



workday
@SLU



Open Forum

April 15th, 2020

9:00 – 10:00am

4:00 – 5:00pm

- Audience members' mics are muted during the presentation
 - Ask your questions through the Q&A feature
 - All questions will be answered at end of webinar

Agenda

- Project Status Phase 2
 - Jackie Manikam
- Finance Updates
 - David Heimburger
 - Patty Klingelhofer (SLUCare)
- Talent & Learning Management Systems Updates
 - Patrick Maloney
- OC&T Updates
 - Stephanie Pasch

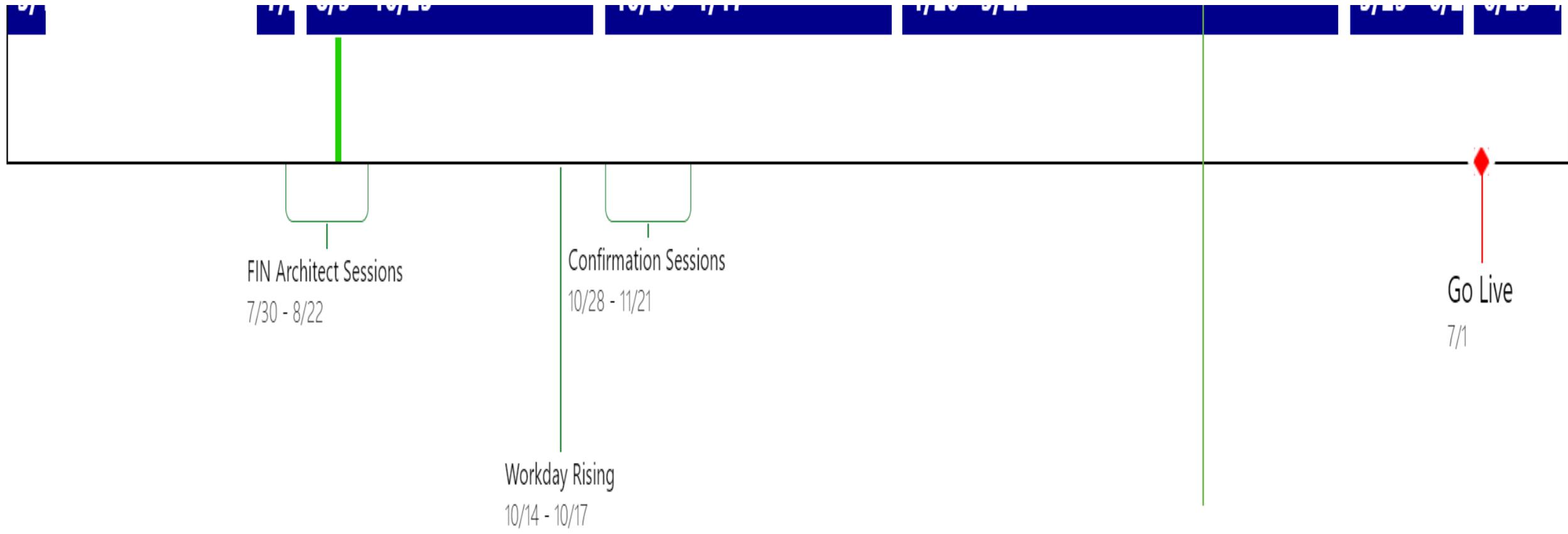




Project Status – Phase 2

Phase 2 Project Status

Phase 2: Finance & Talent / Learning Management System Project Timeline





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Finance Updates

SLU Phase 2 Finance

The senior administration of the University has been discussing a way to have faster and more reliable data from a single source and, after a review of various ERP systems, Workday was selected to help us achieve that goal. The HR module went in 1/1, Finance will go live 7/1 and the Student Module will be added in the near future.

Workday is a real-time reporting tool with strong drilldown capabilities and user aids and it provides the user the ability to customize and save reports.

Working from home is going to cause some difficulties in the final push to go live, but we believe we are still in position to implement this for FY21.

SLU Phase 2 Finance

Other features:

- Automated daily bank reconciliations.
- Cash transactions automated to reduce journal entries.
- Budget amendments will no longer be submitted via paper, but directly in Workday by the business or cost center manager and are automatically routed for approval.
- The budget will be entered at a higher level.
- Around 40 departments will transition from centralized billing to Workday customer accounts.
- Customer contracts can be maintained directly in the system vs. in EXCEL.
- Journal entries will be entered directly in the system and automatically route for approval. A spreadsheet has been designed for uploading larger entries.

SLU Phase 2 Finance

Other features (continued):

- Streamlined approval routing for requisitions and invoices incorporating approvals that were outside the system previously. Workday also includes a send-back feature that allows users to revise and resubmit their purchase requisitions.
- An integration with Unimarket will allow departments to continue accessing the punchout catalogs in Billiken Buy.
- Delivery locations down to the floor and room will be available to end users via FM system integrations.
- Improved supplier setup process for departments reducing paper and forms.
- Ease of the settlement/check run.
- Move of other functions into Workday from other systems and Excel such as CIP, Fixed Assets and Endowments.

SLU Phase 2 Finance

SLUCare Allocations and Customer Accounts:

- Allocation work continues for SLUCare. The overhead assessment is still in progress and we are currently working on the IDX feed into Workday and loading the drug charges on a monthly basis.
- Currently working on building statistics and statistic definitions for contract revenue (linking contract revenue to the appropriate physicians and their percentage of effort associated with each contract).
- Streamlining our customers and contact information and loading the first round of outstanding customer invoices into Workday.
- Working on template to enter in all customer contracts and related accounting functions.



Talent and Learning Management System Updates

Talent Management

Provides a variety of new tools to the SLU community to assist with career development and planning

- Professional profiles
 - Combine core HR information on work experience with worker-supplied skills and experience to create skills profiles.
- Talent reviews
 - Incorporate professional accomplishments and activities with workers' career interest to help guide conversations about future career growth.
- Mentorship framework
 - Help members of the SLU community to connect, learn from colleagues and share knowledge.
- Succession planning
 - Processes that will allow managers to identify critical roles for succession, nominate internal and external candidates, assess readiness, target development needs, and create succession pools and plans.

Learning Management

Provide a mix of new and improved tools to assist with professional development and compliance

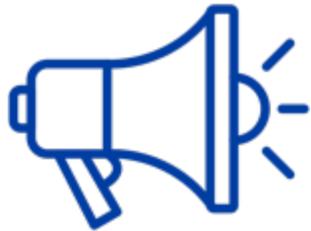
- Content creation tools and security
 - Will expand the number of employees who can create learning content.
- Enrollment management processes
 - Will enhance our ability to assigning training to targeted populations
- Enhanced reporting
 - Improve tracking and monitoring training activities for credentialing, compliance, and professional development



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OC&T Updates

What to Expect Through Go-Live



Communications
Ongoing



User Experience Testing
May 11 – 22



Training
Beginning Early June



Support
Beginning July 1

Communications – Ongoing

- Newslink
- HR Bulletin
- Workday Champion Network Meetings
- Targeted Emails
- 1-Pagers

User Experience Testing – May 11 – 22

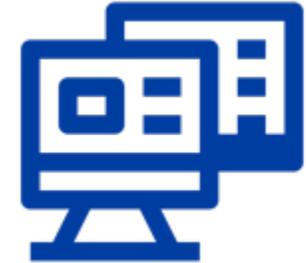
OC&T opportunity to test the usability of Phase 2 job aids



~25 Job Aids



Limited Number of
People



Remote Testing

End-User Training – Beginning Early June



Knowledge Transfer



Job Aids



In-System Guidance



Videos



Remote Instruction

Support – Beginning July 1



“War Room”



**Workday Champion
Network**



Escalation Checklist

Questions?