EMORY UNIVERSITY | Enterprise Data Analytics and Strategic Support

Dashboard: Account Administrator Roles Reference

What is the Account Administrator Roles Reference dashboard?

The Account Administrator Roles Reference dashboard displays the most current role or roles assigned to staff and faculty through the Account Administrator tool in Compass. It can be used as a quick reference to search assignments by various Chartfields, the Employee Role, or by Employee. Account Administrator roles are assigned at the Operating Unit, Department, or Project level.

IMPORTANT: This dashboard should only be used a reference for existing assignments entered through Compass. If assignments need to be added or modified, please refer to the Account Administrator job aids for instructions.

- How do I View Account Administrator Assignments in Compass?
- How do I Perform a Mass Add or Change to Account Administrator Assignments?
- How do I Run Compass Reports for Account Administrator Assignments?

Do other dashboards in EBI use Account Administrator Assignments?

Yes! The **Faculty Financial Summary** dashboard uses two of the Account Administrator roles to populate sponsored and non-sponsored projects for the faculty portfolio:

- The **Project PI** role is assigned to faculty when they are the Project PI for a sponsored project which is on an award for which they are not the award PI.
- The **Faculty** role is assigned to faculty when they are designated with responsibility for a non-sponsored project.

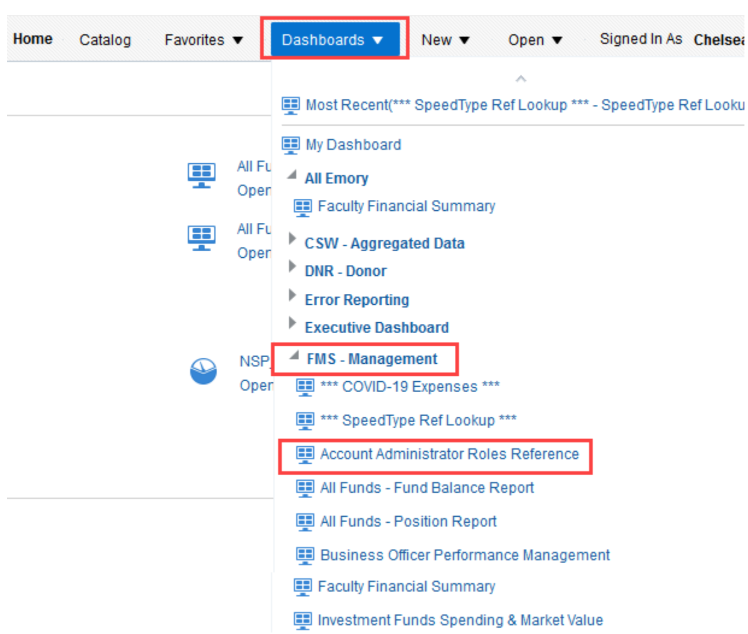
For more information about the Faculty Financial Summary, including job aids, visit our website.

When should I use the Account Administrator Roles Reference dashboard?

Use this dashboard to view the current Account Administrator Roles assigned to staff and faculty. This dashboard can also be used to verify the sponsored and non-sponsored projects that populate the Faculty Financial Summary dashboard, as well as the Financial Outlook Reporting Tool (FORT).

Where do I find this report in EBI?

1. Log in to EBI: https://dwbi.emory.edu/analytics
2. Click on the Dashboards Menu in the upper right corner.
3. In the FMS – Management folder, click the Account Administrator Roles Reference link.



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Understanding the Dashboard Pages

The dashboard is divided into three pages (or tabs): **By Chartfields, Award PI & Faculty Roles,** and **By Administration & Staff Roles.** The default page for the dashboard is the By Chartfields page.

- The **By Chartfields** page displays a reference table for all Account Administrator assignments. Users have the option to prompt on Operating Unit, Department, and Project (the Chartfields where assignments are made). Additional prompts include Fund Group, RAS Unit, Award, and Employee Role.
  - **NOTE:** Award PI is not an Employee Role assigned through the Account Administrator tool and therefore this page does not display Award PIs.
- The **Award PI & Faculty Roles** page allows you to prompt on an individual employee and view any assignments where they are the Award PI, the Project PI on a sponsored project, or Faculty on a non-sponsored project.
  - **NOTE:** Award PI is included here for reference, but is not entered in or managed by the Account Administrator tool.
- The **By Administration & Staff Roles** page allows you to prompt on an individual employee and view any assignments where they are the Chief Business Officer, Dean, Faculty Department Administrator, Staff Department Administrator, Staff, or RAS Administrator.

Account Administrator Roles By Chartfields Page

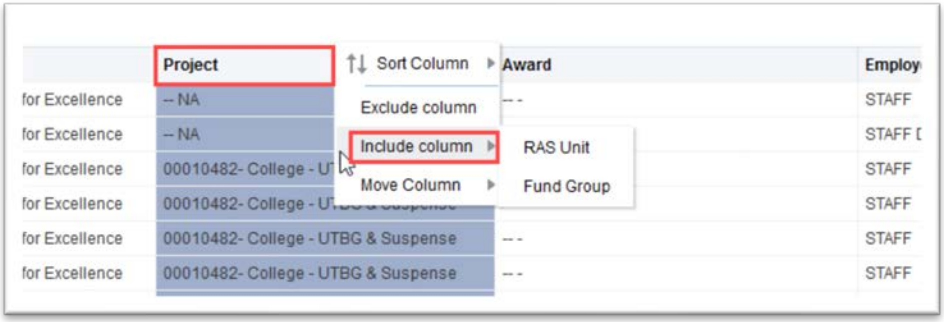
This is the default page and will automatically display all current assigned roles. The default table view includes Operating Unit, Department, Project, Award, Employee Role, and Employee ID & Name.

Operating Unit	Department	Project	Award	Employee Role	Employee Id & Name
10000- Emory College	830000- ECAS: Fund for Excellence	-- NA	-- -	STAFF	0434163- Weaver,Christopher Michael
10000- Emory College	830000- ECAS: Fund for Excellence	-- NA	-- -	STAFF DEPARTMENT ADMINISTRATOR	0439171- OKeefe,Kevin
10000- Emory College	830000- ECAS: Fund for Excellence	00010482- College - UTBG & Suspense	-- -	STAFF	0354032- Parra Zuna,Sonia
10000- Emory College	830000- ECAS: Fund for Excellence	00010482- College - UTBG & Suspense	-- -	STAFF	0393275- Bryan-Powell,Shondra L
10000- Emory College	830000- ECAS: Fund for Excellence	00010482- College - UTBG & Suspense	-- -	STAFF	0406862- Dumas,Sabrina Renette
10000- Emory College	830000- ECAS: Fund for Excellence	00010482- College - UTBG & Suspense	-- -	STAFF	0408803- Gaines,Geraldine Judy
10000- Emory College	830000- ECAS: Fund for Excellence	00010482- College - UTBG & Suspense	-- -	STAFF	0434163- Weaver,Christopher Michael
10000- Emory College	830000- ECAS: Fund for Excellence	00010482- College - UTBG & Suspense	-- -	STAFF DEPARTMENT ADMINISTRATOR	0439171- OKeefe,Kevin
10000- Emory College	830000- ECAS: Fund for Excellence	00052931- Yr2: Bio IRCADA	000029569- IRACDA Fellowships in Research	RAS ADMINISTRATOR	0405405- Laguines,Chryssi
10000- Emory College	830000- ECAS: Fund for Excellence	00052931- Yr2: Bio IRCADA	000029569- IRACDA Fellowships in Research	STAFF	0434163- Weaver,Christopher Michael
10000- Emory College	830000- ECAS: Fund for Excellence	00052931- Yr2: Bio IRCADA	000029569- IRACDA Fellowships in Research	STAFF DEPARTMENT ADMINISTRATOR	0439171- OKeefe,Kevin

TIP: When an employee is assigned a role at the Operating Unit, this table will display all Departments, and Projects that roll up under that Operating Unit. Similarly, when an employee is assigned a role at the Department, this table will display all Projects that roll up under that Department.

Dashboard: Account Administrator Roles Reference

Additional columns are available to include in this table. Right click on any column header and navigate to Include Column to view these columns.

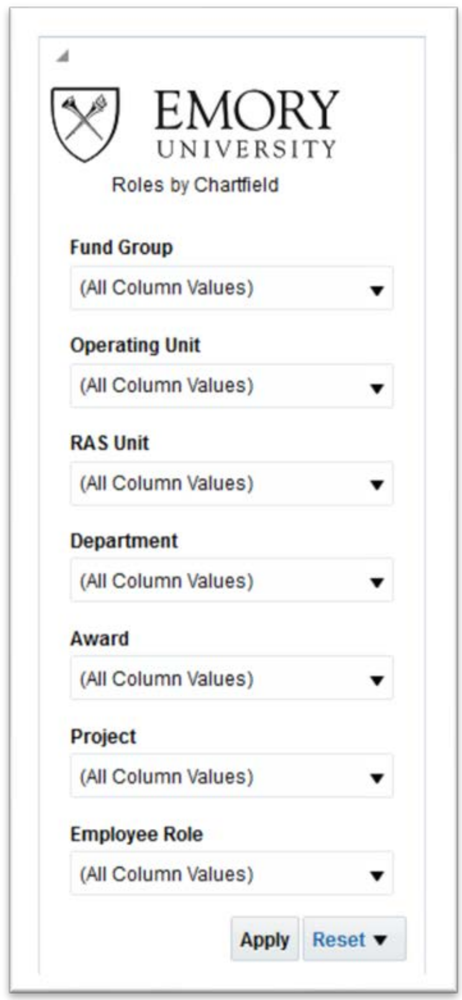


NOTE: When including or prompting on the RAS Unit, please note that the RAS Unit displayed is by the Project Department, not the Award Department.

Selecting Prompts

The results can be filtered by selecting Prompts. On this page, Prompt options include: Fund Group, Operating Unit, RAS Unit, Department, Award, Project, and Employee Role.

Remember to click **Apply** after selecting any Prompt values!



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Account Administrator Roles By Award PI & Faculty Roles Page

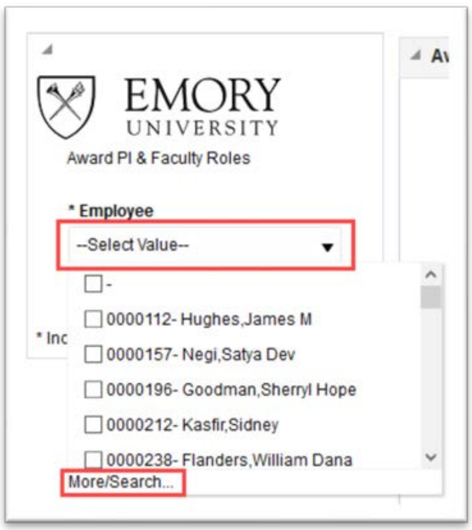
This page displays assignments for PI & Faculty specific roles. On this page, users can prompt on an individual employee to see all sponsored and non-sponsored projects where they are assigned as the Award PI, Project PI, or Faculty. Remember, the Award PI is not assigned through Account Administrator, but is displayed here to provide a full picture of any individual faculty portfolio.

TIP: The assignments on this page should correspond with the sponsored and non-sponsored projects that populate the Faculty Financial Summary dashboard and FORT for the prompted employee.

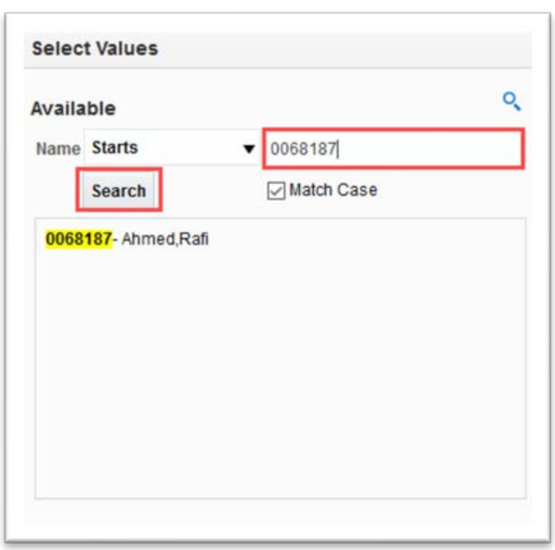
Selecting Prompts

Unlike the By Chartfields page, you must prompt on an Employee to see results.

1. Click on the dropdown menu under the word **Employee**, and click "More/Search…"



2. If you know the EMPLID of the employee you want to select, you can enter it in the **Name** field and click **Search**.



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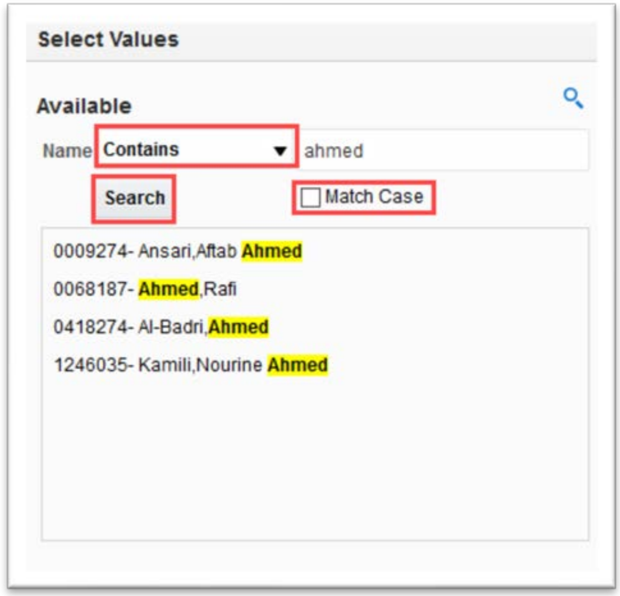
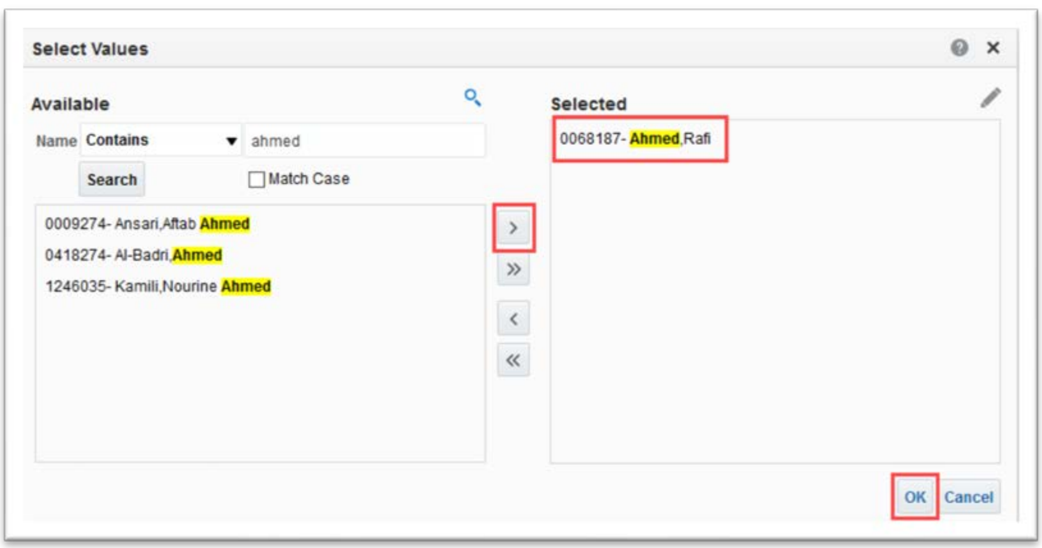
3. If you do not know the EMPLID, you can search by the employee's name.
   i. Click the dropdown menu next to the Name field and select **Contains**.
   ii. Uncheck the box next to **Match Case**.
   iii. Type the employee's first or last name in the **Name** field.

   TIP: Notice the format of the names is "Last,First" without a space. Due to this format, we recommend that you search only by Last OR First name, not both. Searching for both may not yield results. If you must search by both, use the same format as "Ahmed,Rafi"

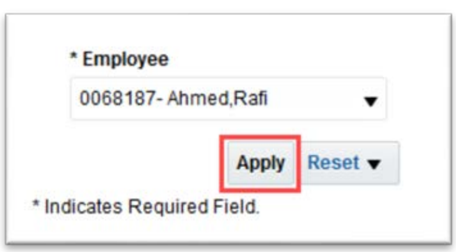
   iv. Click **Search**.



4. Once you have located the employee you wish to see assignments for, Select that employee by double clicking their EMPLID-Name, or by single clicking and using the arrow button to move the employee to the Selected box. Click **OK**.



5. Click **Apply**.



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Viewing the Award PI & Faculty Role Assignments

The assignments are split into three different sections: **Award PI Assignments, Project PI Assignments,** and **Non-Sponsored Project Faculty Assignments.**

If the prompted employee has not been assigned as the Award PI, Project PI, or Faculty on an award or project, you will see a message similar to the following:

Non-Sponsored Project Faculty Assignments

No prompt values selected or the Faculty role has not been assigned to the prompted employee(s).
Refresh

- The **Award PI Assignments** section lists all awards where the employee is identified as the Principal Investigator. This data is not through the Account Administrator tool. The default table includes columns for the **Award Principal Investigator, Award,** and **Project**.

  NOTE: This section only displays active awards, meaning if the award end date has passed it will no longer populate in this table.

Award PI Assignments

Award Principal Investigator	Award	Project
0068187- Ahmed,Rafi	0000027191- Dengue Virus Infection in Indi	00040124- Dengue Virus Infection in Indi
		00040125- Dengue Virus Infection in Indi
		00040126- Dengue Virus Infection in Indi
		00040127- Dengue Virus Infection in Indi
		00040128- Dengue Virus Infection in Indi

- The **Project PI Assignments** section lists all **Sponsored Projects** where the employee has been identified as the Project PI. Project PI assignments are entered via the Account Administrator tool by RAS. The default table includes columns for the **Employee ID & Name, Employee Role,** and the **Project**, with the option to include the **Award** column.

  NOTE: If the faculty member is the Award PI on an award, they should NOT be listed as the Project PI for any projects related to that award.

Project PI Assignments

Employee Id & Name	Employee Role	Project
0068187- Ahmed,Rafi	PROJECT PI	00020154- Micro Programming innate immun
		00036683- Targeting PD-1 Pathway for Fun
		00043234- PROJECT 2: Microbiology Dept.
		00051554- YR 5 Project 3 SOM M&I
		00051728- AHMED: B and T Cell Biology
		00058140- Project 4-Ahmed-Option 2 (Year
		00059126- Y2 PROJECT 2: MICROBIOLOGY DEP

- The **Non-Sponsored Project Faculty Assignments** section lists all **Non-Sponsored Projects** where the employee has been identified as the Faculty responsible for that project. Faculty assignments are entered via the Account Administrator tool by designated staff in schools/units. The default table includes columns for the **Employee ID & Name, Employee Role,** and the **Project**.

Non-Sponsored Project Faculty Assignments

Employee Id & Name	Employee Role	Project
0068187- Ahmed,Rafi	FACULTY	00020765- Kaja ICGEB Start up Funds
		00036991- CH Candler Prof Rafi Ahmed
		00056585- SaLaD - Ahmed
		00077248- Ahmed Support
		00077249- Ahmed Support WF
		D2449400- DR RAFI AHMED SUPPORT ACCOUNT
		D2546100- Ahmed Interim Funds

Account Administrator Roles By Administration & Staff Roles Page

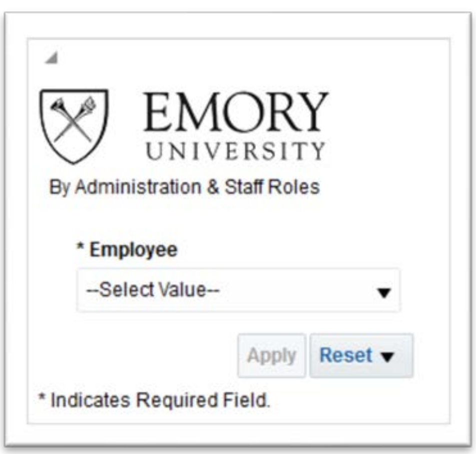
This page displays assignments for Administration & Staff specific roles. On this page, users can prompt on an individual employee to see Operating Units, Departments, or Projects where they are assigned as the Chief Business Officer, Dean, Faculty Department Administrator, Staff Department Administrator, Staff, or RAS Administrator.

Selecting Prompts

Similar to the Award PI & Faculty Roles page, you must prompt on an Employee to see results.

Please see the Selecting Prompts section for the Award PI & Faculty Roles page for tips on how to search for and select Employees, pages 4-5 of this job aid.

Once you have selected the Employee(s) you wish to prompt on, click **Apply**.



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Viewing the Administration & Staff Role Assignments

The assignments are split into four different sections: **Chief Business Officer & Dean Assignments, Faculty Department Administrator Assignments, Staff Department Administrator & Staff Assignments,** and **RAS Administrator Assignments.**

If the prompted employee has not been assigned as the Chief Business Officer, Dean, Faculty Department Administrator, Staff Department Administrator, Staff, or RAS Administrator, you will see a message similar to the following in the relevant section:

RAS Administrator Assignments

No prompt values selected or the RAS Administrator role has not been assigned to the prompted employee(s).
Refresh

- The **Chief Business Officer & Dean Assignments** section lists all Operating Units where the employee is identified as the Chief Business Officer or Dean. The default table includes columns for the **Employee ID & Name, Employee Role,** and **Operating Unit. Department** and **Project** are available as excluded columns.

Chief Business Officer & Dean Assignments

Employee Id & Name	Employee Role	Operating Unit
0132973- Smith,Andrew W	CHIEF BUSINESS OFFICER	10000- Emory College
		60000- President

Refresh - Print - Export

- The **Faculty Department Administrator Assignments** section lists all Departments where the employee is identified as the Faculty Department Administrator. The default table includes columns for the **Employee ID & Name, Employee Role,** and **Department. Operating Unit** and **Project** are available as excluded columns.

Faculty Department Administrator Assignments

Employee Id & Name	Employee Role	Department
0003143- Sunderam,Vaidyalingam S	FACULTY DEPARTMENT ADMIN	831020- ECAS: Math & Computer Science
		831050- ECAS: Computer Science

Refresh - Print - Export

- The **Staff Department Administrator & Staff Assignments** section lists all Departments and Projects where the employee is identified as the Staff Department Administrator or Staff. The default table includes columns for the **Employee ID & Name, Employee Role, Department,** and **Project. Operating Unit** and **Project** are available as excluded columns.

Staff Department Administrator & Staff Assignments

Employee Id & Name	Employee Role	Department	Project
0378256- Benton,Carisa	STAFF	873021- GBS: LEAD Week	-- NA
			00010616- GBS - UTBG & Suspense
			00013612- INTERNATIONAL MODULE G
			00013614- INTERNATIONAL MODULE H
		873080- GBS: General Scholarships	-- NA
			00010616- GBS - UTBG & Suspense
			00027054- Camp Veteran?s Scholarship Fnd

- The **RAS Administrator Assignments** section lists all Projects where the employee is identified as the RAS Administrator. The default table includes columns for the **Employee ID & Name, Employee Role, Award,** and **Project. Operating Unit, Department,** and **RAS Unit** are available as excluded columns.

  NOTE: The Award column is included for reference only, as Account Administrator assignments are not made at the Award level.

RAS Administrator Assignments

Employee Id & Name	Employee Role	Award	Project
0405405- Laguines,Chryssi	RAS ADMINISTRATOR	0000055740- A Methodological Approach to M	00092074- A Methodological Approach to M
0405405- Laguines,Chryssi	RAS ADMINISTRATOR	0000055697- Experimental Philanthropy Lab	00091834- Experimental Philanthropy Lab
0405405- Laguines,Chryssi	RAS ADMINISTRATOR	0000055503- Frontier Probability Days 2020	00091531- Frontier Probability Days 2020
0405405- Laguines,Chryssi	RAS ADMINISTRATOR	0000055402- Advancing Novel Formulations a	00091304- Advancing Novel Formulations a
0405405- Laguines,Chryssi	RAS ADMINISTRATOR	0000055212- Skepticism and Open-mindedness	00090996- Skepticism and Open-mindedness
0405405- Laguines,Chryssi	RAS ADMINISTRATOR	0000055110- Start ME Accelerator Program	00090796- Start ME Accelerator Program

NOTE: When including the RAS Unit column, please note that the RAS Unit displayed is by the Project Department, not the Award Department.

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More Information:

For questions about the Account Administrator tool in Compass, please see the below job aids or contact the Compass Support team via the **Finance Support Center**. Choose **Compass** as your ticket category and **Grants Management Suite** as your Sub Category.

- How do I View Account Administrator Assignments in Compass?
- How do I Perform a Mass Add or Change to Account Administrator Assignments?
- How do I Run Compass Reports for Account Administrator Assignments?

For questions about using the Account Administrator Roles Reference dashboard, contact the Analytics & Reporting team via the **Finance Support Center**. Choose **Emory Business Intelligence (EBI)/Reporting** as your ticket category.