

What's New . . .

June 2024

Business Managers' Meetings

The next Business Managers' Meeting is scheduled for September 2024.

If you would like to present at a future Business Manager Meeting or have suggestions for helpful content, contact: [Heather Kotsybar](#). We would love to hear about best practices in your area, which may also help others.

Human Resources

We are happy to announce that 2024 goals can be uploaded into Workday. You will want to go to the Team Performance App in your Workday menu to get started. If you want further instruction on how to upload goals you can follow our job aid for [Adding, Updating, Archiving and Restoring Goals](#). You can also register for our upcoming webinar on June 6 on Archiving and Updating Goals. Please click [here](#) to register.

In addition, as a follow-up to our enhanced offerings in 2024, a SMART Goal microlearning and template will be delivered on June 10.

We also want to make you aware that we will be closing the 2023 Performance Review on Friday, May 31. Closing the 2023 Performance Review process will allow you to archive any completed goals for your team. If you need a review reopened, please reach out to us and we can get those sent back to your Workday Inbox.

If you have any questions, please contact your Human Resources Consultant or email training@slu.edu.

Central Processing Center

PO vs P card payment reminder:

If you issue a PO to a supplier for payment, do not then use the P card to pay the invoice(s) billed against the issued PO. This causes confusion and duplication of work and the potential to pay the supplier twice.

AMEX T & E card reminder:

The University offers all employees with the business need the opportunity to apply for a SLU T&E card through American Express. The T&E card reduces out of pocket business expense for business travel or local business expense.

T&E card charges are integrated with our expense reimbursement platform, Concur, for streamlined reimbursement directly to the card account. If you travel on SLU business or incur local business expense, employees can apply for a T&E card with their manager's approval. Email CardPrograms@slu.edu for additional information.

Personal credit reimbursement reminder:

Do not use personal credits i.e. airfare, uber, etc... to pay for business expense and then request reimbursement for the personal credit amount. Personal credit amounts are non-reimbursable.

Budget Office

As mentioned in last month's "What's New", and as President Pestello noted in his correspondence on April 25, 2024, delays in the FAFSA process have affected the timing of the University's budget process for FY25. We anticipate a vote from the Board on the FY25 budget in early June, at which the budget office will send out communication/timelines/workbooks/etc. shortly thereafter. Please contact the Budget Office if you have any questions.

Business Services

Fiscal Year-End Reminder – Review Open POs to Assess Closure

In an effort to keep our Workday processes and reporting efficient heading into the new fiscal year:

Please review your open PO listing using the Workday report CR FIN Find Purchase Orders- Open Encumbrances and identify any open POs listed that should be closed.

Examples of POs on your list that should be closed:

- POs with any \$ balance that will not be purchased/invoiced against further

- POs carried forward from prior fiscal years with any \$ balance that will not be invoiced against further
- POs closed with the supplier but not closed in Workday

Please email accountspayable@slu.edu with any PO numbers from your list that should be closed.

Thank you for your cooperation and assistance in preparation for fiscal year-end.

Blanket Order Balance Reports

Business Services recommends that departments monitor their blanket order balances as we approach year-end to ensure that they have enough funds to cover supply needs and invoices through June 30th. This includes supplier contracts and non-catalog blanket orders. The reports that are used to monitor the balances of these blanket orders are as follows:

Non-Catalog Blanket Order Report for Balance: CR - FIN - Find Purchase Orders - Open Encumbrances
Supplier Contract Blanket Order Report for Balance: CR - FIN - Supplier Contract Detail by Organization
Shortcuts will be added to the Workday Procurement Dashboard in mid-to-late June for these reports. We will send out a targeted communication to all blanket order owners when the updated dashboard is available, along with instructions for first-time use.

Blanket Order Training

Business Services held one procurement training session in May. Access to the webinar recording and supporting documentation can be found in the Workday Learning module. A direct link to the recording is also available here: [May Training Session: Blanket Orders](#)

Staples Breakroom Program

Please see the attached flyer for information regarding the Staples Breakroom Program.

Midwest Scientific

Midwest Scientific gives SLU an additional 1.5% discount on all purchases. This discount is added to the invoice. Starting June 1st, this discount will be embedded in the catalog pricing. This change should help with invoice reconciliations buyers have experienced in the past and allow for easier price comparison. They have also previously offered free shipping on orders of \$150 or more. To simplify the reconciliation and decision-making process, they are now offering free shipping on all orders, unless freight is specifically added to your quote. The freight is only added to equipment quotes.

Fisher Scientific Pricing Reminder

In the Fisher Scientific catalog in Billiken Buy, pricing will include shipping and handling. If you look at fishersci.com or Thermo Fisher outside of Billiken Buy, the pricing will not include shipping and handling - it will be a separate charge on the invoice. For items greater than \$1,000 and/or items that will be new/frequently purchased items, Fisher Scientific recommends that you reach out to our Fisher Scientific representative for a quote. Our representative is Markus Langston and his email is markus.langston@thermofisher.com.

Amazon Business – Delivery Reminder

If you select “Rush Shipping” at checkout, it will override the delivery timeframes we have established with Amazon Business. Weekend deliveries might happen, and the product could get lost. Please plan your deliveries accordingly to avoid items potentially getting delivered over a weekend.

Workday Finance

Workday Financials

Questions or issues with Workday Financials? Contact wdfinance@slu.edu



Workday Accounting Structure Updates:

New Internal Service Provider: Student Development – Metro Passes

New Spend Category: Grant Considerations (less than \$500) posting to Ledger Account 5127: Other Expenses

Workday Report Updates and Additions:

As a reminder, you may not have access to certain Workday Reports due to security. Please email wdfinance@slu.edu with any questions.

Report Name	Update/Description	Functional Area
CR - FIN - Find Purchase Orders - Open Encumbrances	Added Purchase Order Type Column	<p>The report is available to following security groups: All SLU Workers Buyer, Cost Center Approver \$100K, Cost Center Approver \$200K, Cost Center Approver \$25K, Cost Center Approver \$2M, Cost Center Approver \$50K, Cost Center Approver \$5K, Cost Center Financial Analyst, Cost Center Manager, DNU Commitment Office >\$2.5K E-40, Finance Auditor, Function Financial Analyst, Fund Financial Analyst, Fund Manager, Gift Financial Analyst, Gift Manager, Grant Approver 100k, Grant Approver 50k, Grant Approver E40, Grant Financial Analyst, Grant Manager, Location Hierarchy Financial Analyst, Location Hierarchy Manager, Procurement Administrator, Program Financial Analyst, Program Manager, Project Financial Analyst, Project Manager, Specialty Financial Analyst, University Commitment Office</p>

Data Audit - Grants

Added Worktags & Activity Code column

The report is available to following security groups: Accountant, Accounting Manager, Administrative Accountant, Award Analyst, Award Approver, Award Billing Specialist, Award Contract Analyst, Award Contract Specialist, Award Contract Specialist (Unconstrained), Award Specialist, Award Specialist (Unconstrained), Award Task Analyst, Company Reporting - Grants Management, Conflict of Interest Approver, Cost Center Approver \$100K, Cost Center Approver \$200K, Cost Center Approver \$25K, Cost Center Approver \$2M, Cost Center Approver \$50K, Cost Center Approver \$5K, Cost Center Financial Analyst, Cost Center Manager, Director of Sponsored Program, Finance Administrator, Finance Analyst, Finance Auditor, Finance Executive, Function Financial Analyst, Fund 32 Grant Manager, Fund Financial Analyst, Fund Manager, Gift Financial Analyst, Gift Manager, Grant Approver 100k, Grant Approver 50k, Grant Approver E40,

		<p>Grant Budget Specialist, Grant Financial Analyst, Grant Manager, HR Auditor, Lead Principal Investigator, Location Hierarchy Financial Analyst, Location Hierarchy Manager, Management Chain Manager, Multiple Principal Investigator, Payroll Auditor, Payroll Partner, Re-Award Specialist, Principal Investigator, Program Financial Analyst, Program Manager, Project Financial Analyst, Project Manager, Specialty Financial Analyst, Sponsored Programs Manager, Sponsored Programs Manager (Cost Center), System Auditor, University Commitment Office</p>
<p>CR - FIN - Award Proposal Report</p>	<p>Added Worktags and Activity Code Column</p>	<p>Report is available to the following security groups: Accounting Manager, Award Contract Specialist, Award Specialist (Unconstrained), Finance Analyst, Finance Auditor, Finance Executive, Pre-Award Analyst, Pre-Award Specialist (Unconstrained), Sponsored Programs Manager</p>

Office of University Compliance & Ethics



The Saint Louis University Integrity Hotline is available as a confidential, toll-free resource for anyone with a concern regarding business, billing, and/or ethical practices in his or her department. Anonymous or self-identified reports of any nature can be made to the Integrity Hotline at **1-877-525-5669**. Additional information and FAQs regarding the Integrity Hotline can be found on the Office of University Compliance and Ethics homepage:

<https://www.slu.edu/compliance-ethics/hotline.php>