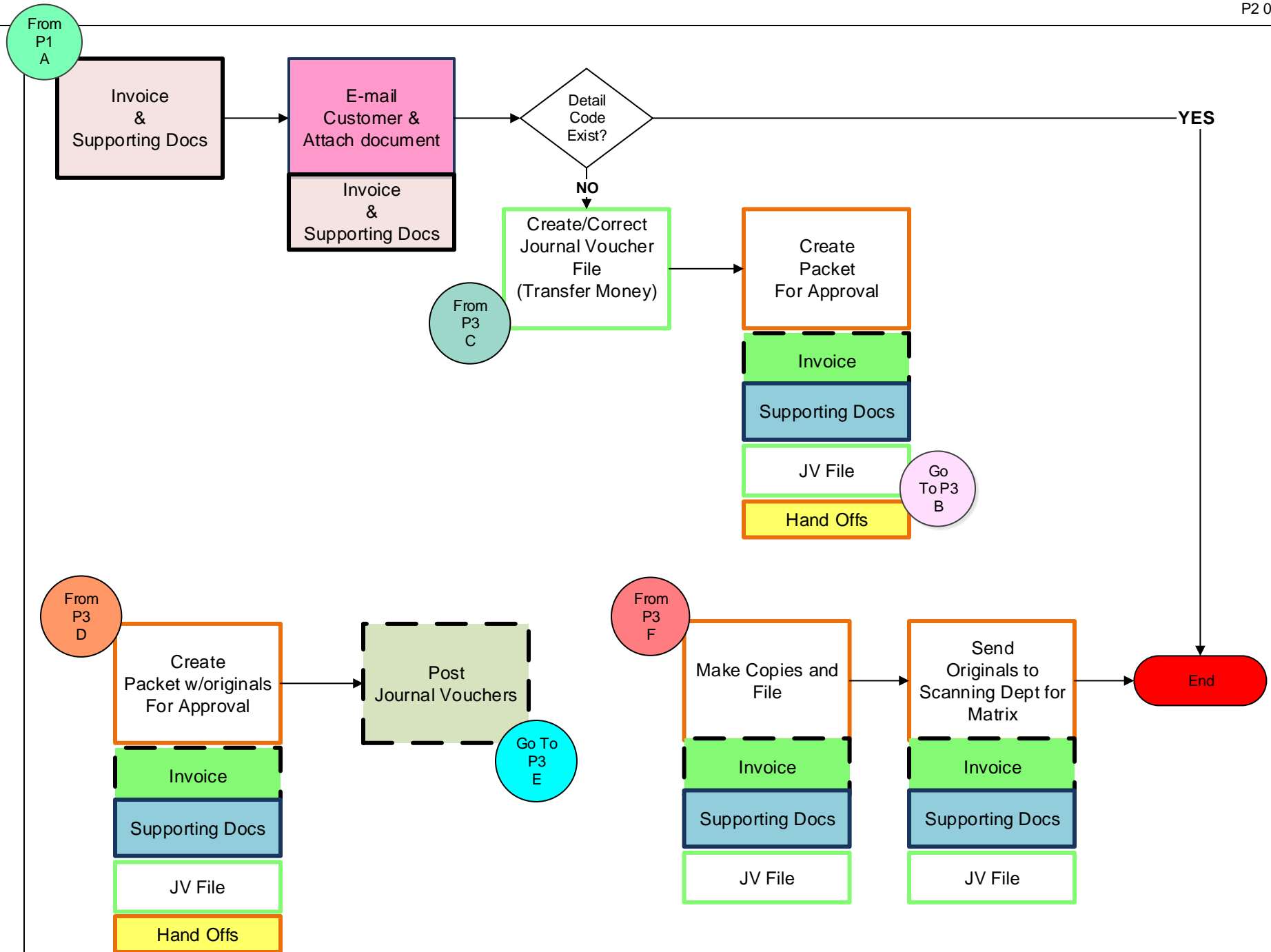
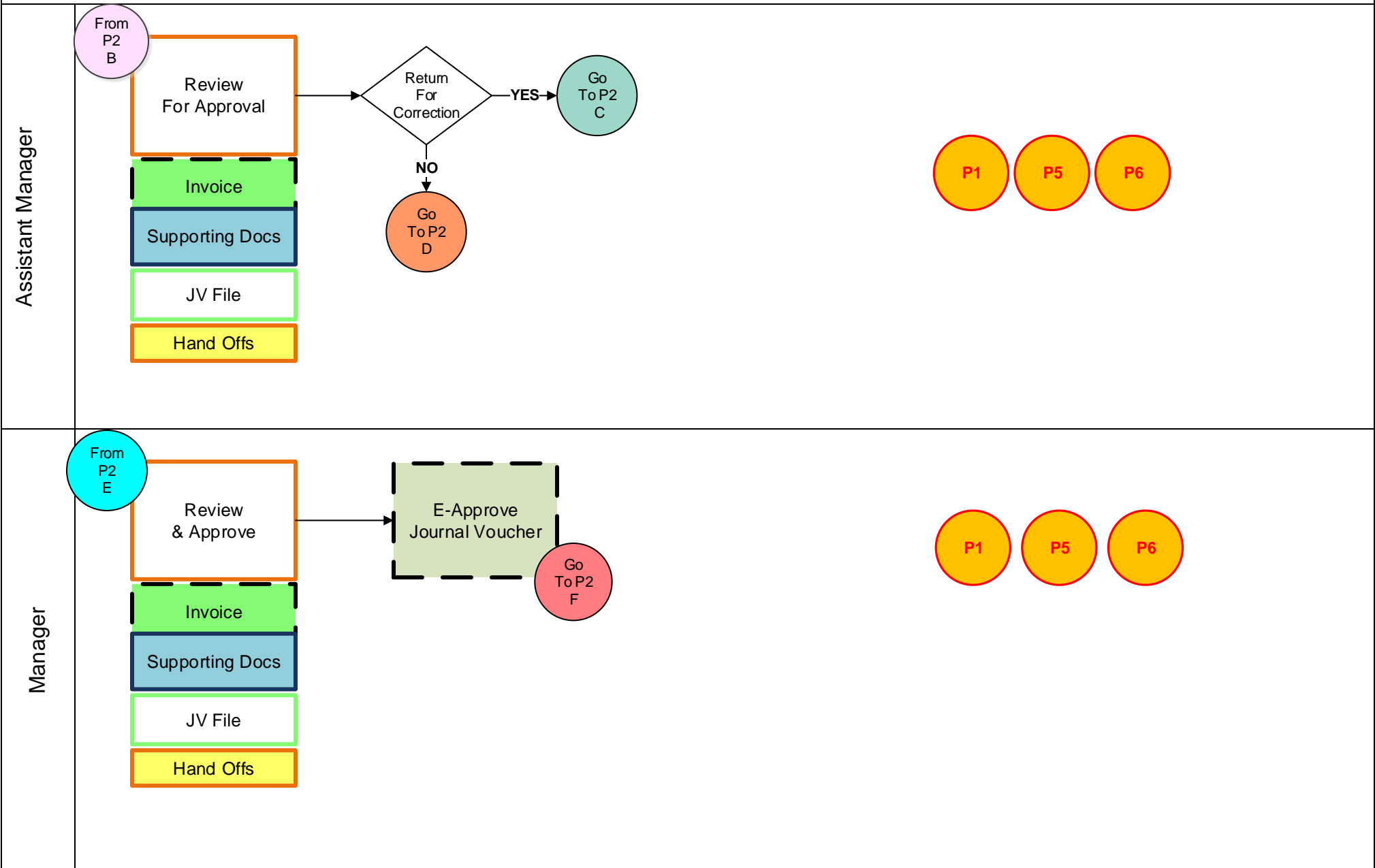


Bursar Acct Clerk (cont)





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. Several Hand offs.

**RCA: Paper process.**

2. Manual creation of journal voucher using excel.

**RCA: Process is paper format.**

3. Manual creation of invoices using excel template.

**RCA: Electronic/automated process not used.**

4. Scanning of documents to create PDF to mail to customers.

**RCA: Electronic administrative system used.**

5. Duplication of effort, Assistant Manager and Manager reviewing documents.

**RCA: Processes been in existence over 10 years.**

6. Paper Process.

**RCA: Banner AR Non-Student billing module has been reviewed for implementation.**

7. Tiger Graphic and Food Vending send transactions in excel format for data entry.

**RCA: Automated process has not been created to load records into Banner.**

8. Duplication copying documents to file that are stored in Matrix.

**RCA: Bursar Acct Clerk does not have access to Matrix to view or update documents.**

## Analysis of the 'AS IS' process

1. Are all roles essential? **No**
2. What is the number of hand-offs? **3**
3. Are any steps automated? **No**
4. Iterations (how many times is process repeated in a timeframe)? **Daily**
5. What tasks consume the greatest amount of time? **Creating invoices and data entry**
6. Does the task add value?
7. What steps can be eliminated or automated? **Automate uploading transactions from Tiger Graphic and Food Vending (BuzHub system). Eliminate Manager approval role by requesting Assistant Manager Banner as a designee to approve JV in Banner. Create a new online Invoice request form that will auto route to financial designee, eliminating manual look-up process. Evaluate Banner AR Non-student billing module.**
8. What steps should be added? **Add Financial Manager electronic approval process**
9. Percentage of errors (forms returned, corrected, contacted person for corrections, etc.)
10. % FTE and/or estimate time per semester: JV monthly total=**12** Departmental invoices=**58** Third-Party Invoices=**193**  
Departmental Originator completing paper invoice request: **15 min**  
Bursar Clerk:  $12 * 55 \text{ minutes} = \mathbf{11 \text{ hours}}$  |  $193 + 58(251) * 30 \text{ min} = \mathbf{125.5 \text{ hours}}$   
Assistant Manager:  $12 \text{ JV to approve} * 10 \text{ minutes} = \mathbf{2 \text{ hours}}$   
Manager:  $12 \text{ JV to e-approve} * 15 \text{ minutes} = \mathbf{3 \text{ hours}}$   
**Measurable outcomes time savings: 141.5 hours and time to create online a invoice request form**

# Legends

