

# Business Administrators' Forum

---

May 19, 2016  
10:00 a.m. – 11:45 a.m.



WAKE FOREST  
UNIVERSITY

401 C/D Benson

## Welcome

*Presenter: Sharon Anderson, Financial Services*

## “How We Do Business at Wake” Orientation Program

*Presenters: Nathan Anderson, Director, Finance Systems and  
Jennifer Rogers, Learning & Development Specialist, Finance Systems*

## Procurement Services Update

*Presenter: Rosey Murton, Director, Procurement Services*

## Administrative Technology Update

*Presenters: Brandon Gilliland, AVP for Finance and Controller and  
Carmen Canales, Chief Human Resources Officer*

## Human Resources and Payroll

**Presenters:** *Kim Crewey, Assistant Controller, Financial Operations;  
Cathy Piño, Director, Payroll; Kriss Dinkins, Director, Recruitment &  
Operations; and Pearlie Patton, Human Resources Operations Manager*

# “How We Do Business at Wake” Orientation Program

*Nathan Anderson & Jennifer Rogers*

---

Business Administrators' Forum

May 19, 2016



WAKE FOREST  
UNIVERSITY

- Serves as an introduction to the people, policies, procedures and resources of Financial Services
- Provides key information on what you need to know in your first 30 days in a business administrator role
  - Can also be used by experienced business administrator for a high level review on particular topics
- Continues the broader mission of the Business Administrator Forum to provide relevant and timely training to individuals across campus



- Received anecdotal feedback over time from new business administrators that it is difficult to know where to get started
- Conducted a comprehensive survey in early 2015 that identified subject areas and topics of importance to business administrators
- Received important feedback from the pilot group

Name	Department
Judy Burkhard	Advancement
Barbara Collie	Information Systems
Kimberly Couch	Sustainability
Luci Hill	Athletics
Marie Isaacs	School of Business
Gina Jarrett	School of Law / PCL
Melissa Mickles	Provost's Office
Irene Picconi	Romance Languages
James Smith	Financial Services
Deborah Snyder	Teaching & Learning Center
Erica Talley	Sociology
Rolisa Tutwyler	Pro Humanitate Institute
Crystal Reid	Dean of the College
Lesley Whitener	Physics
Vicky Zickmund	Bioethics



So let's see it  
already!



- Orientation program URL
  - <http://finance.wfu.edu/online-learning>
- Everyone invited to the BAF meetings is already enrolled in the course
  - Please email Jennifer Rogers if others would like to take the course as well



- Question: How much do you know doing business at Wake?
  - Hint: Probably more than you think!
- Consider volunteering to be a mentor or buddy with another business administrator to share your knowledge and experiences
  - Keep it simple or make it more structured – whatever makes sense and is most comfortable
- Contact Sharon Anderson or Jennifer Rogers to volunteer or request to be partnered with another business administrator



For questions after the meeting, please email Jennifer Rogers at:

[rogersjh@wfu.edu](mailto:rogersjh@wfu.edu)

# Procurement Services Update

*Rosey Murton*

---

Business Administrators' Forum

May 19, 2016



WAKE FOREST  
UNIVERSITY



- Office Depot is current vendor. Co-sourced with Medical Center in FY2012
- Campus has provided feedback on pricing.
- Result is reduced spend and incentives.
- Current market status: Merger between Office Depot/Staples was declined by the FTC. We believe this will continue to remain the case due to decreased competition critically affecting the business sector of the market.
- The current status created a need to relook at our agreement and negotiate a stronger, better agreement.
- We benchmarked with Staples and Office Depot.

1. Product Savings – 4.3%
2. Scholarship/Intern Incentive – \$7,500 per year
3. Aggregate Spend Incentive – 5% reduction to Master Core list - estimated 2% overall savings - this **could** vary up or down based on spend on the master core.
4. Product Category Incentives - Will vary depend on category but you are currently meeting the technology and cleaning/breakroom categories spend.

**Total estimated annual savings in Year 1 - 18.4% based on \$500,000 spend**

---

## A few last notes:

*Pricing is better than the current agreement because we are riding Florida Universities' agreement.*

## New Features:

- **Scraping Software** – allows Office Depot to search websites to capture “promotional pricing”
- **Price Matching** – allows for us to work with Office Depot to match pricing.

# Administrative Technology Update

*Brandon Gilliland & Carmen Canales*

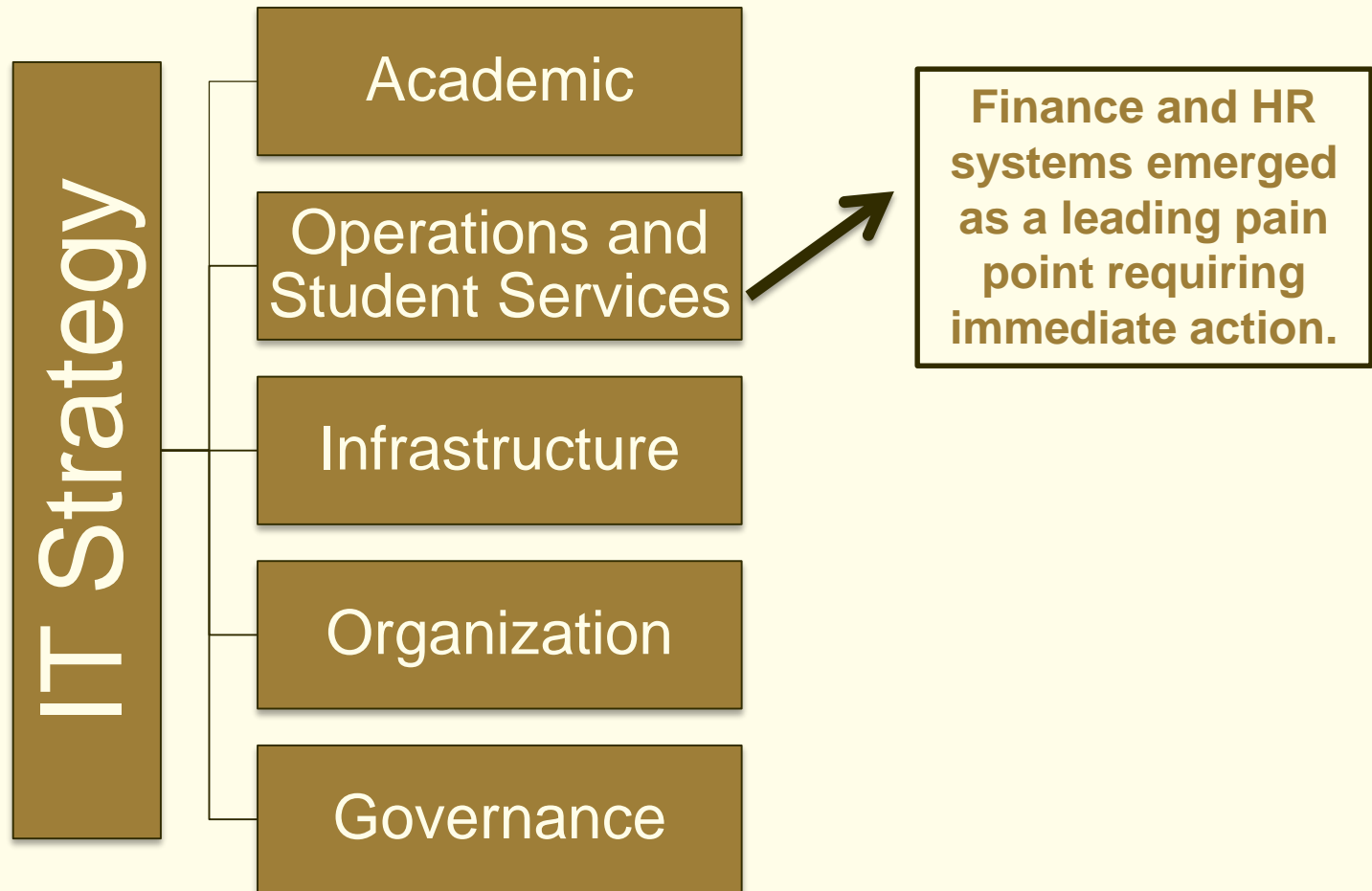
---

Business Administrators' Forum

May 19, 2016



WAKE FOREST  
UNIVERSITY





- Current Banner HR and Finance systems have significant capability gaps
- Requires a constellation of “bolt-on” solutions
- Substantial effort to maintain technology
- Significant manual, paper-based processes and shadow systems
- Unsupported, home grown budget system
- Limited business intelligence
- Uncertain direction with current vendor



***Modernize service, improve administrative productivity and contribute to a climate of innovation***

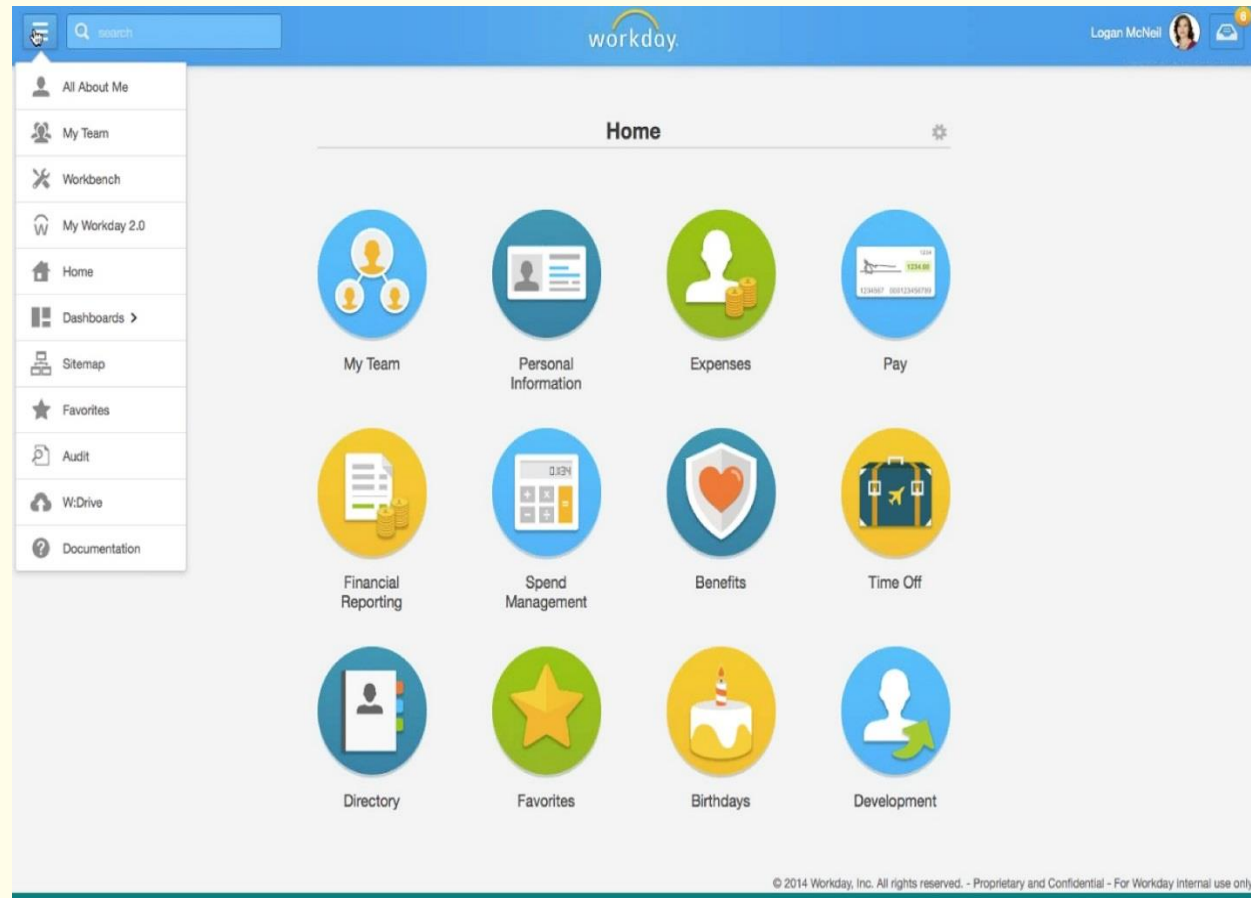
***A University strategy is critical to be more efficient, mobile, and responsive to the needs of faculty, students and staff.***

***Processes should be more consistent, paperless, and automated***

***Data should be more readily available for analysis***

*Solution selected to enable University's innovation strategy: Workday*

- **Scope:** Finance, Human Resources, & Business Intelligence
- **Approvals:** ITPC, ITEC, and Board Approved
- **When:** Implementation planning over summer
- **Go-Live:** TBD, estimate total of 24 months



## Workday Site-Visits:

*Finance, HR, IS*

- University of Miami
- Broward College
- Barry University
- Brown University planning

## Key Takeaways:

- Staggered implementation
- People: implementation team, backfill, partners
- Project Plan
- Change management and training: critical to success
- Clean data
- Roles and security



Area	Scope
Accounting	Accounting, Financial Data Model, capital assets, construction, endowments, revenues, receivables, debt, accounting policies
P2P	Procurement actions and policies, purchasing cards, treasury functions related to settlement, vendor management, accounts payable, integrations with McKesson, data conversions, ad hoc payments
Travel & Expense	Employee travel and expense reimbursements and policies, travel and expense reimbursements for visitors/non-employees, travel card
Reporting	Dashboards, executive reports, medical enterprise reports, regulatory reports, standard reports, shadow systems, longitudinal reporting
Budget Execution	Execution (spend) of budget that is passed from Tidemark, budget vs. actual reporting, commitment control, spend authorizations
Grants	Post award grants administration and compliance

## Implementation Partner interviews and selection

### Implementation planning:

- Financial Data Model
- Business process inventory
- Data cleanup and validation
- Implementation team, strategy, and timing
- Commitment of backfill/front fill

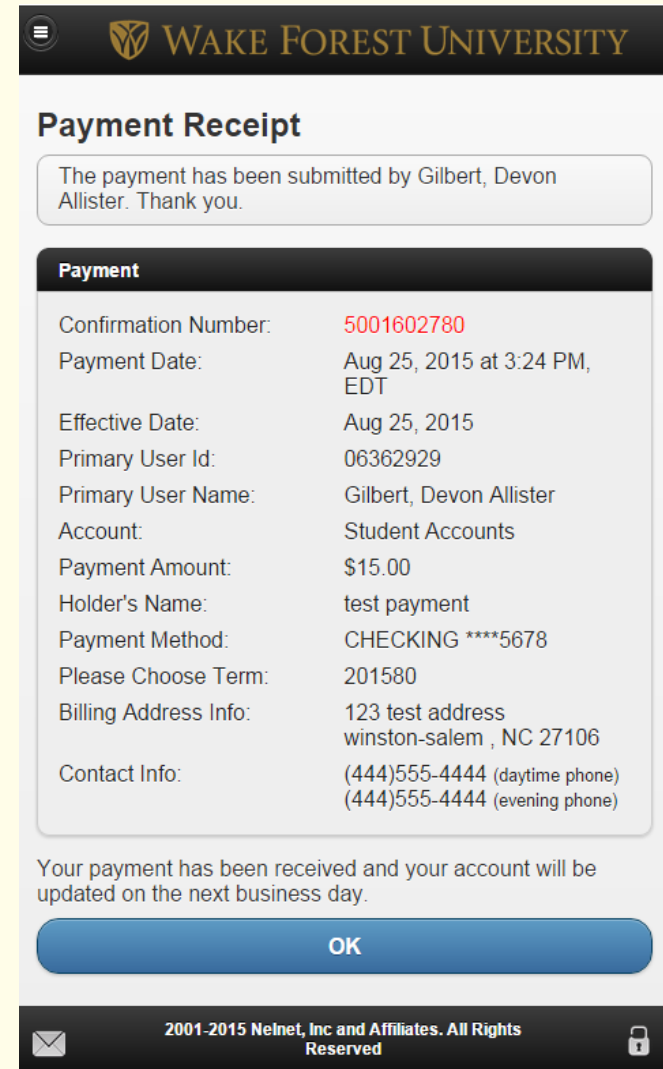
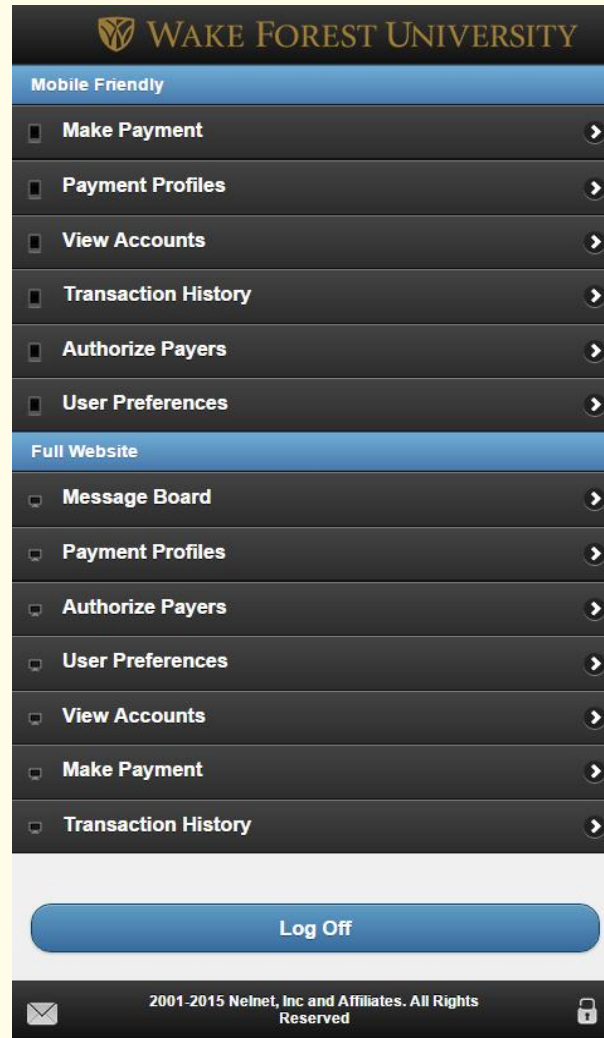


## Completed

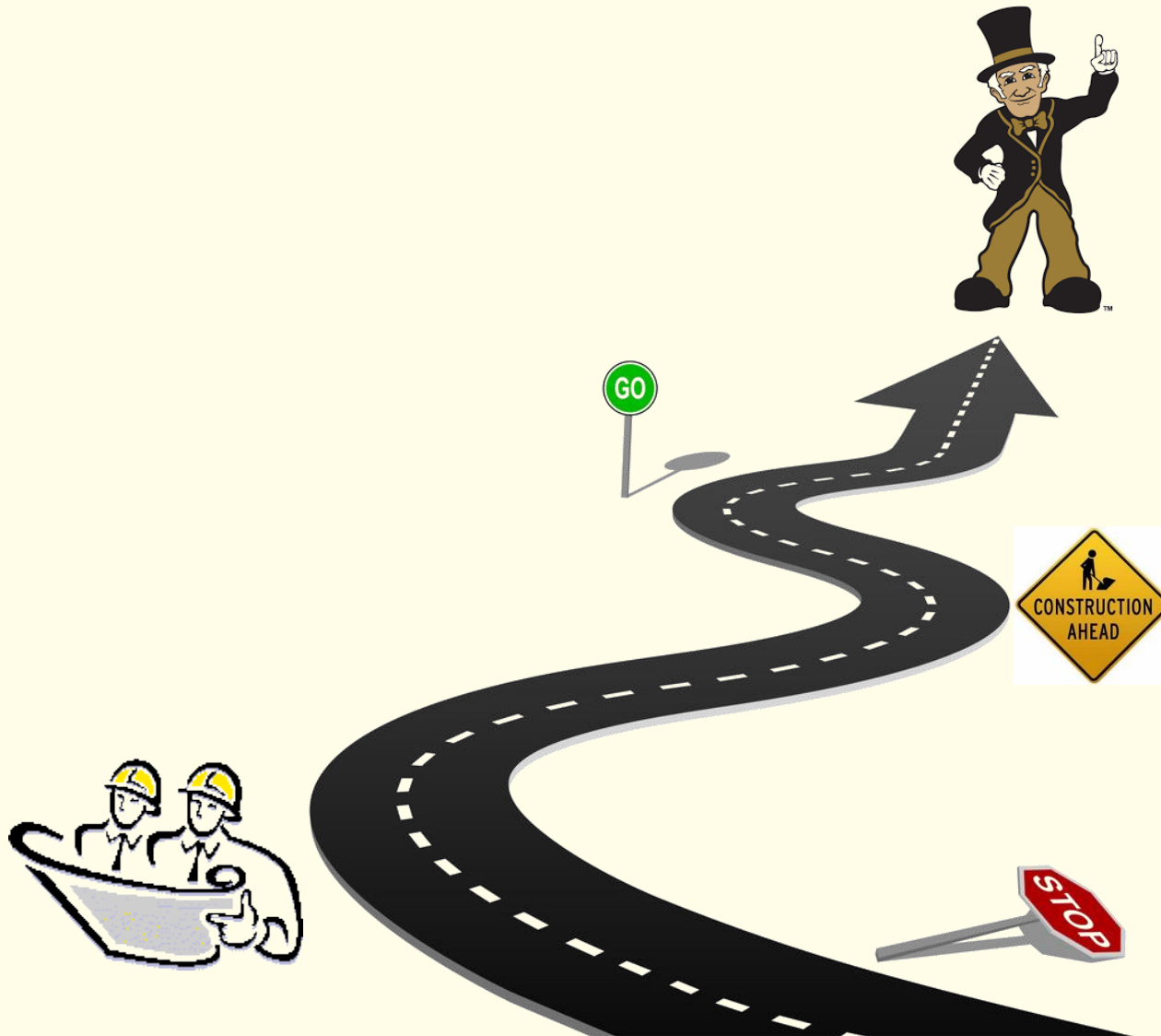
- Student bill improvements
- Payment application priority codes
- Mobile compatibility
- Student fee portal

## Coming in September

- Third party billing









# Human Resources and Payroll

---

Business Administrators' Forum

May 19, 2016



WAKE FOREST  
UNIVERSITY

## The Human Resources and Payroll partnership

- Recent responsibility changes
- HR Operations and Payroll team members

Human Resources will help you with the following:

- Hiring
  - Staff
    - Full time, Part time, Temporary
  - Faculty - in partnership with the College, the Graduate School of Arts and Science, and the Professional Schools
  - Students
    - EPAF set-up and assistance
    - Graduate Students

Human Resources will help you with the following:

- Onboarding
  - Employment documentation (Form I-9)
- Promotions and Transfers
- Faculty and Staff Changes
- Additional Compensation
- Exits

Receive the help that you need

- Contact Human Resources
  - 336-758-4700
  - [AskHR@wfu.edu](mailto:AskHR@wfu.edu)
- Work with your HR Partner
- Access forms on the HR Site
  - [hr.wfu.edu/forms-and-documents/](http://hr.wfu.edu/forms-and-documents/)

Payroll will help you with the following:

- NOVAtime
- Direct Deposit
- Tax Forms: W-4/NC-4
- Payroll Deadlines
- Pay Statement/W-2 Questions

Receive the help that you need

- Contact Payroll
  - 336-758-2960
  - [payroll@wfu.edu](mailto:payroll@wfu.edu)



*Your input is essential as we continue to collaborate and discuss items of interest so that we can improve how we do business at Wake. So, please continue to send along suggestions, questions, and topics you want to hear about, know about, or discuss with others.*

---