**Day In The Life Of / Perspective**

**Total allocated time: 1 hour and 45 minutes**

## Session Objective

The Day In The Life Of / Perspective sessions are intended to serve as a primer of system functionality and how it relates to the work people need to do. These sessions will be high level and brief to allow a broad range of users, with different roles and responsibilities, a preview of how they might interact with the system. The later, Features & Functionality sessions will focus on specific details and how-to's for actions such as Travel, Time and Leave, Payroll and Benefits, Purchasing, Grants Management, and Budget Control.

## Items to Demonstrate

**Allocated time for Faculty/Principal Investigators: 50 minutes, including questions**

**Faculty/Principal Investigators:**
*Intended audience*: Individuals whose activities may include teaching, research, service, supervising students and staff, managing programs, grants and other sponsored projects (academic and non-academic), and other creative and professional activities.

Below are highlights of functions and activities that WSU faculty and PIs might want to do, or need to do, on a daily basis within a single system.

1. Show examples of items that can be viewed.
    a. Post-award grant management activity (e.g. budgets, expenditures, F&A, cost share, etc.).
    b. Notifications/alerts (e.g., upcoming end dates, new award setup, actions needing approval).
    c. Reports (e.g. active projects, budget vs actuals) and drill-down capabilities within reporting tool.
2. Show examples of actions that can be taken.
    a. Initiate a new purchase.
    b. Sign expense reports as approver and traveler (demonstrate how this would look from a mobile device).
    c. View, adjust, or certify time allocated to a particular grant or activity (Effort/Payroll certification).
3. Show examples of the available self-service options (e.g. view paycheck information, leave balances, benefits/retirement selections, etc.).
4. Show additional in-system, delivered functionality or tools to eliminate the administrative burden on busy faculty and PIs.

## Q&A Session

**Allocated time for All Employees and Staff/Administrators/Managers: 50 minutes, including questions**

**All Employees:**
*Intended audience*: Any classified or professional WSU employee.

Below are highlights of functions staff may do apart from their daily tasks.

1. Show examples of the available self-service options (e.g. view paycheck information, leave balances, benefits/retirement selections, etc.).
2. Show examples of things that can be done on a regular basis (e.g. request leave, submit time report, etc.).

**Staff/Administrators/Managers:**
*Intended Audience*: Individuals whose activities may include fiscal management, supervising employees, initiating/routing transactions, reconciling information, and approving/disapproving actions.

Below are highlights of functions and activities that are relevant to a broad range of employees (with different roles and responsibilities) who may need to initiate or approve transactions on a daily basis, within a single system.

1. Show examples of actions that can be initiated.
    a. Travel authorization.
    b. Create a new position.
2. Show examples of actions that need to be reviewed.
    a. Travel authorization (approve request initiated above).
    b. Time and leave (approve request initiated during the *All Employees* perspective).
    c. Purchase (approve request initiated during the Faculty/PI perspective).
    d. *For one of the actions above, please show how to add a temporary delegate or proxy.*
3. Show an example of how an action in one area/module automatically updates other areas/modules.
4. Show examples of information that can be viewed with reporting tools and/or dashboards:
    a. Financial activities (budget to actual, expenditures, revenue, etc.).
    b. View from different perspectives (e.g. report on department, college, campus, or University).
    c. Notifications/alerts (e.g. end date approaching for funding or a position).

## Q&A Session