Open Forums
September 25, 2019
Cook Hall – AB Auditorium
10:00 – 11:00 am

September 26, 2019
Allied Health Building, 3rd Floor Multi-Purpose Room
9:30 – 10:30am
Agenda

- Program Status Phase 1 & 2
  - Jackie Manikam
- Introduction to Workday Experience & Training Plan
  - Mickey Luna
- Finance Updates
  - Brianne Burcke / Tammy Burton
Phase 1 Project Timeline

Phase 1: HCM Project Timeline

- **Strategy**: 12/3 - 2/15
- **Plan**: 2/4 - 3/1
- **Architect**: 3/4 - 5/20
- **Configure & Prototype**: 5/13 - 7/19
- **Test**: 7/22 - 9/27
- **Parallel**: 9/23 - 11/15
- **Deploy**: 11/18 - 12/28
- **Post-Go Live**: 12/29

- **Discovery Workshops (remote)**: 2/18 - 2/26
- **Architect Workshops (onsite)**: 3/4 - 4/3
- **Func WB Sign-off**: 4/11
- **Customer Confirmation Sessions (onsite)**: 5/29 - 6/25
- **Today**: 12/29
Phase 2 Project Timeline

Phase 2: Finance & Talent / Learning Project Timeline

**FIN Planning**
5/13 - 5/24

**Talent, Learning Planning**
7/22 - 8/2

**Config Tenant Build**
9/25 - 10/18

**FIN Architect Sessions**
7/30 - 8/22

**Confirmation Sessions**
10/28 - 11/21

**Workday Rising**
10/14 - 10/17

**Today**

**Configure & Prototype**
10/28 - 1/17

**Test**
1/20 - 5/22

**Deploy**
5/25 - 6/2

**Post...**
6/29 - 7

**Finish**
7/25

**Go Live**
7/1
Introduction to Workday Experience
Employee Home Page & Search Functionality
Employee Home Page
Workday Search Functionality

Search Functionality: Change,
- Change Benefits - Task
- Change My Emergency Contacts - Task
- Change My Home Contact Information - Task
- Change My Legal Name - Task
- Change My Licenses - Task
- Change My Passports and Visas - Task
# SLU Internal Careers Page

## Find Jobs at SLU

<table>
<thead>
<tr>
<th>Current Search</th>
<th>Search</th>
<th>60 Results</th>
</tr>
</thead>
<tbody>
<tr>
<td>&lt;b&gt;Primary Location&lt;/b&gt;</td>
<td></td>
<td></td>
</tr>
<tr>
<td>1831 Chestnut (9)</td>
<td>IT Technologist I-1</td>
<td>2019-02-17</td>
</tr>
<tr>
<td>Doctors' Office Building (6)</td>
<td>IT Technologist I-2</td>
<td>2019-02-18</td>
</tr>
<tr>
<td>Wool Center (5)</td>
<td>Assistant to VP</td>
<td>2019-02-15</td>
</tr>
<tr>
<td>Allied Health Building (5)</td>
<td>Assistant Professor of Law (CLR 9.12.230PM)</td>
<td>2019-02-12</td>
</tr>
<tr>
<td>DuBourg Hall (4)</td>
<td>Assistant Professor</td>
<td>2019-02-06</td>
</tr>
<tr>
<td></td>
<td>admin assist</td>
<td>2019-02-20</td>
</tr>
<tr>
<td></td>
<td>More</td>
<td></td>
</tr>
</tbody>
</table>

## Saved Searches

- Current Search: None
- Search: None
Enter & Submit Time (Hourly Employees)
Enter Time – Hourly Employees

Welcome, [user_name]

Go to Inbox

Click Time Application

Applications
- Personal Information
- Benefits
- Pay
- Time
- Absence
- Directory
Click This Week
Click in column of date for which you want to enter time.
Complete fields

Enter Time
09/17/2019

Time Type  *  
X Hours Worked

In  *

Out  *

Out Reason  

Out:

Hours  *  0

Details

Comment

Click OK

OK  Cancel
Submit Time – Hourly Employees

Click Submit

Submit
Enter Time

Hours Worked 8:00am - 5:00pm 9 Hours
Not Submitted

Hours Worked 8:00am - 5:00pm 9 Hours
Not Submitted

Hours Worked 8:00am - 4:45pm 8.75 Hours
Not Submitted

Hours Worked 7:45am - 5:00pm 9.25 Hours
Not Submitted

Hours Worked 8:00am - 5:00pm 9 Hours
Not Submitted
Time-Keeping via Web Clock
Enter Time Using Web Clock – Check In

Welcome, [Employee Name]

Click Time Application
Time

Enter Time

- This Week (0 Hours)
- Last Week (0 Hours)
- Select Week

View

- My Schedule
- My Time Off
- Time Off Balance
- Time Clock History

Time Clock

Click Check In

Check In  Check Out
1. Select Time Type (defaults to Hours Worked)

2. Click OK

3. Click Done
Note the Time clock shows you are checked in and at what time.
Enter Time Using Web Clock – Check Out

Welcome, [Name]

Inbox
0 items

Applications
8 items
- Personal Information
- Pay
- Benefits
- Directory
- Time
- Absence
- Talent and Performance
- Requests

Click Time Application
### Check Out

Please click OK to check out. You will be checked out once you click OK.

<table>
<thead>
<tr>
<th>Worker</th>
<th>Maureen McAnany</th>
</tr>
</thead>
<tbody>
<tr>
<td>Date</td>
<td>09/25/2019</td>
</tr>
<tr>
<td>Time</td>
<td>04:40 PM</td>
</tr>
<tr>
<td>Time Zone</td>
<td>GMT-06:00 Central Time (Chicago)</td>
</tr>
</tbody>
</table>

**Reason**

- Out

**Details**

- Comment

You have successfully checked out at 09/25/2019 4:43 PM.

---

Click OK

Click Done

---

Click OK
Hours worked are calculated and shown here.

This Week (.25 Hours)

Last Week (0 Hours)

Select Week

My Time Off

Time Off Balance

Time Clock History

Time Clock shows you are checked out and at what time.

Check In

Check Out

Checked Out at 4:43 PM
View Vacation/Sick Time Balance
View Vacation/Sick Time Balance

Click Absence Application
### Available Balance as of Today

*Does not include future absence requests*

<table>
<thead>
<tr>
<th>Type</th>
<th>Hours</th>
</tr>
</thead>
<tbody>
<tr>
<td>Vacation</td>
<td>176</td>
</tr>
<tr>
<td>Holiday Used Banked Time</td>
<td>0</td>
</tr>
<tr>
<td>Parental Leave</td>
<td>0</td>
</tr>
<tr>
<td>Sick</td>
<td>434.82</td>
</tr>
<tr>
<td>Vacation</td>
<td>82.07</td>
</tr>
</tbody>
</table>
Request Time Off
Request Time Off

Click Request Absence

Request
- Request Absence
- Correct My Absence
- Request Return from Leave of Absence

View
- My Absence
- Absence Balance

Available Balance as of Today

Does not include future absence requests

<table>
<thead>
<tr>
<th>Hours</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>176</td>
<td>Vacation</td>
</tr>
<tr>
<td>0</td>
<td>Holiday Used Banked Time</td>
</tr>
<tr>
<td>0</td>
<td>Parental Leave</td>
</tr>
<tr>
<td>434.82</td>
<td>Sick</td>
</tr>
<tr>
<td>82.07</td>
<td>Vacation</td>
</tr>
</tbody>
</table>
1. Select Days
2. Click Request Absence

Balances

View Balances

<table>
<thead>
<tr>
<th>Balance as of:</th>
<th>09/18/2019</th>
</tr>
</thead>
</table>

**Per Plan**
- Holiday Used Banked Time: 0 Hours
- No Eligible Time Offs - Parental Leave: 0 Hours
- No Eligible Time Offs - Sick - Staff Non Union - Non Exempt: 434.82 Hours

**Vacation**
- 82.07 Hours (Vacation)
1. Select Absence Type

2. Click Next
### Request Absence

Total: 0 hours - Vacation

<table>
<thead>
<tr>
<th>Request</th>
<th>1 item</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>From</th>
<th>To</th>
<th>Type</th>
<th>Quantity per Day</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>09/09/2019</td>
<td>09/10/2019</td>
<td>Vacation</td>
<td>0 hours</td>
<td>0 hours</td>
</tr>
</tbody>
</table>

**Click Edit Quantity per Day**
1. Enter hours off per day

2. Click Done
Request Absence

Total: 13 hours - Vacation

Request: 1 item

<table>
<thead>
<tr>
<th>From</th>
<th>To</th>
<th>Type</th>
<th>Quantity per Day</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>09/09/2019</td>
<td>09/10/2019</td>
<td>Vacation</td>
<td>Variable Quantity</td>
<td>13 hours</td>
</tr>
</tbody>
</table>

Click Submit
Review/Approve Time Worked by Hourly Employees
Review/Approve Time Worked by Hourly Employee

Welcome, [Username]

Inbox
- Benefit Change - PE: Dependent Child Ages Out: [Reason], [Date]
- Manager Evaluation: 2019 Year End Review (v2): [Reason], [Date]

Applications
- 15 items
  - Personal Information
  - Team Absence
  - My Team
  - Benefits
  - Pay
  - Compensation
  - Recruiting Dashboard
  - Absence
  - Team Performance
  - Directory
  - Talent and Performance
  - Team Time

Click Team Time Application
Click Review Time

**Actions**
- Review Time
- Enter Absence
- Correct Absence
- Enter Time for Worker
- Return Worker from Leave

**View**
- My Team’s Schedule
- Time Clock History
- Time Off & Leave Calendar
- Review Time By Week
Complete fields (optional)

Click OK
1. Click Checkboxes
2. Click Approve
Workday Time Entry Approval Delegation

Time Entry Approval

Time Entry: Yogi Bear - 80 hours from 09/08/2019 to 09/21/2019

39 second(s) ago - Due 09/20/2019, Effective 09/21/2019

Worker: Yogi Bear

Daily Totals: 10 items

<table>
<thead>
<tr>
<th>Date</th>
<th>Type</th>
<th>Hours</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mon, 9/9</td>
<td>Hours Worked</td>
<td>8</td>
</tr>
<tr>
<td>Tue, 9/10</td>
<td>Hours Worked</td>
<td>8</td>
</tr>
<tr>
<td>Wed, 9/11</td>
<td>Hours Worked</td>
<td>8</td>
</tr>
<tr>
<td>Thu, 9/12</td>
<td>Hours Worked</td>
<td>8</td>
</tr>
<tr>
<td>Fri, 9/13</td>
<td>Hours Worked</td>
<td>8</td>
</tr>
</tbody>
</table>
Workday Time Entry Approval Delegation

Delegate Task

39 second(s) ago - Due 09/20/2019, Effective 09/21/2019

Delegating Worker: Joyce Shively
Business Process: Time Entry: Yogi Bear - 80 hours
Task: Approval by Manager
Current Delegates: (empty)

Delegate Task

39 second(s) ago - Due 09/20/2019, Effective 09/21/2019

Delegating Worker: Joyce Shively
Business Process: Time Entry: Yogi Bear - 80 hours from 09/03/2019 to 09/21/2019
Task: Approval by Manager
Current Delegates: (empty)
Workday Time Entry Approval Delegation

You have submitted
Delegate Task for Joyce Shively: Time Entry: Yogi Bear - 80 hours from 09/08/2019 to 09/21/2019

39 second(s) ago - Due 09/20/2019; Effective 09/21/2019

Process Successfully Completed

Details and Process

For Joyce Shively
Overall Process Delegate Task for Joyce Shively: Time Entry: Yogi Bear - 80 hours from 09/08/2019 to 09/21/2019
Overall Status Successfully Completed
Due Date 09/19/2019

Welcome, On behalf of: Jeanne Lawo

Time Entry: Yogi Bear - 80 hours from 09/08/2019 to 09/21/2019
6 minute(s) ago - Due 09/20/2019; Effective 09/21/2019
Click Payslips
### My Payslips

#### Change Payslip Printing Election

<table>
<thead>
<tr>
<th>Company</th>
<th>Payslip Printing Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Saint Louis University</td>
<td>You do not receive a paper copy of payslips.</td>
</tr>
</tbody>
</table>

#### Print Multiple Payslips

<table>
<thead>
<tr>
<th>Company</th>
<th>Period Start Date</th>
<th>Period End Date</th>
<th>Payment Date</th>
<th>Gross Amount</th>
<th>Net Amount</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Saint Louis University</td>
<td>06/01/2019</td>
<td>06/30/2019</td>
<td>06/28/2019</td>
<td></td>
<td></td>
<td>View</td>
</tr>
<tr>
<td>Name</td>
<td>Employee ID</td>
<td>Pay Period Begin</td>
<td>Pay Period End</td>
<td>Check Date</td>
<td>Check Number</td>
<td></td>
</tr>
<tr>
<td>------</td>
<td>-------------</td>
<td>------------------</td>
<td>----------------</td>
<td>------------</td>
<td>--------------</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>06/01/2019</td>
<td>06/30/2019</td>
<td>06/28/2019</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Current and YTD Totals**

<table>
<thead>
<tr>
<th>Balance Period</th>
<th>Hours Worked</th>
<th>Gross Pay</th>
<th>Pre Tax Deductions</th>
<th>Employee Taxes</th>
<th>Post Tax Deductions</th>
<th>Net Pay</th>
</tr>
</thead>
<tbody>
<tr>
<td>Current</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>0.00</td>
</tr>
<tr>
<td>YTD</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>0.00</td>
</tr>
</tbody>
</table>

**Earnings**

<table>
<thead>
<tr>
<th>Description</th>
<th>Dates</th>
<th>Hours</th>
<th>Rate</th>
<th>Amc</th>
</tr>
</thead>
<tbody>
<tr>
<td>Group Term Life -&gt;$50K</td>
<td>06/01/2019 - 06/30/2019</td>
<td>0.00</td>
<td>0.00</td>
<td></td>
</tr>
<tr>
<td>Salary Regular</td>
<td>06/01/2019 - 06/30/2019</td>
<td>1.41</td>
<td>1</td>
<td></td>
</tr>
</tbody>
</table>

**Employee Taxes**

<table>
<thead>
<tr>
<th>Description</th>
<th>Amount</th>
<th>YTD</th>
</tr>
</thead>
<tbody>
<tr>
<td>Social Security</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Medicare</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Federal Withholding</td>
<td></td>
<td></td>
</tr>
<tr>
<td>State Tax - MO</td>
<td></td>
<td></td>
</tr>
<tr>
<td>City Tax - STLOU</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Total:**
### My Payslips

#### Change Payslip Printing Election

<table>
<thead>
<tr>
<th>Company</th>
<th>Payslip Printing Details</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Saint Louis University</strong></td>
<td>You do not receive a paper copy of payslips.</td>
</tr>
</tbody>
</table>

#### Print Multiple Payslips

<table>
<thead>
<tr>
<th>Payslips 1 item</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Company</strong></td>
</tr>
<tr>
<td><strong>Saint Louis University</strong></td>
</tr>
</tbody>
</table>

**Click Print for PDF to Save or Print**
<table>
<thead>
<tr>
<th>Name</th>
<th>Description</th>
<th>1st Period</th>
<th>2nd Period</th>
<th>Total Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Social Security</td>
<td>Social Security Contributions</td>
<td>33.33</td>
<td>33.33</td>
<td>66.66</td>
</tr>
<tr>
<td>Medicare</td>
<td>Medicare Contributions</td>
<td>5.14</td>
<td>5.14</td>
<td>10.28</td>
</tr>
<tr>
<td>Federal Income Tax</td>
<td>Income Tax</td>
<td>20.67</td>
<td>20.67</td>
<td>41.34</td>
</tr>
<tr>
<td>State Income Tax</td>
<td>Income Tax</td>
<td>10.85</td>
<td>10.85</td>
<td>21.70</td>
</tr>
<tr>
<td>Total Earnings</td>
<td></td>
<td>69.82</td>
<td>69.82</td>
<td>139.64</td>
</tr>
</tbody>
</table>

**Pre-Tax Deductions**

<table>
<thead>
<tr>
<th>Name</th>
<th>Description</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Social Security</td>
<td>Social Security Contributions</td>
<td>66.66</td>
</tr>
<tr>
<td>Medicare</td>
<td>Medicare Contributions</td>
<td>10.28</td>
</tr>
<tr>
<td>Federal Income Tax</td>
<td>Income Tax</td>
<td>41.34</td>
</tr>
<tr>
<td>State Income Tax</td>
<td>Income Tax</td>
<td>21.70</td>
</tr>
<tr>
<td>Total Earnings</td>
<td></td>
<td>139.64</td>
</tr>
</tbody>
</table>

**Employee Taxes**

<table>
<thead>
<tr>
<th>Name</th>
<th>Description</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Social Security</td>
<td>Social Security Contributions</td>
<td>66.66</td>
</tr>
<tr>
<td>Medicare</td>
<td>Medicare Contributions</td>
<td>10.28</td>
</tr>
<tr>
<td>Federal Income Tax</td>
<td>Income Tax</td>
<td>41.34</td>
</tr>
<tr>
<td>State Income Tax</td>
<td>Income Tax</td>
<td>21.70</td>
</tr>
<tr>
<td>Total Earnings</td>
<td></td>
<td>139.64</td>
</tr>
</tbody>
</table>
Overall Workday Training Objectives

- Provide foundational Workday knowledge
- Demonstrate the ability to execute *critical* day 1 tasks (e.g. Time Entry)
- Familiarize users with how SLU processes are managed in Workday
- Instruct how/where additional guidance and support can be located
- Assess need for sustainment and remediation strategies
Job Aids

Getting Started: Edit Your Personal Information

ACCESS YOUR WORKER PROFILE PAGE
Your Worker Profile page displays information about you, including your office location, phone number, and compensation. Note that the visibility of sensitive information is controlled by individual users' security profiles.

To access your Worker Profile page, click your Profile icon > View Profile.

Note: All instructions in this job aid start from the Worker Profile page.

Add or Change Your Contact Information
1. Click the Contact tab. The Contact subtab is selected.
2. Click Edit and select Change My Home Contact Information to change your personal contact information. Within each section, click Edit to change existing information or click Add to add new information. You can also click within a field to edit.
3. Click Submit and Done to save your changes.

Add or Change Emergency Contacts
1. Click the Contact tab.
2. Click the Emergency Contacts subtab.
3. Click Edit. Enter or modify your emergency contacts. Click Done to save your changes.

Time Tracking:

 TRACK TIME USING TIME CLOCK

Note:
Time Clock is only visible to hourly employees in Workday. To enter hours worked using the weekly calendar see the Job Aid entitled Time Tracking: Weekly Calendar.

1. Log in to your Workday account.
2. Click the Time application on the Home page.
3. Navigate to the Time Clock section.
4. Click Check In.
5. Click Check In to enter a start time for your work day.
6. A Check In dialog box displays.
7. Enter Hours Worked (In/Out) in the Time Type field.
8. Enter any comments in the Comments field.
9. Click OK.
10. A Check In confirmation box displays.
11. Click Done.

Note: In the Time Clock section a green circle with checkmark and the Check In [time checked in] displays.
# Training & Support Delivery Methods

<table>
<thead>
<tr>
<th>Delivery Method</th>
<th>Usage</th>
<th>Vehicle</th>
</tr>
</thead>
<tbody>
<tr>
<td>Instructor-Led Training</td>
<td>Teach complicated tasks and processes</td>
<td>In-Person</td>
</tr>
<tr>
<td>Videos</td>
<td>Demonstrate steps to complete tasks in Workday</td>
<td>Self-Service via the Web</td>
</tr>
<tr>
<td>Webinars (synchronous and/or recorded)</td>
<td>Teach complicated tasks and processes</td>
<td>Self-Service via the Web</td>
</tr>
<tr>
<td>Job Aids and Quick Reference Materials</td>
<td>Step by step instructions and/or information to complete tasks in Workday</td>
<td>Self-Service via the Web</td>
</tr>
<tr>
<td>Peer and Expert Assistance</td>
<td>Explain or demonstrate steps to complete tasks in Workday</td>
<td>In-Person/Email</td>
</tr>
</tbody>
</table>
## Training Communications & Delivery Timeline

<table>
<thead>
<tr>
<th>Date</th>
<th>Topic</th>
<th>Audience</th>
</tr>
</thead>
<tbody>
<tr>
<td>October 7, 2019</td>
<td>Train the Trainer- Timekeeping</td>
<td>Facilities Supervisors</td>
</tr>
<tr>
<td>October 15, 2019</td>
<td>Instructor Led Training Registration Opens</td>
<td>Business Managers and People Leaders</td>
</tr>
<tr>
<td>November 18 – 22, 2019</td>
<td>Delivery of Instructor Led Training Begins</td>
<td>Business Managers and People Leaders</td>
</tr>
<tr>
<td>November 11, 2019 – January 10, 2020</td>
<td>Workday Job Aids and On-Demand Videos become available</td>
<td>All Faculty &amp; Staff</td>
</tr>
<tr>
<td>January 2, 2020</td>
<td>Peer Support Available</td>
<td>All Faculty &amp; Staff</td>
</tr>
<tr>
<td>January 2 – 10, 2020</td>
<td>Open Labs (schedule/locations TBD)</td>
<td>All Faculty &amp; Staff</td>
</tr>
</tbody>
</table>

* All dates and audiences are tentative and subject to change
Finance Updates

• Four weeks of full-day architect sessions covering Procurement, Supplier Accounts, A/R and Revenue Management, Banking Settlement, Projects, Grants, Endowments, Business Assets, Financial Accounting and Budgets concluded late August.

• Sessions went well, participants were engaged, and team leads were appreciative of the knowledge and helpfulness of the Collaborative experts.

• Although progress was made, a lot of the time was devoted to learning what Workday does vs deciding exactly how it would be used.

• Groundwork will continue to be formed through the end of October with weekly one-hour calls for the ten workstreams noted plus Integrations and Reporting. Once in the configuration stage, there will be more information to share.
Finance Updates

Benefits:

• Real time reporting – no waiting for overnight loads to Cognos.

• Ability to drill down from the report to actual invoices and journal entries with back-up attached.

• Future potential when student and gift modules are added.
Thank You!