

(132) Business Case:

ENTERPRISE BUSINESS SERVICES PROGRAM - START UP

PROJECT SUMMARY

The UW is implementing an Enterprise Document Management System (EDMS) to digitize and electronically store documents. The Enterprise Business Services (EBS) Program will provide the supporting services necessary to fully utilize the EDMS, including workflow to automate document routing, Web services to provide additional content and approval, and business process redesign to improve efficiency and make paperless processes the norm. Without these additional services, the value of the EDMS is limited primarily to storing electronic documents. The EBS program will provide the tools and resources necessary for units to streamline and automate their process on a self-service basis.

KEY OBJECTIVES AND BENEFITS

The EDMS is one of five services or "building blocks" required to quickly and easily streamline UW business processes. The Enterprise Business Services (EBS) Program will provide the other four services or "building blocks" necessary to fully realize the benefits of the EDMS. Making these building blocks work together requires a coordinated approach to both store documents electronically and automate the processes around them. The services, or building blocks, are:

- 1) **Enterprise Document Management System:** Provides centralized accessible document/content management as a service. (Fully funded and staffed)
- 2) **Workflow:** Utilized to automatically route documents and support other required actions. (1FTE required)
- 3) **Lean/agile business process transformation:** Tool kit providing cookbook approach to doing a LEAN process improvement to ensure automation achieves the highest business value. Helps avoid automating "the cow path." Enables units to streamline business processes on their own. (1 FTE required)
- 4) **Web services/integration needs:** Serves up standard data such as budget numbers, organization codes or other information required to easily complete document. (1 FTE required)
- 5) **Web forms/applications and notifications:** Provides "canned" forms that can be modified to provide a user interface for each step of the process. (1 FTE required)

With these four additional tools (Workflow, Lean/agile business process transformation, Web services, and Web forms), EDMS can be a key driver for rapidly streamlining business processes and empowering business partners to make paperless workflows the norm across the UW. For example, a Grants and Contracts Accounting (GCA) pilot implementation is automating one of over 20 manual processes associated with post-award reporting. After the first implementation, GCA staff will automate the remainder, having learned how to utilize the service tools provided. Other examples of processes that could be automated using these tools include over 28 manual Office of Animal Welfare processes, ORIS pre-award workflow processes, and online student application processing. The objective is to establish EBS as a self-sustaining service in FY 2016.

TIMELINE ESTIMATE

Estimate of Project Duration (#of Months): 12 - 24 months Start date (Month, Year): July 2014

BUDGET ESTIMATE – COMPLETE THE YELLOW BOXES (DOUBLE-CLICK)

	Implementation		Ongoing (Annual)	
Contributed Labor (# of Hours @ \$107):	7,750	\$ 829,250	5,050	\$ 540,350
New Labor (# of FTE @ \$135,000/yr):	4	\$ 540,000	4	\$ 540,000
HW/SW/Other non-Labor Expenses:	10,000	\$ 10,000	1,500	\$ 1,500
Total:		\$ 1,379,250	Total:	\$ 1,081,850

FUNDING

How will this project be funded? (check all that apply) Existing UW-IT Budget Provost Self-sustaining, grant, other

Are the funds for this project already committed?

Implementation: Yes No Partially, explain: _____

Ongoing (annual): Yes No Partially, explain: _____

This start-up project is focused on building out the Enterprise Business Services program framework to support the EDMS five-year goals. The start-up project will require seed money to support both #83 EBS and #113 BPM new labor needs. Program will follow a maturity model with the goal of being a self-sustaining service.

PROJECT DEPENDENCIES

Successful implementation of EDMS is dependent upon the EBS startup project.

PRIORITIZATION CRITERIA

1. STRATEGIC VALUE

- 1. **Does this project improve the University’s academic or research excellence?** Yes, indirectly. The Enterprise Business Services (EBS) Program will support systematic streamlining of UW business processes and services across the enterprise, deploying a suite of services to automate manual paper processes.
- 2. **Does it improve the UW’s competitiveness by helping to attract the best students, faculty, and staff or by increasing and diversifying funding?** Yes, indirectly. The implementation of the EBS Program will support the University of Washington’s strategic goals to reduce the administrative burden for faculty, staff and students, increasing time, resources and funding available to support the University’s core mission.
- 3. **Does it enhance interdisciplinary collaboration in research, instruction, or other University efforts across organizational, regional, or global boundaries?** Yes, implementation of the EBS Program will support implementation of the Enterprise Document Management Systems providing the opportunity to create, share and access a common, secure repository of documents and content that is organized utilizing standard meta data to ensure easy cross-organizational access.

2. Impact

- 4. **Does this project improve the personal productivity or experience of students, faculty, or staff (i.e. individual end user of system or service)?** Yes, the EBS Program will provide business partners with the tools they need to continue automating processes with limited support and oversight from EBS staff, supporting the broad implementation of EBS tools enterprise-wide.
- 5. **Does it benefit a large number of UW students, faculty, or staff?** Yes, full implementation of the EBS Program will streamline and automate cross-organizational processes impacting faculty, staff and students.
- 6. **Does it improve administrative efficiency or reduce overall administrative costs for the University (and not by shifting costs to units)?** Yes, utilizing EBS services to automate manual processes will reduce administrative costs and improve administrative efficiency. Further, it will create a framework that allows the EDMS and AIS teams to easily pool resources and manage priorities in concert allowing both teams to gain efficiencies and round out available skill sets, resulting in increased overall productivity.

3. Risk

- 7. **Does this project help sustain and strengthen core IT operations, mitigate operational risk, or ensure key services are resilient?** The EBS Program will strengthen the value of each of the individual services included under the EBS umbrella. Each individual service, while valuable based on its own merit, is more valuable when applied as a suite of services supporting the overall automation of a previously manual paper process; a secure repository, workflow and related records management automation will mitigate operational risk and increase the resilience of key services.
- 8. **Does this project address compliance, financial, or information security and privacy risk?** The EBS Program will set criteria for prioritizing implementation requests from units across the University of Washington that are seeking to address compliance, financial or information security and privacy risk. Established request selection criteria is expected to take these risks into account as part of the request prioritization process.

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Date: 1/24/2014 [Latest Revision: 2/7/2014]

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DATE: 1/27/14

