

University Process Improvement Completed Projects Update January 2019

SUMMARY :

- Eight (8) projects completed since June 2018
- Three (3) projects have a direct positive impact on students
- Estimated staff hours saved is 11,160
- Estimated student hours saved is 220

COMPLETED:

1. Access Control Process – Vendor Phase (P072)

- Scope – Continuation of project to standardize requests for Building Access and creating an electronic process.
- Outcome – Successfully completed creating a new process for departments to request keys for vendors during on-campus projects. System provides ability to track who has possession of the key and return dates.

2. Cayuse/Banner Integration Review (P075)

- Scope – Analyze and assess the related business processes and policies supporting sponsored research at the university, with a particular focus on the implementation and integration of the two main enterprise software systems (Cayuse and Banner). Improve operations by supporting the research mission.
- Outcome – Team reviewed processes relating to:
 - Support grant development and submission
 - Award notification and setup
 - Plan and track program expenditures
 - Identify reports needed for researchers, support staff, administration and grant agencies
 - Documented 'Process Maps'
 - Documented current data management standards and report writing capabilities
- Recommendations:
 - Hire a consulting firm to develop a process to integrate Cayuse data to Banner.

3. Travel & Reimbursement Process Review (P076)

- Scope – Review current processes, relating to departmental request/reimbursement process and travelers who use Shared Service Center. Determine where processes can be streamlined, eliminate paper and evaluate Travel/Expense software options.
- Outcome – Recommend purchase of 'Chrome River Travel & Expense' software
 - Eliminates need to create travel PO
 - Captures electronic signatures
 - Reduces staff hours on handling paper, scanning and filing
 - Speed up reimbursement turn around

4. Academic Term Delete Process (P077)

- Scope – Review current policies, practices and processes relating to 'Term Delete'. Design and create an improved streamline process that eliminates paper, create an electronic form submission, and captures approvals using existing software.
- Outcome – Created DocuSign form to provide automatic workflow and capture electronic signatures
 - Eliminated unnecessary signatures, manual emails and staff processing
 - Eliminated paper, scanning and filing of forms.
 - Systematic process to update the 23 Staff Senate LDAP groups

*Estimated to save **415 staff hours in an academic year** by automating the process.

5. Academic Program Maintenance (P078)

- Scope – Review current practices and administrative processes relating to Academic Program Maintenance (Change Major). Develop an online request form with electronic approvals and routing, eliminating paper and

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improving process time. Review and update guidelines, websites and catalog information relating to the process.

- Outcome – Created a new electronic online system that allows the advisors to submit changes relating to major, minor and catalog changes.
 - Systematically updates Banner
 - Eliminated estimated 19,000 sheets of paper that was being processed by Registrar’s office
 - Eliminated unnecessary signatures
 - Generates automated email messages

*Estimated to save **8,745 staff hours in an academic year**, paper and filing and imaging documents.

6. Access Control Phase V – Sub-Master Key & Vendor Request (P081)

- Scope – Complete Access Control phase to address requesting, approving and inventory sub-master keys and keys for vendors.
- Outcome – System updates to handle the additional AVP Physical plant approval for these requests and maintain an accurate inventory.

7. Late/Add Registration (P082)

- Scope – Streamline late/add registration to reduce student and staff time.
- Outcome – discovered multi versions of the form on departmental websites, process and information was not consistent.
 - Eliminated departmental versions of the form
 - Eliminated Bursar and Financial Aid staff from process
 - Students only need to complete ‘one’ form, eliminating additional forms that were required by departments
 - Once form has appropriate signatures, students only visit Registrar Office once

*Estimated to save students and staff 220 hours for **savings of 440 hours in an academic year**.

8. Cayuse/Banner Integration (P083)

- Automate processes to load Cayuse Data to Banner.
 - Hired an external consulting company to write the interface scripts and daily log reports
 - Eliminates manual processes, data entry and duplication of efforts
 - Standardized data fields between the two systems
 - Reduce data entry errors

*Estimated to save **2,000 staff hours annually** by eliminating manual entries, based on 500 submissions.

PROCESS IMPROVEMENT RESOURCES WERE DEDICATED TO THE FOLLOWING PROJECTS:

1. Staff Hiring Process Review - (P073) - COMPLETED

- **Efficiencies in the Hiring Cycle Time**
 - Mapped “AS IS” and “TO BE” processing.
 - Staff posting reduced from minimum ten (10) days to five (5) days.
 - Maximum of 30-days from the job posting’s closing date for departments to submit interview candidates for approval. After 30-days the posting will be cancelled, and the process will have to start from the beginning.
 - New staff positions funded by grants may now be posted with “TBD” listed as the position number while the new position number is being established.
 - Office for Institutional Equity (OIE) will only review candidates selected to interview, eliminating the second review when a candidate was recommended to hire.

- **Automation of Processes**
 - Eliminated paper approvals for new staff positions. CFO & Presidential approvals will be routed electronically through WorkforUM.
- **Training/Documentation**
 - Hiring departments will now receive tips/how-to emails throughout the hiring process. Once a position is posted, the hiring manager will receive an email identifying the next steps.
 - Upon approval of the hire, the hiring manager will receive an email containing a “Supervisor Checklist” to assist with the new employee’s onboarding process.
 - A UofM “Quick Facts” benefits leaflet to be used for hiring both staff and faculty has been developed to assist hiring managers during the recruitment and interview process. This information is also posted on the HR website.

2. Procurement Process Flow – (P074) - COMPLETED

- Met with procurement staff to design and create a process flow mapping that outlines the steps involved when requesting a product or services.
- Outcome – Process Map was created and posted on Procurement and Contracts website

3. Research Administration/Grant Accounting Process Mapping (P079) - COMPLETED

- Documented current Offices Sponsor Programs and Grants Accounting as they relate to Sponsored Internships
- Identified the Pains & Issues and Root Cause

4. Review of University Benefits and Benefits Processing (P084) – IN PROGRESS

- Review all benefits provided to employees to ensure they provide the intended need.
- Ensure communications (including website) and information provided during New Employee Orientation is clear and consistent.
- Evaluate processing of all benefits to determine efficiency and elimination of manual steps.

5. P-Card Program Review, Expansion of Usage(P080) – IN PROGRESS

- Expand usage to create efficiencies and increase revenue stream.
- Develop new training materials and guidelines.
- Create DocuSign form created for P-Card applications with electronic approval routing.
- Currently piloting US Bank cards with select campus users.