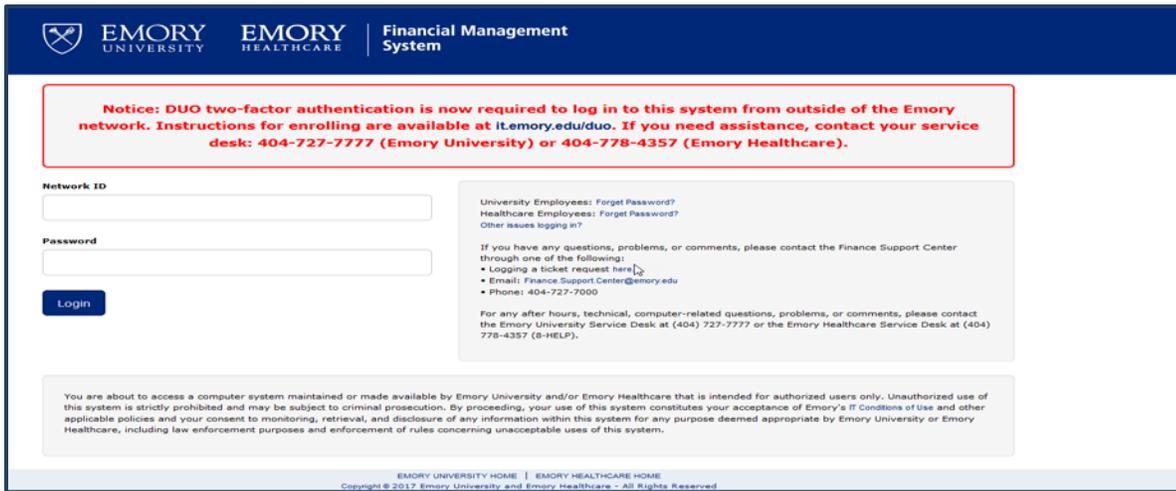


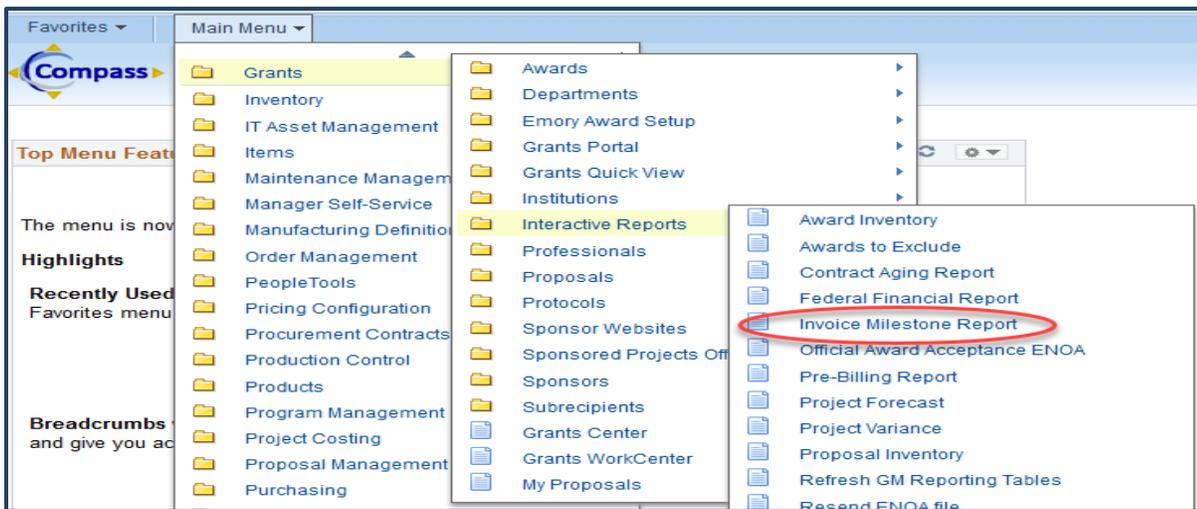
# Job Aid: Invoice Milestone Report

## Running the Report in Compass

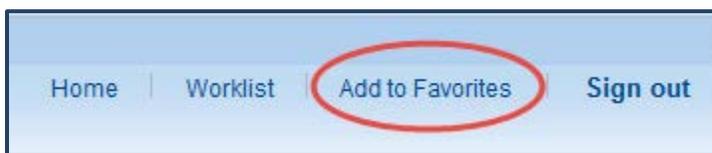
1. Navigate to the Compass Production Environment and log in: <https://compass-login.emory.edu>



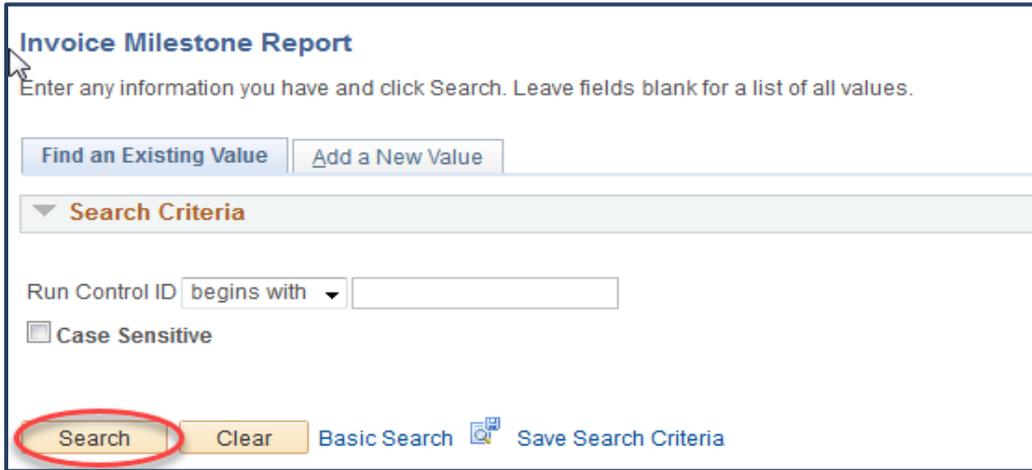
2. In Compass navigate to:



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.

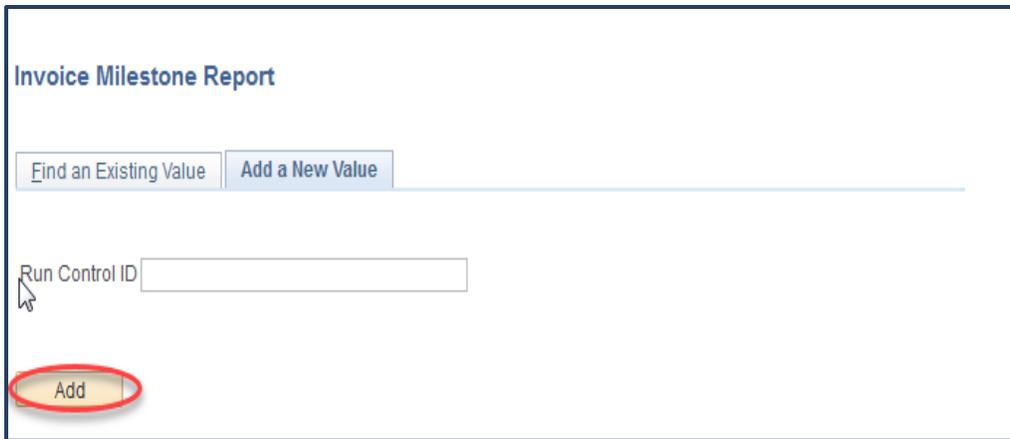
▼ **Search Criteria**

Run Control ID begins with

Case Sensitive

[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**

Run Control ID

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 MILESTONE TRACKING**

Run Control ID InvMilestoneReport      Report Manager      Process Monitor      **Run**

**Invoice Tracking Parameters**

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:**

Report by Billing Specialist  
 Report by Contract Type  
 Report by Sponsor/Agency  
 Report by Primary Investigator  
 Report by Department  
 Report by Due Dates

**Save**    Return to Search    Notify    Add    Update/Display

7. 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

User ID JCROCK3      Run Control ID InvMilestoneReport

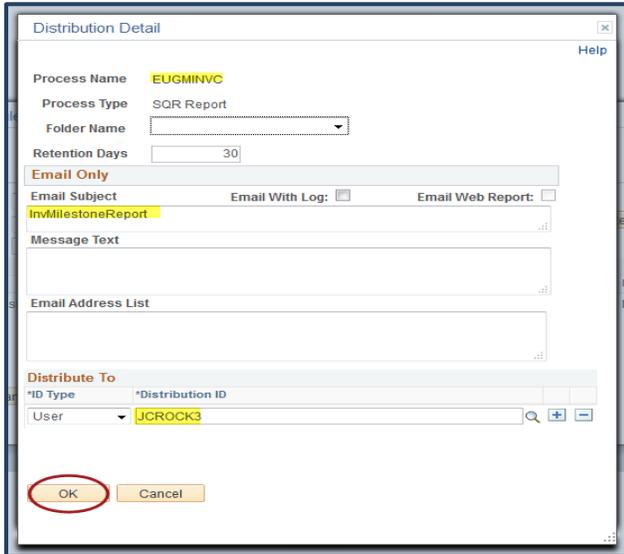
Server Name PSNT      Run Date 02/28/2017  
Recurrence      Run Time 8:50:39AM      Reset to Current Date/Time

Time Zone

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input checked="" type="checkbox"/>	Invoice Milestone Tracking	EUGMINVC	SQR Report	Email	CSV	Distribution

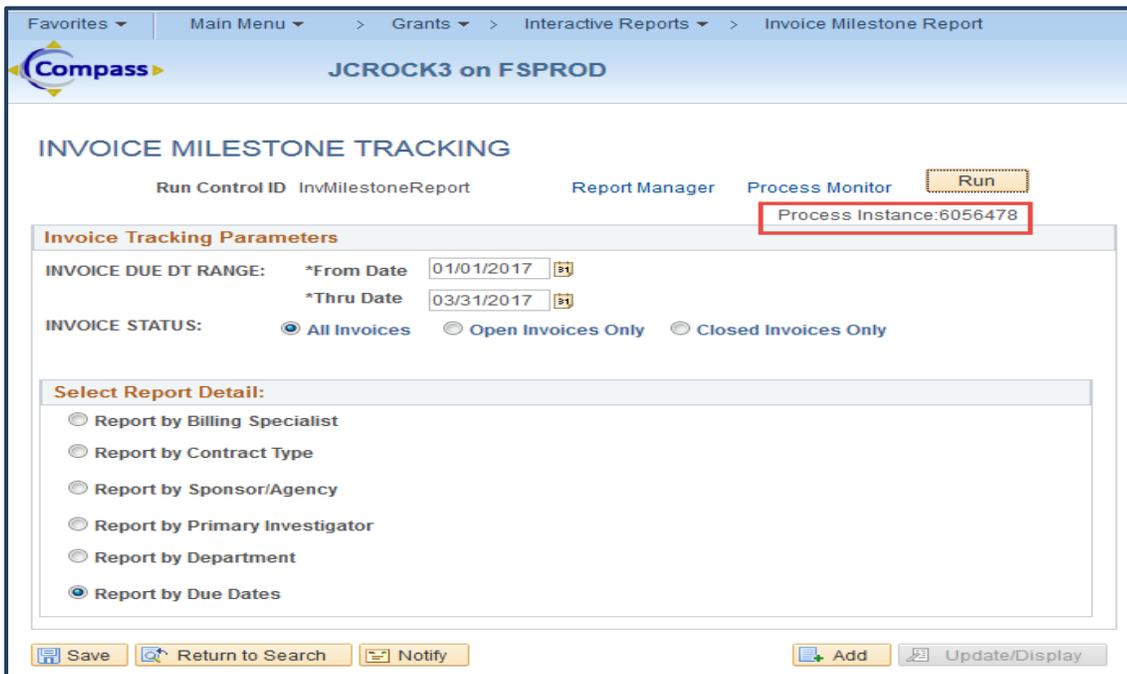
**OK**    Cancel

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

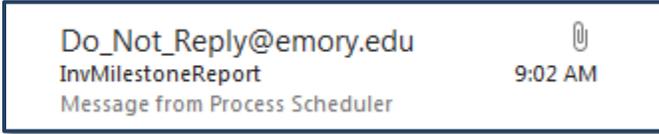


9. Click ‘**OK**’ in ‘**Process Scheduler Request**’ window.

10. Record your process instance number in case your report doesn’t run.



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.

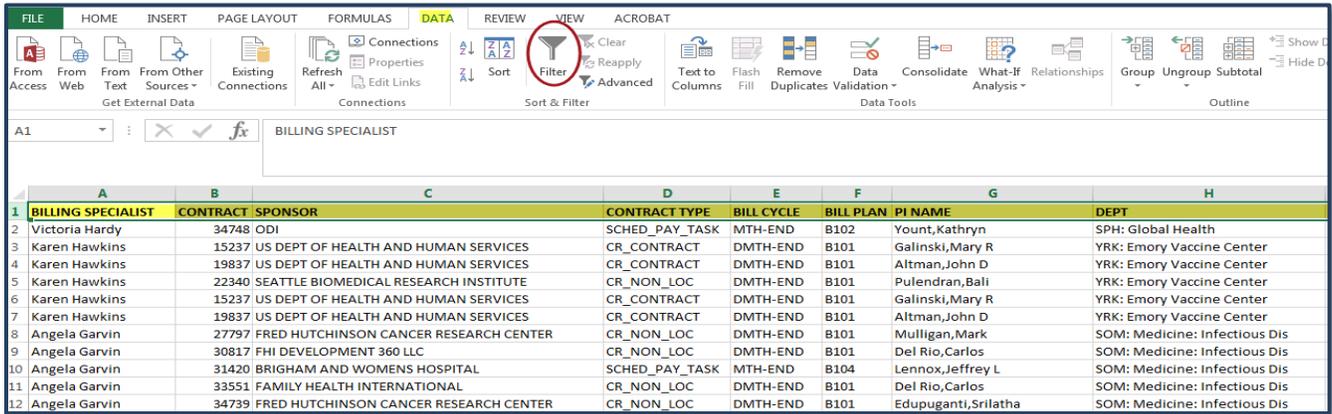
13. Open your file in excel.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P
1	BILLING SPECIALIST	CONTRACT	SPONSOR	CONTRACT TYPE	BILL CYCLE	BILL PLAN	PI NAME	DEPT	INVOICE PD START DT	INVOICE PD END DT	DT INVOICED	DUE DT	INVOICE	INVOICE AMT	COMPLETE INVOICE	FINAL
2	Angela Garvin	20885	NIH NAITL 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		N
3	Angela Garvin	32309	US DFPT 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		N
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		N
5	Angela Garvin	36106	US DEPT OF HEALTH AND HUMAN SERVICES	CR_NON_LOC	DMTH-END	B101	Mulligan,Mark	SOM: Medicine: Infectious Dis	1-Dec-16	31-Dec-16		15-Feb-17		0 N		N
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	SCHEP_PAY	MTH-END	B102	Krishnamurthy,Venkatagiri	SOM: Neurology: Neuro-Rehab	1-Oct-16	31-Oct-16		3-Feb-17		0 N		Y
8																
9																

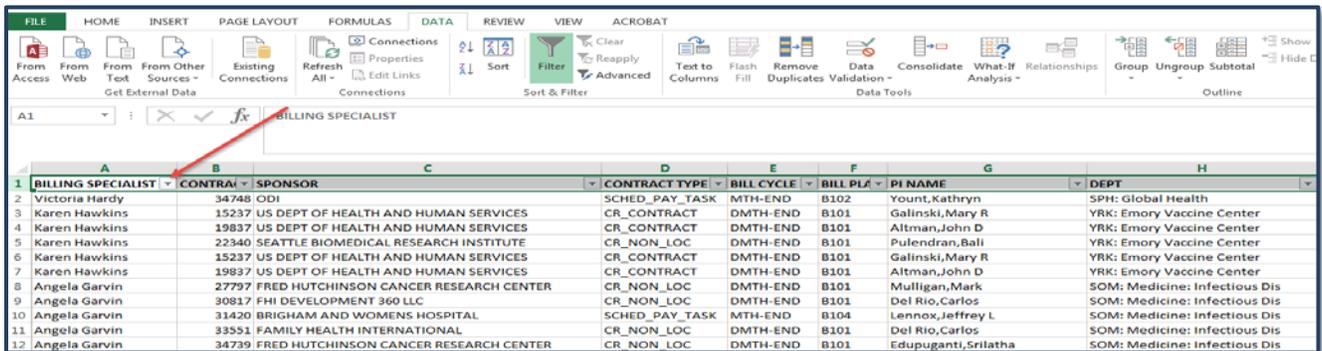
## Sorting & Filtering the Data:

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

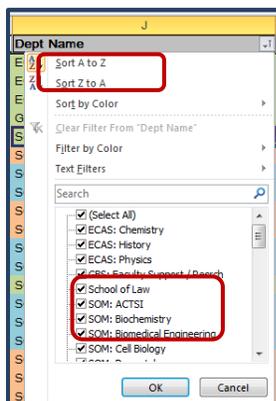
14. Highlight Row 1, and select the 'Filter' Option under the 'Data' tab in Excel.



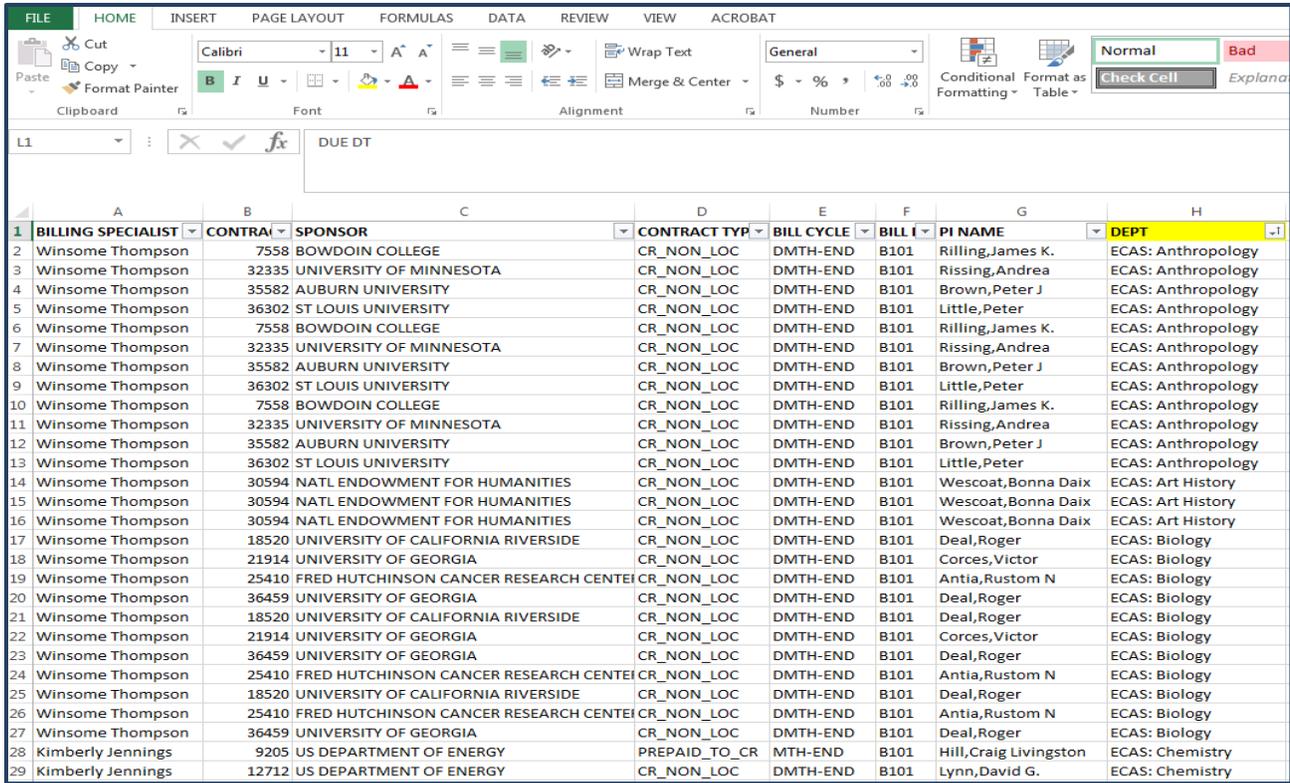
\*Drop down tabs will now appear on the column headers in row two so that you can sort/filter.



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'.

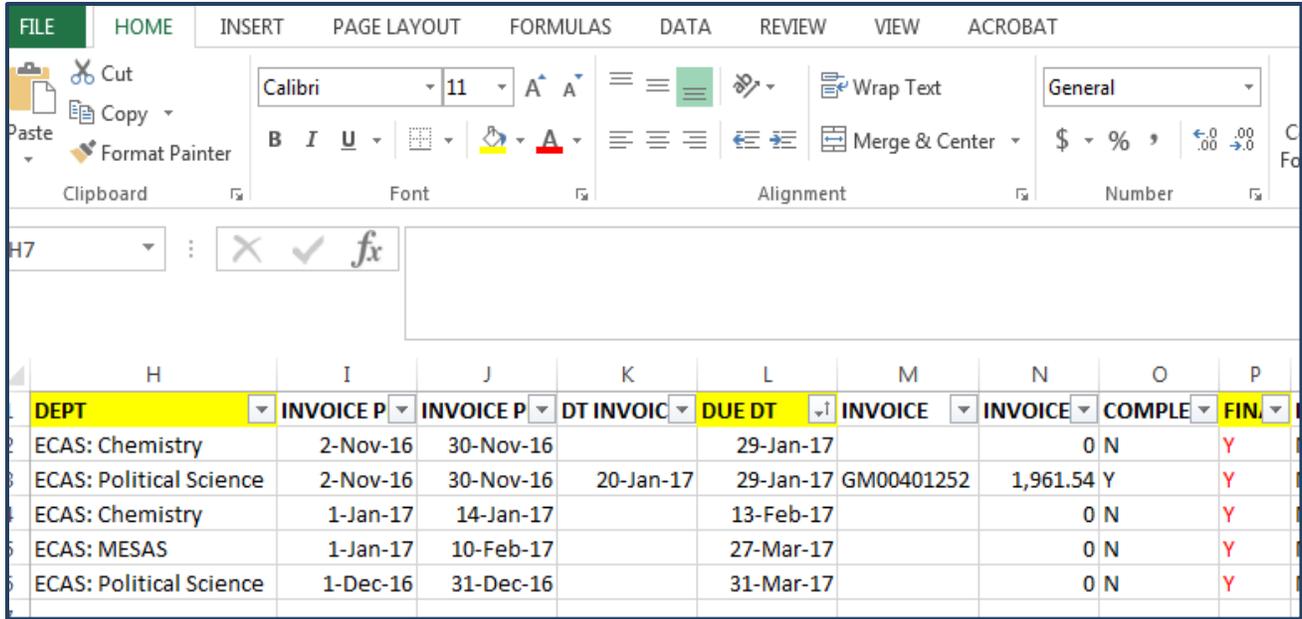


16. If sorting, start by deleting any Awards that do not pertain to your unit.
  - a. *i.e. only working on **ECAS** (for job aid purposes), so I'll delete all others.*
  - b. *Now instead of the **1641** delivered in the original report, I'm left with only **122**, but I'm not done sorting/filtering.*



	A	B	C	D	E	F	G	H
1	BILLING SPECIALIST	CONTRACT	SPONSOR	CONTRACT TYP	BILL CYCLE	BILL I	PI NAME	DEPT
2	Winsome Thompson	7558	BOWDOIN COLLEGE	CR_NON_LOC	DMTH-END	B101	Rilling,James K.	ECAS: Anthropology
3	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 CENTE	CR_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 CENTE	CR_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 CENTE	CR_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.



DEPT	INVOICE P	INVOICE P	DT INVOIC	DUE DT	INVOICE	INVOICE	COMPLE	FIN
ECAS: Chemistry	2-Nov-16	30-Nov-16		29-Jan-17		0	N	Y
ECAS: Political Science	2-Nov-16	30-Nov-16	20-Jan-17	29-Jan-17	GM00401252	1,961.54	Y	Y
ECAS: Chemistry	1-Jan-17	14-Jan-17		13-Feb-17		0	N	Y
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