Deactivate Financial Org – ‘AS IS’

Deactivate Steps:
1. NTRRQUE – remove all users
2. FTMAPPQ – Fin Approve ques (12 for ea org)
3. FTMORGN – Org maint – deactivate org
4. Program Guides – validate users are gone
5. FOMUSOR – deactivate the users associated with the org code
6. PSAORGN – deactivate ea user
7. Banner reports FGRORHG – run next day after updates and validate changes
Deactivate Financial Org – ‘AS IS’

Financial Planning

- Review
- Hand Off
- E-Mail Updates
- Go To P1 B

From Pg1 A

Financial Reporting

- Review
- Hand Off
- E-Mail Updates
- Go To P1 D

From P1 C

Grants Accounting

- Review
- Hand Off
- E-Mail Updates
- Go To P1 F

From P1 E

P2 Jun 7, 2016
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. Campus users were not aware process was being implemented.
   RCA: There wasn’t a communication plan developed.

2. Indexes could not be inactivated since ORG HAD been inactivated.
   RCA: Indexes should have been inactivated prior to the ORG inactivation.

3. Process was labor intense.
   RCA: Manual process lack of automation.

4. Too many handoffs.
   RCA: Manual process and lack of automation.

5. Report generated needed additional information.
   RCA: Additional specifications were needed, Minimum effective date, Max change date and timekeeping orgs.

6. Time leave orgs deactivated were actively being used, pain for HR Records.
   RCA: Report did not identify orgs that were used only for timesheet reporting, not associated with labor account.
Analysis of the ‘AS IS’ process

1. Are all roles essential? Yes

2. What is the number of hand-offs? 8

3. Are any steps automated? No

4. What steps can be eliminated or automated? Create process to create the report and automatically burst and emailed to the appropriate offices and LDAP groups.

5. What tasks consume the greatest amount of time? Review the report and deactivating orgs in Banner

6. Does each task add value? Yes

7. What steps should be added? Deactivate the Indexes prior to inactivating the Orgs, add HR Records as part of the review and send final report to Business Officers and Research Support Services.

8. Iterations (how many times is process repeated in a timeframe)? Annually (February)

9. Percentage of errors (forms returned, corrected, contacted person for corrections, etc.) less than 1%

10. % FTE and/or estimate time takes for each key role in the process. Total: 183 hours
- EAS – 175 orgs, 1 hour per org for all steps = 175 hours
  - Create report and distribute to appropriate reviewers = 1 hour
- Financial Planning = 2 hours
- Financial Reporting = 4 hours
- Grants = 1 hour

11. Metrics – identify measurable outcomes What do we expect to save (time, manual steps, paper, unnecessary reviews & approvals). Save time, manual steps, unnecessary communications and required certifications and training and eliminate maintenance of approval queues, etc.
Note: On revisions some departments do not send form back to faculty for signature.

Penultimate Semester: Contact faculty advisor for names of honors students.

Rejected contracts may go to either rep for re-processing.

Consider for Phase 2 implementation - Put on hold if waiting on Confirmation of final semester enrollment.