

To: Business Managers (Central and Medical)
From: Scott Lucker, Associate Director of Electronic Commerce
Re: EMS enhancements update

We write to provide you with an update on our progress making enhancements to the EMS solution. Based on helpful input from the EMS Advisory Committee, over the past several months the EMS Team has completed several key enhancements to the EMS solution.

What new and recent enhancements have been delivered?

- **NEW! The certification statement will move to the top of [A] Approval Email** (effective June 20th)
- **NEW! To add/change an EMS assistant, please contact the ITS Help Desk** at 785-3200, 432-9000 or helpdesk@yale.edu. (effective June 9th)
- Provided full visibility into all reimbursable expenditure type names for Mixed T&E reports
- New functionality now available to regenerate lost payee approval emails
- Enhanced information on data warehouse financial reports including Preparer, Out-of-pocket merchant, item comment/itinerary
- Improved front page layout and organization

What additional enhancements are being actively considered? (these will likely happen)

- Sponsored Research Workflow
 - Automatically route reports the GCFA for foreign travel expenses charged to sponsored awards.
- Cost Center Driven Workflow
 - Automatic workflow of expense reports to EMS approvers based on organization number.
- New Fax Number Hosted by Yale
 - Fax number for receipt submission will be changing to a Yale number.
 - Currently in pilot phase. Onsite assistance will be available for conversion of fax machine presets

What other enhancements have requested... (these may or may not happen)

- Currency Converter Exception Calculation
 - Recalculate error message to include dollar amount of exchange rate variance. Do not apply exception to Pcard charges, already converted by bank
- Email Notification to Division Approvers of New and Terminated Accounts
 - Automatically generate email to Division Approvers when EMS accounts are setup and terminated.
- Improve Visibility of EMS Workflow Hierarchy
 - Allow more visibility to Departmental workflow and allow other departments to view Division Approver list for passing reports.