



Job Aid: Invoice Milestone Report

Running the Report in Compass

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

EMORY EMORY Financial System Notice: DUO two-factor authentication is no network. Instructions for enrolling are availab desk: 404-727-7777 (Emory U	Management w required to log in to this system from outside of the Emory le at i <u>temory.edu/duo.</u> If you need assistance, contact your service niversity) or 404-778-4357 (Emory Healthcare).	
Network ID Password Login	University Employees: Forget Password? Healthcare Employees: Forget Password? Other asues togong in? If you have any questions, problems, or comments, please contact the Finance Support Center through one of the following: • Logging a ticket request hereigned • Email: Prace Support Center(Genery edu • Phone: 404-727-7000 Pror any after hours, technical, computer-related questions, problems, or comments, please contact the Emory University Service Desk at (404) 727-7777 or the Emory Healthcare Service Desk at (404) 778-4357 (8-HELP).	
You are about to access a computer system maintained or made available by the system is strictly prohibited and may be addject to criminal presentations available and provide and system of the strictly of discourse Healthcare, including law enforcement purposes and enforcement of rules con	Emory University and/or Emory Healthcare that is intended for authorized users only. Unauthorized use of y proceeding, your use of this system constitutes your acceptance of Emory's IT Conditions of Use and other constitution of the system. Set the system of the system of the system of the system of the system.	
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2. In Compass navigate to:

Grants 🔻 🚿

Main Menu 🔻

Favorites -	Main	Menu 🔻			
Compass		Grants	Awards		►
V		Inventory	Departments		►
		IT Asset Management	Emory Award Setup		►
Top Menu Feat		Items	Grants Portal		
		Maintenance Managem	Grants Quick View		F
		Manager Self-Service	Institutions	_	►
The menu is nov		Manufacturing Definition	Interactive Reports		Award Inventory
Highlights		Order Management	Professionals		Awards to Exclude
ingingins		PeopleTools	Proposals		Contract Aging Report
Recently Used		Pricing Configuration	Protocols		Federal Financial Report
r avonces menu		Procurement Contracts	Sponsor Websites		Invoice Milestone Report
		Production Control	Sponsored Projects Off		Official Award Acceptance ENOA
		Products	Sponsors		Pre-Billing Report
		Program Management	Subrecipients		Project Forecast
Breadcrumbs		Project Costing	Grants Center		Project Variance
and give you ac		Proposal Management	Grants WorkCenter		Proposal Inventory
		Purchasing	My Proposals		Refresh GM Reporting Tables
		·	 		Resend ENOA file

Invoice Milestone Report

Interactive Reports 🔻 🚿

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





- 4. Depending on how you organize your Compass reports, either use an existing Run Control ID or create a new one.
 - a. **Existing** Run Control ID:
 - i. If you cannot remember the name of the run control already set up, make sure you are on 'Find an Existing Value', leave the 'Run Control ID' field blank, and select 'Search'.
 - ii. This will return a list of Search Results select the one you most recently saved.

Invoice Milestone Report Enter any information you have and click Search. Leave fields blank for a list of all values.
Find an Existing Value Add a New Value
Search Criteria
Run Control ID begins with Case Sensitive
Search Clear Basic Search 🖾 Save Search Criteria

- b. Set up a **new** Run Control ID:
 - i. Select the tab 'Add a New Value', enter a value name that makes sense to you, then select 'Add'.

Invoice Milestone Report	
Eind an Existing Value Add a New Value	
Run Control ID	
Add	



5. Enter the dates that you want to review the Invoice Milestones for your assigned units by either using the calendar or directly typing into the cells.

From Date: 01/01/2017 Thru Date: 03/31/2017

- 6. Select 'All Invoices' and 'Report by Due Dates' under the Select Report Detail section.
 - a. Click 'Save'
 - b. Click 'Run'.

INVOICE MILEST	ONE TRACKING
Invoice Tracking Paran	neters
INVOICE DUE DT RANGE:	*From Date 01/01/2017 前 *Thru Date 03/31/2017 前 ● All Invoices Open Invoices Only © Closed Invoices Only
Select Report Detail: CREPORT by Billing Spece Report by Contract T Report by Sponsor/A Report by Primary In Report by Department Report by Due Dates	ecialist Type Agency Investigator Int
Return to S	earch 🔄 Notify Update/Display

- Selecting the 'Run' button will give you a pop-up screen for the 'Process Scheduler Request' (it does not yet 'run' the reports). You can select 'HTML' or 'Email', the preference is Email.
 - a. Select 'Email',
 - b. click on 'Distribution' to provide the email information

Process Scheduler Request						×
						Help
User ID JCROCK3		Run Control	ID InvMilestoneF	Report		1
Server Name PSNT	← Run D	Date 02/28/2017	F			1
Recurrence	- Run T	ime 8:50:39AM	Rese	t to Current	Date/Time	1
Time Zone						
Process List	Droopag Namo	Broose Ture	1Turne	1E o report	Distribution	
Invoice Milestone Tracking	FUGMINVC	SOR Report	Email -	CSV	- Distribution	
OK Cancel						

and Contracts





- 8. This will give you another pop-up screen for the 'Distribution Detail'
 - a. Add the 'Email Subject' for ease input the report you are running, i.e. InvMilestoneReport
 - b. Click 'OK' to go back to the previous screen

Distribution D	etail	×
1		Help
Process Name	EUGMINVC	
Process Type	SQR Report	
Folder Name	▼	
Retention Days	30	
Email Only		
Email Subject	Email With Log: Email Web Report:	
InvMilestoneRep	ort	
Message Text		
1		
Email Address L	ist	
Distribute To		
*ID Type	*Distribution ID	
User -	JCROCK3	—
ОК	Cancel	

- 9. Click 'OK' in 'Process Scheduler Request' window.
- 10. Record your process instance number in case your report doesn't run.

Favorites - Main Menu - > Grants - > Interactive Reports - > Invoice Milestone Report
Compass
INVOICE MILESTONE TRACKING Run Control ID InvMilestoneReport Report Manager Process Monitor Run
Process Instance:6056478
INVOICE DUE DT RANGE: *From Date 01/01/2017
*Thru Date 03/31/2017 🛐 INVOICE STATUS: © All Invoices © Open Invoices Only © Closed Invoices Only
Select Report Detail:
C Report by Billing Specialist
© Report by Contract Type
© Report by Sponsor/Agency
© Report by Primary Investigator
© Report by Department
Report by Due Dates
Return to Search Solution Display



- 11. The report will be delivered to the email address specified on the distribution page.
 - a. The InvMilestoneReport report generally takes less than fifteen minutes to run



- 12. Save the attachment to your drive (network drive or hard drive in a folder where you can easily find it later).
 - a. It will export as file type **CSV** and will need to be changed to **Excel Workbook** when you save the file.

13. Open your file in excel.

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1	BILLING SPECIALIST	CONTRACT	SPONSOR	CONTRACT TYPE	BILL CYCLE	BILL PLAN	PINAME	DEPT	INVOICE PD START DT	INVOICE PD END DT	DT INVOICED DU	EDT IN	VOICE INVOICE AM	COMPLETE INVOICE	E FINAL
2	Angela Garvin	20685	NIH NATL INST OF ALLERGY AND INFECTIOUS	CR_CONTRACT	DMTH-END	B101	Mulligan, Mark	SOM: Medicine: Infectious Dis	1-Dec-16	31-Dec-16	15	Feb 17		0 N	Ν
3	Angela Garvin	32309	US DEPT OF HEALTH AND HUMAN SERVICES	CR_CONTRACT	DMTH-END	B101	Mulligan,Mark	SOM: Medicine: Infectious Dis	1-Dec-16	31-Dec-16	15	-Feb-17		0 N	Ν
4	Angela Garvin	32381	US DEPT OF HEALTH AND HUMAN SERVICES	CR_CONTRACT	DMTH-END	B101	Mulligan, Mark	SOM: Medicine: Infectious Dis	1-Dec-16	31-Dec-16	15	-Feb-17		0 N	Ν
5	Angela Garvin	36106	US DEPT OF HEALTH AND HUMAN SERVICES	CR_NON_LOC	DMTH-END	8101	Mulligan, Mark	SOM: Medicine: Infectious Dis	1-Dec-16	31-Dec-16	15	-Feb-17		0 N	Ν
6	Kimberly Jennings	9100	US DEPARTMENT OF ENERGY	CR_NON_LOC	DMTH-END	B101	Heaven, Michael C	ECAS: Chemistry	1-Jan-17	14-Jan-17	13	-Feb-17		0 N	Y
7	Sharon Rogers	34814	US DEPT OF VETERANS AFFAIRS	SCHED_PAY	MTH-END	B102	Krishnamurthy, Venkatagiri	SOM: Neurology: Neuro-Rehab	1-Oct-16	31-Oct-16	3	-Feb-17		0 N	Y
8															
9															

and Contracts



Sorting & Filtering the Data:

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

14. Highlight **Row 1**, and select the '**Filter**' Option under the '**Data**' tab in Excel.

FILE HOME INSERT	PAGE LAYOUT FORMULAS DATA	REVIEW ACROE	AT			
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A	BC		DE	F	G	н
1 BILLING SPECIALIST CONT	TRACT SPONSOR	CONTRA	ACT TYPE BILL CYCLE	BILL PLAN PI NAME	DEPT	
2 Victoria Hardy	34748 ODI	SCHED_	PAY_TASK MTH-END	B102 Yount,Kathryn	SPH: C	Global Health
3 Karen Hawkins	15237 US DEPT OF HEALTH AND HUMA	AN SERVICES CR_COM	NTRACT DMTH-END	B101 Galinski,Mary	R YRK: E	mory Vaccine Center
4 Karen Hawkins	19837 US DEPT OF HEALTH AND HUMA	AN SERVICES CR_COM	NTRACT DMTH-END	B101 Altman, John D) YRK: E	mory Vaccine Center
5 Karen Hawkins	22340 SEATTLE BIOMEDICAL RESEARCH	H INSTITUTE CR_NO	N_LOC DMTH-END	B101 Pulendran,Bal	i YRK: E	mory Vaccine Center
6 Karen Hawkins	15237 US DEPT OF HEALTH AND HUMA	AN SERVICES CR_COM	NTRACT DMTH-END	B101 Galinski,Mary	R YRK: E	mory Vaccine Center
7 Karen Hawkins	19837 US DEPT OF HEALTH AND HUMA	AN SERVICES CR_COM	NTRACT DMTH-END	B101 Altman, John E) YRK: E	mory Vaccine Center
8 Angela Garvin	27797 FRED HUTCHINSON CANCER RE	SEARCH CENTER CR_NO	N_LOC DMTH-END	B101 Mulligan, Mark	SOM:	Medicine: Infectious Dis
9 Angela Garvin	30817 FHI DEVELOPMENT 360 LLC	CR_NO	N_LOC DMTH-END	B101 Del Rio,Carlos	SOM:	Medicine: Infectious Dis
10 Angela Garvin	31420 BRIGHAM AND WOMENS HOSP	ITAL SCHED_	PAY_TASK MTH-END	B104 Lennox, Jeffre	y L SOM:	Medicine: Infectious Dis
11 Angela Garvin	33551 FAMILY HEALTH INTERNATION	AL CR_NO	N_LOC DMTH-END	B101 Del Rio,Carlos	SOM:	Medicine: Infectious Dis
12 Angela Garvin	34739 FRED HUTCHINSON CANCER RE	SEARCH CENTER CR_NO	N_LOC DMTH-END	B101 Edupuganti,Sr	ilatha SOM:	Medicine: Infectious Dis

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

Free	A HOME INSE	RT PAGE	LAYOUT FORMULAS DAT.	A REVIEW VI 2↓ <u>₹</u> 2↓ Sort Sort & F	EW ACROBAT	o Flash Remo ns Fill Duplica	ve Data ates Validation Data	Consolidate What-If Analysis ~ Teols	Relationships	Group Ungroup Subto	t∃ Show tal Hide C
1	A BILLING SPECIALIST		SPONSOR		D • CONTRACT TYPE	E BILL CYCLE	F BILL PLA *	G PI NAME	T DEF	<u>н</u>	¥
2	Victoria Hardy	34748	ODI		SCHED_PAY_TA	K MTH-END	8102	Yount,Kathryn	SPH	I: Global Health	
3	Karen Hawkins	10237	US DEPT OF HEALTH AND HUM	AN SERVICES	CR_CONTRACT	DMTH-END	8101	Alteran John D	TRA	L'Emory Vaccine Cer	ter
4	Karen Hawkins	22240	SEATTLE BIOMEDICAL RESEARC	IN SERVICES	CR_NON LOC	DMTH-END	8101	Rulendran Pali	VPK	: Emory Vaccine Cer	ter
6	Karen Hawkins	15237	US DEPT OF HEALTH AND HUM	AN SERVICES	CR_CONTRACT	DMTH-END	8101	Galinski Mary B	VRK	: Emory Vaccine Cer	ter
7	Karen Hawkins	19837	US DEPT OF HEALTH AND HUM	AN SERVICES	CR CONTRACT	DMTH-END	8101	Altman.John D	YRK	: Emory Vaccine Cer	ter
8	Angela Garvin	27797	FRED HUTCHINSON CANCER BI	SEARCH CENTER	CR NON LOC	DMTH-END	B101	Mulligan, Mark	SO	M: Medicine: Infectio	ous Dis
9	Angela Garvin	30817	FHI DEVELOPMENT 360 LLC		CR NON LOC	DMTH-END	8101	Del Rio, Carlos	sor	M: Medicine: Infectio	ous Dis
10	Angela Garvin	31420	BRIGHAM AND WOMENS HOST	PITAL	SCHED PAY TA	K MTH-END	B104	Lennox, Jeffrey L	sor	M: Medicine: Infectio	ous Dis
11	Angela Garvin	33551	FAMILY HEALTH INTERNATION	AL	CR_NON_LOC	DMTH-END	8101	Del Rio, Carlos	sor	M: Medicine: Infectio	ous Dis
12	Angela Garvin	34739	FRED HUTCHINSON CANCER RI	SEARCH CENTER	CR_NON_LOC	DMTH-END	B101	Edupuganti, Srilatha	SO	M: Medicine: Infectio	ous Dis

15. On Column H, 'Dept Name', select the drop down tab, and select 'Sort A to Z' or to filter, select individual departments and select 'OK'.

	J	
Dept	Name	ψÎ
ΕŻ	Sort A to Z	- 1
ΕX	Sort Z to A	
E	Sor <u>t</u> by Color	\rightarrow
GW	Clear Filter From "Dept Name"	
5	Filter by Color	
S	Text <u>F</u> ilters	
S	Search	2
S S S	Select All) GECAS: Chemistry GECAS: History GECAS: Physics	•
S S S S	School of Law School of Law SOM: ACTSI SOM: Biochemistry	
S	SOM: Biomedical Engineering	•
SS	OK Cano	el



16. If sorting, start by deleting any Awards that do not pertain to your unit.

- a. i.e. only working on ECAS (for job aid purposes), so I'll delete all others.
- b. Now instead of the 1641 delivered in the original report, I'm left with only 122, but I'm not done sorting/filtering.

F	ILE HOME INSE	RT PAGEI	LAYOUT FORMULAS DATA REVIEW	VIEW ACROBA	т							
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1	BILLING SPECIALIST 👻	CONTRA -	SPONSOR	CONTRACT TYP -	BILL CYCLE 🔻 I	BILL I 👻	PI NAME -	DEPT vî				
2	Winsome Thompson	7558	BOWDOIN COLLEGE	CR NON LOC	DMTH-END	B101	Rilling, James K.	ECAS: Anthropology				
з	Winsome Thompson	32335	UNIVERSITY OF MINNESOTA	CR NON LOC	DMTH-END	B101	Rissing, Andrea	ECAS: Anthropology				
4	Winsome Thompson	35582	AUBURN UNIVERSITY	CR_NON_LOC	DMTH-END	B101	Brown,Peter J	ECAS: Anthropology				
5	Winsome Thompson	36302	ST LOUIS UNIVERSITY	CR NON LOC	DMTH-END	B101	Little,Peter	ECAS: Anthropology				
6	Winsome Thompson	7558	BOWDOIN COLLEGE	CR_NON_LOC	DMTH-END	B101	Rilling, James K.	ECAS: Anthropology				
7	Winsome Thompson	32335	UNIVERSITY OF MINNESOTA	CR NON LOC	DMTH-END	B101	Rissing, Andrea	ECAS: Anthropology				
8	Winsome Thompson	35582	AUBURN UNIVERSITY	CR_NON_LOC	DMTH-END	B101	Brown,Peter J	ECAS: Anthropology				
9	Winsome Thompson	36302	ST LOUIS UNIVERSITY	CR_NON_LOC	DMTH-END	B101	Little,Peter	ECAS: Anthropology				
10	Winsome Thompson	7558	BOWDOIN COLLEGE	CR_NON_LOC	DMTH-END	B101	Rilling, James K.	ECAS: Anthropology				
11	Winsome Thompson	32335	UNIVERSITY OF MINNESOTA	CR_NON_LOC	DMTH-END	B101	Rissing,Andrea	ECAS: Anthropology				
12	Winsome Thompson	35582	AUBURN UNIVERSITY	CR_NON_LOC	DMTH-END	B101	Brown,Peter J	ECAS: Anthropology				
13	Winsome Thompson	36302	ST LOUIS UNIVERSITY	CR_NON_LOC	DMTH-END	B101	Little,Peter	ECAS: Anthropology				
14	Winsome Thompson	30594	NATL ENDOWMENT FOR HUMANITIES	CR_NON_LOC	DMTH-END	B101	Wescoat,Bonna Daix	ECAS: Art History				
15	Winsome Thompson	30594	NATL ENDOWMENT FOR HUMANITIES	CR_NON_LOC	DMTH-END	B101	Wescoat,Bonna Daix	ECAS: Art History				
16	Winsome Thompson	30594	NATL ENDOWMENT FOR HUMANITIES	CR_NON_LOC	DMTH-END	B101	Wescoat,Bonna Daix	ECAS: Art History				
17	Winsome Thompson	18520	UNIVERSITY OF CALIFORNIA RIVERSIDE	CR_NON_LOC	DMTH-END	B101	Deal,Roger	ECAS: Biology				
18	Winsome Thompson	21914	UNIVERSITY OF GEORGIA	CR_NON_LOC	DMTH-END	B101	Corces,Victor	ECAS: Biology				
19	Winsome Thompson	25410	FRED HUTCHINSON CANCER RESEARCH CENT	ELCR_NON_LOC	DMTH-END	B101	Antia, Rustom N	ECAS: Biology				
20	Winsome Thompson	36459	UNIVERSITY OF GEORGIA	CR_NON_LOC	DMTH-END	B101	Deal,Roger	ECAS: Biology				
21	Winsome Thompson	18520	UNIVERSITY OF CALIFORNIA RIVERSIDE	CR_NON_LOC	DMTH-END	B101	Deal,Roger	ECAS: Biology				
22	Winsome Thompson	21914	UNIVERSITY OF GEORGIA	CR_NON_LOC	DMTH-END	B101	Corces,Victor	ECAS: Biology				
23	Winsome Thompson	36459	UNIVERSITY OF GEORGIA	CR_NON_LOC	DMTH-END	B101	Deal,Roger	ECAS: Biology				
24	Winsome Thompson	25410	FRED HUTCHINSON CANCER RESEARCH CENT	ELCR_NON_LOC	DMTH-END	B101	Antia,Rustom N	ECAS: Biology				
25	Winsome Thompson	18520	UNIVERSITY OF CALIFORNIA RIVERSIDE	CR_NON_LOC	DMTH-END	B101	Deal,Roger	ECAS: Biology				
26	Winsome Thompson	25410	FRED HUTCHINSON CANCER RESEARCH CENT	EFCR_NON_LOC	DMTH-END	B101	Antia,Rustom N	ECAS: Biology				
27	Winsome Thompson	36459	UNIVERSITY OF GEORGIA	CR_NON_LOC	DMTH-END	B101	Deal,Roger	ECAS: Biology				
28	Kimberly Jennings	9205	US DEPARTMENT OF ENERGY	PREPAID_TO_CR	MTH-END	B101	Hill,Craig Livingston	ECAS: Chemistry				
29	Kimberly Jennings	12712	US DEPARTMENT OF ENERGY	CR_NON_LOC	DMTH-END	B101	Lynn,David G.	ECAS: Chemistry				

17. Review the awards listed in Column B, 'Contract', and identify any duplicate lines

- a. Sort 'Smallest to Largest' and highlight duplicates
- b. This is generally because there may be multiple milestone lines for invoicing during the time period, especially for those invoices billed monthly.
- 18. On Column **P**, '**Final**', Sort '**Z to A**', to see which awards are marked with '**Y**' and have a Final Invoice due
 - a. Delete all others
 - i. The total count of Final Invoices is now down to 5
 - b. Sort Column L, 'Due Date' by 'Oldest to Newest' to see your list of Final Invoices due during the time period.

3	Research Administration Services	Award R	eview Too	ol (ART) -	- Invoice	Milestone	Report		MORY "inance: Grants and Contracts	
E	E HOME INSERT PAGE LAYOUT FORMULAS DATA REVIEW VIEW ACROBAT									
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Ě	ECAS: Chemistry	2-Nov-16	30-Nov-16		29-Jan-17		0	N	Y	
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H	ECAS: Chemistry	1-Jan-1/	14-Jan-1/		13-Feb-1/		0	N	Y I	
È	ECAS: MESAS	1-Jan-17	10-Feb-17		27-Mar-17		0	N	Y	
	ECAS: POlitical Science	1-Dec-16	31-Dec-16		31-Mar-17		0	N	Y I	