Welcome

Personnel Update  
*Presenters:* Shannon Badgett, Director, Budget & Financial Planning  
Brandon Gilliland, Vice President for Finance

University Card Program Update  
*Presenter:* Erika Brown, Pcard Administrator

Upcoming Policy: Contract Policy and related administrative procedure  
*Presenters:* Brandon Gilliland, Vice President for Finance  
Johnny Trevino, Contract Administrator

Workday: Round Robin  
*Presenters:* Workday Implementation Team
Personnel Update

Shannon Badgett, Director of Budget & Financial Planning
Brandon Gilliland, Vice President for Finance
Finance Personnel Updates

Matt Grau
Director, Capital Budgets
grautm@wf.edu
Bridgett Clancy
Learning & Development Specialist
clancybt@wfu.edu
x2434
Finance Personnel Updates

Matthew Borlik
Travel & Expense Specialist, Accounts Payable
borlikmt@wfu.edu or ap@wfu.edu
x5833
Finance Personnel Updates

Darla Berrier
Payroll Specialist

berriedw@wfu.edu or payroll@wfu.edu

X2562 or x2960
Finance Personnel Updates

Jennifer Shore
Payroll Specialist
shorejm@wfu.edu or payroll@wfu.edu
X4741 or x2960
Allison Franklin
Associate Director, Tax
franklah@wfu.edu or tax@wfu.edu
x2444
Recruiting:

Open Positions in Financial Operations (3):

- Student Financial Services (1 position)
  - Customer Relationship Representative

- Accounts Payable (1 position)
  - AP Long Term Temporary

- Payroll (1 position)
  - Payroll Long Term Temporary

Director, Procurement Services
University Card Program

Erika Brown
PCard Administrator
brownel@wfu.edu
336-758-5998
New PCard Online Training

- Flexibility
- Reach Faculty & Staff outside of Winston Salem
- Your time is valuable
- Self-Paced
New PCard Online Training: How it works

• Submit an application

• Cardholder will receive an email from PCard Admin

• Cardholder may complete training at their convenience

• Ready to go
http://finance.wfu.edu/reynolda-campus-university-cardholder-application
Accessing Online Training

http://finance.wfu.edu/training-resources/online-learning
PCard Modification Form

- Intended to facilitate concise & timely request and approvals

- Electronic form
  - PCard Limit Increase
  - Card Status Change-- Close, Temporarily Suspend (Leave)
  - Travel Notification
  - Proxy- Add or Remove
  - Replace PCard- Lost/Stolen or Damaged
• Submit request electronically

• PCard Admin will email budgetary approver to secure approval

• Apply changes once approved

• Email requester upon completion of changes
http://finance.wfu.edu/pcard-account-modification-form
http://finance.wfu.edu/pcard-account-account-modification-form
Upcoming Policy: Contracts

Brandon Gilliland, Vice President for Finance
Johnny Trevino, Contract Administrator
November 30

10:00 – 11:30 a.m.

Pugh Auditorium, Benson University Center

Topics of interest including:

P-card

Contract and Spend Authority Changes

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. (My e-mail is andersse@wfu.edu). I would love to hear from you!
Welcome

Meet the Workday Team!
Rules of Engagement

**Guidelines**

- Since this is a demo and not training, we hope you will attempt to get an overall picture.
- Please save all questions until the end of each demo.
- Ask questions!
- Write your questions on the comment cards and leave them on the tables.

**Schedule**

- There are 5 tables.
- You have **15 minutes** at each table.
- There will be a **2 minute** warning before the time is up.
- You will have **3 minutes** to rotate **right** to the next table.
Contact us at workday@wfu.edu

Visit us at workday.wfu.edu