Efficiency in collecting statistics using advance Excel

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Background

Finance Shared Services (FSS) currently uses activity log Excel file to collect statistics for cost recovery billing (chargeback) to our partner institutions for services rendered.

- ❌ Staff data entries were **prone to error**
- ❌ **Not user friendly**, staff unsure of the correct activity code to select / input
- ❌ Data consolidation process is **time consuming** and **labour intensive**

METHODOLOGY

The revamped activity log was created after several rounds of discussion with the stakeholders involved and it includes the following enhancements:

➢ More comprehensive set of activity codes were added into the template for the Accounts Payable and Fixed Assets section

➢ Data validation included to minimise invalid entries

➢ Formulas added to automatically calculate hours spent on each activity and proper activity classification

➢ Summary with colour coding was included to allow a quick check on any possible errors

Excel Visual basic applications (VBA) was used to develop a simple program to speed up data consolidation from the staff activity logs. The program will extract all the data from each individual staff's activity log and paste all the data into a single Excel worksheet before performing some basic formatting to the data extracted.

An overtime claims template was also created which extracts information such as "activities done" for the month and "overtime hours". Data is thus transferred from the activity log to the overtime claims form as and when staff performs data entry in his/ her activity log.

RESULTS

The new activity log was implemented in September 2015. Staff data entry accuracy improved and the time spent on correcting data entry errors was reduced. Time required to consolidate data from all the activity logs have significantly decreased from few hours to 5 minutes; **a reduction of up to 98% of the time spent!**

- ✔ Data **accuracy improved** due to built-in data validation checks and formulas

- ✔ **Time required** for the staff to input their activities has been **reduced** as they do not have to manually calculate and convert the time taken from minutes to hour format

- ✔ **Significant decrease** in the time taken to consolidate the data as the data extraction work is now done by the Excel Macro (VBA)

- ✔ **Eliminate duplication of effort**. Overtime claim form is completed concurrently; as and when the staff updates their activity log

- ✔ **More accurate and standardised data** collected for workload analysis, as the activity codes are now more refined and comprehensive.

CONCLUSION

The revamped template has enabled FSS to **achieve cost saving** through reducing staff time spent on logging their daily activities and preparing their overtime claim form. It also enabled FSS's management to collect data **more efficiently and timely** for workload analysis, workload forecast and for budgeting purposes.

This initiative has benefitted both FSS staff and management.