AGENDA

SLU Business Manager Meeting  
November 9, 2006  
Busch Student Center rooms 352-353  
9:00a.m.-10:30a.m.

1) Meeting Overview/Announcements: Linda Pizzo

2) Human Resources Renewal: Kathy Hagedorn

3) Gateway II Project: Keith Hacke, Jeff Kapp and Kevin Ballard

4) Business Process Improvement Discussion - B&F Processes: 
   Process Improvement Team Leaders
   
   • Business Manager Development and Training: Linda Pizzo
   • Interdepartmental Order Process: Lisa Zoia
   • Payroll Processes/Time Reporting: Marsha McBride
   • Travel Processes: Sharon Gajewski
   • Accounts Payable Processes: Sharon Gajewski
   • Banner Requisitioning Process: Linda Pizzo
   • Reporting: Greg Haney
Business Manager Meeting

Minutes of the Meeting of November 9, 2006

Meeting minutes of the Saint Louis University Business Managers held at 9:00 a.m. on Thursday, November 9, 2006 in the Busch Student Center, Room 352-353.

Business & Finance Staff Present:

Lisa Zoia   Linda Pizzo   Marsha McBride   Lee Kneibert
Sharon Gajewski   Mary Drexel   Vicki Cassady   Bob Woodruff
Janice Crawford   Stacey Barfield   Tawnya Musial   Jackie Siebert
Gary Whitworth   Greg Haney   Dale Goode

Guests in attendance: Kathy Hagedorn, Jennifer Haegele, Keith Hacke, Jeff Kapp and Kevin Ballard.

Number of Business Managers Present: 54

Linda Pizzo welcomed everyone to the meeting and introduced Keith Hacke from IT to give a presentation on the Gateway II Project.

IT GATEWAY II PROJECT

Keith Hacke, Jeff Kapp and Kevin Ballard reviewed the upcoming rollout of the Gateway II project. The project will take approximately 18 months to complete. Some components of the project are completed. Banner 7.3 upgrade (complete) and a WebFocus 7.3 have both been implemented. WebExtender is being made available for Finance and Undergraduate Admissions and Workflow will be implemented. UMG will have a Banner Budgeting Process introduced and Banner “Pain Points” will be addressed. The Business Intelligence Committee will make information available to the university community in a secure fashion and educate the SLU community on intelligent reporting and mentor end users to they can create and maintain the reports they want and need. Portal and integrated log-ons are being addressed with a February 2007 targeted implementation date. There will be minor upgrades every 18 months. See the presentation on line for more information. Gateway II Project

Human Resources Renewal

Kathy Hagedorn, Vice President of Human Resources, gave a presentation outlining the changes that have occurred over the past year in HR. The entire Department has been revamped to allow for better customer service. Each department now has their own specialist to assist them with all HR needs. HR is working to develop a culture of high performance. Improving job satisfaction through training and development programs is a priority for Human Resources. Please click on the link to learn more. HR Presentation

Process Improvement Teams

Linda Pizzo provided an overview of the goals and objectives for the seven Business Process Improvement Teams and introduced the Team Leaders. A full list of team members can be found on the Business Manager’s web page. Each team will have its first meeting this week or next.

Process Improvement Team Leaders

- Business Manager Development and Training: Linda Pizzo
- Interdepartmental Order Process: Lisa Zoia
- Payroll Processes/Time Reporting: Marsha McBride
- Travel Processes: Sharon Gajewski
- Accounts Payable Processes: Sharon Gajewski
- Banner Requisitioning Process: Linda Pizzo

Updated 12/18/08
The following suggestions were made for team leaders:

**Business Manager Training and Development:**
- Training program for newly hired business managers
- Generic Calendar for the University Business (budget process dates, closing, payroll deadlines, etc.)
- New hires automatically set up with same access of the previous person in that position
- Improved Banner access form with clearer instructions
- Contact help list – who to call for what within the University

**Reporting:**
- Information on active grant funding. How many are active, what are the awards, work titles.
- Ability to download reports into Excel or PDF and include the heading in the report.
- Ability to run the same report for various departments by using multiple selection criteria
- Replacement to the former L86 report for salary reports

**Accounts Payable:**
- Make the DPV electronic - Consider the Practice Management electronic forms as a model

These suggestions and others will be addressed by the appropriate teams.

**P-Card Roll-out Schedule:**
A request was made to provide the University roll-out schedule for the P-Card.
The schedule will be posted on the Business Manager’s web site before the next Business Manager’s meeting (12/14/06).

The meeting ended at 11:00 a.m.

Minutes respectfully submitted by Mary Drexl.
## P-CARD Roll-out Schedule

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<thead>
<tr>
<th>Wave 2 15-Oct-06</th>
<th>Wave 3 15-Dec-06</th>
<th>Wave 4 15-Feb-07</th>
<th>Wave 5 15-Apr-07</th>
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<td>MarCom (Dev/Univ Rel)</td>
<td>COPS Social Work</td>
<td>Cupples House &amp; Gallery</td>
<td>General Counsel</td>
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<td>Development (Dev/Univ Rel)</td>
<td>College of Public Service</td>
<td>University Event Services</td>
<td>Museum of Contemp Religious Art</td>
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<td>VP Dev &amp; Univ Rel</td>
<td>COPS School for Prof Studies</td>
<td>Graduate School</td>
<td>Planning and Decision Resources</td>
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# T & E Card Roll-out Schedule

## American Express Travel Cards

The waves are scheduled for approximately one per month. We are at wave 3 as of November 2006.

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<td>Community &amp; Family Medicine&lt;br&gt;Surgery&lt;br&gt;Student Development</td>
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<td>Anesthesiology&lt;br&gt;Biochemistry &amp; Molecular Biology&lt;br&gt;Cancer Center Operations&lt;br&gt;Center for Advanced Dental Education&lt;br&gt;Ctr for Anatomical Science &amp; Ed&lt;br&gt;Dermatology&lt;br&gt;Ob/Gyn/Women's Health&lt;br&gt;Pathology&lt;br&gt;Research Admin.-Medical Center</td>
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<td>Call Center&lt;br&gt;Comparative Medicine&lt;br&gt;Employee Health&lt;br&gt;Environmental Safety&lt;br&gt;Family Health Services&lt;br&gt;Molecular Virology&lt;br&gt;Museum of Contemp Religious Art&lt;br&gt;Neurology&lt;br&gt;Ophthalmology&lt;br&gt;Orthopedic Surgery&lt;br&gt;Otolaryngology&lt;br&gt;Pharmacol &amp; Physiol Science&lt;br&gt;Psychiatry&lt;br&gt;Radiation Oncology&lt;br&gt;Radiology&lt;br&gt;UMG Ambulatory Care Medical Records&lt;br&gt;UMG Support Services</td>
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Agenda

- Gateway II Program
  - Overview
  - Governance
  - Project Methodology
- Business Process Re-engineering
- Business Intelligence and Data Integrity
- New Functionality
- Operationalized Changes
Gateway Vision

Provide a state-of-the-art way of managing information and providing services to students, faculty, staff, and administrators through technology.
A true University-wide integrated information management system

A TOOL!

Not a panacea
The Gateway II Program is several interrelated projects managed together to optimize synergies and effectively manage dependencies and resources. The major projects included are:

- Banner 7.3 Upgrade
- WebFocus 7.3 Upgrade
- WebXtender for Finance and Undergraduate Admissions
- Axiom Upgrade
- Workflow Implementation
- Banner Budgeting Process for UMG
- Business Process Re-engineering (Banner Pain Points)
- Operational Data Store Upgrade (ODS),
- Enterprise Data Warehouse Implementation (EDW)
- Training
- Communications

**Process**: Project Management Methodology

**Duration**: 18 months (Jan 2006 – June 2007)

**Governance**: Administrative Planning and Policy Committee

**Contributors**: Data Integrity, and Business Intelligence Committees
## Gateway II Program Projects & Scheduling

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- **Post Implementation Support**
- **PCR for date change**
- **Project Complete**
- **Project in Progress**
Executive involvement and commitment
User involvement AND commitment across campus
Thorough preparation and planning
Thorough testing (early, often and broad)
Follow-through Execution (3 dry runs resulting in a flawless Go Live)
Using ITS’ Project Management framework
Using CIBER’s proven Implementation Methodology
APPC presence and decision making (empowered)
Project Office and Program Management presence
Extensive communications using multiple methods
On time budget

Statistics:
- 40 Non-ITS people involved in the upgrade (during upgrade weekend)
- 700 Hours of user training
- 37 resolved issues
- 4 weekends of overtime work
- 1400 Hours of preparation (reading upgrade guides, release guides, listserves, documentation, developing testing from Dec 05 on; separate from planning below)
- 950 Hours of planning (ITS, APPC, teams)
- 340 Hours of execution (that weekend; ITS, teams and validation)
- 350 Hours of user testing
- External (hard dollar) costs of $66,880
Program Governance:
Administrative Planning and Policy Committee

**Executive Sponsors**

- Marla Berg-Weger, Senior Associate Provost
- Ellen Watson, Vice President ITS & CIO
- Bob Woodruff, CFO

**Governance Committee Membership**

Membership is diverse & representative of all University Constituents

- Team Leader of each Module
- UMG Representative
- ITS Data Architect
- Chair, Data Integrity Committee
- Chair, Business Intelligence Committee
- ITS Representative
- Program & Project Managers (as required)

**Responsibilities**

- Prioritize & Schedule
- Ensure decisions support Institutional vision & needs
- Issue Resolution
- Ensure activities are Operationalized
- Oversee & monitor system efficacy
- Finalize governance structure for Enterprise Systems
Administrative Planning and Policy Committee Team Leads

- Chairperson – Kevin Ballard
- Business & Finance – Tom Meadows
- Human Resources – Jenny Haegele
- Student – Jay Haugen
- Advancement – Jim Shiels
- Financial Aid – Cari Wickliffe
- SluCare – John Seay
- Information Technology Services – Jeff Kapp
How we communicate, escalate and assure success

Escalation:
- Risks
- Issues
- Action Items
ITS Project Management Framework & Methodology helps you manage projects by giving you all of the methods, processes, and tools to succeed.

- **Initiate** – Register, Set Scope, Requirements gathering, Approval
- **Define** – Charter, document requirements, Develop budget, Funding, Approval
- **Plan** – Create Schedule, Create detailed Plans
- **Perform & Control** – Perform work, Track & manage, Report
- **Close-Out** – Validate, Review, Release & Complete

http://www.slu.edu/its/projectoffice/
Where do you fit in?

- Business Process Re-engineering
  - Functional and end users identified Pain Points and Open Issues (55 open items in Banner Finance and 24 open items in Banner HR)
  - Business Process Improvement Teams, along with input from Business Managers, identify “To Be Business Process”
  - Teams work hand in hand with IT representative or contractor
Process

“As Is / To Be Business Process” aka “Fit Gap Analysis”

Data A

Data B

Manual Input

Data C

App: HR

App: GL

App: SA

Excel

App: HR

App: GL

App: SA

“As is Business Process”

“To Be Business Process”
Where do you fit in?

“As Is / To Be Business Process” aka “Fit Gap Analysis”
### When will it happen?

<table>
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<tr>
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<th>2006</th>
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<td><strong>HR</strong> 1074 Hours</td>
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<td>ITS Supplemental</td>
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**Total Hours**: 1142 Hours
The purpose of the Business Intelligence Committee is:

- Make strategically and operationally relevant information available in a secure environment to the university community for decision making and planning.
- Educate the SLU community on intelligent reporting and mentor the end users to enable them to create and maintain their reports.
Business Intelligence Vision

Business Intelligence is the process of professionally gathering, processing, and transforming data into information to assist business leaders in making knowledgeable decisions.
**Business Intelligence**

**Reporting Now & Future**

![Diagram showing the flow of data from BANNER to Operational Data Store (ODS) and then to Enterprise Data Warehouse (EDW).](image)

**Operational Data Store (ODS)**
- Current Operational data formatted for ease of ad hoc reporting
- Loaded Nightly

**Enterprise Data Warehouse (EDW)**
- Detailed historical data formatted for Historical reporting and trend analysis
- Loaded Nightly

**New Functionality:**
- Operational Data Store (ODS)
- Enterprise Data Warehouse (EDW)

**Number of Current reports** 1335

**Estimated # of Requested Reports:**
- 40 per developer per month
- Total: 260 reports
The purpose of the Data Integrity Committee is to:

- Ensure the validity, accuracy and reliability of shared university data.
- Maintains the Data Standards document for the university.
New Functionality: WorkFlow

- WorkFlow
  - What is Workflow?
  - What is the benefit of using Workflow?
  - How is Workflow requested and implemented?
New Functionality: SluCare Budget Tool

The SluCare budget tool was developed to assist the Business Managers with Budget Management.

- The budgeting tool allows you to:
  - Spread the annual budget
  - Manage quarterly projections
  - Maintains a database where regular financial reports can be generated.
  - Calculates fringe & overhead.

- Used by 20-30 SluCare Business Managers
UMG Budgeting Tools

- **Budgeting Allocation**
  This option allows you to review, update and save budget allocation by fund.

- **Budget Projection - Under Construction**
  This option allows you to review, update and save budget projection by fund.

- **Maintain Budget Allocation Rules - Under Construction**
  This option allows you to review, update and save budget allocation parameters.

- **Maintain Organization Lock**
  Lock Users from entering allocation or projection.

- **Budgeting Allocation - For Developer Use Only**
  This option allows you to review, update and save budget allocation by fund.

RELEASE: 1.0
### UMG Budgeting Tools Worksheet - Budget Allocation

**Click one =>>**  **Save Changes**  **Cancel**

**Fund:** 885100 - A&R Anesthesiology  **Budget ID/Phase:** UMG07 - ALLOC1

**Organization:** D217 - Anesthesiology  **Allocation Rule Applied:**

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Portal and Integrated Sign-on

- Where are we?
  - Technical work and testing via the Identity Mgmt. project is underway.
  - Working to determine the systems to be included.

- Timeline
  - Implementation targeted for February
Operationalized Changes

- **Banner Upgrades**
  - Minor upgrades every 18 months
  - Major upgrades at next release level
Want more information?

- APPC Web Site houses governance and project information
  Link: [http://www.slu.edu/appc/](http://www.slu.edu/appc/)

- ITS Project Management:
  [http://www.slu.edu/its/projectoffice/](http://www.slu.edu/its/projectoffice/)

- Contact your team lead

- Contact your Business Process Improvements Team Member
Questions
Business & Finance
Business Process Improvement Teams

Business Manager’s Meeting
November 9, 2006
## Process Review Teams

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</table>
Process Review Teams

Scope

• Process only; policy issues are outside of the scope of these teams

• All processes within the area that involves an end user; internal functional department processes will not be reviewed

• Most teams will have multiple processes to review. Prioritization will be based on impact.
Process Review Teams

Process

- Map the current process and gather data
- Define the improved state
- Identify the gaps
- Develop a plan
- Implement and Go-live
Other Teams Established

Business Manager Development

- Lead: Linda Pizzo
- Vision: Culture of High Performance
- Objectives:
  - Define what is a culture of high performance for us as a group
    - Competencies
    - Skill set
    - Strive for professional excellence
  - Assess where we are now
  - Develop a plan to realize the next level
    - Training program
    - Mentoring program
    - Open communication
    - Method to reward high performance
Other Teams Established

Reporting

• Lead: Greg Haney
• Scope: Periodic and adhoc end user reporting based on data from Banner Finance and payroll that meets the need of the University community as a whole
• Objectives:
  – Identify reports currently available to end users
  – Identify the reporting needs of the end users
  – Determine what reports simply require modification vs. what new reports are needed
  – Identify the barriers to getting data to the end users and the risks of not having the data available
Timing

- Map Current Process and gather data (survey business managers) - Nov to Jan
- Identify improved state and technological solution if applicable – Jan to Feb
- Develop plan and implement – Mar to June
Expected Outcomes

• More efficient processes
• Improved user satisfaction
• Enhanced training and documentation
• Business managers will have the skills, tools and data needed to do their jobs effectively
• Collaboration between functional service areas (B&F, HR, ITS, etc.) and the business managers will be enhanced
• Culture of high performance
Discussion

Begin identifying the current state for each area

- What works well?
- What doesn’t work well?
- What are your biggest frustrations?
- What suggestions do you have?
Human Resources

Presentation to
Business Managers
November 2006
Recent Changes in HR

- Academic year 2005-06 was a year of great change in HR (and for many organizations at SLU)
  - Banner project
  - Reorganization ("HR Renewal")
  - Turnover of some staff members
Goals of HR Renewal

- Align the HR Goals and Organization with the needs of our customers;
- Align the HR Goals and Organization with our Mission, Vision and Values;
- Identify the strengths and weaknesses of our HR team at SLU compared to the HR Competency model we developed;
- Design developmental programs and processes to fill any gaps; and,
- Ensure that people are assigned to jobs that best utilize their strengths, and give them some opportunities to grow.
Desired Outcomes

- Develop a culture of high performance at SLU:
  - Improve productivity and performance;
  - Reduce waste and duplication;
  - Improve customer satisfaction for SLU customers (internal people and external - students, alumni, donors, etc.)
  - Improve job satisfaction and development/growth opportunities for staff and faculty.
Process

- 2004: Staff participated in developing new HR Mission, Vision, Values.
- Jan - March, 2005: HR Directors developed a Competency Model for HR.
- May-June, 2005: Assessment of all HR staff compared to competency model.
- August-October, 2005: Reassignment and reorganization of staff to achieve mission and customer service.
Results

• HR Consultant model implemented for improved customer relations.
• Front desk and “back office” processes revamped.
• Significant cross training of HR staff.
• High turnover (20% in six months).
• Even more time pressures (learning new skills, technology, still doing old jobs).
Functional Chart: Human Resources

- Consulting and Client Services
- HR Information Systems
- Professional & Org. Development
- Benefits and Compensation
Contact & Customer Support Listing

• http://www.slu.edu/services/HR/hrdirectory.html
HR Mission

Human Resources serves as a catalyst in Saint Louis University’s transformation into the finest Catholic university, and a strategic partner with our diverse community in the accomplishment of the Mission.

Saint Louis University is the employer of choice for talented professionals committed to transforming society through teaching, research, and community service.
Saint Louis University

Human Resources

Our Vision

Members of human resources at SLU serve as experts on organizational, people, and productivity issues. Our work directly impacts the ability of all departments to carry out the mission and goals of their unit (and the University) in a manner that maximizes goal achievement, customer satisfaction, employee satisfaction, effective stewardship of resources, and alignment with Ignatian principles and values.

We are respected and trusted for our confidentiality, knowledge, organizational insight, service orientation, critical thinking, honesty, and collegiality. We challenge people to learn, grow, and “be” more. We serve as catalysts for change to encourage continuous learning within the organization. Through our work, Saint Louis University will be the employer of choice for talented, diverse professionals committed to transforming society through teaching, research, and community service at the finest Catholic university in the country.