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CU I&E: Automating Processes to Save Staff Time/Resources [1]

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As promised earlier this month [2], we'll be highlighting each of the submissions to this year's CU Innovation & Efficiency (CU I&E) Awards Program [3] in a series of OUC Newsletter articles.

We've covered three creative solutions already, in a previous news article [4]. Today, we'll look at five more innovative projects that are saving employee time, effort, and stress across CU.

Anaplan Budget Tool

In response to multiple pain points identified during a multidepartment survey, the Boulder Office of the Provost and Department of Budget & Fiscal Planning determined to research and implement a common budgeting tool for the campus. Ultimately, Susan Nasher, Teddy Niedermaier, and Hanna Coatney worked with business planning software company Anaplan to help facilitate the annual resource planning process, and the campus is currently using Anaplan to develop the FY2025 continuing General Fund budget. The tool integrates strategic planning into the annual budget exercise, reduces retroactive budget planning, eliminates the need for some homegrown systems, and can deliver more powerful reports, dashboards and visualizations. The greatest efficiencies for campus departments are automation opportunities, reduced manual processes, and the ability to draw together multiple sources of campus data, with particular improvement to the position budgeting process.

Asana Project Management for External Vendors

As a Boulder Campus research entity that focuses on equitable community partnerships, the Renée Crown Wellness Institute manages a large volume of external payments in support of community-based participatory research. To facilitate mutual understanding between study investigators and Institute administrators, the Finance and HR team (Sam Hubley, Wanda Cardenas, Grace Dostart, Analyce Leigh, and Martin Castorena) created a comprehensive system to track all external payments from inception to close out. They turned to the Asana work management platform since it contains systems for requesting new payments, clarifying payment mechanisms, tracking scopes of work and purchase orders, paying invoices, modifying purchase orders, and sunsetting agreements. When Institute leadership, study investigators, and administrators need information about an external vendor, they can easily locate that data in less than one minute. The system clarifies unique roles for each employee type to streamline workflows and reduce inefficiencies and duplication of effort – and to increase transparency between all personnel.

Automate Department Administration Indirect Cost Recovery (DAICR) Report

At the Boulder Campus, preparing the individual Department Administration Indirect Cost Recovery (DAICR) reports – which inform over 90 departments of the DAICR amount they will receive for the coming year's budget – used to take over a week to complete. The Campus Controller's Office emailed the reports in June and August, and the extensive manual data handling introduced a likelihood of human error at various stages of the process.

So Joy Vidalon and Carl Sorenson collaborated to automate the manual process. They created a report in CU-Data that stakeholders can run to conduct forecasting and to see how PIs and projects are doing. The report is readily available at any time and it is fast, consistent, and accurate.

Automating Excel Tasks

At UCCS, the Office of Advancement was looking for better, faster ways to assemble and update student and donor information. The large KPWE (Karen Possehl Women's Endowment) Scholars database was particularly challenging to maintain and revise. Using JavaScript programs to automate repetitive Excel tasks, Andrew Bruce was able to eliminate manual processing related to the creation and update of multiple spreadsheets for scholar, mentor, and donor details. The scripts allow users to edit information once in the main KPWE sheet and then quickly and easily update the whole workbook.

CU-SIS TDClient Automations

For years, the campus Financial Aid offices spent hours each day downloading and processing files from the Department of Education. Recently, the University Information Services (UIS) office was able to eliminate such manual processes. Now, at the press of a button, these files are downloaded and processed in Campus Solutions – with extremely limited campus interaction required. The team of Rick Rowcotsky, Rakesh Vangapati, Brad Baker, and Mayank Mittal are thrilled to enable this time savings across the CU campuses.

Want to learn more about these, and other submissions to the CU I&E Awards Program? Check out our CU I&E Current Submissions [5] website.

More to come!

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