

Account Managers Group Survey Results

<u>Ques #</u>	<u>Question</u>	<u>Totals</u>
14	Going Paperless.	219
9	What are the best screens to use to manage my budgetary accounts?	212
19	Banner Finance Training - review with question and answer session.	206
5	Travel guidelines review.	193
8	Completing PTF's correctly.	189
18	Budget Development - How does it get put together? Why stick to budget?	183
3	When do I use a direct pay voucher (DPV), P-card, or purchase requisition?	180
10	Encumbrances - When are funds encumbered?	179
12	Contract Policy - When is one required? How does the routing form work?	177
15	New Employee documentation.	173
6	What is an Interdepartmental Transfer (IDT) and when is it used?	165
7	Procurement card issues.	159
4	Payroll - How do dates affect how much and when an employee is paid?	152
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2	How does MSU benefit from "State of Texas" formula funding?	143
16	Workstudy - What is it and how does it help my budget?	136
17	Why hire student workers vs non-student workers?	134
1	Explain and define "weighted semester credit hours" and why is it important.	122
11	Cash sales across campus.	118
	Travel Vouchers	5
	Weave	5
	Information at D2L so we can understand what faculty/adjuncts are talking about when they have problems	5
	Tips for Reconciling Budget	5
	Budget Transfer vs. IDT	5
	Database Training-Access	5
	How to balance accounts	5
	Portal	5
	Charging fees to Student Accounts	4
	Who signs where on forms and what forms need to be signed by which people?	4
	Native vs. Webworld Banner	3

What can we streamline to become more efficient?

General/Paperless:

- Electronic form submission/approval
- Electronic signatures
- Go paperless
- Need to go paperless
- Paper forms
- Paper requirements
- Paper - fewer forms with one request
- Paperwork
- Signatures for paperwork
- Fewer steps in the chain of command

Purchasing:

- Contract routing sheets
- Contract routing sheets
- Credit card statements
- Procurement process
- Purchase reqs
- Purchase reqs - Paperless
- Simple Contracts

Miscellaneous

- Account managers group file on I drive
- Being able to have a fee for police - every student charged a fee to include parking fee, etc. on bill

HR:

- PTFs
- PTFs
- PTFs
- PTFs
- PTFs
- Hiring process

Business Office:

- Quicker posting of transactions on banner
- Travel
- Travel

Budget:

- Budget
- Budget transfers
- Make it easier to understand the budget

What's one thing you would want automated?

General/Paperless:

- All forms electronic format
- 5-part NCR form
- Just get started
- Paperless
- Signatures
- Anything that will speed the process
- Key requests

HR:

- Hiring student workers
- New employment documentation
- Sick Leave
- Staff/Faculty time sheets, Sick leave
- Time Sheets
- PTF's (*x 13*)

Business Office:

- DPV's
- DPV's
- Transfers – IDT and Budget
- Travel RTA
- Travel vouchers

Purchasing:

- P-card Envelopes
- Purchased orders
- Purchase requisitions
- Purchase requisitions
- Purchase requisitions
- Purchase requisitions

What process drives you crazy and is not efficient?

General/Paperless:

- Forms that do not have an electronic format!
- Most paper authorization processes
- Need to go paperless!!
- Printing difficulties
- Routing of forms for multiple signatures
- The number of hoops to go through for simple paperwork
- Degree Plans and Change of Major forms. I have a pile sitting here and can't get the students to stop by and sign them.

HR:

- New employee orientation
- Paper timesheets
- PTFs
- PTFs
- PTFs
- PTFs

Business Office:

- DPV process
- It takes too long to get reimbursed for travel expenses.
- Travel and all forms that go with it
- Travel vouchers
- Slow processing of daily purchases on banner (sometimes takes a month to post)
- Banner
- Banner Finance
- Banner Finance
- Native Banner
- Understanding Banner finance

Purchasing:

- Contract routing sheets
- Contracts-\$500 or less
- Getting contracts to purchasing so they will get processed
- Online purchase reqs (printing, times out)
- Preparing purchase requisitions.
- Purchase orders
- Purchase reqs
- Service agreements

Budget:

- Budget

Other:

- Weave

Other comments:

- PTFs – these 5-page forms are out-dated, difficult to read.
- There are many universities going paperless. It's critical.
- I would like the presentation (slides, etc) sent to us electronically.
- Electronic forms submission/approval needed – especially with 1x / day mail delivery.
- I need to learn how to “dig” into an acct for detailing. To become proficient with doing this.
- Entertainment expense forms and process
- Thanks for creating this Account Managers Group!
- Moving to electronic/automated is great!
- Update the Banner books/material every couple of years.
- Most interested in knowing when determinations have been made - regarding budget.
- Banner Finance Training – would like to learn how to drill down better regarding “mystery purchases.”