Meeting Minutes for Thursday, September 19, 2019

**Call to Order 12:02 and Reflection:** Cyn Wise called to order the meeting for September and shared a reflection by Henry David Thoreau.

Cyn Wise asked for a motion to approve the minutes from the August 15, 2019 meeting, which was made and then seconded.

**Announcements:**

Cyn went on to discuss recent openings for Staff representation on new Board of Trustee committees. Due to time limitations, she needed to immediately put forward names. Also, she noted that there are still several vacancies on other committees and asks that the membership review the openings and let her know if you would be interested in serving.

**Monthly Spotlight: Workday**

David Hakanson, VP & Chief Operations Officer started the presentation by explaining that Workday implementation has been divided up into separate phases. Phase I will go live on January 1, 2020 in which all Human Resource functions will be moved from Banner to Workday. This process began back in December of 2018. Currently, Phase I is in a testing phase: it will move to parallel testing in October, and will be initially deployed in January. There will eventually be a Phase for Student Records; however, that Phase is several years away.

Fred Winkler, Asst., VP & Controller, continued with the presentation to discuss the Finance Phase II piece. They have just recently started their work with the designers and their discussion have mainly been around what can Workday do for us. Several applications will remain - Billiken Buy for purchasing and Concur for travel planning and reimbursement. Cognos will be going away. Implementation of the finance piece will be July 2020. There is a positive benefit from Workday: reports will be in real time. We will no longer have to wait for a refresh overnight.

Mickey Luna, VP of Human Resources, presented the Human Resources Phase, which is the first to go live on January 1, 2020. Currently, they are in the testing phase. He gave a demonstration as to what Workday looks like. As we get closer to the transition date, he stated that there will be opportunity for training and they currently are also working on training aids. He also presented the new organizational charts that are part of Workday which contain photos of all employees which come from your Badges.

He asked for all of us to be understanding of Human Resources as most of the staff are doing 2 jobs rights now- working on Workday and doing their normal duties.

Banner will not be going away for several years and when it eventually does, those records will be stored and will be accessible as needed.

**Update:**

The Fall 2019 enrollment census was recently announced and there are 1902 new students.
The Staff Advisory Committee Bylaws are fully approved and now are filed in the Office of the General Counsel. We are now free to discuss new amendments. Do we want to be a free-standing group; e.g., the Staff Advisory Council? Cyn has asked for input on this issue. She is asking for volunteers to serve on an ad-hoc committee to discuss and create a document to put forward as an amendment. Please send your comments to SAC@slu.edu. Also, being considered is sending out a survey to the membership to see how they feel.

**Announcement:**

Judy Buncher introduced Sister Virginia Herbers who is now the Director of Spiritual Formation in the Office of Mission and Identity.

Ellen Weis invited everyone to the Toast of SLU held the 2nd and 4th Thursdays from 11:30-12:30 in the Wool Center. Contact Ellen if you have questions.

**Adjournment:** Cyn Wise,
Agenda

• Program Status – Phase 1 & 2
  - David Hakanson

• HR Updates
  - Mickey Luna

• Training Plan
  - Mickey Luna

• Finance Updates
  - Fred Winkler
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 ...
12/29 +

- Architect Workshops (onsite)
- Discovery Workshop (remote)
- Func WB Sign-off
- Customer Confirmation Sessions (onsite)
- Final Test Scenarios
- Data Due
- Config Tenant Complete
- Test Tenant Complete
- Batch-1 Integration Sign-off
- Batch-2 Integration Sign-off
Phase 2 Project Status

Phase 2: Finance & Talent Learning Project Timeline

FIN Planning: 5/13 - 5/24
Talent, Learning Planning: 7/22 - 8/2
July 2019

Start: 5/13
Architect: 7/2
8/5 - 10/25

September 2019

Configure & Prototype: 10/28 - 1/17
Test: 1/20 - 5/22

January 2020

March 2020

May 2020

Deploy: 5/25 - 6/26
Post P...: 6/29 - 7/1

July 2020

Go Live: 7/1
Finish
workday @ SLU
Employee Home Page and Search Functionality
Employee Home Page
Workday Search Functionality

- 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
workday @ SLU
Enter & Submit Time
Hourly Employee
Enter Time – Hourly Employees

Welcome, [User Name]

Click Time Application
Click in column of date for which you want to enter time.
Enter Time
09/17/2019

Time Type  *
Hours Worked

In  *

Out  *

Out Reason  Out

Hours  *
0

Details

Comment

Complete fields

Click OK
workday @ SLU

View Vacation/Sick Time Balance
View Vacation/Sick Time Balance

Click Absence Application
Request Time Off
Click Request Absence

Request Time Off

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>Description</th>
<th>Hours</th>
</tr>
</thead>
<tbody>
<tr>
<td>176 Hours - Vacation</td>
<td>176</td>
</tr>
<tr>
<td>0 Hours - Holiday Used Banked Time</td>
<td>0</td>
</tr>
<tr>
<td>0 Hours - Parental Leave</td>
<td>0</td>
</tr>
<tr>
<td>434.82 Hours - Sick</td>
<td>434.82</td>
</tr>
<tr>
<td>82.07 Hours - Vacation</td>
<td>82.07</td>
</tr>
</tbody>
</table>
Click and drag on the calendar or select date range.

1. Select Days

2. Click Request Absence

View Balances

Balances

View Balances

Balance as of 09/18/2019

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
  - 434.62 Hours

Vacation

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

2. Click Next
<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
- **From**: 09/09/2019
- **To**: 09/10/2019
- **Type**: Vacation
- **Quantity per Day**: Variable Quantity
- **Total**: 13 hours

**Actions**
- [Edit Quantity per Day]

**Comment**

### Submit Button
- **Submit**
- **Cancel**

---

*Click Submit*
workday @ SLU

Review/Approve Time Worked by Hourly Employee
Review/Approve Time Worked by Hourly Employee

Welcome, [Employee Name]

- Benefit Change - PE: Dependent Child Ages Out: [Effective Date]
  - 1 month(s) ago - Effective [Effective Date]
- Manager Evaluation: 2019 Year End Review (v2): [Due Date], [Effective Date]
  - 1 month(s) ago - Due [Due Date], Effective [Effective Date]

Go to Inbox

Click Team Time Application
Click Review Time
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**

<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>

Delegation button highlighted.
### Delegate Task

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

<table>
<thead>
<tr>
<th>Delegating Worker</th>
<th>Joyce Shively</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Business Process</strong></td>
<td>Time Entry: Yogi Bear - 80 hours</td>
</tr>
<tr>
<td><strong>Task</strong></td>
<td>Approval by Manager</td>
</tr>
<tr>
<td><strong>Current Delegates</strong></td>
<td>(empty)</td>
</tr>
</tbody>
</table>

#### Superiors

- Proposed Delegates

#### Peers

- Search for Value

#### Business Process: Time Entry: Yogi Bear - 80 hours from 09/03/2019 to 09/21/2019

#### Task

- Approval by Manager

#### Current Delegates

- Proposed Delegates

- Jeanne Lawo
View Pay Slip

Welcome, [Name]

Click Pay Application
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></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>45000</td>
<td>40000</td>
<td></td>
</tr>
</tbody>
</table>

- **Click View**
<table>
<thead>
<tr>
<th>Name</th>
<th>Employee ID</th>
<th>Pay Period Begin</th>
<th>Pay Period End</th>
<th>Check Date</th>
<th>Check Number</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>06/01/2019</td>
<td>06/30/2019</td>
<td>06/28/2019</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>Amount</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>1</td>
</tr>
<tr>
<td>Salary Regular</td>
<td>06/01/2019 - 06/30/2019</td>
<td>1</td>
<td>4</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: |
## Payslip to Print Report - Design 09_18_2019

### Employee Information

- **Name:** [Redacted]
- **Company:** Saint Louis University
- **Address:** 3000 Lindell Blvd
- **City:** St. Louis
- **State:** MO
- **ZIP:** 63104

### Pay Period Information
- **Pay Period Start:** 09/10/2019
- **Pay Period End:** 09/16/2019
- **Check Date:** 09/20/2019
- **Check Number:** [Redacted]

### Gross Pay Details
- **Gross Pay:** $6,392.00
- **Gross Pay:** $6,392.00
- **Net Pay:** [Redacted]

### Taxes and Deductions

<table>
<thead>
<tr>
<th>Description</th>
<th>Amount</th>
<th>VT</th>
<th>FICA</th>
<th>Social Security</th>
<th>Medicare</th>
<th>Federal Income Tax</th>
<th>State Income Tax</th>
<th>Federal Dep</th>
<th>State Dep</th>
</tr>
</thead>
<tbody>
<tr>
<td>Social Security</td>
<td>573.35</td>
<td>6</td>
<td>0</td>
<td>6</td>
<td>0</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Medicare</td>
<td>63.28</td>
<td>6</td>
<td>0</td>
<td>6</td>
<td>0</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Federal Income Tax</td>
<td>0</td>
<td></td>
<td>0</td>
<td>0</td>
<td>0</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>State Income Tax</td>
<td>0</td>
<td></td>
<td>0</td>
<td>0</td>
<td>0</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Federal Dep</td>
<td>0</td>
<td></td>
<td>0</td>
<td>0</td>
<td>0</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>State Dep</td>
<td>0</td>
<td></td>
<td>0</td>
<td>0</td>
<td>0</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Employee Expenses

- **Employee Expenses:** [Redacted]

### Company Information

- **Company:** Saint Louis University
- **Address:** 3000 Lindell Blvd
- **City:** St. Louis
- **State:** MO
- **ZIP:** 63104

### Additional Information

- **Addition Information:** [Redacted]
workday @ SLU

Job Aids
**Payroll:**

**View and Manage Your Pay**

You can view and manage your pay via the Pay Application.

From the Home page:
1. Click the Pay application icon on the Workday homepage.
2. Three areas display: Actions, View and Payslips.

**VIEW OR PRINT YOUR PAYSILP**

**View Recent Payslips**
1. Click the Pay application icon.
2. In the Payslips area at the bottom of the screen you will see your five most recent payslips.
3. Click on any of those payslips to view it.
4. At the top of the page you have the option to view your Previous Payslips, Return to My Payslips, Print Payslip Image and Print Multiple Payslips.
5. If you choose Print Payslip Image or Print Multiple Payslips go to step 4 under Print Your Payslip in this document.

**View Older Payslips**
1. Click Payslips in the View area.
2. A table with your payslips listed by date displays.
3. Navigate to the payslip you wish to view.

**Print Your Payslip**
1. Follow steps 1 through 4 above.
2. Click Print located to the left of the payslip to generate a PDF of your payslip.
3. A box appears indicating the your request in being processed.
4. Click Notify Me Later in the box that appears.
5. An alert is delivered to in your notifications folder when the PDF is ready.
6. Click on the Notifications icon.
8. Click on the blue hyperlink to view and print the document (see image on following page).
ENTER TIME WITH WEEKLY CALENDAR

There are two types of time reported by Non-Exempt (overtime eligible) employees hours using a Time Entry Code (see below) and hours related to an absence. The Instructions below are for hours reported using a Time Entry Code. For absence time reporting see page 2. For Instructions for submitting time see the bottom of page 2.

Report Time using a Time Entry Code

Time Entry Codes include the following types of time spent “working.”

- Hours Worked
- Emergency Call In
- Training
- Holiday Worked
- Meal Break Waiver
- Meal Break Unpaid
- "For these time entry codes see steps for Absence Codes.

1. Log in to your Workday account.
2. Click the Time application on the Home page.
3. Click This Week in the Enter Time column.
   - A Calendar for the current week displays.
   - Tip: Use the back and forward arrows in the upper left corner of the screen to navigate to a past or future week.
4. Click the day in which you want to enter time.
   - An Enter Time dialog displays.
5. Click on the Prompt icon in the Time Type field. Note this field defaults to Hours Worked.
6. Select Time Entry Codes.
7. Select the appropriate entry from those displayed.
8. Enter the time your hours began in the In field.
9. Enter the time your hours ended in the Out field.
   - Tip: Pay attention to the AM or PM suffix to the time and adjust as needed.
10. The Hours field will auto-populated based on the entries in the In and Out fields.
11. Enter comments in the Comment field.
   - In the calendar, you should see an entry with the Time Type chosen in the In/Out time and your comments in the comment field.

SUBMIT TIME

1. Click on the Time application on the Home page.
2. Click This Week in the Enter Time column.
3. Review your time entries for the week.
4. Click Submit at the bottom of the screen when you have completed entering your time for the week.
   - Note: If you are submitting time for the week, your time is being submitted as well as a list of the time being submitted.
Training Plan
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
Training Plan and Development Approach

1. **Training Strategy** - Sets guardrails, top-level objectives, and primary approach for all training

2. **Needs Assessment** - Identifies the gaps, target audience and establishes and prioritizes the knowledge and ability requirements for each stakeholder group

3. **Training Plan** - Detailed training development and delivery plans that are inclusive of power user train-the-trainer

4. **Design and Develop** - Includes prototypes, drafts, and review/signoff cycles for all training collateral

5. **Deliver and Implement** - Deploying training activities and materials via varied and multiple vehicles

6. **Reinforce** - Includes conducting an assessments, as well as updates to training to ensure the desired outcomes are achieved
# 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 High-Level Timeline

- **Training Needs Assessment and Curriculum Plan**: July 2019
- **Training Strategy Confirmed**: September 2019
- **User Experience Testing**: October 2019
- **Instructor Led Training Delivery Begins**: November 2019
- **Training Materials Available Early December 2019**
- **Go-Live Support & Training Remediation**: January 2020

**Key Steps**:

- Complete Training Needs Assessment and Curriculum Plan
- Plan and Execute Training Evaluations
- Develop and Finalize Training Materials
- Training Delivery
- Training Scheduling and Registration

**For HR staff, Business Managers, People Leaders**

**Job Aids, On-Demand Videos**
Training High-Level Timeline

**June - August**
- Prepare Training Needs Analysis and Curriculum Plan
- Begin Developing Training Materials

**August - October**
- Refine Curriculum Plan
- User Experience Training (UET)
- Establish End-User Adoption Measures

**November - December**
- Deliver End-User Training
- Assess/Analyze Training Effectiveness

**January and beyond**
- Evaluate End-User Adoption
- Update and Maintain Training Materials (Ongoing)
- Training Remediation as needed
# Training Communications & Delivery Timeline

<table>
<thead>
<tr>
<th>Date</th>
<th>Topic</th>
<th>Audience</th>
</tr>
</thead>
<tbody>
<tr>
<td>October 1, 2019</td>
<td>Training invitees notified about instructor led training</td>
<td>Business Managers and People Leaders</td>
</tr>
<tr>
<td>October 1, 2019</td>
<td>Instructor Led Training Registration Open</td>
<td>Business Managers and People Leaders</td>
</tr>
<tr>
<td>November 11 – 22, 2019</td>
<td>Instructor Led Training Delivered</td>
<td>Business Managers and People Leaders</td>
</tr>
<tr>
<td>November 11, 2019</td>
<td>First Workday Job Aids become available</td>
<td>All Faculty &amp; Staff</td>
</tr>
<tr>
<td>November 11, 2019 – January 10, 2020</td>
<td>Additional 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 and/or Open Labs become available</td>
<td>All Faculty &amp; Staff</td>
</tr>
<tr>
<td>January 2 – January 10, 2020</td>
<td>Open Labs available according to schedule (schedule TBD)</td>
<td>All Faculty &amp; Staff</td>
</tr>
</tbody>
</table>

* All dates and audiences are tentative and subject to change
workday @ SLU

Finance Updates
Finance Update

• 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 Update

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.