

Client



University of Medicine and Dentistry of New Jersey's School of Health Related Professionals

Project

Financial Process and Procedure Documentation

Role

Technical lead; sub consultant to TCGi, Inc.

Scope

- > Document existing processes
- > Document existing systems
- > Build solution for maintaining process and procedure documentation

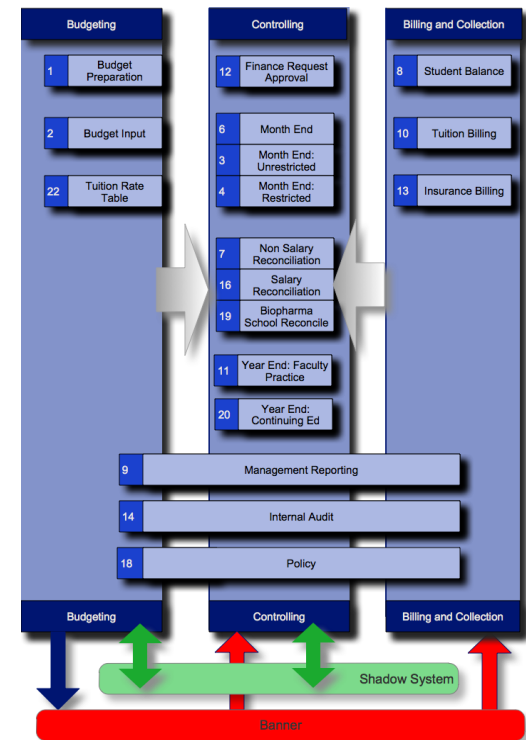
Technologies

SunGuard Banner Digital Campus, Oracle, Microsoft Access

Solution

Working for the CFO of UMDNJ's School of Health Related Professionals, Project Gestalt :

- > Analyzed and documented key processes and procedures for the Finance and Administration function
- > Prepared documentation on the internally-developed "shadow" system, spreadsheets, and document templates used by Finance and Administration for forecasting and reporting
- > Defined the procedures for maintaining these support tools
- > Documented the linkage between the processes and procedures and the support tools
- > Prepared a "living" standard operating procedures document linking from procedure steps to the current version of spreadsheet or "shadow" system tools
- > Defined the role and boundaries of the "shadow" system within the annual financial planning cycle (see diagram above)



Finance and Administration employees are using the documentation prepared by the project team as a reference guide for their activities. The documentation is also available as a training tool for new employees, and to present to UMDNJ auditors seeking written documentation on department procedures.