

TOP 3

Update to Campus Wide Business Managers

09.21.17

IRIS Functionality

Suggestion	Status
Searching payments based on vendor invoice number	
Searching pro card purchases globally (thru IRIS) rather than month by month (thru pro-card statements)	
Eliminate the header page when you print an IRIS document.	<i>Need example of header page</i>
Electronic updates within IRIS after funding or pay change approvals.	<i>To be discussed with the IRIS team</i>
R-Account Ledgers - Sources vs Uses NOT Actual vs Budget	
Improved and simplified accounting for self-supporting activities combining E and I accounts into a single account showing revenue and expenses.	<i>DONE! Contact Accounting & Budget for details</i>
Eliminate monthly phone log reconciliations	<i>DONE!</i>
Eliminate budgets on R-accounts	<i>Under Review - gathering requirements</i>

Travel

Suggestion	Status
Scanning travel receipts	<i>AVAILABLE! Not required, but departments can use this functionality any time. Original receipts must be maintained in the department.</i>
Exempt employees be allowed to complete a T-25 to direct bill their airfare.	<i>COMING SOON! Change in campus procedure in process.</i>
Comprehensive travel management system	<i>UT CBOs reviewing options</i>

Procurement / ESM System Functionality

Suggestion	Status
Why can it not store the pro card?	<i>Requested</i>
When checking out, why can't the Asset > \$5000 not default to "No" if the total order is less than \$5000?	<i>Requested</i>
When a person purchases an item through Marketplace, the obligation of that item is not reflected in real time in IRIS to help determine true balances.	<i>Requested</i>
Bid Limit – Moving the limit to \$10,000 was one of the most helpful things (A. Haynes)	

Contracts

Suggestion	Status
Be allowed to accept software terms and conditions up to a certain dollar amount when updating or adding to a computer.	<i>Will need to discuss with UTSA</i>
It seems to me that contracts are processed through the system primarily in the order they come in. I would think a better system would be to push the easy ones through quickly which would reduce the backlog. Anything that removes a bottleneck in Contracts would be great.	<i>Changes coming with new staff and new system (ESM)</i>

Training

Suggestion	Status
Create scripted templates that explain how to read E, I, R, S and other account data, especially for managers.	
Distribute points of contact for each of those account types (E, I, R, S and other) by name, email address and work phone number.	
Get user input on program designs and partner with users in delivery	<i>Finance Directors will address</i>

Procurement Card

Suggestion	Status
REGISTRATION FEES – would love to be able to either pay with P-card or be immediately reimbursed like airline tickets so individuals can register themselves.	<i>DONE!</i>
AUDIT -- I completely understand the potential abuse with these cards but can we make it more logical? We should not be able to purchase prohibited items from the ESM Staples website therefore they don't need to pick Staples charges to audit and ask us why we purchase general office supplies. It would be reasonable to audit a Staples charge that exceeds \$1500 to make sure it was not an asset.	<i>To be discussed with UTSA</i>
University-approved contracted vendors should be exempt from these monthly audits below a threshold.	<i>To be discussed with UTSA</i>

Electronic vs Paper

Suggestion	Status
Reduction in hard copy forms requiring original signatures (i.e., Moving Allowance Form).	<i>Soon to implement forms with workflow through OnBase – starting with OID</i>
Electronic time entry (web based for biweekly and monthly) with workflow routing for approvals.	<i>The electronic time entry is being tested. A request has been made to include our campus in pilot testing.</i>
Reduce PIF paperwork for position changes.	<i>Look at coordination between Accounting and Payroll where payroll can get electronic position changes in lieu of paper PIF.</i>

Miscellaneous

Suggestion	Status
ARCHIBUS – Functionality	<i>Issued to be referred</i>
PROCEDURES -- I have definitely seen improvement from both the campus and system but when a policy changes, state what changed and not say read the new policy to find out. When notifications are sent to business managers regarding policy updates, it would be helpful to know what information changed.	<i>Options being researched in “Policy Medical” for indicating changes.</i>
PETTY CASH – when someone uses the small form it would be great if the person receiving the reimbursement could be listed first so we can more quickly identify the reimbursement.	<i>Bursar will research options</i>