

Highlights of UW Administrative Efficiencies: February 2, 2009

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Key UW Strategic Roadmap efficiencies generated by the Office of Information Management in partnership with schools, colleges, and central business units including Financial Management, Office of Research, Registrar's Office, UW Technology, Computer Science and Engineering, and the Graduate School.

Executive Summary

Improvements to the University's information management and administrative systems are saving time and money. Below are examples of major savings in three top categories. More details follow.

Reduce the Administrative Burden for Researchers, Faculty, and Staff:

- **MyFinancial Desktop:** New functionality eliminates substantial manual work for PIs and administrative staff, streamlines management of 40,000 budgets, and provides better information faster. Enables PIs to see budget updates in one day, rather than an average of four.
- **Electronic Cost Share:** Provides quick access to vital cost share information, better analytical tools, and improved compliance data—saving time and providing better information for department staff, Grant and Contract Accounting, the Office of Sponsored Programs, and anyone dealing with cost share information.
- **Web Grade Submission:** Instructors and TAs will submit final grades online with this new service, and students will get their grades faster. The new service, launching Winter Quarter, will save time and money by eliminating the need to handle and mail paper forms.
- **SAGE:** New functionality will allow PIs to get their grant funding faster and make it easier for them to apply for research grants and track their progress online.

- **eTravel:** Travelers will get reimbursements faster, and staff in departments, Financial Services, and the central Travel Office will save time through a new service that electronically processes travel expense reimbursements online and routes them for approval.

Provide Better Information for Decision Making:

- **Top 5:** An effort to answer the five most critical data questions identified by Deans and Chancellors has produced new reports giving units quick and secure access to their most needed student, human resources, and finance data. It has also addressed key challenges to UW information delivery, making it easier to answer future data questions.
- **Data Warehouse:** An updated infrastructure now holds student, finance, and human resources data—giving staff wider, faster, and more secure access to reports and information and better positioning the UW to meet its growing institutional data needs.
- **Catalyst GradeBook:** Allows faculty and students to track student grades online—throughout the quarter—faster and more accurately.

Position Us for the Future:

- **Data Warehouse:** Ongoing efforts will add more data for research, procurement services, finance, student, and HR.

- **Roadmap:** Sets forth a long-term vision and plan with five key initiatives to transform UW business operations and provide information for decision making. Now online at: www.washington.edu/provost/oim/roadmap/report/
- **Kuali Student Partnership:** UW is now a founding partner of a consortium of leading higher education institutions developing a next-generation student system that will improve educational quality and the student experience.
- **Financial System Needs Assessment:** This project will collect basic requirements for a new financial system that will provide access to accurate financial information, enable the ability to forecast the future, and reduce administrative tasks by automating many manual processes.



Saving Time and Money Now

Improving Financial Processes and Systems

MyFinancial Desktop functionality creates big efficiency gains: Fiscal technicians, administrators, principal investigators (PIs), and other staff can manage their budgets more effectively, get better information faster, and spend substantially less time on administrative tasks thanks to a new MyFinancial Desktop transaction module. A top priority for administrators, this effort eliminates paper processing of expense transfers and provides details for all budget transfers.

What's changed:

- Eliminates substantial, time-consuming manual work for more than 3,000 PIs and for UW fiscal technicians and specialists, administrators, and central support staff.
- Streamlines management of 40,000 budgets, reducing time expended on individual transactions by 75 percent.
- PIs and staff see budget updates in just one day, rather than an average of four.
- Reduces administrative burden on PIs, faculty, and staff, annually saving more than 10,000 hours.
- Potential for \$400,000–600,000 annual savings University-wide.

Improving Research Administration

PIs get newly awarded grant funding faster with new electronic award and account process in SAGE: Newly enhanced modules have enabled improvements in the efficiency, accuracy, and transparency of critical processes for approving awards and setting up accounts for the UW's more than \$1 billion of annual research funding. **What's changed:**

- PIs and their administrators receive faster, more consistent notification of award and account information.
- Reduces time to process a request by as much as 40 percent with a new electronic advance budget request form.
- PIs can more easily monitor progress of newly awarded funding with a new and improved Status Checker that provides timely and transparent status.
- Reduces processing time of awards—some by as much as 60 percent—by replacing a paper-based Notice to Establish Account process and more than 25-year-old technology with a new electronic process.
- Process integration greatly reduces both redundant budget numbers and the number of retroactive salary transfers.

Improving Administration and Information Management

Top 5 effort answers key business questions: An effort to answer the five most critical data questions identified by Deans and Chancellors has produced new reports giving units quick and secure access to their most needed student, human resources, and finance data. The project also has addressed key challenges to UW information delivery. **What's changed:**

- Five student reports provide easier, wider, secure access to the most-needed data. In addition, one finance report and one HR report will be released in March 2009.
- Produced 38 institutional definitions for key data terms and corrected data quality issues by establishing consistent rules.
- Made data available in the Enterprise Data Warehouse that formerly was local or unavailable.
- Established a repeatable process that can be used to efficiently answer future questions.

Data warehouse improvements provide better data access and reporting: The Enterprise Data Warehouse (EDW) and Business Intelligence environment have been renovated to meet growing institutional needs. The EDW currently holds student, finance, and human resources data, which gives staff wider, faster, and more secure access to information for decision making. Ongoing efforts will add more data for research, procurement, finance, student, and HR. **What's changed:**

- A robust, stable infrastructure is now in place to meet growing business needs, allowing staff better data access, faster report distribution, and collaborative report development.
- Newly implemented data security standards enable user authorization, provide wide access to EDW data, and make EDW compliant with state and federal regulations. They also enable rapid deployment of enterprise analytics so reports are quickly distributed, and they facilitate collaborative development of additional reports.
- New Purchasing/Accounts Payable data in the EDW preserves data that formerly was lost to the UW system, and the data soon will be available to units for reporting and analysis.
- Reports about finance, student, and HR information save staff time by providing better data for key UW business functions including centralized payroll, benefits administration, and labor negotiations.
- In the next three-to-six months, automated reports are coming that will make it unnecessary for staff to gather data manually. UW Procurement Services estimates annual savings of \$18,000 in labor on one invoice discrepancy report.

Upcoming 2009 Improvements

New software efficiencies and improvements rolling out Winter Quarter:

A list of projects rolling out in 2009, including those detailed here and more, is now online. To view upcoming project activities, determine how your business may be impacted, or obtain contact information, see www.washington.edu/provost/oim/rollout.1.22.09.pdf

Improving Financial Processes and Systems

eTravel will generate huge efficiencies and faster reimbursements: Travelers will get reimbursements faster, and staff in UW departments, Financial Services, and the central Travel Office will save time through this new service that electronically processes travel expense reimbursements, routes them for online approval, and replaces paper travel expense vouchers (TEVs). The new eTravel service will begin rolling out in February, eventually replacing the paper-based manual process. **What's changing:**

- Big savings in time for staff, with the Travel Office saving an average of 30 minutes per TEV and Financial Services 17 minutes per TEV. UW departments could save an average of 50 minutes per TEV, including easier handling of complex reimbursements. In addition, reimbursements will get to travelers faster.
- Will eliminate manual routing, automatically calculate per diem and mileage rates, and coordinate data entry and review.
- Estimated to save 1.5 hours of staff time per TEV. With about 25,000 TEVs processed per year at the UW, this will result in potential annual time savings of 20,800 hours, or \$800,000.

- Will eliminate need to enter and approve a PAS purchase order and manual routing of reimbursement forms for approval.
- Will provide an improved user interface, coordinated entry and review, and automatic calculation of per diem and mileage rates.

Ongoing work will deliver reports more efficiently and reduce printing costs:

OIM and UW Technology are working with business units to identify ways to reduce the distribution of printed reports from UW administrative systems—eliminating reports that nobody needs anymore and identifying those that can cost-effectively be delivered electronically. **What's changing:**

- Distributing salary revision worksheets electronically already has eliminated the need for staff to walk to the Budget Office to pick up worksheets, saved paper, and made life easier for administrators.
- Since November 2007, 32 percent of units have opted out of receiving monthly Budget Activity/Summary Reports on paper, reducing print volume by 18 percent.
- Starting this month, the Budget Office will distribute monthly Operating Budget Detail reports electronically rather than on paper to administrators across the UW.
- These efforts will save an estimated 360,000 printed sheets of paper per year, generating overall annual savings of about \$40,000.

Improving Research Administration

Electronic Cost Share module means big improvements in managing cost-share information:

The new module will provide quick access to vital information, better analytical tools, and improved compliance

data—saving time and providing better information for departmental staff, Grant and Contract Accounting, the Office of Sponsored Programs, and anyone dealing with cost share compliance. The new system, coming early 2009, will replace a cumbersome mainframe budget screen and manual processes with an interface that summarizes and expands details, looks up information, and calculates quarterly UW cost sharing (the UW's share of the cost of research). **What's changing:**

- Will simplify managing and reporting UW share of research costs (over \$110 million) for more than 1,300 budgets in over 122 departments.
- Will facilitate accurate application of the UW's indirect cost rates.

Integration with Grants.gov will make it easier to apply for new research funding:

PIs will be able to complete grant applications through Grants.gov faster and track the status of their applications with critical, real-time information using a new Grant Runner module coming Summer 2009 in SAGE.

What's changing:

- PIs already can submit NIH grants directly through Grants.gov using Grant Runner forms. More grant sponsors will be supported soon.
- Up-front data validation soon will reduce the number of applications returned for error correction.
- The time to complete an application will be cut by 50 percent, according to data from pilot submission participants.
- PIs and their administrators will monitor applications online with real-time status provided by Grants.gov and NIH, eliminating unnecessary phone calls and saving time.

Improving Administration and Information Management

Web Grade submission saves time and money: Instructors and TAs soon will be able to submit final grades electronically, and students will be able to get grades faster with a new online service launching Winter Quarter. The new service will also save staff time and money. **What's changing:**

- Faculty already can enter and manage class assignment and test grades online through Catalyst GradeBook, and students can track their progress throughout the quarter.
- Faculty soon will be able to enter and manage their final quarterly class grades online, rather than on paper that then needs to be hand carried to the Registrar's Office. Students will get their final grades faster.
- The new service eventually will save time and money for Registrar's Office staff by eliminating paper forms and printing and handling costs. It will decrease campus mail and give other authorized UW staff access to student data.
- The underlying Student Web Services infrastructure and security model can be adapted to quickly develop other UW Web Services.
- When the Web grade submission service completely replaces paper grading forms, estimated annual savings will be \$53,000 in printing, distribution, and processing. In addition, it will save faculty time by eliminating the need to mail paper forms.

Planning for Our Future

Strategic Roadmap with vision and action plan for the future now online: The UW Strategic Roadmap for Information Management and Administrative Systems

(Roadmap) is now online, along with a new Web site providing more details and information. The Roadmap sets a long-term vision and comprehensive plan, with five major initiatives and an action plan. See:

www.washington.edu/provost/oim/roadmap/report/

What's next:

- The Office of Information Management is working with stakeholders to reevaluate Roadmap priorities in light of the current budget climate. Its goal is to identify ways to make progress on the most important priorities.
- Recent discussions with key stakeholders have affirmed that two projects of strategic significance to the UW should move forward. The projects are the Financial System Needs Assessment project, which is the first step in replacing the UW's financial system, and the Kuali Student development effort, which the UW joined last year as a founding partner. These projects (described below) were named by key stakeholders last year as the top Roadmap priorities.

UW Joins Kuali Student Partnership to develop new student system: UW has become a founding partner of the Kuali Student partnership, joining a consortium of leading higher education institutions to develop a next-generation student system. The UW joined the partnership after receiving approval from the UW Board of Regents and the state Information Services Board. Joining Kuali was identified as a key short-term Roadmap priority by stakeholders. UW is contributing technical and subject matter expertise to the five-year effort. For information on partner institutions and the project plan, see: <http://student.kuali.org>

What's next:

- Recent discussions with key stakeholders have affirmed that this project is of

strategic importance to the UW and should move forward.

- UW staff have been assigned to the project and are starting to gather business requirements.
- A next-generation student system could substantially improve educational quality and the student experience with better tracking of educational outcomes and new tools for finding courses and navigating programs. It should also be cost effective since there are no licensing fees, and it should significantly streamline processes and reduce the cost of software customizing and support.

Financial System Needs Assessment Project moving ahead:

This project is the first step in replacing the UW's legacy financial system, which was identified as a key Roadmap priority by stakeholders. The project will collect the UW's basic requirements for a new financial system.

What's next:

- Recent discussions with key stakeholders have affirmed that the project is a key strategic investment essential to the UW's future and should move ahead.
- Over the next several months, the project will bring together focus groups to provide feedback on the UW's current general ledger and chart of accounts, document "as is" business processes, and seek stakeholder input on the opportunities and challenges of a new financial system.
- A new financial system eventually will automate many manual processes now used to collect revenue, purchase and pay for goods and services, and budget for future needs. It will provide access to accurate financial information and the ability to forecast the future.