

COMPASS Self Service Tips (Revised for EFS Updates)

Rev. 3/2/10

Signing On

1. Username and password are not case sensitive.
2. Usenames are normally set up as the characters to the left of the @ in your email(e.g.doe123 from doe123@umn.edu).
3. If you are a key requestor and completed the authorization process through the Dept. of Central Security, you will have access to the Key Request forms.

Service and Key Request Form Navigation

1. Due to the many additional fields of account data needed on both of these forms, there is more scrolling both vertically and horizontally required by the user. If you don't immediately see everything you expect or a button needed to proceed further in the request, be sure to try the scroll arrows.

Service Request Entry

1. If you are requesting work that is chargeable, you must enter the fund, dept., account and program values. The percent value must be entered as 100 or add up to 100 if you have multiple accounts.
2. When entering work that will be charged against a capitalized project, you do not have to enter a program but must enter the PCBU, project and activity codes (activity is always "1").
3. Use the radio button next to the next account number row if you are entering more than 1 billing account.

Service Request/Work Order Query

1. When you get to the last page of the Service Request or Key Request Entry (where you receive your SR or KR number), you can press the Go Back to Service (Key) Requests button or use the browser (Internet Explorer) Back button to enter another service request. Click on the "Service Request" tab on the menu bar at the top to get to other Self Service menu functions.

Invoice Query

Fiscal Year 2008 (Compass data prior to 7/1/08-CUFS)

1. When searching for charges by Area – Org, you must also enter the suborg. Ex. If querying charges for 585-3120, you would enter 585 in the Area field and "312000" in the Org-SubOrg field.
2. If you are printing a summary level invoice report, you need to select the landscape option on your printer preferences in order to fit all the columns.
3. JV FMT numbers were not available prior to Oct. 2005. If you use the JV FMT Charge query option and your charge does not come up, verify that it was entered using the format "FMT99999999".

Invoice Query

Fiscal Year 2009 and beyond (Compass data from on or after 7/1/08 - PeopleSoft)

This Invoice Query will allow users to query by the PeopleSoft account fields including Fund, Dept, Account, and Program. Only Dept. is required and the results will include all funds, accounts, programs etc. that match the department ID requested. Each time there is a new account segment, there will be a new break with sub-totals. The “Advance Query” option will allow you to further define your selection using additional PeopleSoft chart fields.

General

1. Only the browser Internet Explorer (IE) is fully supported at this time. Although Fire Fox and other browsers may function to some extent, IE will provide the most consistent functionality.
2. The Back button can generally be used. Please report any irregularities.
3. If you are using Internet Explorer and still having trouble viewing the full screen, you may want to close or shrink your favorites menu on the left side of your screen or check your screen resolution.
4. If you have financial questions about the queries, contact Gail Pinola at 612-624-2522 or pinolag@umn.edu.