

# Business Administrator Forum

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October 31, 2017  
9:00 a.m. – 11:00 a.m.



WAKE FOREST  
UNIVERSITY

401 A/B/C Benson



## 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

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



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**Matt Grau**  
**Director, Capital Budgets**  
grautm@wfu.edu

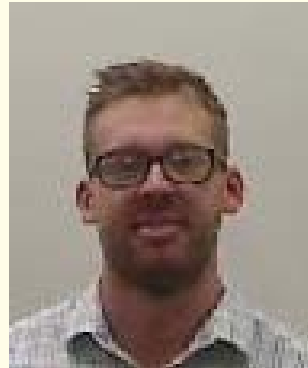


**Bridgett Clancy**

**Learning & Development Specialist**

**[clancybt@wfu.edu](mailto:clancybt@wfu.edu)**

**x2434**



**Matthew Borlik**

**Travel & Expense Specialist,  
Accounts Payable**

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**x5833**

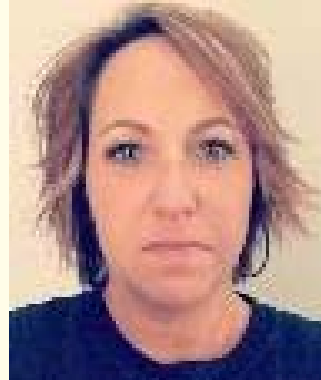


**Darla Berrier**

**Payroll Specialist**

[berriedw@wfu.edu](mailto:berriedw@wfu.edu) or [payroll@wfu.edu](mailto:payroll@wfu.edu)

**X2562 or x2960**



**Jennifer Shore**

**Payroll Specialist**

shorejm@wfu.edu or [payroll@wfu.edu](mailto:payroll@wfu.edu)

X4741 or x2960





**Allison Franklin**

**Associate Director, Tax**

**[franklah@wfu.edu](mailto:franklah@wfu.edu) or [tax@wfu.edu](mailto: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

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Erika Brown  
PCard Administrator  
[brownel@wfu.edu](mailto:brownel@wfu.edu)  
336-758-5998



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- Flexibility
- Reach Faculty & Staff outside of Winston Salem
- Your time is valuable
- Self-Paced





- 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>

The screenshot shows the Wake Forest University website's Financial Services section. At the top, there is a navigation bar with the university logo and links for Students, Alumni, Parents, Faculty, and Staff. Below this is a secondary navigation bar with links for Admissions, Financial Aid, Schools, Libraries, Research, Arts, International, and Directories. A dark navigation bar contains links for ACADEMICS, NEWS, EVENTS, ADMINISTRATION, ATHLETICS, VISITING, GIVING, and WIN, along with a search box. The main content area is titled "Financial Services" and includes a breadcrumb trail: Home > Faculty & Staff > University PCard. A left sidebar menu lists various services, with "Faculty & Staff" selected. The main content area is titled "University PCard" and features a horizontal menu with tabs for Overview, How To/FAQ, Tools, Forms, and Policies & Procedures. The "Forms" tab is active, displaying a list of links: "Missing Receipt Affidavit [xls](#)", "University PCard Application", and "University PCard Account Modification Form".



<http://finance.wfu.edu/training-resources/online-learning>

The screenshot displays the Wake Forest University Financial Services website. The top navigation bar includes links for Students, Alumni, Parents, Faculty, and Staff. Below this is a secondary navigation bar with links for Academics, News, Events, Administration, Athletics, Visiting, Giving, and WIN. A search bar is located on the right side of this bar. The main content area is titled "Financial Services" and features a left-hand sidebar with various menu items such as Home, Vision and Mission, Students & Parents, Faculty & Staff, Suppliers, Audited Financial Statements, Forms, Policies & Procedures, Training Resources, and Contact Financial Services. The "Training Resources" menu item is expanded to show "ONLINE LEARNING". The main content area is titled "Online Learning" and contains the following text: "The following courses have been developed to provide an on-demand, self-paced option for Financial Services learning opportunities. Click any course title to learn more about the course and complete it. We will add to this list as more online courses are developed." Below this text is a section titled "Accessing Finance Online Learning Courses:" which includes a list of instructions: "Use this link to log in with your WIN credentials. Once logged in, you will be returned to this screen to click the 'Begin Course' link under the course description that you want to access.", "Be sure that your pop-up blocker is disabled.", "If you have difficulty accessing a course, email Bridgett Clancy for assistance.", and "Begin the course!". There is also a section titled "Course Offerings" with a sub-section for "New PCard Cardholder Training" which states: "This training is designed for new PCard cardholders. This course will identify key roles and responsibilities within the PCard program; differentiate between allowed and prohibited expenses; show cardholders how to prepare accurate and complete documentation, and provide information..." An image of a man sitting at a desk with a laptop is visible on the right side of the page.



- 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>

The screenshot shows the Wake Forest University website's Financial Services section. The top navigation bar includes links for Students, Alumni, Parents, Faculty, and Staff. Below this is a secondary navigation bar with links for Admissions, Financial Aid, Schools, Libraries, Research, Arts, International, and Directories. A dark navigation bar contains links for ACADEMICS, NEWS, EVENTS, ADMINISTRATION, ATHLETICS, VISITING, GIVING, and WIN, along with a search bar. The main content area is titled "Financial Services" and "University PCard". A left sidebar lists various services, with "Faculty & Staff" expanded to show options like "ACCEPTING PAYMENT CARDS" and "ASSET MANAGEMENT". A horizontal menu below the title includes "Overview", "How To/FAQ", "Tools", "Forms", and "Policies & Procedures". Under the "Forms" section, three links are listed: "Missing Receipt Affidavit (xls)", "University PCard Application", and "University PCard Account Modification Form", which is highlighted in yellow.



The screenshot shows the 'University PCard Account Modification Form' page. At the top, there is a navigation bar with links for 'Students', 'Alumni', 'Parents', 'Faculty', and 'Staff'. Below this is a secondary navigation bar with links for 'Admissions', 'Financial Aid', 'Schools', 'Libraries', 'Research', 'Arts', 'International', and 'Directories'. A dark navigation bar contains links for 'ACADEMICS', 'NEWS', 'EVENTS', 'ADMINISTRATION', 'ATHLETICS', 'VISITING', 'GIVING', and 'WIN', along with a search box. The main content area features the 'Financial Services' header and the 'University PCard Account Modification Form' title. Below the title is a brief description of the form's purpose and a list of change request types with checkboxes.

Home > University PCard Account Modification Form

## University PCard Account Modification Form

**University PCard Account Modification Form**  
The University PCard Account Modification Form is intended to facilitate concise and timely requests and approvals for PCard modifications. Once your request is submitted it is routed to the PCard Administrator. The PCard Administrator will then email the request to the budgetary approver, where the request will either be approved or declined. If further information is needed the PCard Administrator will contact the requester. Once your request has been processed, you will receive an email update. If you have questions please contact the PCard Administrator, Erika Brown, at extension 5998.

**Cardholder Name \***

First Last

**Name of Your Approver \***

The approver that signs your PCard statement. For example, your Department Head or Chair.

**Select type(s) of change requesting \***

- PCard Limit Increase
- Department/Org Number
- Address/Phone Number
- Card Status Change
- Name Change
- Travel Notification
- Proxy
- Replace PCard
- Other

<http://finance.wfu.edu/pcard-account-modification-form>

# Upcoming Policy: Contracts

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Brandon Gilliland, Vice President for Finance

Johnny Trevino, Contract Administrator



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# Workday Round Robin

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Workday Implementation Team



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*Thursday, 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 [anderssc@wfu.edu](mailto:anderssc@wfu.edu)). I would love to hear from you!*

# Welcome

Meet the Workday Team!

## Rules of Engagement

### Guidelines

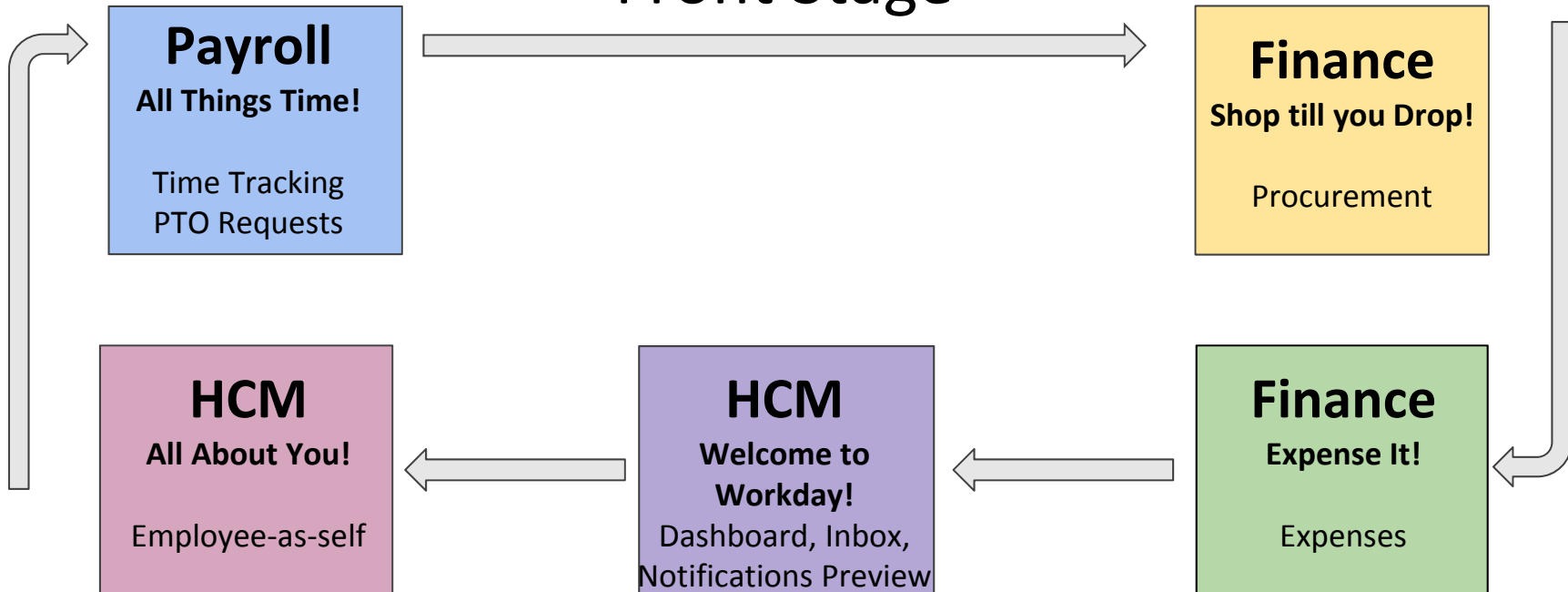
- Since this is a **demo** and not training, we hope you will attempt to get an overall picture
- Please save all questions until the end of each demo.
- Ask questions!
- Write your questions on the comment cards and leave them on the tables.

### 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.



## Front Stage



Contact us at  
[workday@wfu.edu](mailto:workday@wfu.edu)

Visit us at  
[workday.wfu.edu](http://workday.wfu.edu)