OPENMSU PROJECT STATUS SPRING 2016

SHARED SERVICES

Project Manager: Kathy Attebury

% Complete: 75

Description: This project will analyze opportunities to share administrative functions across campus units, departments, and colleges to improve information sharing, training and operational efficiency across the university. The goal is to develop working shared services models within certain departments as a way of testing and refining processes before rolling the models out as examples for the greater university community.

Status: The Office of Shared Services began providing accounting, budgeting and human resources support to a variety of clients beginning in spring 2015. Its clients include the Office of the President, Administration and Finance, the Library and the Dean of Arts and Architecture.

Other shared services models have been developed in the College of Letters and Science and the College of Engineering. The OpenMSU Shared Services Model project team is in the process of gathering best practices from all of these different shared services models for campus' benefit.

ELECTRONIC DOCUMENT MANAGEMENT AND WORKFLOW

Project Manager: Laura Humberger

% Complete: 40

Description: Implement electronic Document Management and Workflow functionality that comes with the Banner system to replace many of the current paper-based approvals and notifications performed by our staff. Document Management would allow an external document such as a student's tax return or a vendor invoice to be filed as an image and attached within the Banner system rather than in a physical file. Workflow is a tool for automating and simplifying administrative processes.

Status: The Banner Document Management (BDM) functionality has been implemented. The first pilot processes to which it will be applied are:

- the purchasing card process,
- the migration of legacy transcripts on the Bozeman campus from an outside imaging system,
- imaging of transfer student transcripts
- and retaining images of revised student award letters

The OpenMSU goal for Workflow will be to inventory all manual processes on campus that could benefit from an automated review and/or approval process. A steering committee will then be developed to prioritize the processes that would benefit most from automation, and the project will then be moved into ongoing business in the Enterprise IT Governance Council framework.

SERVICE EXCELLENCE

Project Manager: Betsy Webb

% Complete: 75

Description: Developing a culture of service excellence among staff and faculty is a vital part of a productive and efficient campus working environment. All individuals in the university community, including senior leadership, must foster a spirit of service excellence. This project will train and empower staff to provide great customer service.

Status:

- Teri Yanovitch engaged as consultant for process ("Unleashing Excellence").
- MSU Service Philosophy defined by MSU leaders.
- MSU Service Standards are safety, courtesy, reliability and competence.
- A Service Excellence Team formed to manage process.
- Developed the Service Excellence Website www.montana.edu/serviceexcellence.
- 5 full-day workshops provided to 150 leaders on campus March 28, 29, 31, April 1, 2.
- 15 MSU employees trained to facilitate Service Excellence workshops.
- Service Excellence Workshops are being offered on campus. Roughly 50 workshops for over 1000 MSU employees have been conducted to date. A condensed workshop has been developed for student workers. Extension Annual Conference in 2015 offered a condensed workshop while agents from across the state were in attendance on the Bozeman campus. There is a current effort underway to adapt and shorten the 3-hour workshop for faculty in AY2017.
- The Annual Employee Recognition celebration organized around the Four Service Standards of Safety, Courtesy, Reliability and Competence.
- Facilitated follow up meetings are available to units who have completed Service Excellence workshops. The follow up sessions assist units in identifying processes that can be improved specific to the units.
- A Service Opportunity System is in the development phase that will allow for service obstacles that cross departmental lines to be examined and addressed by a leadership group.
- A Manager's Tool Kit has been posted and is available on the website.
- The Recognition subcommittee has developed "Random Acts of Excellence" postcards which are available to recognize excellence (template posted on the website).

HR RECRUITMENT

Project Manager: Cathy Hasenpflug

% Complete: 100

Description: This project will analyze and improve the recruitment and hiring process to reduce time-to-hire and process inefficiencies. The project will incorporate talent acquisition management software to automate the recruitment process through a user-friendly web interface that enables ease of use for applicants, recruiters, and search committees. Automating the recruitment process will improve operational efficiency, decrease time to hire, and reduce frustration across the institution.

Status: The Human Resources Office (HRO) has implemented the Applicant Tracking System (ATS) for all four campuses and redesigned recruiting/hiring processes in conjunction with this technology implantation. These actions are intended to streamline the recruitment process, reduce time-to-hire and increase the number of applicants for positions at MSU.

In addition, the Jumpstart program consolidated and improved the new hire onboarding process.

FRONT END TO BANNER

Project Manager: Laura Humberger

% Complete: 100

Description: Banner Finance does not provide certain user-friendly functionality that is desirable and necessary. Catbooks, an internally developed software program, is currently used to supplement Banner but it is not a viable long-term solution. This project will implement a permanent, consistent solution to accounting "shadow" systems and provide a front end to Banner Finance.

Status: Initial scoping meetings took place to investigate whether new software, re-implementation of Banner Finance or some combination of these options was the best solution for the university. It was determined that CatBooks will continue to be the best option for now.

SERVICE PROVIDER DEVELOPMENT

Project Manager: Betsy Webb

% Complete: 100

Description: This project will develop and maintain ongoing structured training for administrative service providers.

Status: The Professional Development & Training (PD&T) manager was hired in February 2013. The PD&T manager created the Financial Development Certificate program and Management Development Certificate. Monthly PD&T sessions are being offered on various topics and customizable PD&T workshops are available for departments and teams (e.g. retreat facilitation, strategic planning, team building, etc.). Other training programs and curriculum are being developed and presented.

HR PAYROLL PROCESS

Project Manager: Cathy Hasenpflug

% Complete: 90

Description: The payroll process improvement project is intended to reduce cycle times, increase the capacity of the HR Office and meet campus demand for improved HR processes.

Status: Human Resources has determined that that demand for improved payroll processes was mostly driven by challenges with the EPAF process. The redesign of the EPAF workflow appears to have reduced bottlenecks that affected payroll. In addition, the Jumpstart program has significantly streamlined the new hire payroll/first paycheck process. Finally, an enhanced online paystub was introduced, and the departmental payroll report is currently being redesigned.

BANNER PAYMENT AUTHORIZATION & PURCHASING PROCESS

Project Manager: Laura Humberger

% Complete: 70

Description: Payment Processes- A review of the procurement process, from initial request through payment to vendor, will identify inefficiencies, duplication of effort, and opportunities for automation. The outcome will simplify the procurement process and related reporting. Furthermore, the Banner Payment Authorization process is labor-intensive and addressing the inefficiencies will reduce administrative overhead.

For Banner Payment Authorizations (BPA), implementation of Banner Approval Queues has decreased time from invoice receipt to payment. The use of APEX forms for BPAs allows for easier data entry.

The purchasing card process is being redesigned and automated in conjunction with the implementation of the electronic document management (EDM) solution, another OpenMSU project. The purchasing card process was identified as the first pilot for application of EDM technology because the process already includes a decentralized electronic record and because of the process's multi-campus applicability.

Description: Strategic Procurement - Significant efficiencies and cost savings may be possible through more strategic procurement methods, such as greater use of negotiated discounts.

Status: An independent consultant has analyzed MSU's office supplies spend, and staff is working with them to propose specific changes to save time and money. Additional areas of spend will be forthcoming.

HR EPAF PROCESS

Project Manager: Cathy Hasenpflug

% Complete: 100

Description: This project will streamline the Electronic Personnel Action Form process.

Status: Human Resources redesigned the EPAF workflow and introduced automated error notifications. In addition, a new EPAF workflow and "mass apply" has reduced delays in student worker system access and time to 1st paychecks. HR has enabled new-hire immediate system access by redesigning EPAF workflow (Jumpstart pilot program).