I. **General Information:**
   Lead agency name: Liquor and Cannabis Board

   **Improvement project title:** Contract Workload Report

   **Date improvement project was initiated:** 11/15/2016

   **Project type:** New Project

   **Project is directly connected to:**
   - ☐ Results Washington performance measure
   - ☒ Agency Strategic Plan
   - ☐ Other

   **If applicable, specify the alignment:** Use existing technology better and modernize technology where needed.

   **Report reviewed and approved by:** Jim Morgan

II. **Project Summary:**
   The Liquor and Cannabis Board improved the Contract Workload Report, resulting in reduced steps and reduced time spent on compiling the report.

III. **Project Details:**

   **Identify the problem:**
   Within the Contract Team, one individual compiles a report for the team to work from each week consuming a large chunk of time.

   **Problem statement:**
   Currently it takes 33 steps and 5 hours to compile the Contract workload report as opposed to less steps and maximum of 2 hours which I want to achieve by November 30, 2016.

   **Improvement description:**
   Research options to add new records without refreshing and compiling the entire data set each week, finds tools to help automate and allow all users to collaborate and contribute reducing the reliance to one team member, reduce wait time while report is compiled.

   **Customer involvement:**
   Sought feedback from team members on what fields they would like to change, update or edit. Asked them what worked for them in the current report and what did not.
IV. Impact to Washingtonians:

The 3 hours saved each week from the improvement can be redirected to managing agency assets and fleet.

Workload report is completed in 2 hours or less per week

We improved the contract workload report to reduce time spent compiling the report

V. Project Details:

<table>
<thead>
<tr>
<th>Improved process as measured by:</th>
<th>Specific results achieved: (Complete the narrative boxes below)</th>
<th>Total Impact: (Actuals; Current Reporting Period)</th>
<th>Results status:</th>
</tr>
</thead>
<tbody>
<tr>
<td>☒ Time</td>
<td>Decreased time spent compiling report from 5 hours per week to 1.5 hours per week. Decreased steps in the process from 33 to 22.</td>
<td>Actuals</td>
<td>Final</td>
</tr>
</tbody>
</table>

VI. Contact information:

Name: Tia Livingood
Phone number: 360-688-4433

e-mail: tia.livingood@lcb.wa.gov
VII. Optional Visuals: Illustration of the reduction of steps

Before

ECMS Workload report
Start
Login to web intelligence
Open 195 public folder and use report all tasks – not final
Refresh data and download to excel
Save report to temp location
Filter data: end date in the past and order number equals zero
Login to ECMS

Filter & Process order
- Incomplete: Data complete "N"
- No action needed: Date 120 days in future
- Pending Delivery: Status blank, delivery date in the future
- Awarded: Status blank, and delivery date in past, and order number 0, comp type mandatory use
- UW/UI: status blank

Show filters and make text wrap
Insert a table and select the data range
Remove Gridlines, highlighting, remove fill, make font black times new roman 10
Add a column called Status
Continue until all items are updated in filter-view
Look up each item in ECMS and replace and date with the end date shown on the 1st contract

Insert 11 rows above table
Open last week report copy 1*11 rows and paste to new report
Adjust columns to fit page, freeze panes under Last name field
Filter by data complete "N"
Make status incomplete
Filter Data by date 120 days in future, status blank

Filter by status blank
Make status Amend
Filter items with end date in the past or order number "0", competition type is mandatory use
Make status pending delivery
Filter by delivery date in future, status blank
Make status no action needed

Look up each item in ECMS attachment and payment tab to determine status
Update status for each item
Clear filters, sort by status, then by end date, then by date created
On another tab create pivot table
Show by status and last name counts and percentages
Go to report tab and add formula under summary under each item at top of page

Upload to SharePoint folder
Save and close report
Filter out status no action needed
End

After

ECMS Workload report
Start
Login to web intelligence
Open 195 public folder and use report all tasks – not final
Refresh data and export to excel
Save report to temp location
Filter data: “record create date” since last run date
Filter by data complete "N"

Highlight excel records (excluding headings)
Reconcile and delete any duplicate records
Filter by record create date since last run
Open workload report list All items “quick edit view”
Remove filter from data complete
Highlight in yellow

Copy and paste records to workload report list
Update status and Procurement coordinator for each new item
Replace “today” with correct date on all records
Change all status “pending delivery” for items where end date has past to correct status
Change all status “No action needed: monitoring” for items where ending 120 days or less to correct status
Change Status “choose one” to correct Status
Change Competition Type “choose one” to correct Competition Type

End
Send pending delivery notification to customers
Share report update with Team
Edit comments as needed

ECMS Workload report
February 3, 2015
November 15, 2016