

**Pathway Goal:** Infrastructure and Shared Governance    **Report:** Year-End: May 2018  
**Action Item #** 3-4

**Action Item Description:**

Address an array of urgent issues to improve business processes:  
 Financial account numbers.

**Submitted By:**

Name	Department
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**Working Group Members:**

Name	Department
Nancy Rapoport	President's Office
Caleb Konner	Controller's Office
Julie Maxwell	Planning & Construction
Lori Ciccone	Office of Sponsored Programs

**Process and Timeline: Provide a brief summary of the year-long process for your working group.**

- Compile and publish organizational documents to guide the process and improve the system.
- Create documents.
- Formulate a plan to invest necessary constituents and rollout.
- Recognize that financial account numbers issues relates to some faculty onboarding for faculty members who are bringing grants.

**Describe what has been accomplished so far this year.**

As was the case with many of the existing standard process related to HR and Financial transactions, the introduction of Workday has modified many of the previous paper based process. A new account request is one of those processes. Up until now due to the launch of Workday, there has not been much progress with identifying the challenges that had led to delays in issuing new accounts. Given the departure of one of the key committee members additional request have gone out to relevant campus contacts to ask them to join the subcommittee and assist in reviewing this process.

### Identify next steps.

Given the initiation process for campus has not changed immediately with the launch of Workday, the team should focus on specific examples of delays to determine if the delays are more related to grant accounts or other account request such as plant accounts. Having this information will help diagnose and unreasonable delays and help the team formulate solutions.

### What will your final product be at the end of the year? Such as, what metrics which will be used to assess your progress/achievement, will a report be generated, etc?

The non-grant funded request account request process has been documented and the task force will work together to review that process. To address the grant funded account request, the committee will need to bring in the Office of Sponsored programs to determine that process and map it out for further review of the committee.

### You may have reference material to attach to this report. Select from the list.

No additional reference material

**OR**

Any material generated by this working group (if completed at this time)

### Additional information to include (optional).

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**End of Mid-Year Report**  
**Remainder of the report will be completed in May.**

### Year-End

**This portion is to be completed in May.**

#### 2017-18 Accomplishments.

As noted in the mid-year report, Workday changed much of the process for requesting and creating new work tags for the Office of Sponsored Programs as well as for campus use and plant funds.

- The work tags request form has been updated with the new Workday information and an additional education component has been added.
- Since the process is new due Workday, the steps needed to create new work tags for Sponsored programs and Plant account has been collected into a process map. The process maps are being used to understand the effort that is required to request a new account number.

#### SWOT Analysis: Determine the strengths, weakness, opportunities, and threats presented in the data.

Strength(s)	The new committee members are knowledgeable in their areas and routinely request new work tags as a large portion of their duties.
Weakness(es)	<ul style="list-style-type: none"> <li>• Until this year, all of the participants assigned to this committee are no longer part of the Top Tier committee.</li> <li>• Workday is still very new, and the staff creating account numbers are just learning how to complete their assigned task. Little exploration into the capabilities in Workday has been done to date.</li> <li>• The committee lacks some technical expertise as well and the use of an IT person could help explore Workday's capabilities better.</li> </ul>
Opportunity(ies)	The current process is still manual and further opportunities to automate the process should be explored.
Threat(s)	Due to limitations in Workday and NSHE business processes, the ability to improve the process may be contingent on NSHE approval. If NSHE does not approve, the process improvements may be limited.

#### 2018-19 recommendations and next steps

- **What does the SWOT analysis reveal?**
- **What should the goals / activities be for the subcommittee?**
- **Who should be responsible?**

NSHE Business Analyst should be asked to participate in the process improvement discussions as well as a representative from the Financial Reporting office. Also, adding a representative from IT that is knowledgeable with Workday would also help explore the automation capabilities to see if a business process could be created through Workday request framework.

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Any material generated by this working group

**Additional information to include (optional).**

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**End of Report**

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