Welcome

- Communicate the improvements to the AP Online Payment Request
- View the agenda
- The presentation is scheduled for 45 minutes
- Additional 15 minutes for questions
Webinar

- Turn on audio through PC/Laptop/iPad or Tablet/Mobile Device
- Communicate with us through:
  - CHAT feature – continual
- Use status options (dropdown) for short responses
- Delays might be present due to wireless connections
- Be prepared for periodic knowledge checks
- No need to change any settings
- Sit back and enjoy!
Presenters

- David Thurston -- Assoc VP, Financial Operations
- Amy DeMore -- Supervisor Customer Service
- Barry Flink -- Training Mgr, Financial Systems
- Margaret Stevens & Brenda Norris – Accounts Payable Specialists
Thanks to the Team

- Functional Team
  - Jennifer Hulsey, Ann Uher, Joy Coburn, Haniya Vaid, Amy DeMore, Charles Walker, Barry Flink

- Technical Team
  - Joann Dodson, David Miller, Carol King, David Overby
# Introductions -- Pilot Test Team

<table>
<thead>
<tr>
<th>Name</th>
<th>Affiliation</th>
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<tbody>
<tr>
<td>Sharon Olson</td>
<td>School Of Medicine</td>
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<tr>
<td>Deanna Walker</td>
<td>School Of Medicine</td>
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<tr>
<td>Phyllis Peninger</td>
<td>School Of Public Health</td>
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<tr>
<td>Barry Brighton</td>
<td>Emory College</td>
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<td>Gene Murphy</td>
<td>Emory College</td>
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<tr>
<td>Tascha Short</td>
<td>Payment Services</td>
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<td>Margaret Stevens</td>
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<td>Brenda Norris</td>
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<td>Carmen Mosley</td>
<td>Payment Services</td>
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From the desk of the Project Sponsor

- We listened to campus requirements
- Acted upon feedback
- Campus impact
- Team effort
- Delivered on time – Go-Live June 17
Project Background
The Business Case

- Changes consistent with Expenses Process
- Minimize lost documentation
- Streamline workflow
- Expanded messaging
- Expanded inquiry capacity
Improvements to AP Online Request Process

- Green Project
  - Attach > Upload
  - Reduce copy and printing – Overall
  - Decrease paper flow
- Adoption of industry best practices
- Page level changes
  - Attachment capabilities
  - Vendor look-up
Improvements to AP Online Request Process, cont.

- **Streamline Workflow**
  - Departments initiate approval
  - From Expense Improvements in March 2011
- **Enhanced Communications**
  - Messaging up front
  - Messaging in body of application
  - Messaging for approvers
- **Voucher and Payment Inquiries**

* University Only
Improvements to Remember

- Upload and attach documents
- Workflow begins with departments
- Improved Vendor Search
- Go-Live is June 17
The Process

- Pre-work
- Accounts Payable > vouchers > Add/Update > Regular Entry > Add
- Vendor look up > Create as necessary (NO save)
- Payment details
- Save
- Attachments
  - Invoice
  - Tax and Banking
- Submit to workflow
- Approver experience
Let’s Take a Look

[Image of a Compass software interface with fields for invoice number, total, vendor, name, location, address, payment handling, expenses to be paid, message, and payment to or on behalf of a Foreign National]

Finance Division
Additional Resources

Camelia Petty

Kimberly Gordon

Damian Alston

Finance Division

Customer Care Team
- Procurement
- Payments
- Travel and Expense
- 404-727-5400
- (M-F, 8:30-5:00)
- actspay@emory.edu

Website:
- www.finance.emory.edu

Online Reference Guide:
- www.compass.emory.edu
Concluding Remarks

- We appreciate your time
- Concludes discussions about the June 2011 AP Online Payment Request
- Remember the date – June 17, 2011