

OIM Highlights: Executive Summary of Accomplishments Fiscal Year 2008-2009

Major progress on [Strategic Roadmap](#) initiatives and significant efficiencies delivered to the University of Washington community 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.



Information for Decision Making

- Developed the [Data Management Committee](#) into a highly effective institutional forum that:
 - Provides the structure necessary to produce meaningful information from highly complex, decentralized data.
 - Established a transparent, structured process to guide policy, including an “open books” policy on institutional salary data.
 - Took a major leap forward in providing access to data by producing and publishing more than [50 new reports](#) that answer critical student, financial, and faculty questions.
 - Engaged stakeholders in a new process that produced agreement on **38 new institutional data definitions** and enables development of future definitions and reports.

Replace the Base

- UW became a founding partner of the [Kuali Student Consortium](#), joining leading higher education institutions in developing a next-generation student system.

- Completed two-thirds of the **Financial Systems Needs Assessment project**, the initial phase of a multi-year effort to replace the UW's aging financial systems.

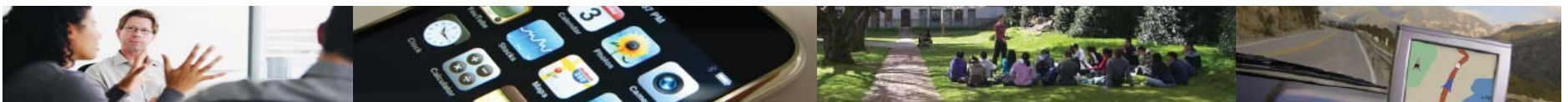
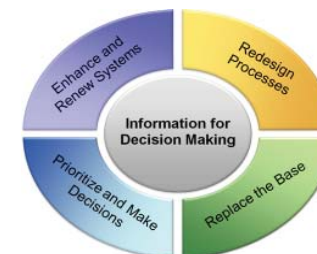
Enhance and Renew Systems

- Ensured smooth operations of UW's core administrative systems that run critical business operations, including a \$1.6 billion payroll and \$1.1 billion in research grants.
- Delivered significant efficiencies to the UW community by automating costly and time consuming processes, saving units time and money. For details, see: [OIM Highlights—Administrative Efficiencies](#).
- Advanced Web Services technology to improve online course management tools for faculty.
 - In Spring Quarter, instructors used the new Catalyst Gradebook tool to submit 67 percent of all on-time grades.
 - Another new tool—available through MyUW—lets faculty see an online list of students in each of their classes, along with their photos.

- New MyFinancial Desktop functionality brought large efficiency gains, providing better financial information faster. Saved thousands of hours of effort by eliminating paper processing of expense transfers and providing details for all budget transfers in one day—not the usual four.

Prioritize and Make Decisions

- Led and facilitated the November **IT Governance Retreat**, setting the foundation for subsequent IT governance planning.
- Coordinated and supported a new [Interim U-TAC](#).
- Led and supported the **Governance Action Team** in developing recommendations for a new IT governance structure.



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August 13, 2009. Major progress on [Strategic Roadmap](#) initiatives and significant efficiencies delivered to the University of Washington community 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.

Information for Decision Making

- **Developed the [Data Management Committee \(DMC\)](#) into a highly effective institutional forum for tackling tough data questions;** fulfilling its charge of making information management an institutional priority. The DMC:
 - **Provides the institutional structure to produce meaningful information** from highly complex, decentralized data.
 - **Established a transparent, structured process for guiding policy,** including an “open books” policy on institutional salary data needed to electronically administer grants, faculty effort, and cost sharing.
- **Developed and published over 50 new reports** providing decision makers in all units with critical student, financial, faculty, and other information. Made them [available on the Web](#), along with a schedule of future reports.
 - **Includes reports answering critical data questions** identified by deans and chancellors as part of the [Top 5 project](#).
 - **Created [institutional definitions](#) for essential data needed to produce meaningful reports.** Engaged stakeholders in a new process that produced agreement on 38 new institutional data definitions and will enable development of future definitions and reports.
- **Launched an Academic Advisory Group** for Enterprise Reporting to solicit input from academic units and meet their needs.
- **Added new data to the data warehouse,** including all student data from the

University Student database, finance data for biennium and fiscal year accounting, procurement data, and clinical salary data.

- **Completed major advances in technology infrastructure critical to supporting key information management initiatives.** A robust, stable infrastructure now meets growing business needs, allowing better data access, faster report distribution, and collaborative report development. Newly implemented data security standards provide secure access to data warehouse data.

Replace the Base

- **Launched the Kuali Student initiative,** securing the necessary support, approvals, and funding for the UW to join other leading higher education institutions in developing a next-generation student system. Created a “Student Program” within OIM to tightly integrate Kuali development with existing student system maintenance and production.
- **Completed two-thirds of the Financial Systems Needs Assessment project,** phase one of a multi-year effort to replace the UW financial system. Identified requirements for a new financial system, evaluated recommended changes to the UW's General Ledger and Chart of Accounts, and initiated planning for the second phase—Financial Systems Alternatives Analysis—to kick off this fall.

Redesign Processes

- **Documented all financial business processes** to understand the potential impact of a new system on current processes and staff roles and responsibilities:

- **Identified key touch points** with other systems.
- **Identifying process improvements to address** well before financial system replacement.
- **Exploring wider application** of the documentation process used; leveraging it to provide consistent documentation across all Replace the Base projects.

Enhance and Renew Systems

- **Ensured smooth operation of UW's critical administrative systems** including processing a \$1.6 billion in annual payroll, \$1.1 billion in research grants, \$150 million in gifts, and \$1 billion in purchases of goods and services. Enabled students to register online and receive grades for 500,000 courses, receive \$450 million in financial aid, and pay \$400 million in tuition and fees.
- **Completed high-value enhancements to core administrative systems, saving units time and money,** including the following:
 - **New MyFinancial Desktop functionality creates large efficiency gains and provides better financial information faster.** The new functionality saves thousands of hours of effort—eliminating paper processing of expense transfers and providing details for all budget transfers in one day, not the usual four.
 - **Advances in Web Services technology bring significant improvements to online course management tools:**
 - **A new tool allows faculty to submit final course grades online.** Instruc-

tors used Catalyst Gradebook to submit 71 thousand grades online Spring Quarter, or 67 percent of all grades that were submitted on time.

- **This same tool allows faculty to track student grades and class assignments** during the quarter.
- **Another new tool—available through MyUW—allows faculty to see a list of students in each of their classes, along with their photos, online.**
- For more information on the new student Web services technology, see the [University Week article](#).
- **eFECS improves efficiency, saves staff time, and provides better information.** The first module of eFECS (the Electronic Faculty Effort and Cost Sharing project) launched in February and provides quick access to cost share information, better analytical tools, and improved compliance data for UW staff who deal with cost share information.
- **New electronic award and account processes in SAGE allow PIs to get newly awarded grant funding faster,** making it easier for them to apply for research grants and track their progress online.
- **New eTravel service provides faster reimbursements and major efficiencies.** Travelers get reimbursed faster and staff in UW departments save time through a new service that electronically processes travel expense reimbursements, routes them for online approval, and replaces paper travel expense vouchers.
- **Reduced annual print volume from administrative systems by 1.2 million pages** by eliminating unused reports and delivering others electroni-

cally. Ten of the 25 largest reports no longer are printed.

–For details, see [OIM Highlights: Administrative Efficiencies](#).

Prioritize and Make Decisions

Key work on UW information technology (IT) governance moved forward this year:

- **Facilitated IT governance retreat that provided the foundation for moving ahead with key governance efforts,** including Interim U-TAC and the Governance Action Team (see below). The November retreat brought together UW leaders involved in IT governance to evaluate the UW's current approach and recommend future directions.
- **Provided coordination and support for a new [Interim University Technology Advisory Committee](#) that is enabling the UW to address important IT policies and priorities** until a permanent governance structure is established. The committee is chaired by the Provost and supported by OIM in partnership with UW Technology.
- **Provided leadership and support for the Governance Action Team (GAT), which is developing recommendations for a new UW IT governance structure.** The GAT, one of 11 action teams implementing the recommendations of the UW Technology Working Group, plans to present its recommendations to the Working Group this fall.
- **Launched Roadmap Web site and report** to communicate the [UW Strategic Roadmap for Information Management and Administrative Systems](#) to the UW community. The report and Web site provide an overview of the Roadmap and its five key initiatives.

- **Continued to enable prioritization of administrative systems and information management projects** while an interim governance structure is being determined.
- **Improved the operations and effectiveness of the priority setting groups** that provide input into UW business system and decision support maintenance projects.
- **Developed a comprehensive catalogue of administrative systems applications in use across the UW.** Identified over 650 systems in use across 89 departments—the first effort of its kind.
- **Strategic approach to budget reductions enables continued work on key strategic roadmap initiatives.** OIM's budget was reduced by 17.5 percent (including mid-year reductions), and 20 positions were eliminated.
 - **OIM preserved a portion of the \$3 million FY2009 budget allocation for Roadmap priorities,** which enables it to move ahead with the next phase of the Financial System Needs Assessment and the Kualii Student partnership.
 - **Budget cuts will delay build out of the data warehouse and hinder OIM's ability to implement system improvements** that create efficiencies for UW units. See [OIM Summary of Estimated Budget Reduction Impacts FY 2010](#).

