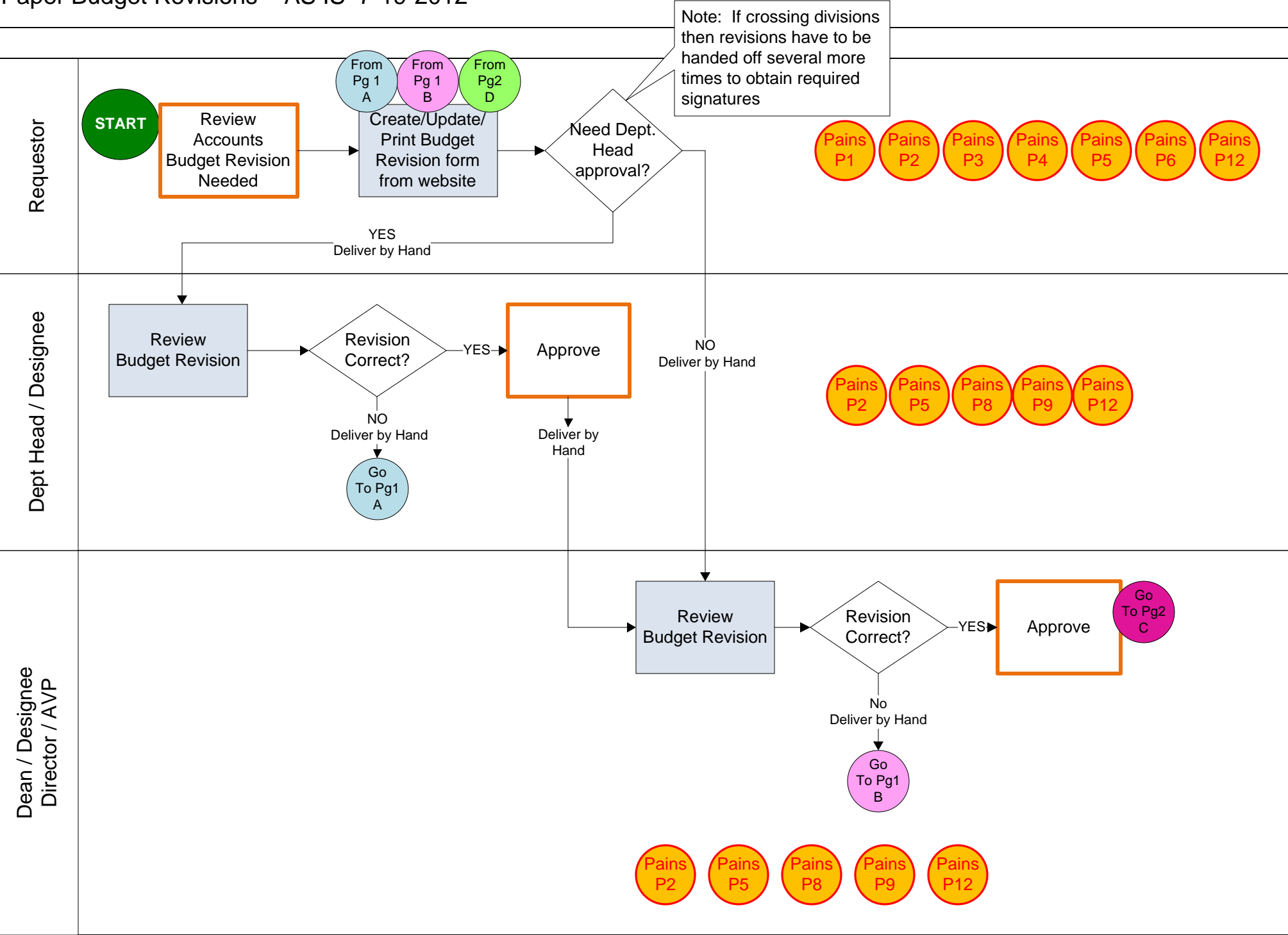
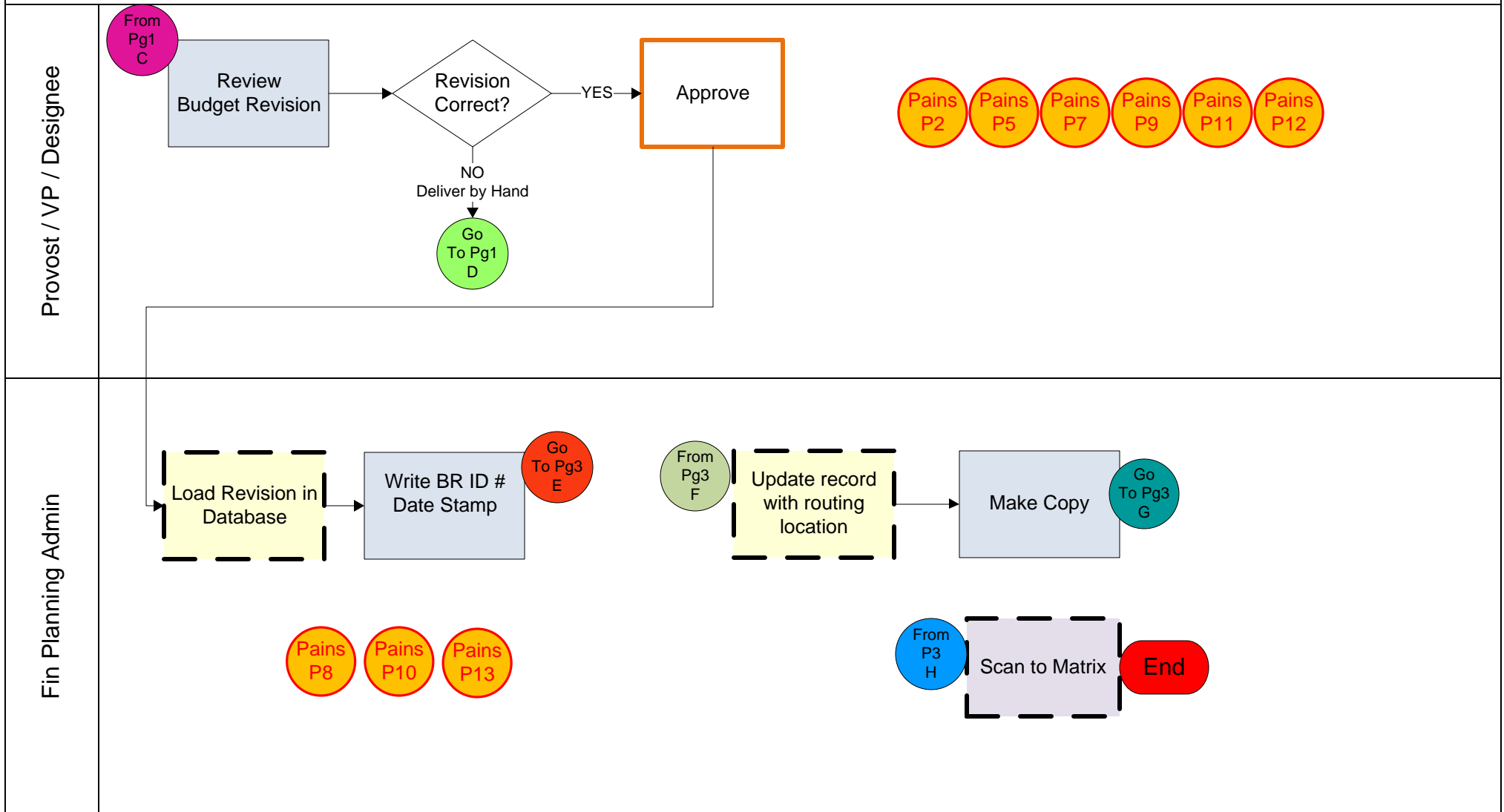


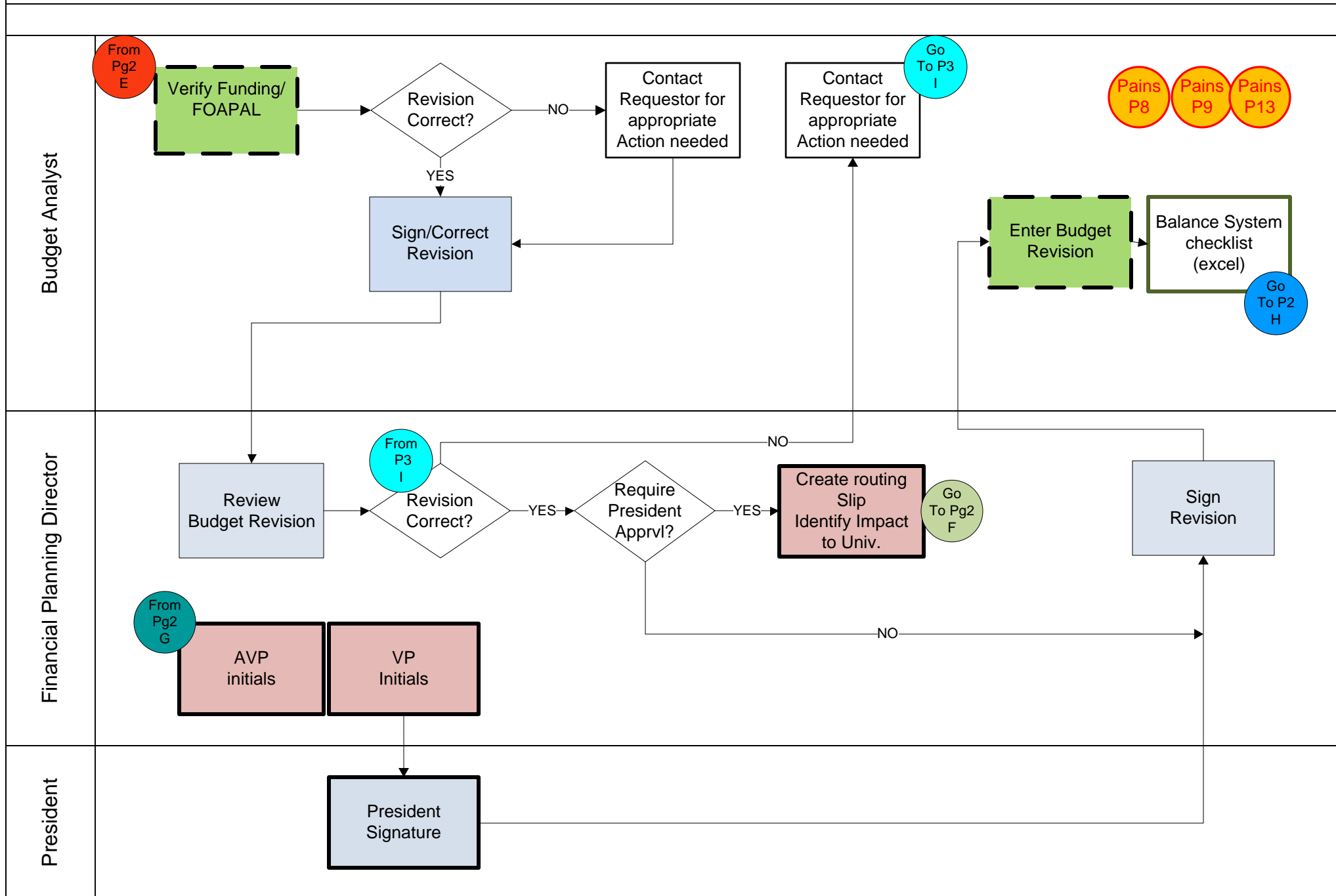
Paper Budget Revisions – AS IS 7-19-2012



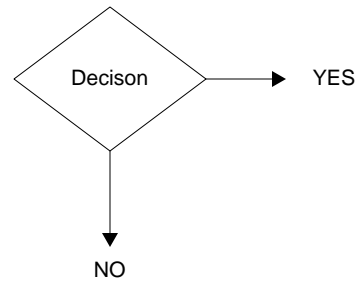
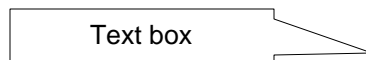
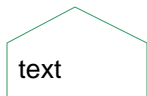
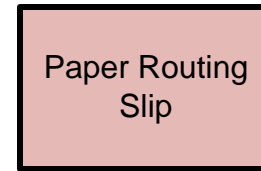
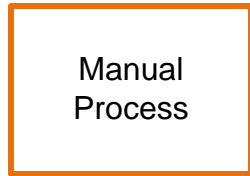
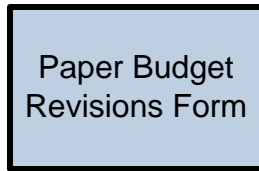
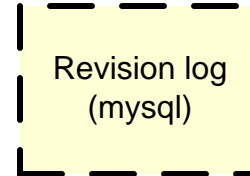
Paper Budget Revisions – AS IS 7-19-2012



Paper Budget Revisions – AS IS Final 7-19-2012



Legends



Pains & Issues:

Please Read First:

The issues and pain points identified during the As Is Process Mapping workshop and the Analysis workshop are noted below. The Issue is numbered and its Root Cause Analysis is in red text, preceded by **RCA** prefix.

1. Determine which Budget Revision Form to use

RCA: Forms are not easily identifiable, unaware of training opportunities available, lack of accountability

2. Budget Revision form is paper

RCA: Not all budget revisions types are set up to be processed in Banner Self Service

3. Current year reversal – understanding timing

RCA: Training not be taken advantage of

4. Departments don't know where the paper form is located during the process

RCA: There isn't a tracking system in place for campus users

5. Manual Signatures are acquired by walking form through process

RCA: Aren't using an online form to acquire electronic signatures, approvers aren't available

6. Unaware of Financial Planning training sessions

RCA: Communication to all levels missing, emails with links are not read, lack of accountability

7. People create paper budget revisions when they could use Banner Self-Service form process

RCA: Accountability, training and limitations of Banner form to 5 transaction lines

8. Financial Planning tracking outstanding revisions that have been returned to the departments

RCA: Manual process

9. Incomplete / Inaccurate Submissions

RCA: Training and accountability

10. Financial planning admin makes copy of first page of revision before returning for corrections for tracking

RCA: There isn't an electronic form/database

Pain and Issues cont'

11. All Paper Revisions require Provost/ VP signature

RCA: TBR Policy 4:01:00:00 Budget Control <http://www.tbr.edu/policies/default.aspx?id=1026>

12. Lack of security access limits departments ability to create transfers between orgs/depts.

RCA: Departments don't know they only need to make access request

13. Occasionally form is returned for missing signatures

RCA: Signature verification is preformed