



Banner Success Stories

(May 18, 2005)

(The following are some of the unedited responses received from UNM staff when asked recently to share Banner Success Stories. Our thanks to those who can see the glass half full and our commitment to keep working on it for those who cannot.)

This week I have had to use Live Chat on a daily basis to see if we could figure out why Oracle wouldn't install the upgraded software. The person on the other end has been most helpful and each day we looked at something different to see if that was the problem. This morning a solution was found and I was able to follow the email instructions and download the file and then log into Banner. If Live Chat wouldn't have been there I'm not sure how long I would have had to stay on the phone to get help. Live Chat has been a life saver in many cases.

Another story is of a recent study participant who didn't receive her payment for participation due to it getting stuck to another reimbursement. Once the error was found, I was able to enter it into Banner and she received her check 4 days later. That would have not been the case last year as I would have had to walk many a steps to get all the approval signatures. Banner sure has saved a many steps and frustrations for me.

Joni Roberts
Internal Medicine/Endocrinology

I want to say that I love the information given on the Hyperion Payroll Reports. At my request, Dominic Martinez itemized out the Professional Liability Insurance expense and has saved us all a lot of work. With FRS, monthly I had to request that the HSC Controller's office down load the data and send to me in an excel file so that I could track the expense being charged to IDC for each grant at the College of Nursing.

The new breakout has saved us all work.

Penny Fishel, CPA
College of Nursing

Our division is paying per diem for a visiting collaborator in the physics department for work on a grant studying the spread of epidemics. I can submit a DPR/DPI and have the professor paid within two days and actually have a check in his hand. With the previous system it would have taken at least a week if not two.

Hollie Medina
Department of Internal Medicine

My story is very positive for ME...being a very small office...just 1...as the sole employee/support person for the Staff Council and the Retiree association, I have no time for classes and banner related events so I was lost, lost, lost..my budget is very small by the numbers, but non the less needs to conform to the system..I mentioned this to my supervisor-Dupuy Bateman-and he told me that he has set up an office within his office to serve small clients like me!!!! Imagine the thrill of it all...Karen Mann has met with me once and is assisting me in getting some copier coop charges posted to my copier clients AND she has met with the treasurer of the UNM Retiree Association to assist her with her banner needs as well. This is an awesome service and I WONDER if other offices might need the same sort of support...the model is already set up!

Karin Retskin
UNM Staff Council

It was 4:50pm on a Thursday afternoon and my boss reminded me of the Monday lunch meeting which included food. Well, you guessed it...who was in charge of the food....me!! I had forgotten about the food, meeting and how important this function was to our center. Well, as I scrambled and turned my PC back on...(I had of course shut down for the day) I submitted a req. in Higher Markets with the quote that had sat in my in box from last week....it took me a total of 3 minutes to complete the requisition. At this point, I said a silent prayer for the next day. Friday a.m. I called the catering service and told them the PO was in the works.....

The catering service took my order for food and saved the day! because by Monday a.m. there was a PO# processed and the food was delivered....everybody enjoyed the meeting.....and no one...not even my boss knew I had almost dropped the ball!

Success doesn't happen overnight...unless it's BANNER!

Kim Halsten
Center for Community Partnerships

This isn't so much directly connected to Banner but because of banner the way purchases are processed has changed. We were told right up front that we needed to utilize P-Cards to pay for all purchases under \$1,000. And that was not well received by many folks out there. I was not a P-Card holder at the time but was soon to become one. Once I had it, I recognized the time saving of getting supplies delivered by using my P-Card versus getting a PO processed. Now a year later the processing time frame for PO's has significantly been lowered, but I still will always go the P-Card route if at all possible!

One other plus, is here recently a standing order for a service one of projects requires was out of money, not the project just the "standing order", formerly known as Blankets. In the process of trying to increase the existing one to cover recent invoices and then getting a new one set up for future requests, many questions came my way from the good folks at Purchasing. And they really are the good guys!!

Because of these questions I called the vendor, happened to be local, and they were most cooperative in working with my P-Card for all future requests and even paid for the invoices we had via the P-Card. That lead me to realize that another arrangement like this with yet another vendor was needing to have a new "standing order". I got online for the vendor and found that they actually had a method very similar to a Gift Card in personal spending, where you could get a card for lab personnel to use, with a pass code and when it runs out of money we can increase it. So there are many ways to work with vendors that provide services on a regular basis for you that can be set up by using the UNM Purchasing Card. You just have to research and communicate with the vendor.

One more thought, the folks that I initiate orders for, love the fact that the PCard gets what they want within less than a week. Vendors really like P-Card purchases!

Kay Jantz
Department of Internal Medicine

I manage Field Experience Office at C.O.E. Gaia, the admin, processes at least 35 mileage payment requests every month. What used to take up to a week of input and processing is now cut down to a few days.

Roberta Marquez
Center for Teacher Education

I find Banner to be very helpful to me in helping the end user (in my case Faculty / Staff). It is wonderful to be able to look up to see if the payment has been made to the persons account and when it was paid. Just today I had a faculty person ask me regarding their payment on some travel. They had been really busy and did not think/notice if the payment had been made. I was able to look on BANNER and tell them the information they were asking for. After checking their account and finding the payment, they called me back to thank me for the information. Also if I

was paying for a conference fee I am able to search and find the information online without having to call Accounts Payable.

I had a vendor call me the other day and ask what this check was for that they had received. They had the check number. So I was able to look the check # up in BANNER and lead them in the right direction (Department, phone number and person name). They were very appreciative of the information I was able to provide. I could not have been as helpful before BANNER.

Connie Kelly
Zimmerman Library

When Banner went live in July I was a month away from delivering my baby. Because we are a small office I don't have a backup to do most of my job. I was able to work from home every day. I processed refunds, ordered supplies and did lots and lots of Journal vouchers. While this was not a good time to be going through a large learning curve, I managed and the office kept going.

Kimberlea Goodson
UNM Ticketing Service

In the Accounts Payable Department, we've experienced many very positive experiences. Probably the biggest being, having the ability to make electronic payments. We opened this up to employees only initially (which was very well received) but we've also recently opened up direct deposit payments to vendors! Needless to say, they are thrilled to be able to have their payments direct deposited to their bank accounts! What a leap forward into the electronic age!

Elaine Friestman
Accounts Payable Department

I like FOIDDOCH - it tells me at a glance, what has transpired with an order. I like Higher Markets. It is easy to edit an order; re-issue a rejected order, if an index code or account code has to be edited; find an old order; check vendor addresses (if there are multiple listings with the same vendor name, but different addresses); and a spot to explain weird orders to Purchasing!

Dianne Zincke
Facilities Services

I think my most recent Banner success story has to do with the new Hyperion Report that works faster than ever before! I was one of those complainers about how slow and inefficient generating a report was. Just recently I saw the LINK email announcing the new FOX0002, so I naturally immediately went to see for myself how quick it worked. The same afternoon I was able to provide copies of reports to my manager, which used to take me almost half the morning to generate! Now I'm able to maximize productivity with reconciling and providing answers quicker on "how much money do I have?"

Thank you to FSM team, especially Duane!

Zulfar Zamir
College of Fine Arts

I'm responsible for managing the LOBOCASH start up budget and I had not reconciled or reviewed the transactions that posted to the index code since June 30, 2004. Well, I was asked by the boss to give a status of the amount of funds available in April 2005, so I began my quest to reconcile and report on this project. First, I logged into Banner Finance and did a quick review of form "FGIBDST" to get an up to date balance available. I then went to E-Print to print out the Operating Ledger Summary and Detail report for this index code. After reviewing the report, I realized there were a number of transactions I didn't recall I had approved back in July, August, and September of 2004. So I proceeded to query the different account codes, selected the

transactions that were in question, zoomed into Xtender to see the imaged invoice, and was able to reconcile the account within an hour. Not a bad recovery!

The moral to this success story is I did not have to call anyone or department to send me a copy of an invoice or a Purchase Order. I was able to view all invoices and Purchase Orders right on-line using Banner Finance. Kudos to the Procurement and Accounts Payable teams for their dedication and support to make this dream a reality. We could not do this in FRS!!!

Thanks,

Chris Vallejos
Auxiliary Enterprises

I made a deposit in one of my accounts at the Cashier's office in the Basic Medical Science Bldg via the "Money List" procedure. I was able to check the fact that it had been deposited to the right account via Hyperion. I did not have to ask our Accounting Office to check the account and wait for an answer. I was able to check the account myself! I appreciate this part of Banner/Hyperion. Carolyn King

Carolyn King
Endocrinology

DOIM is a very large, complex department. We have probably 50-60 banner users in our department. While we all continue to face the day-to-day challenges of any large conversion, I feel that overall DOIM staff like banner. Many of us feel it provides more up-to-date information at our fingertips. Banner in concert with Hyperion provide instant access to data. A huge improvement over the old IDMS system.

I know that there are folks at UNM who are still not happy, complain, etc. but from the Department of Internal Medicine, we have embraced this change and continue to work towards greater knowledge of the system.

Now if we can just get that darn Hyperion to work better (and I know it will get better), our financial "hats" will be easier to wear.

Jerry White
Department of Internal Medicine

Here is a short and sweet success story and something I DO LIKE about Banner finance. I find it so luxurious to have an e-mail message from Accounts Payable write: Are you ready to pay the invoice that just came in on your Purchase Order? Oh, how easy it is to respond back "yes of course." And if the answer is "no not yet," that's not so bad either.

Susanna Gilbert
College of Education

I was notified that a particular vendor had submitted an invoice three weeks previously and had not received payment. The only information we had was the vendor's name. In Banner, we looked up the vendor by name and found that he had had three invoices during the fiscal year, one in March, and two in April. We looked up the invoice numbers and found the PRs and POs for the invoices. We also found the checks that had been written. We could see that checks had been cut for all three invoices. Just for the heck of it, we used Xtender to look at the vendor invoices. It took us about 10 minutes to get that information. Departments can also do all of that in Banner. In General Accounting, we could take it several steps further. We were able to look at the Checks Cleared file and learn that the checks had cleared the bank. Then we called Accounts Payable, and they were able to FAX us copies of the fronts and backs of the checks. It took about half an hour to get the FAX.

A really big thing for General Accounting (but one that no one else cares about), is moving expenses. Every month, a General Accounting staff person prepares a report on the moving expenses for the month. The report lists the costs per employee and determines the tax

reportability to the employee. The report is then sent to Payroll for withholding. In the past, we had to send a student over to Accounts Payable to pull all the appropriate checks. The student then had to make copies of all of the backup attached to the checks. It usually took half a day to get the information. Now, with Xtender, the backup can be accessed on line, and it takes about half an hour to get all the documentation necessary to prepare the report.

Frances Starnes
Controllers Office

I don't have a neat story but I am aware of how exhausted the Accounting Offices, Purchasing, and Accounts Payable are. I am sure there are others that are working hard on my behalf and I am not aware of it. Those of us that began working with BANNER when it went live July 04 may not be aware that core departments were working on FY04 year closing and BANNER implementation up to 6 months or more before it went live. For the most part these core departments did not necessarily receive compensation for this extra workload. Many worked long hours with workloads that have not diminished with their efforts. All the difficulties we as individual initiators experience are problems core departments have to solve along with their regular workload. I take my hat off and bow low with great heaps of acknowledgement for their efforts and for the continued high quality customer service I received over this time. I can hear the exhaustion in many voices but I have never experienced a rude interaction. Thank you.

Martha Vigil
CASAA

I have a story to tell you....I recently had a very frustrating experience with trying to pay a vendor for custom made pottery pieces, basically being passed back and forth and told "that's not our department," "you should have done it this way," ultimately ended up getting hung up on.

But, I found some relief and understanding on fastinfo with one of your technicians. Her name is Andrea. She was very helpful. If she couldn't answer my questions, then she researched it and got back to me immediately. I cannot tell you how stressed out I was with the situation I was in a couple of months ago. Her positivism and helpfulness turned things around. I am very thankful for all the hard work everyone has done and continues to do and Andrea is a true example of that!!!!

Cynthia Mason
American Indian Student Services
