

Compass Upgrade Update

As highlighted in the Compass 9.2 Tips & Tricks, the Activity ID Status (not to be confused with the project status) is now in effect. This new feature is used to control charges that are allowed to post to a project after the project end date.

Project / Activity Status Control ✓ Post-Award

We will continue to use Status Control at the Project level. However, we will also use controls at the Activity ID level. In 9.2, the only status that will be used at the project level, will be the **Open** and **Archived** status.

For the activity level status, we will be using **Pending, Open, Ended, Closed, Final** and **Hold**.

We have modified the generate award process to systematically assign the project and activity statuses.

For any new projects that a user adds after the award is generated, **the user must manually add each status or leverage the Emory date change page to create the statuses.**

All of the project statuses other than Open and Archived **will be removed from the project level and copied down to the activity level.**

Please note you will not see or should not expect to see other statuses then these two on the project level.

Project & Activity			
Status	Level	Transaction	Message
Pending	Activity	Budget	
		All Others	Reject
Open	Project & Activity	All	
Ended	Activity	New PO's	Reject
		All others	Warning
Closed	Activity	PO, AP, EX, Payroll, RST	Reject
		Journals & Budget	Warning
Hold & Final	Activity	All	Reject
Archived	Project	All	Reject

Although the project status may be open, the activity ID status controls transactions as detailed below:

Ended

- Project status will change to "ended" day of project end date
- New PO's will be rejected
- All other transactions will receive a warning message

Closed

- Project status will change to "closed" 60 days after project end date
- All PO, AP, EX, Payroll, and RST transactions will be rejected
- Journals and budget adjustments will receive a warning message

Final

- Project status will change to "final" 90 days after project end date
- All transactions will be rejected

What does this mean to RAS?

Within **59 days** of the project end date –

1. All costs must be posted, including RSTs
2. Deficits must be removed

Within **89 days** of the project end date –

1. Any necessary journals (e.g., F&A) must be posted
2. Any necessary budget adjustments must be completed

*Otherwise, a ticket to the Finance Support Center is required for each award affected. FGC will extend activity ID status for 10 days.

How do I submit a ticket?

1. <https://eufinancesupportcenter.force.com/login?so=00D36000000JQII>
(**Category** - Finance Grants & Contracts, **Sub-category** - Budget Override Unfreeze, and **Subject line** – Change Activity Status)

or

2. Send an email to Finance.Support.Center@emory.edu

How is this beneficial?

1. Minimizes unwanted expenses once FFRs have been submitted to FGC
2. Allows RAS closeout responsibilities (PACTs) to be submitted timely and without the concern of future changes
3. Ensures compliance with sponsor guidelines, minimizing Emory's financial risk
4. Increases Emory's ability to collect funds and receive future funding timely

Where can the effective dates for each status be found in Compass?

Main Menu > Grants > Award > Emory - Date Changes (verify results tab)

The screenshot displays the Compass system interface. On the left, there is a 'Menu' sidebar with various categories. The 'Grants' category is highlighted with a red circle. In the main menu area, the 'Awards' folder is also highlighted with a red circle. A sub-menu is open for 'Awards', and the 'Emory - Date Changes' option is highlighted with a red circle. To the right of the 'Awards' sub-menu, a list of options is displayed, with 'Emory - Date Changes' being the selected option.

Menu

- My Favorites
- Smart Solutions
- Emory Custom
- Emory WorkCenter
- Employee Self-Service
- Manager Self-Service
- Supplier Contracts
- Grants
- RSTs
- Customers
- Products
- Customer Contracts
- Order Management
- Pricing Configuration
- Customer Return Items
- Cost Accounting
- Suppliers
- Procurement Contracts
- Purchasing
- Inventory
- eProcurement
- Services Procurement
- Sourcing
- Engineering
- Manufacturing Design
- Production Control
- Quality
- Supply Planning
- Program Management
- Project Costing

Main Menu

- Accounts Payable
- Accounts Receivable
- Allocations
- Asset Management
- Background Processes
- Banking
- Billing
- Cash Management
- Commitment Control
- Cost Accounting
- Customer Contracts
- Customer Returns
- Customers
- Deal Management
- Development Utilities
- Emory Custom
- Emory WorkCenters
- Employee Self-Service
- Engineering
- Enterprise Components
- eProcurement
- eSettlements
- Excise and Sales Tax/VAT
- Financial Gateway
- General Ledger
- Grants
- Inventory
- IT Asset Management
- Items
- Maintenance Management

Awards

- Departments
- Emory Award Setup
- Grants Portal
- Grants Quick View
- Institutions
- Interactive Reports
- Professionals
- Proposals
- Protocols
- Sponsor Websites
- Sponsored Projects Office
- Sponsors
- Subrecipients
- Grants Center
- Grants WorkCenter
- My Proposals

Emory - Date Changes

- Award Profile
- Commitment Control Errors
- Create Continuation
- Emory - Date Changes
- FA Error Interactive Report
- Milestone Notification
- Negotiate Award
- Process Facilities Admin
- Process Milestone Notification
- Process Retroactive F&A
- Project
- Project Activity
- Project Budget Inquiry
- Project Budgets
- Request For A Refund
- Request for Residual Transfer
- Review Award Modifications
- Review Retroactive F&A
- View Bill Plan
- View Bill Plan History
- View Contract
- View Contract Attachments

BU: GRANT Award: 0000017096
Begin Date: 09/15/2012 End Date: 08/31/2016

Contract Detail Find | View All | [?] First 1 of 1

Line	Start Date	End Date
1	09/15/2012	08/31/2016

Award Funding Find | [?] 1 of 1

Period	Project	Begin Date	End Date
1	00021261	09/15/2012	08/31/2016

Award Modification Find | View All 1 of 1

Period: 1 Begin Date: 09/15/2012 End Date: 08/31/2016

Award Modification Details Find | [?] 1-4 of 4

Seq Nbr	Begin Date	End Date	Reference Award Number	Comment
1	09/15/2012	08/31/2017		
2	09/01/2013	08/31/2014	r01AR054625-07	
3	09/15/2012	08/31/2017	5R01AR054625-08	
4	09/15/2012	08/31/2017	5R01AR054625-09	

Project Information Find View All 1 of 1

Project: 00021261 Start Date: 09/15/2012 End Date: 08/31/2016

Project Status Find | [?] 1 of 1

Effective Date	Effective Sequence	Project Status
09/15/2012		O

Project Activity Find | View All | [?] 1 of 1

Activity	Start Date	End Date
GRANT	09/15/2012	08/31/2016

Activity Status Personalize | Find | View All | [?] First 1-4 of 4 Last

Project	Activity	Effective Date	Activity Status
00021261	GRANT	09/15/2012	O
00021261	GRANT	08/31/2016	E
00021261	GRANT	10/30/2016	C
00021261	GRANT	11/29/2016	F

O = OPEN
E = ENDED
C = CLOSED
F = FINAL
(H = HOLD)

Team Members Personalize | Find | [?] First 1-3 of 3 Last

Project	Team Member		Project Role	Start Date	End Date
00021261	0362043	Pacifici,Roberto	PI	09/15/2012	08/31/2017
00021261	0380129	Li,Jau-Yi	COIN	09/15/2012	08/31/2017
00021261	0393190	Zhou,Zheng	COIN	09/15/2012	08/31/2017