Business Process Review Worksheet

Foothill-De Anza CCD Educational Information System (EIS) Project

Thank you for agreeing to participate in our FHDA EIS BUSINESS PROCESS REVIEW forum. While the actual assessment activity will take place on-line via DecisionDirector, you might find it helpful to use this worksheet to preview our list of items and write your thoughts before you go on-line.

PLEASE NOTE: People often confuse "process" with "requirement". A process is something you do; but with no indication of how you do it. A requirement tells how you want that process to be accomplished. For example, evaluating an application for completeness can be done manually or automatically. The process is the same either way. Our requirement is to have that determination automated. We will deal with requirements in a separate forum.

In the on-line forum, you will be presented with a list of the primary FHDA BUSINESS PROCESSES. For each process that applies to you, we would like to know which of the following roles best describes your relationship to the function of the process:

* PROCESS MANAGER, i.e. your oversee the function and you are responsible for process design and performance.
     Example: You are the Procurement Director, you are responsible to set up the purchasing policy and procedures.

* ROUTINE USER, i.e. you work in or with this process on a daily or weekly basis;
     Example: You are the buyer who handles the actual procurement process.

* OCCASIONAL USER, i.e. you work in or with this process on an occasional or irregular basis;
     Example: You are the department administrator who generates Purchasing Requisition document.

* CUSTOMER, i.e. you receive the end product of the process (product or service).
     Example: You are the user who requests the purchase of the equipment or service

You can use this worksheet to note which is the case for each process. You may indicate more than one role for any given process.

We would then like you to evaluate the process in terms of the following metrics, each on a scale of Very Low (1) to Very High (5):

 * EFFICIENCY - End result achieved with minimum effort and training. Minimal rework, duplication of effort, and complexity.

 * AUTOMATION - The extent to which the process is automated.

 * RELIABILITY - The extent to which the end result of the process is predictable; process is stable, accessible, and produces valid results; the systems that support or automate this process are good.

 * SATISFACTION - The extent to which you are satisfied with the way this process *currently* works.

 * VALUE OF CHANGE - Improvements to the process will enable you to be more effective and productive. An investment of time and money to improve this process is justifiable.

Please feel free to add comments. If the process *does not apply* to you, please skip it and move on to the next. If there are other processes that you think have been missed and need to be added, please feel free to add (and rate) them in the spaces provided at the bottom of the list. (You can also use those spaces to suggest NEW processes that we should consider.)

Questions about DecisionDirector? Contact Advantiv at 602.808.0618 x2 or support@advantiv.com.

Area: Finance Processes

Section: General Finance

Please review the list of business processes presented below. We would like you to rate them according to the criteria presented to the right of each process. You may also add comments. If the process does not apply to you, you may skip it. If there are other processes that you think have been missed and need to be added, please feel free to add (and rate) them in the spaces provided at the bottom of the list. (You can also use those spaces to suggest NEW processes that we should consider.) Please be sure to click "SAVE". Thank you!

		ROLE(S)	EFCY	AUTO	REL	SAT	VALU
464189	General Ledger // Chart of Accounts // Control Accounts -- Process of defining control accounts and linking them to other chart of account segments.						
464190	General Ledger // Security -- Process of granting various levels and areas of access.						

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Area: Finance Processes

Section: General Finance

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		ROLE(S)	EFCY	AUTO	REL	SAT	VALU
464191	General Ledger // Validations -- Process to validate accounts, account segments, and interfund activity based upon type of transaction and process being performed.						
464192	General Ledger // Validations -- Process of defining rules and parameters to validate establishment of new accounts and to control data entered during transaction processing.						
464193	General Ledger // Journal Entries -- Process to record and validate journal entries (manual, reversing, etc.), uploads and integration with other systems (e.g. HR, SI).						
464194	General Ledger // Maintain Accounts -- Process of maintaining general ledger chart of accounts, activities performed for active accounts, and control removal of inactive accounts.						
464195	General Ledger // Long-Term Account Maintenance -- Process for Maintenance of Long-Term Liability Accounts						
464196	General Accounting // Encumbrances -- Process of encumbering amounts based upon purchases and payroll commitments.						
464197	General Ledger // Online Query/Reporting -- Process of producing financial statements and adhoc query and reporting analysis, drill down from the general Ledger to detail in other integrated/interfaced modules, etc.						
464198	Bank Reconciliation -- Process of receiving cleared check and bank account activity from financial institution and preparing daily, weekly, and monthly reconiliations of bank accounts.						
464199	Investment Management -- Process of managing investments, including such processes as purchases, sales, gains and losses, and unitization of endowment and pooled type funds.						
464200	General Ledger // Accounting Period Management -- Process to tie transactions to accounting period rather than to date of transaction						
464201	General Ledger // Entity Creation -- Process for creating Fund, Foundation, and Enterprise entities, including structure and consolidation.						

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Area: Finance Processes

Section: Budgeting

Please review the list of business processes presented below. We would like you to rate them according to the criteria presented to the right of each process. You may also add comments. If the process does not apply to you, you may skip it. If there are other processes that you think have been missed and need to be added, please feel free to add (and rate) them in the spaces provided at the bottom of the list. (You can also use those spaces to suggest NEW processes that we should consider.) Please be sure to click "SAVE". Thank you!

		ROLE(S)	EFCY	AUTO	REL	SAT	VALU
464202	Budget Development // General Set-Up -- Process to set up budget (e.g. % increases, or by fixed amounts).						
464203	Budget Development // Set-Up by End-Users -- Process for various users to set up budget.						
464204	Budget Development // Fund-Based Budgeting -- Process to develop fund accounting budgets as well as for profit and non-profit budgets.						
464205	Budget Forecast -- Process of forecasting and modeling multiyear budget.						
464206	Budget Monitoring // Budgetary Controls -- Process to provide for limitations or warnings if spending limits reached.						
464207	Budget Monitoring // General -- Process to monitor current budget usage and balances available throughout the fiscal year.						
464208	Budget Modification -- Process to track budget transfers and revisions to approved budget.						
464209	Budget Reporting // Reporting and Analytics -- Various budget reporting and analytical activities including online query/reporting, charts, and graphs.						
464210	Budget Reporting // Comparison -- Process to compare multi-year budget revenue and expenses.						

Section: Purchasing

Please review the list of business processes presented below. We would like you to rate them according to the criteria presented to the right of each process. You may also add comments. If the process does not apply to you, you may skip it. If there are other processes that you think have been missed and need to be added, please feel free to add (and rate) them in the spaces provided at the bottom of the list. (You can also use those spaces to suggest NEW processes that we should consider.) Please be sure to click "SAVE". Thank you!

		ROLE(S)	EFCY	AUTO	REL	SAT	VALU
464211	Purchase Requisitions (PR's) -- Process for creating, routing, approving, submitting, modifying, cancelling, tracking, and monitoring purchase requisitions.						
464212	Purchasing // Assignment to Buyer -- Process of assigning Purchase Requisitions to certain Buyers based upon various criteria such as type of product, volume or attributes developed by the institution.						

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Area: Finance Processes

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		ROLE(S)	EFCY	AUTO	REL	SAT	VALU
464213	Chargebacks -- Process of charging various expenses back to departments.						
464214	Mail -- Process to deliver and distribute inter-office mail.						
464215	Procurement Card -- Process to accept, analyze, distribute and approve procurement card transactions from third party vendor.						
464216	Purchasing // Bid Processing -- Process of conducting bids for products and services. Inclusive of ITB, RFQ, RFI and RFP processes required by procurement rules of the institution.						
464217	Purchasing // Bid Publication -- Process of preparing, posting and distributing legally advertised sealed competitive bids and amendments.						
464218	Purchasing // Bid Number Assignment -- Process to assign bid document numbers.						
464219	Purchasing // Contract Management -- Process of monitoring and reporting for subcontractors, insurance certificates, bonds, preliminary lien notices, stop notices, penalties, etc. on construction projects.						
464220	Purchasing // Online Query/ Reporting -- Process of generating various reports such as open purchase orders, analysis of ordering by vendor, incompletely shipped orders, encumbrance balances, etc.						
464221	Purchasing // Purchase Orders // Create PO -- Process to generate and create various types of purchase orders for goods and services.						
464222	Purchasing // Purchase Orders // Issue PO -- Process to issue a purchase order for goods and services.						
464223	Purchasing // Purchase Orders // Maintain PO -- Process of changing purchase orders including revisions, changes, modifications, and cancellations.						
464224	Purchasing // Purchase Orders // Monitor Status -- Process to track the status of purchase orders such as ordered, shipped, partially filled, etc.						
464225	Purchasing // Purchase Orders/ Internet -- Process of making web-based purchases.						
464226	Purchasing // Competitive Bids -- Process of getting competitive quotes from multiple vendors.						
464227	Receiving // Delivery -- Process of central receiving and delivery of goods to end users.						

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		ROLE(S)	EFCY	AUTO	REL	SAT	VALU
464228	Receiving // Delivery -- Direct shipment processes to end-users.						
464229	Receiving // Fixed Assets -- Process of tagging fixed asset equipment (central receiving or direct shipment).						
464230	Receiving // Outside Vendors -- Process for receiving and delivering courier deliveries and correspondences.						
464231	Receiving // Receive Shipments -- Process to receive shipments and match with purchase order.						
464232	Receiving // Receive Shipments -- Process of reporting incomplete, damaged freight.						
464233	Receiving // Returns -- Process to manage returned materials and monitoring status.						
464234	Stores Inventory // General -- Process of managing stock inventory. This includes ability to track all units and measures and locate them in a warehouse. Additionally, automatic replenishment and certain supply management functionality is included.						
464235	Stores Inventory // Reporting -- Various reporting and analytical capabilities for the stores inventory.						
464236	Stores Inventory // Item Requests -- Process for requesting "stores" items.						
464237	Stores -- Process to sell and deliver stores items.						
464238	Surplus Property -- Process for receiving, selling, recycling, storing, tracking, and donating surplus equipment, goods and e-waste.						
464239	Vendor Management // Online Query/Reporting -- Process of performing analysis on vendor activity, performance and mix of products and services.						
464240	Vendor Management // Vendor Data -- Process for vendor or bidder registration.						
464241	Vendor Management // Vendor Information -- Maintenance of vendor information (name, address, contacts, products or services offered, terms, history, etc.)						
464242	Vendor Management // Vendor Information -- Process of capturing and reporting vendor statistical data.						

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Area: Finance Processes

Section: Purchasing

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	ROLE(S)	**EFCY**	**AUTO**	**REL**	**SAT**	**VALU**

Section: Accounts Payable

Please review the list of business processes presented below. We would like you to rate them according to the criteria presented to the right of each process. You may also add comments. If the process does not apply to you, you may skip it. If there are other processes that you think have been missed and need to be added, please feel free to add (and rate) them in the spaces provided at the bottom of the list. (You can also use those spaces to suggest NEW processes that we should consider.) Please be sure to click "SAVE". Thank you!

		ROLE(S)	EFCY	AUTO	REL	SAT	VALU
464243	Accounts Payable // General AP Functionality -- Process to match purchase order, receiving documentation and invoices for goods and services.						
464244	Accounts Payable // Invoices -- Process of entering invoices and vouchering activity.						
464245	Accounts Payable // Calculate Payment -- Process of calculating discounts, freight, and other charges and well as calculation and tracking of sales taxes for exempt and non-exempt organizations.						
464246	Accounts Payable // Vendor Payment Process -- Process for printing checks and processing payment to vendors.						
464247	Accounts Payable // Demand Checks -- Process for generating Demand Checks.						
464248	Accounts Payable // Recurring Payables -- Process of setting up recurring transactions or schedule payments for monthly and long term agreements.						
464249	Accounts Payable // Credit Memos -- Process of issuing and tracking credit memos.						
464250	Accounts Payable // Online Query/Reporting -- Process of generating standard payables reports and analyses such as open item reports, aging and specific vendor detail analysis.						
464251	Accounts Payable // Year End Reporting -- Process of year end reporting such as 1099, and other IRS reporting.						
464252	Accounts Payable // Voiding Checks -- Process for voiding checks.						
464253	Accounts Payable // Handling Pre-Paids -- Process for handling prepaids.						

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Section: Accounts Payable

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		ROLE(S)	EFCY	AUTO	REL	SAT	VALU
464254	Accounts Payable // Multi-Bank Payments -- Process for handling payments from multiple internal banks.						
464255	Travel and Expense Reporting -- Process of submitting travel and expense requests.						
464256	Vendor Management // Online Query/Reporting -- Process of performing analysis on vendor activity, performance and mix of products and services.						
464257	Vendor Management // Vendor Information -- Process of maintaining of vendor information (name, address, contacts, products or services offered, terms, history, etc.)						

Section: Accounts Receivable

Please review the list of business processes presented below. We would like you to rate them according to the criteria presented to the right of each process. You may also add comments. If the process does not apply to you, you may skip it. If there are other processes that you think have been missed and need to be added, please feel free to add (and rate) them in the spaces provided at the bottom of the list. (You can also use those spaces to suggest NEW processes that we should consider.) Please be sure to click "SAVE". Thank you!

		ROLE(S)	EFCY	AUTO	REL	SAT	VALU
464258	Billing // Set Up Receivables -- Process for the creation and maintenance of customers and for defining parameters for processing statements of charges.						
464259	Billing // Dates -- Process of billing based upon start and end dates of terms.						
464260	Billing // Invoices -- Process for defining and generating invoices.						
464261	Billing // Internal Invoices -- Process of billing for services provided by internal providers, such as chargeback invoices.						
464262	Billing // Statements -- Process of generating billing statements or electronic communication to students.						
464263	Billing // Past Due/Late Charges -- Process to define and impose late charges or fees for delinquent payments and add flag to student accounts.						

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Section: Accounts Receivable

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		ROLE(S)	EFCY	AUTO	REL	SAT	VALU
464264	Billing // Collection -- Process by which outstanding accounts receivables are identified and aggressively tracked and placed with the in-house or third party collections department/agency. This process also allows for generation of collection letters by the institution prior to placement with agencies.						
464265	Billing // Sponsored Awards -- Process of accounting for and billing sponsored awards.						
464266	Receipt of Payment // General -- Process of receiving payments.						
464267	Receipt of Payment // Cash -- Process of receiving and processing cash payments for amounts owed (billed and non-billed amounts) the institution.						
464268	Receipt of Payment // Credit Cards -- Process of receiving and processing credit card payments for amounts owed (billed and non-billed amounts) the institution.						
464269	Receipt of Payment // Electronic Receipts -- Process of receiving and processing electronic payments for amounts owed (billed and non-billed amounts) the institution.						
464270	Cashiering // Online Query/Reporting -- Standard reports and analysis capability of cashiering system such as daily cash processed.						
464271	Apply Payments -- Process of the cash application to customer invoices.						
464272	Refunds/Reimbursements -- Process of generating a refund to customers or students.						
464273	Student Accounts -- Process of posting various charges to student accounts, including application of student financial aid transactions.						
464274	Account Management -- Process of balancing with cashiering and bank deposits.						
464275	Revenue Recognition // Sponsored Awards -- Process of accounting and recording revenue for sponsored awards.						
464276	AR Reconciliation -- Process of reconciling AR between general ledger and detail accounts receivable, and generating exception reports.						
464277	Online Query/Reporting -- Process for generating standard accounts receivables reports and analysis such as aging and reconciliation.						
464278	GL Transactions -- Process for generating transactions to the general ledger.						

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Section: Accounts Receivable

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		ROLE(S)	EFCY	AUTO	REL	SAT	VALU
464279	General AR Functions -- Process to query payment status, aging and posting of charges and credits.						

Section: Sponsored Programs

Please review the list of business processes presented below. We would like you to rate them according to the criteria presented to the right of each process. You may also add comments. If the process does not apply to you, you may skip it. If there are other processes that you think have been missed and need to be added, please feel free to add (and rate) them in the spaces provided at the bottom of the list. (You can also use those spaces to suggest NEW processes that we should consider.) Please be sure to click "SAVE". Thank you!

		ROLE(S)	EFCY	AUTO	REL	SAT	VALU
464280	Proposal Development -- Pre-Award processes for preparing a grant proposal.						
464281	Proposal Submission and Tracking -- Pre-Award processes for submitting and tracking a grant proposal.						
464282	Award Initiation -- Post Award processes for creating an account in the system for new sponsored awards/grants.						
464283	Award Budget -- Post Award processes for creating, revising and maintaining the budget for sponsored awards/grants.						
464284	Award Management // General -- Post Award processes for managing sponsored awards/grants in the system including features for monitoring sponsored awards/grants.						
464285	Award Management // Salary Expenditures -- Post Award processes related to salary and benefit transactions for staff, faculty, and administrators charged to sponsored awards/grants.						
464286	Award Management // Administration -- Discretionary purchasing processes, tracking of subcontract development, and approval for sponsored programs/grants.						
464287	Award Management // F&A Costs -- Post Award processes related to facilities and administration transactions for sponsored awards/grants. Includes rate calculations and automatic posting.						
464288	Award Management // Cost Sharing -- Post Award processes and tracking related to cost sharing/matching cost transactions for sponsored awards/grants.						

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		ROLE(S)	EFCY	AUTO	REL	SAT	VALU
464289	Award Management // Transactions -- Post Award processes related to other types of transactions for sponsored awards. Includes certain types of monitoring of unallowable expenditures and restrictions on processing to sponsored project/grant accounts.						
464290	Award Management // Online Query/Reporting -- Post Award processes for querying and reporting on sponsored awards/grants.						
464291	Award Management // Grantor Tracking -- Process for tracking current and historical information on the various grantor agencies that have awarded grants to our District.						
464292	Project Close Out -- Post Award processes for closing out sponsored awards/grants.						
464293	Project Close Out -- Process for Archiving sponsored awards/grant information, including tracking location of grant materials and maintaining dates grant information must be maintained/destroyed.						

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		ROLE(S)	EFCY	AUTO	REL	SAT	VALU
464294	Additions -- Process of capitalizing and tracking moveable equipment and property. Includes specific data items and information to be tracked for fixed assets.						
464295	Inventory (Physical Verification of Fixed Assets) -- Process of physically tagging/inventorying moveable equipment and updating asset records for physical counts. Includes tracking of certain assets for insurance purposes that may not be capitalized for accounting purposes.						
464296	Maintain Data -- Process of updating asset records and transferring assets between departments and entities						
464297	Depreciation -- Process and methods to depreciate and amortize assets over their useful lives.						

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Area: Finance Processes

Section: Fixed Assets

Please review the list of business processes presented below. We would like you to rate them according to the criteria presented to the right of each process. You may also add comments. If the process does not apply to you, you may skip it. If there are other processes that you think have been missed and need to be added, please feel free to add (and rate) them in the spaces provided at the bottom of the list. (You can also use those spaces to suggest NEW processes that we should consider.) Please be sure to click "SAVE". Thank you!

		ROLE(S)	EFCY	AUTO	REL	SAT	VALU
464298	Disposals // Retirements -- Process for disposal, write-off and retirement of fixed assets.						
464299	Self-Service Assets Inquiry -- Online self service for end-users to query and report on fixed asset records.						
464300	Online Query/Reporting -- Process for generating various standard and custom fixed assets reports and analyses.						
464301	Vehicle Management -- Process to maintain inventory of vehicles and to identify and track maintenance services performed.						
464302	AutoCAD Interface -- Process to report space utilization in AutoCAD.						
464303	Trade-ins and Replacements -- Process for trade-in of old equipment and removal & replacement of new equipment.						
464304	Capital Leases - Process for identifying, tracking and reporting of capital leases.						
464305	Lost/Stolen and Destroyed Property - Process for flagging and recording lost, stolen and destroyed property.						
464306	Capital Asset // Set-Up -- Process of defining the type of capital asset and capitalization rules						
464307	Capital Asset // GL Transactions -- Process by which there is an integration to allow for the ability to feed data to the general ledger and reconcile balances with the general ledger.						

Section: Physical Plant

Please review the list of business processes presented below. We would like you to rate them according to the criteria presented to the right of each process. You may also add comments. If the process does not apply to you, you may skip it. If there are other processes that you think have been missed and need to be added, please feel free to add (and rate) them in the spaces provided at the bottom of the list. (You can also use those spaces to suggest NEW processes that we should consider.) Please be sure to click "SAVE". Thank you!

		ROLE(S)	EFCY	AUTO	REL	SAT	VALU
464308	Key Control -- Process to track and control keys issued to employees						
464309	Tool Control -- Process to track and control tools utilized in the physical maintenance of institutional property.						

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		ROLE(S)	EFCY	AUTO	REL	SAT	VALU
464310	Self-Service Maintenance Requests -- On-line self service processes to request repair work orders for routine and emergency requests.						
464311	Work Order Tracking -- Process to identify and track work orders, including costs, dates started and complete, etc.						
464312	Construction Project Accounting -- Process to capture and accumulate costs related to large construction projects.						
464313	Preventive Maintenance -- Process to schedule, generate, and track preventive maintenance work orders.						
464314	Maintenance Project Tracking -- Process to identify and track maintenance projects.						
464315	Building Maintenance -- Process to identify and track maintenance projects specific to buildings, sepcifically inspections.						
464316	Space/Location Management -- Process to identify, track, and report regarding the space utilization of buildings.						
464317	Utilities Management -- Process to manage utilities services and capture costs to bill for consumption of utilities.						