

What's New . . .

July 2023

Business Managers' Meetings

The next Business Managers' Meeting is scheduled for September 7, 2023, at 9:00 a.m. in Il Monastero Banquet Center, 251A, located at 3050 Olive St, St Louis, MO 63103.

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

Financial Planning & Budget

The Office of Financial Planning & Budget has completed loading the following budgets in Workday:

- FY24 Operating Budget
- FY24 Designated Budget
- FY24 SLUCare and CADE budget

Please use the following report to review your budgets.

- CR-FIN-Budget vs Actuals by Org

July Budget Development Milestones

- 7/1/2023 - Start of new fiscal year and FY24 budgets available in Workday.
- 7/5/2023 - Costing allocation/labor distribution changes need to be complete for first biweekly payroll.
- 7/21/2023 - Costing allocation/labor distribution changes need to be complete for July monthly payroll.

Risk Management

Risk Management would like to remind anyone who drives on behalf of the University (golf carts too) to renew their MVLRC for the new fiscal year. Please go to the Risk Management page linked here.

If your department has drivers that drive frequently for University business and uses the online program Supervision, please submit a current driver's license to your supervisor to ensure that your information is up to date.

For those who drive golf carts, please make sure that you have taken the Golf Cart Safety Training found in Workday Learning and have read and signed the Golf Cart/Utility Vehicle Usage Rules and Regulations and submitted it to your supervisor. This training should be taken every year.

Business Services

FedEx Express Changes

FedEx Express has informed the university that they will no longer have daily pickups for outbound packages. They will have regular pickups on Monday, Wednesday, and Thursday for outbound packages. If you have an outbound package that needs to be picked up on Tuesday or Friday, please reach out to Distribution Services for assistance.

Lowe's Punchout – New in the Billiken Buy marketplace!

Lowe's now has a punchout available in our Billiken Buy marketplace. We encourage departments to use this punchout as it offers additional discounts on products you purchase in the retail store. The punchout allows you to select pick-up or delivery for your order. The delivery fee varies depending on the item(s) ordered. Please reach out to billikenbuyadmin@slu.edu with any questions.

Technology Asset Management Program – What does it mean for Purchasing?

In support of the new ITS technology asset management program, access to the Dell and Apple punchouts in Billiken Buy will be restricted to the Asset Technology team in ITS only, effective 7/1/2023. Computer purchases will also be blocked in our Amazon Business punchout. If you have any questions about these changes, please reach out to assetmanagement@health.slu.edu or andrew.chism@slu.edu.

Vendor Fair - The Saint Louis University Preferred Vendor Fair is back!

Event Details: 10:30 a.m. - 2:00 p.m., July 28th, Wool Ballroom, Busch Student Center
Business Services will host the 2023 Saint Louis University Preferred Vendor Fair from 10:30 a.m. to 2 p.m. Friday, July 28th in the Wool Ballroom in Busch Student Center.

The fair is an opportunity for faculty and staff to meet account representatives from preferred vendors. Complimentary light lunch items, attendance prizes and product demonstrations will be included throughout the event.

Attendees are encouraged to bring business cards.

Please contact Andrew Chism at andrew.chism@slu.edu or 977-6890 with questions.

Workday Financials



Workday Accounting Structure Updates:

Updated Payment Terms:

Added Net 90 to Payment Terms for Customer Invoices.

New Internal Service Provider:

Workstation Refresh Program

Inactivated Revenue Category:

Contract Revenue (515): posts to Ledger Account 4600 Contract Revenue & Clinical Services (Historical)

Cost Center Name Changes

D080 Communication Sciences and Disorders has changed to **Speech, Language, and Hearing Sciences**.

D570 Dean Parks College has changed to **Dean School of Science and Engineering**.

D738 Parks College has changed to **School of Science and Engineering General**.

D739 Parks Master's Program has changed to **School of Science and Engineering Master's Program**.

D300 Campus Recreation has changed to **Campus Recreation and Wellness**.

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 Award Tasks Alert – All Research Awards	CR-FIN tag has been added to the Award Tasks Alert – All Research Awards.	This report is available to those who manage Grants.
CR-FIN Award Tasks Alert – All Research Awards – PI Dashboard	CR-FIN tag has been added to the Award Tasks Alert – All Research Awards – PI Dashboard.	This report is available to those who manage Grants.

		Security Group: Principal Investigator
New Reports on PI Dashboard	The following reports have been added to the PI Dashboard: - CR-FIN Subcontractor Budget vs Invoice Received PI Dashboard - CR-FIN Subcontractor Invoice Received PI Dashboard - CR-FIN Subcontractor Invoice by Supplier PI Dashboard	This report is available to those who manage Grants. Security Group: Principal Investigator
CR-FIN Fund Balance Cumulative Rev/Exp – Clinical Trials	A new report has been added to Production. This report includes Grant Name, Status, Principal Investigator, Cost Center, Fund, Beginning Balance, YTD Revenue, YTD Expenses, YTD Transfers, Ending Balance, Available Balance, Cumulative Revenue, and Cumulative Expenses.	This report is available to those who have access to Clinical Trials reporting.
Data Audit – Grants	A new column has been added to the Data Audit – Grants report: Sponsor Award Reference Number	This report is available to those who manage Grants.
CR-FIN Find Customer Invoices	A new report has been added to Production. This report includes the Invoice Number, Customer, Customer Status, Invoice Status, Adjustment Reason, Invoice Type, Invoice Date, Invoice Amount, Amount Due, Created by Worker, Invoice Follow-up Date, Is on Hold, Collection Code, and Dispute Reason.	This report is available to the following Security Groups: Accounting Manager, Accounts Receivable Analyst, Award Approver, Award Billing Specialist, Award Contract Specialist, Award Specialist, Customer Billing Specialist, Customer Collections Specialist, Customer Deposit Specialist, Customer Payment Specialist, Customer Refund Specialist, Director of Sponsored Programs.

<p>CR-FIN Income Statement</p>	<p>Supplier has been added as a drill down option on the CR-FIN Income Statement report.</p>	<p>This report is available to the following Security Groups: Accountant, Accounting Manager, Administrative Accountant, Award Approver, Budget Manager, Controller, Director of Sponsored Programs, Finance Analyst, Finance Auditor, Finance Executive, and Grant Budget Specialist.</p>
<p>CR-FIN Red and Black Report by Org</p>	<p>A new report has been added to Production. This report includes Year to Date FY Actuals, FY Budget, Previous Year Actuals, Variance, Current Year vs Prior Year and Month to Date FY Actuals and Previous Year Actuals.</p>	<p>This report is available to the following Security Groups: Award Analyst, Award Contract Analyst, Award Contract Specialist, Award Specialist, Award Task Analyst, Cost Center Financial Analyst, Cost Center Manager, Fund 32 Grant Manager, Fund Manager, Gift/Grant Financial Analyst, Gift/Grant Manager, Manager, Payroll Partner, Pre-Award Specialist, Principal Investigator, Program Financial Analyst, Program Manager, Project Financial Analyst, Project Manager, Region Costing Manager, Region Financial Analyst, Specialty Financial Analyst, Sponsored Programs Manager</p>
<p>CR-FIN Committed Effort on Award for Company – Sponsor</p>	<p>This report can be used to check if individuals have committed effort tied to specific funders/sponsors. This is helpful in case a sponsor requires a blanket policy for all individuals participating in awards from that sponsor (i.e., NSF and RCR).</p>	<p>This report is available to those who manage Grants. Security Groups: Award Analyst and Award Specialist</p>

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

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 FAQ's regarding the Integrity Hotline can be found at the Office of University Compliance and Ethics homepage:

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