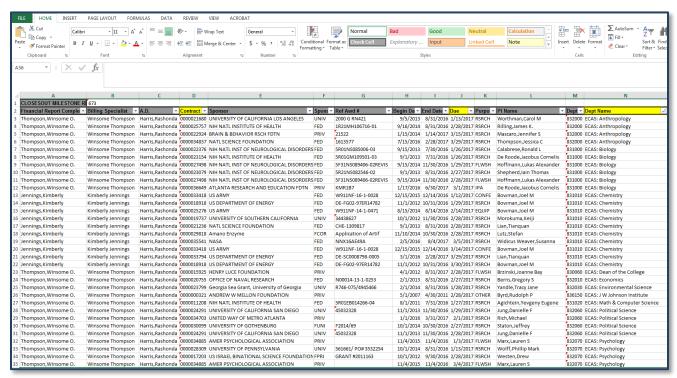
13. On Column N, 'Dept Name', select the drop down tab, and select Sort A to Z. To filter, select the appropriate, individual departments and click OK.







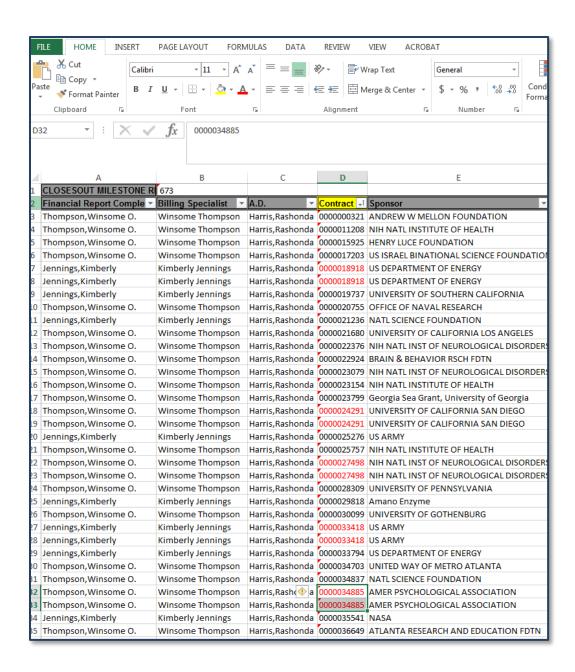
- 14. If sorting, start by deleting any Awards that do not pertain to your unit.
  - a. e.g. If you are only working on ECAS (for job aid purposes), delete all other Awards.
  - b. By deleting those that do not pertain, instead of the 673 delivered in the original report, you are left with only 35. <u>But, you are not yet done sorting</u>.



- 15. Review the awards listed in Column D, Contract, and identify any duplicate lines.
  - Use Sort A-Z and highlight the duplicates.
  - b. Duplicates are generally found because there is a milestone line for RAS and for FGC.
  - c. Removing the duplicate lines will give you a better understanding of the workload.



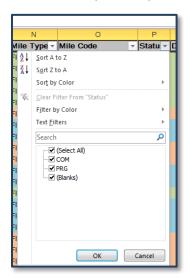








16. On Column T, Status, Sort A to Z, to see Closeout Milestone Status:



COM - Completed

PRG - In progress

- 17. Review the following columns to further identify your workload:
  - a. On Column W, Action, Sort Z to A, to differentiate between RAS and FGC Workload
  - b. On Column J, **Due**, Sort Oldest to Newest to see what is due now

**Note**: Some milestones may not be assigned appropriately, so use caution before deleting lines.

\*The example results in the image below and for job aid purposes assumes that you are in a RAS Unit. You've deleted all other rows and find that you have 12 Closeouts due in the next few months:

