

# Seamless Automation: Streamlining Workflows for the Research Administrator



Research administrators balance a multitude of responsibilities, all while adapting to the dynamic funding landscape, ever-evolving federal policies, institutional shifts, and daily operational challenges. Growing workloads can easily overwhelm and lead to increased errors. To address this, Michigan State University (MSU) employs Microsoft 365 tools to automate tasks such as updates, emails, and approvals so administrators can focus on supporting the investigators and teams that drive research growth.

## **Leveraging Automation for Efficiency**

In MSU's College of Human Medicine's (CHM) Office of Research and the university's Health Colleges Research Services (HCRS) office, automation is harnessed to streamline various administrative workflows. Use of Microsoft 365 tools facilitates seamless collaboration among team members and offices. Below are three examples of these automated processes.

**Proposal Intake Process:** Developed for the HCRS office, the [proposal intake process](#) gathers initial proposal information via an electronic Microsoft form, which is saved in a SharePoint List. If the intake meets certain conditions, automated email notifications are sent with the proposal details. For example, if the project involves human subjects, the Human Subjects Protection Program receives a summary of the proposal intake for review. Next, the manager assigns the proposal to a team member, and the investigator receives an automated message with the assignment. The HCRS team member then logs proposal development progress in the SharePoint List, allowing transparency and

collaboration within the office. Power BI is used to report on the SharePoint List data, including drill-down options, date slicers, and other filters. The data set is automatically refreshed eight times a day, allowing users to access accurate reports at their convenience.

**Faculty Startup:** The CHM's Office of Research allocates startup funds to incoming faculty, enabling them to establish research groups or programs at MSU. There is a fiscal responsibility to ensure the funds are used within the startup term limit, generally not more than 5 years. These startup accounts, along with relevant faculty attributes, are stored in a SharePoint List for reference and reporting. To proactively manage account expirations, the office employs a Power Automate that sends automated email reminders to both the faculty member and the fiscal officer for any startup account expiring in 120 days. The email includes details about the CHM startup policy and instructions for requesting an extension within 90 days of the account expiration date, if needed.

**Financial Support Requests:** CHM recently released a new process for Financial Support Requests (FSR), including requests for travel funds or event sponsorships. The request begins with a Microsoft form that captures the request details, including the total amount requested. Upon submission, a Power Automate workflow saves the request in a SharePoint List, then routes it to the Senior Associate Dean for Research (SADR) for review. The SADR or delegate makes a determination (approve, decline, return for edits), which is then automatically recorded in the SharePoint List. Finally, the requester receives an automated email with the decision and directions for next steps based on the decision outcome.

### **Exploring Further**

In addition to using automation for project management, account management, and funding requests, here are some other circumstances to consider using automation:

- Conference travel requests, including approvals by manager(s), as appropriate
- New employee onboarding, including welcome emails, messaging to other offices including Human Resources (HR) and Information Technology (IT), triggers for processing access requests, and tracking training milestones
- An issue or ticket system, recording customer complaints or problems, as well as solutions and timelines for addressing the need
- Expense/procurement requests, including routing and flags for additional review per institutional policies.

### **Conclusion**

Harnessing automation can help alleviate administrative burdens, safeguard data integrity, and foster transparency. If interested in building automated processes, begin with a straightforward workflow you know well and gradually expand to more complex processes involving other teams and offices. The effort invested in building automated systems pays dividends, ultimately saving valuable time in the future.



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<https://www.srainternational.org/blogs/srai-news/2024/06/12/seamless-automation-streamlining-workflows-for-the>