

284 different items

- 13 Communication
- 73 Training
- 71 Reporting
- 127 Process/Other

Major requests in each area

- Communication: centralized area of communication  
single mechanism to communicate  
weekly newsletter with updates/changes  
proactive notification of policy/procedure changes
- Training: Generating documents  
What is required for backup  
Not only the mechanics of how to generate document, but how to apply policies/procedures  
Finance data dictionary for query/report writers  
How to reconcile an index  
EPAF/PZAREDS
- Reports Labor reports
- Processes SPQ  
Pcard  
How to hire someone (what to do, which forms to fill out, how to pay them)  
Grant closeout process

Overall most requested items:

- Streamline SPQ process
- Streamline Pcard process (from scheduled training to process to communication styles)
- Enhance payroll reporting
- Consolidate HSC/Main campus reports
- Single dashboard for majority of needed reports was received well and thought to be helpful (also mentioned in 10/2006 survey)
- "Metadata" aka overall information about:
  - Training available, for which security role
  - Reports available, what to do to get them, where located, extended descriptions
- Request for a "Finance Academy" that puts newly hired employees through an orientation process
  - Policies/procedures governing Finance transactions
  - How to apply those procedures to generating transactions
  - Which departments to contact, for what, which dept governs which process
  - How to reconcile an index
  - How to generate a report, where to go for which report
- Clear and consistent communication "single version of the truth" from core offices

Area Responsible	Category	Subcategory	Description	
FSSC	Overall		One website to communicate policy, standard procedures, and changes to both	
FSSC	Overall		Strong need for centralized website of information, no time to "web site shop"	
FSSC	Overall		Miss the "Brown Bag" lunch meetings that had different topics each month for networking and discussion	
FSSC	Overall		More frequent updates of Central Accounting websites.	
FSSC	Overall		Notification of new policies and when they become effective (i.e. cell phone usage)	
FSSC	Overall		Need a weekly message giving links to where new(that week's) information is located.	
FSSC	Overall		Need for consistent communication regarding financial services and departments	
FSSC	Policy changes		Centralized website tracking changes to processes/updates with respect to Banner Finance, HRPR, Budget, Student, etc.	
FSSC	Forms		<b>Suggestions to consolidate all forms for Finance transaction processing to employee tab of my.unm.edu or link to them (money list, hiring documents)</b>	
FSSC	Forms		suggestion to clearly state which department maintains which Finance transaction processing form	
FSSC	Overall		single mechanism to communicate (one website, weekly newsletters, linkalerts with history lookup capabilities)	
FSSC	Pcard		tone of infraction emails could be more customer friendly for quick resolution	
FSSC	Overall		Consistent communicataion on processes We need SOPs known by both departments and Financial Services. Ie: food purchases, calculating F&A, allocating copy charges	
FSSC	Labor reports	FSH0001 - all	Fringe benefits:Legacy posted these correctly; now they are posted as "undefined".	Training issue, prepare fastinfo communication
FSSC	Labor reports	FSH0002	Clarification on difference between effective and start dates	Training issue, prepare fastinfo communication
FSSC	Labor reports	FSH0002	Effectiveness of presenting end dates? Clarification on helpfulness	Training issue, prepare fastinfo communication
FSSC	Communication	Overall	Broad overview of financial audit findings would be helpful so that depts would be prepared to accommodate changes as a result of these findings when guidance is provided.	
FSSC/FSM reportin	Communication	Listing of all reports available	Master listing of all reports available, all formats, with detailed descriptions and security roles required to see	
FSSC	Communication	Fiscal Agent	Clarification as to what "Fiscal Agent" means (responsible for financial activities vs. signature authority on bank account, etc)	Training issue, prepare fastinfo communication
FSSC	communication	for Faculty	Devise method of communication that Faculty/PI's will pay attention to (announcements on portal upon login?)	

Area Responsible	Category	Subcategory	Description
Banner Ops	Finance	Document processing and approvals	Standard expectations as to what supporting documentation is required for various documents
Banner Ops	Finance	Document processing and approvals	If document disapproved, please include policy #/fastinfo answer_ID with explanation as to why document was denied for future training purposes.
Banner Ops	Finance	Document processing and approvals	Standard turnaround times between department and core offices to help set expectations as to how long a document will be in the approval queue
Banner Ops	Finance	Document processing and approvals	Training for document initiators that address how to answer questions from the document approver.
Banner Ops	Finance	Document processing and approvals	Refresher course for Banner processes (initiating/approving documents)
Banner Ops	Finance	EPAF	CBT format for EPAF training not found to be very informative
Banner Ops	Finance	EPAF	Consistent communication as to EPAF processing requirements between training,handouts,and Fiscal Agent.
Banner Ops	Finance	Overall	Accounting 101 at UNM – basic accounting class for non-accountants
Banner Ops	Finance	Overall	Account definitions – listing/explanation of commonly used account codes at UNM with proper usage guidelines.
Banner Ops	Finance	Overall	Reconciling an index – exactly what this means, and very detailed guidance as to how to do it.
Banner Ops	Finance	Purchasing	When/why SPQ required?
Banner Ops	Finance	Purchasing	Overview of purchasing life cycle (requisition -> PO->receiving document->invoice->check)
Banner Ops	Finance	Purchasing	Communication with respect to when a receiving document is required or not.
Banner Ops	Finance	Purchasing	Lobomart – a link in/near login screen that provides an overview of how the process works as they are entering information into Lobomart.
Banner Ops	Finance	Purchasing - Pcard	Flowchart overview/step-by-step guide covering process to obtain a pcard
Banner Ops	Finance	Purchasing - Pcard	Training re: appropriate use of pcard v. purchase requisition
Banner Ops	Finance	Purchasing - Pcard	Consider necessity of pcard training each time a person changes departments
Banner Ops	Finance	Purchasing - Pcard	Fostering and maintaining communicative relationships with departments
Banner Ops	Finance	Research Accounting	Training on what are allowable/non-allowable expenses
Banner Ops	Finance	Research Accounting	Instead of training each department on pre/post award administration, develop an effective and centralized body of expertise within the core office to facilitate research on campus. Consistency of process and therefore more consistent results.
Banner Ops	Finance	Research Accounting	Assist PI's with budgeting their grants.
Banner Ops	Finance	Research Accounting	F&A: if F&A split between more than 1 organization, training on how to calculate and identify.
Banner Ops	Finance	Research Accounting	PI's: training with respect of how to look up their grants in Banner
EOD	Finance	Overall	Need both Main Campus/branch as well as HSC perspectives incorporated into Finance process training
EOD	Overall		Trainers should have enough practical experience to answer questions. Competency tests?
FSM Reporting		Finance Reporting	Finance data dictionary which tells developers what data is used for which purpose

Area Responsible	Category	Subcategory	Description
FSM Reporting		Finance Reporting	How to write queries/reports using UNM Finance data
FSM Reporting		Finance Reporting	Class designed to assist non-financial personnel read basic financial reports (PI/Faculty level)
FSSC	Finance	Document processing and approvals	Training with respect to which document serves which purpose (in general)
FSSC	Finance	Overall	What training is available pertaining to Finance from various sources (EOD, Continuing Ed, etc.)
FSSC	Finance	Overall	Policies, procedures, function of each Finance department, and what they expect of submitted documents for processing.
FSSC	Finance	Security	What training is required for various security roles (both department and core office)
HR-EOD	Overall	Format	Initial training is best when done in person, with workshop if applicable
HR-EOD	Overall	Format	Refreshers are best as CBT to serve as "reminders"
HR-EOD	Overall	Format	Periodic "brown bags" still desired as a way to network and share tips/tricks among peers.
HR-EOD	Overall	Format	In-person classes preferred overall as they give an opportunity to ask questions, network and share knowledge among peers.
HR-EOD	Overall		Need schedule for EOD training for > 1 quarter at a time for appropriate planning
HRPR	HRPR	Payment types	Training with respect to how to pay people (non-standard payment form, honorarium, etc), develop checklist to help determine payment method
ITS-database	Overall		Test database should include data that is more representative of "real data".

Area responsible	Type	Category	Subcategory	Description	Comments
FSM	Report	New	Salary Projection Report	Similar to FSE0004	
FSM	Report	Labor reports	FSH0001 - all	add benefits_earning code to payroll report, or have that as a option. Goal: break out overtime from other pay	
FSM	Report	Labor reports	FSH0001 - all	have "no grouping" variations of the report that remove the grouping by acct code so that labor/fringe will be presented on the same line	
FSM	Report	Labor reports	FSH0001 - all	add the % for fringe rate to all reports.	
FSM	Report	Labor reports	FSH0001 - all	Removal of the encumbrance column from all reports	Pending salary projections report
FSM	Report	Labor reports	FSH0001 - all	Displaying fringe separately from labor will take some getting used to. (It would be nice if fring was displayed underneath the person, so maybe if the report is run alphabetically this might alleviate part of the problem).	See if sort order can be changed to have fringe/labor by person for FSH0001 by index report
FSM	Report	Labor reports	FSH0001 - ee	Cuts off Banner ID in "by employee" report	
FSM	Report	Labor reports	FSH0001 - index	Preferred a scheduled/delivered hardcopy	Hyperion 8.5 job scheduler?
FSM	Report	Labor reports	FSH0001 - index	A separate line appears on the bottom of each table dated 12/27/07: salary and fringe aren't included on the line, and there is no pay or transaction code listed, it is not related to the date the report was run and is completely useless near as I can tell. This might require explanation because I would suspect it has to do with the Banner implementation.	investigate if report pulling from the T "no enc" table which would exclude this line
FSM	Report	Labor reports	FSH0001 - new	Request by hiring org, then group by index	
FSM	Report	Labor reports	FSH0001 - org	Run by level 5 org without the subgroupings	
FSM	Report	Labor reports	FSH0001 - org/ee	include internal/external indices for individuals when requested by org (too numerous to request individually by employee) equivalent to "outside distribution" checkbox previously available on HSC payroll report	
FSM	Report	New	Claim on Cash report	Need Claim on Cash Report for Clinical Trials	Received design specs, report in development
FSM	Report	Finance	F Index Lookup report	One page per index format not very useable, develop more readable format for multiple requests.	
FSM	Report	Production	F Index Lookup report	Include grant # if the index is tied to a restricted fund	
FSM	Report	Operating Ledger	Operating Ledger Detail	pcard holder to appear in op ledger detail report	in the final stages of testing, FSM reporting team working with Purchasing Dashboard allowing for inclusion/exclusion of various chart elements
FSM	Report	All	All	"Universal Dashboard" that covers all parameters that could be requested for a Finance report, use for all Finance reports	To be included with standardized reports working "Universal Dashboard"
FSM	Report	All	All	Consolidate Finance Production and HSC reports, with particular attention to the additional features available on the HSC reports (including the different report formats)	
FSM	Report	All	All	extended description of reports (E-print/Hyperion, etc)	
FSM	Report	All	All	master listing of all reports, locations,with definitions and snapshot examples (excerpts of first pages)	

Area responsible	Type	Category	Subcategory	Description	Comments
FSM	Report	All	All	Include some alternative sorting options on dashboard (transaction amount, index, etc)	Can be incorporated into specs for Universal Dashboard
FSM	Report	Labor reports	FSH0002	Sort by index	
FSM	Report	Labor reports	FSH0002	Payroll report to show how individual person is distributed. 4 digits in the % column.	expand column to show 4 digit %, format column currently a project, navigating security issues in e-print, as HRS data includes SSN#
FSM	Report	Labor reports	HRS data in eprint	HRS payroll data	
FSM	Report	New	Disapproved documents	Hyperion report listing out documents denied, retrievable by userid	
FSM	Report	New	Non Endowed Spending	Indicate the corpus fund that the spending account is attached to	
FSM	Report	New	FOXH004A	Restore FOXH004A, report B from HSC folder	
FSM	Report	New	Internal PR's	report that allows organization to maintain/manage internal purchase requisitions	dependency on mechanism to incorporate internal PR's into LoboMart/Banner
FSM	Report	New	Pcard reallocations/transactions available for reallocation	Hyperion report detailing pcard reallocations/transactions available for reallocation	
FSM	Report	New	Professional Liability > 01/2008	Professional Liability administered by 3rd from 1/2008 onward, how to determine by person PLI?	
FSM	Report	New	Research Accounting	One line item report for PI's that include functionality to include/exclude F&A, and also include/exclude revenue for their grants, start/end dates and remaining balance	
FSM	Report	New	Rolling average report	Three year rolling average by index/account code to assist in forecasting for the budgeting process	
FSM	Report	New	Security	Listing of who has access to what reports, and listing of what reports person does NOT have access to (so can know if there is a report they'd like access to, but need training for, etc.)	
FSM	Report	New	Student AR	Request financial information broken down by student for F docs feeding into Finance (course fees, etc.)	
FSM	Report	New	Variance report	Compares budget to actual expenditures on MTD, FYTD, ITD and project year to date bases for projecting and forecasting purposes	
FSM	Report	New	Chart element report	Hyperion report that enables user to request fund, org, program, account, activity using hierarchies and grouping options (org then index, org then fund, org then program, org then activity, etc.), and appropriate fund financial managers (fund, org)	
FSM	Report	Operating Ledger	FOH0001 & 2	summary at bottom that shows ending balance previous period, rev/exp current period, to show ending balance current period (MTD, FYTD options only )	
FSM	Report	Operating Ledger	FOH0001 & 2	ability to compare to previous fiscal year (part of consolidation, this is on the HSC version)	
FSM	Report	Operating Ledger	FOH0001 & 2	exclude balance forward from revenue section (included as part of consolidation as this is on the HSC version)	

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FSM	Report	Operating Ledger	Operating Ledger Detail	Op Ledger Detail report - subtotal by account type level 2	
FSM	Report	Operating Ledger	Operating Ledger Detail	provide page break between indexes on operating ledger detail report	
FSM	Report	Operating Ledger	Operating Ledger Detail	option to *not* have grouping by index on detail report, which would combine the information by account code for the requested elements. This removes need for user to combine the data manually, or use ad hoc query to pull this information out	
FSM	Report	Research Accounting	FRH0003 C&G Executive Summary	Include sort options such as by PI, grant end date and/or index. Display corresponding index with grant (?)	
FSM	Report	Research Accounting	FRRGITD	FROE'd indices be left off of FRRGITD reports	
FSM	Report	Research Accounting	Grant Ledger Detail	include award period and PI (fund financial manager) reports to show only current information (terminated/frozen indexes),omit information relating to FROE'd or terminated indices (grant ledger/op ledger detail report)	
FSM	Report	Research Accounting	Grant Ledger Detail	Option to disply *only* terminated funds	
HRIT	Report		New	A report showing all HR job suffixes is needed.	
HRIT	Report		PZAREDS	Repair e-print PZAREDS status report	
HRIT	Report		PZROEMA	Incorporate ability to export cleanly to excel	
HRIT	Report		PZRTNOT	Please sort payroll period in descending order so most recent shows first, would be very helpful!	
HRIT	Report		PZROEAE	Displays all ePAF transactions that have open errors. Includes information on: Originator, Employee, Routing Queue (Approvers), New Labor Distribution records. This shows all ePAF transactions from the last 30 days of report run date. This report is intended for use by department timekeepers and is grouped by Organization code and then sorted by employee.	Per fastinfo #3990,not yet assigned, request for this in production by Finance community
HRIT Telecom	Report		PZROEAT Telecom	more user friendly format of telecom bills	Per fastinfo #3990,not yet assigned, request for this in production by Finance community

Area Responsible	Category	Subcategory	Description
Banner Ops	Accounts Payable	DPI	Airline travel (bought well in advance to reduce cost), not having invoice # before DPI submitted, how to resolve?
Banner Ops	Approving Documents	Disapprovals	Would be helpful to streamline error correction process. Once a document is disapproved, correction/resubmission can result in a delay of several business days to obtain document approval.
Banner Ops	Approving Documents	Disapprovals	If a document disapproved for an error, can Financial Services communicate all the errors instead of one at a time?
Banner Ops	Approving Documents	Disapprovals	Would help departments be more efficient in document re-submission.
Banner Ops	Approving Documents	Disapprovals	When a document is denied, including the exact reason, including any Fast Info Number, would help departments be more efficient in document re-submission.
Banner Ops	Approving Documents	Disapprovals	appears to be a practice of disapproving all outstanding DPI's in core office queue at month end even if documentation on the way
Banner Ops	Approving Documents	Disapprovals	Request for Financial Services to track documentation more carefully as supporting documentation has been lost and resulted in disapproved documents.
Banner Ops	Approving Documents	Procedure	Consistency in how documents are approved, appears to vary depending on person.
Banner Ops	Approving Documents	Procedure	Need more efficient way of handling errors in documents from departments
Banner Ops	Approving Documents	Procedure	Request for a standard timeframe across Financial Services in which departments can expect their document to be approved/disapproved. If there is one, please communicate that to departments.
Banner Ops	Approving Documents	Procedure	Would be helpful if the possibility of accepting electronic signatures could be explored.
Banner Ops	Approving Documents	Procedure	Would be helpful to have Financial Services (both sides) adhere to standards of how long documents held prior to disapproving, type of supporting documentation required, what type of documents accepted (hardcopy, fax, scan)
Banner Ops	Financial Transactions (all)	Account Codes	Consistent communication in regards to which account code to use for which instance. (ex: copy rentals, etc.)
Banner Ops	Financial Transactions (all)	Communication	A master list of what forms to use and any changes is needed, for all processes.
Banner Ops	Financial Transactions (all)	Documents	Consistent standards of what is to go into the description line for documents
Banner Ops	Financial Transactions (all)	Forms	Can Fiscal Agent sign on some forms that would normally be signed by Dean/Director/Chair/PI?
Banner Ops	Financial Transactions (all)		Have consistent "look and feel" for all UNM forms required for processing Finance transactions.
Banner Ops	Foundation	Index titles	need the Index number in the title, since they still use FRS numbers.
Banner Ops	General	Websites	Please update out of date websites. Especially out of date forms.
Banner Ops	General	Xtender	For all documents being scanned, is private data (home address, cc#s, etc) being blacked out? If so, please communicate this.

Area Responsible	Category	Subcategory	Description
Banner Ops	General Accounting	Travel Reimbursement	Submitting receipts for travel being rejected by Financial Services due to the increased time to process them, though the per diem rate is higher. Is there a more efficient way to handle this? Please provide guidance
Banner Ops	General Accounting	Travel voucher/reimbursement	Is it possible to have a post-audit review under a certain threshold for more streamlined processing?
Banner Ops	General Accounting	Travel vouchers	mechanism to streamline backup documentation for travel vouchers (scan?)
Banner Ops	Payroll	Special Comp	Processes vary from Main Campus and HSC, and they have to deal with both. Request to standardize procedures or provide comprehensive training on both sets of guidelines.
Banner Ops	Payroll	Special Comp	Provide clear guidance on the process, including a step by step guide.
Banner Ops	Policy	Implementation	Request to not require departments to follow unfunded policy mandates (i.e. background checks which will cost ~50-75/person)
Banner Ops	Policy	Implementation	Premature enforcement of draft policy (i.e. cell phone usage), if policy draft, not active yet. Request to not enforce policy until it is no longer draft.
Banner Ops	Purchasing	Approval process	Can take 30 days to approve a PO, can this be streamlined?
Banner Ops	Purchasing	Pcard	request for SSN# if not being paid for a zero dollar dpi (i.e. plane ticket), this happens when a person is being brought in by the university. Should only require SSN for a taxable event
Banner Ops	Purchasing	P-Card	Reconsider procedure as applied to airline ticket purchases with a p-card. Currently, airline tickets (purchased in advance to reduce cost), considered an infraction if DPI# not present, though travel is not complete.
Banner Ops	Purchasing	P-Card	Can the reallocation window be extended beyond the 10 days?
Banner Ops	Purchasing	P-Card	Conflicting communication from Purchasing and Financial Services (both sides) regarding allowability of expense for one-time exceptions. Financial Services will approve according to one set of standards, Purchasing will disapprove using a different set of guidelines. Request to find a more accurate and efficient way to communicate allowability of an expense for p-card purposes.
Banner Ops	Purchasing	P-Card	Ability to obtain detail for what was charged (supporting documentation)
Banner Ops	Purchasing	P-Card	Reconsider procedure that even if approval obtained for special exception after the fact, it is still considered a violation.
Banner Ops	Purchasing	P-Card	Request to extend time period to turn in pcard log
Banner Ops	Purchasing	P-Card	Request to more carefully review business purpose, i.e. hot chocolate purchased for a demonstration not food, but item rejected as business purpose was overlooked

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Banner Ops	Purchasing	P-Card	Pcard expense - hotel, require special approval each time, can this be reviewed?
Banner Ops	Purchasing	P-Card	pcard violations are intimidating and not conducive to long term correction
Banner Ops	Purchasing	P-Card	Set schedules for P-card training so departments can plan.
Banner Ops	Purchasing	P-Card	Clear guidelines explaining how an employee can obtain a P-Card.
Banner Ops	Purchasing	P-Card	Find an easier way to trace JV's that were used to reallocate pcard purchases
Banner Ops	Purchasing	P-Card	Several comments requesting a shift in approach on the part of p-card personnel from "punitive" to "partnering" in smoothing out the purchasing process using p-card to the benefit of the University as a whole.
Banner Ops	Purchasing	PO	PO's set up as a standing order for pennies, cannot clear out.
Banner Ops	Purchasing	PO	Clear out insignificant PO's on a regular basis
Banner Ops	Purchasing	PO	PO's with balances < \$300 not roll forward from year to year.
Banner Ops	Purchasing	PO	Request to close out PO's with insignificant balances instead of rolling forward to new fiscal year.
Banner Ops	Purchasing	PO	Request to allow unrestricted index be frozen if PO was ever on it
Banner Ops	Purchasing	PO	Request for ability to sweep PO's with only pennies left on them in preparation for index termination
Banner Ops	Purchasing	SPQ	Reconder necessity of SPQ's for each non-USP transaction
Banner Ops	Purchasing	SPQ	Refine timing as to sending the SQP with the PO, too soon/too late for core office personnel.
Banner Ops	Purchasing	SPQ	SPQ process incredibly time consuming for both core offices and departments, streamline
Banner Ops	Purchasing	SPQ	can SPQ's be re-used for a certain period of time?
Banner Ops	Purchasing	SPQ	if SPQ is to be required each time, can the form be interactive and online?
Bursars	AR	LoboCash	Provide audit trail for transactions
Bursars	AR	LoboCash	Supporting documentation for charges hitting dept indices
			Provide clarification on when it is appropriate to change the predecessor for an organization code, and when it is appropriate to request a new index?
FSM	Chart of Accounts Maintenance	Procedure	
FSM	Chart of Accounts Maintenance	Request Process	Request to be able to request new org code through system
FSM	INB Banner	FRAREV	Ability to extract data from this form for staff at department level
FSM	Payroll	Annual/Cat Leave	Make available supporting documentation for annual/cat leave calculations that are loaded to department indices annually
FSM	Payroll	Annual/Cat Leave	Propose running annual/cat leave calculation/accruals more often than annually (semi-annually, quarterly)
FSM	Payroll	experiments	Economic experiments are pretty much impossible since we must require participants to submit their Social Security number to get paid. Is there another way?

Area Responsible	Category	Subcategory	Description
FSM	Security	Notifications	Please notify us when we have been given security. Alicia was not notified when she was given EPAF approver status; she just "appeared"
FSSC	Communication	FastInfo	communicate class that assists in using fastinfo to its fullest advantage (how to drill down parameters correctly to get more specific answers, etc)
FSSC	Communication	FastInfo	Improved search capabilities in fastinfo to yield more helpful results
FSSC	Communication	List Serves	Request to strive to target the appropriate audience with the correct communication.
FSSC	Communication	Process changes	changes in process, even if the old process violated policy, should be communicated in advance. ie: who is allowed to sign P-card logs?
FSSC	Communication	Process changes	Comprehensible information about what the change is. Short and clear.
FSSC	Communication	Process changes	Notification in advance before processes are changed. Even minor changes.
FSSC	Financial Transactions (all)	Procedure	Need someone to advise on proper procedures. A "How do I do it right?" hotline. [finance help line goes live Monday]
FSSC	Purchasing	Training	Need 1 sheet job aids for purchasing
FSSC	Security	Training requirements	Provide a master listing of what training is required for which security role, as currently cannot see the security role to request unless training completed.
FSSC	Telecom	Procedure change	Request to notify departments of any change in procedure that may impact them before the change is effective.
HRPR	HR	faculty contracts	Have a process flow documented as to how to process faculty contracts (both regular and expedited workflows)
HRPR	Human Resources	EOD	refine registration process at EOD to be more user friendly
HRPR	Human Resources	HRPR website forms	HRPR forms on website, font size on website as well as print out too small to be readable. Please enlarge font on the website forms
HRPR	Human Resources	Non Standard Payment Form	Please refine form to print more readably (larger font, margins, etc.)
HRPR	Human Resources	HRPR website forms	HR forms on website require refining (data is clearing out when hitting "back" button so you have to re-enter). Please refine.
HRPR, Budget, Finance	Calendars		Consolidate payroll, finance month end, and budget calendars for departments
ITS Cross Applications Support	E-print		Default repository to be HRPR
ITS Shared Components	Security	BAR	report to detail who has what level of BAR access at department level?
ITS Shared Components	Security	BAR	Update website security certificate so users no longer receive warning
ITS Technical Team - Finance	Accounts Payable	DPI	Associate document text with direct pay invoices
			in discussions with FinTech team for scope/approach

Area Responsible	Category	Subcategory	Description	
ITS Technical Team				
- Finance	Accounts Payable	DPI	Can the DPEZ and DPI invoice #'s be the same?	in discussions with FinTech team for scope/approach
ITS Technical Team				
- Finance	Accounts Payable	DPI	Date field in DPI is not consistent throughout the form	in discussions with FinTech team for scope/approach
ITS Technical Team			Incomplete DPEZ cannot be retrieved to complete. Routing is faulty	in discussions with FinTech team for scope/approach
- Finance	Accounts Payable	DPI		in discussions with FinTech team for scope/approach
ITS Technical Team			Building safeguards into the "JV via feed" process so charges cannot hit closed/inappropriate indexes	Component of Finance Self-Service Phase III
- Finance	Feeds to Finance			
ITS Technical Team				
- Finance	Feeds to Finance		Associate document text with external loads	in discussions with FinTech team for scope/approach
ITS Technical Team	Financial			
- Finance	Transactions (all)	Freezing Indexes	Ability to freeze/unfreeze indices (inactivate)	Component of Chart of Accounts Maintenance Application project Functionality currently available to core accounting offices via AppGen and BXS. Finance Application Support team is working with Mike Schwantes and Doug Nelson in order to develop training materials in order that FSSC can support future requests.
ITS Technical Team	Financial		Possible to scan/attach backup documentation to General Accounting?	
- Finance	Transactions (all)	Processing Transac		
ITS Technical Team				
- Finance	General Accounting	Petty Cash	Request to explore handling this process electronically.	in discussions with FinTech team for scope/approach
ITS Technical Team		FGAJVCQ/FGAJ	Capacity to print out JV from INB without having to use screenshots/extract data no key functionality	in discussions with FinTech team for scope/approach
- Finance	INB Banner	VCD forms		in discussions with FinTech team for scope/approach
ITS Technical Team				Possible incorporation with <a href="#">Finance Release 7.4 Upgrade</a> project.
- Finance	INB Banner	FWAINVT	Pcard transaction sort on FWAINVT to be desc instead of asc	Dependent upon General Release 7.5 upgrade.
ITS Technical Team			Email notification that messages are present in INB?	Available with Shared Components' <a href="#">Luminis Banner Channels Implementation</a> project.
- Finance	INB Banner	Messages	Increase functionality for Pis and faculty that do not log in regularly	
ITS Technical Team			Provide additional information regarding common INB screens on My Menu	in discussions with FinTech team for scope/approach
- Finance	INB Banner	My Menu		in discussions with FinTech team for scope/approach
ITS Technical Team			Can approval document notification e-mails be turned off to be consistent with INB?	Available with <a href="#">Finance Self-Service Phase II</a> project deployment.
- Finance	INB self-service	Approval notificati		
ITS Technical Team				
- Finance	Purchasing	Internal PR	Liquidate manual PR's as invoices come in	in discussions with FinTech team for scope/approach
ITS Technical Team			Method to handle internal PRs that is electronic and integrated with Banner.	in discussions with FinTech team for scope/approach
- Finance	Purchasing	Internal PR		in discussions with FinTech team for scope/approach
ITS Technical Team			Lobomart: have links on login screen to SOP's/how to/updates/new catalogs, etc	Purchasing to work with SciQuest to request enhancement
- Finance	Purchasing	LoboMart		Purchasing to work with SciQuest to request enhancement
ITS Technical Team			Make Lobomart intelligent enough to know if vendor is USP or not	Purchasing to work with SciQuest to request enhancement
- Finance	Purchasing	LoboMart		Purchasing to work with SciQuest to request enhancement
ITS Technical Team			Not always receiving denied requisition notifications	Punch-out defined via collaborative effort between Purchasing and SciQuest. Changes to functionality need to be initiated by Purchasing.
- Finance	Purchasing	LoboMart	Apple punch-out in LoboMart creates an order not a request, purchasing wants the request before the order.	
ITS Technical Team				
- Finance	Purchasing	P-Card	Ability to Query for vendor/refine search capabilities	in discussions with FinTech team for scope/approach
ITS Technical Team			Request to eliminate variance between how banner calculates PO balance and FGIENCD balance	in discussions with FinTech team for scope/approach
- Finance	Purchasing	PO		in discussions with FinTech team for scope/approach
ITS Technical Team		research	InfoEd information to be incorporated into Banner (SPAAS, OVPR info)	Available with <a href="#">InfoEd Feed to Grants Management</a> project deployment.
- Finance	Research Accounting	accounting		
ITS Technical Team				roll into workflow project
- Finance	Purchasing	P-Card	Develop workflow for one time exception pcard purchases	

Area Responsible	Category	Subcategory	Description
ITS Technical Team - HRPR	EPAF		request to have approvers automatically routed
ITS Technical Team - HRPR	Payroll	EPAF	Ability to put end dates on EPAFs
ITS Technical Team - HRPR	Payroll	EPAF	Can the type of redistribution be automatically detected instead of manually entered?
ITS Technical Team - HRPR	Payroll	EPAF	Please display person's job title/position and department in addition to their net ID to assist user in choosing the most appropriate approver. Can be difficult to choose when user is unfamiliar with personnel in that organization.
ITS Technical Team - HRPR	Payroll	EPAF	Show both % and dollar amount of redistribution
ITS Technical Team - HRPR	Payroll	EPAF	Request to refine navigation of form Ability to retract payroll forms like incomplete documents (redistribution, etc) prior to posting. Give user ability to fix/resend
ITS Technical Team - HRPR	Payroll	EPAF	Requiring hardcopy of signatures, instead of accepting faxed signatures (which are legal). Explore accepting faxed signatures?
ITS Technical Team - HRPR	Payroll	Timekeeper Approver	Guidance as to how to change the main timekeeper approver.
ITS Technical Team - HRPR	Payroll	Timekeeper data €	Overriding distribution each time for student employment, is there a more efficient way to handle this when the distribution is uncertain?
ITS Technical Team - HRPR	Payroll	Timekeeper Entry	Request to explore different ways to enter timekeeper data to make the process more efficient as the deadlines are very concrete (Friday/Monday)
Research Accounting	Research Accounting	Pre-award	takes as much time to process a small dollar grant as a multimillion dollar grant,
Research Accounting	Post-Award	Close out	Request to refine the grant close-out process
Research Accounting	Pre-Award	Approval process	Require the approval officers to find all errors in a proposal and submit them to PIs at once, rather than one at a time (requiring a lot of duplication).
Research Accounting	Pre-Award	Approval process	Several comments requesting a shift in perspective on the part of research accounting from "gatekeeper" to partnering in successful contract negotiation
Research Accounting	Pre-Award	Budget preparation	Provide standard budget spreadsheets to each faculty member for each organization
Research Accounting	Pre-Award	Budget preparation	Request for hands-on help in preparing budgets
Research Accounting	Pre-Award	Policy	Request for consistency in policies of UNM and the regulations from the funding agencies with respect to contract and grant administration
Research Accounting	Pre-Award	Process changes	Use workflow software to allow for electronic approvals. It takes days to move paper around two or more campuses.

Area Responsible	Category	Subcategory	Description	
Research Accounting	Pre-Award	Proposal submissi	UNM should move to a system of proposal submission that is entirely electronic. An "EZ" version of the form in which a single form is filled out covering all of an investigator's sponsored projects would reduce paperwork immensely. Even better, if this document were online, digital, and able to be digitally signed, then the document could be transferred between the interested offices much more readily.	
Research Accounting	Pre-Award	Sponsored Project	Get ended indices CLOSED so nothing else can go into them.	
Research Accounting	Research	Close out	Give admins a list of open indices so they know what to watch.	
Research Accounting	Research	Close out	Request to be more efficient when it comes to awarding subcontracts to fellow researchers and responding to requests from the federal agencies.	
Research Accounting	Research	Subcontracts		
Research Accounting	Research Accounting		Streamline grant closeout process	Grant closeout workflow developed by Randy Whelan
Telecom	Telecom	Billing practices	Please stop charging closed indices.	Terry Shoebottom working with Telecom to develop validation database prior to submitting feeds to Finance (database designed by Meifen Zhao)
Telecom	Telecom	Billing practices	Request for more accurate and timely billing	Terry Shoebottom working with Telecom to develop validation database prior to submitting feeds to Finance (database designed by Meifen Zhao)

Working well DPEZ DPEZ form is a fantastic improvement!!!!  
Working well LinkAlerts Link Alerts are very helpful, please provide/inform where older linkalerts can be found  
Working well P-card Raising pcard threshold really helped  
Working well Purchasing Peggy and Vince are very responsive in Purchasing!

DAN 02.21.08  
SOM-Dean's office 02.28.08  
SchArch 03.07.08