

What's New . . .

May 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.

Budget Office

To follow up on the note from the Office of the President on April 25, 2024: delays in the FAFSA process will affect the timing of the University's budget process for FY25. As a result, budget bases and merit workbooks will not be distributed to the departments until after the Board meeting this summer (date to be determined). Please contact the [Budget Office](#) if you have any questions. We will continue to keep you updated as we gain more information on timing.

Sponsored Program Financial Management and OVPR Working to Reduce Cost Transfers

As recently shared in the PRC Pulse newsletter, the University completed the FY23 Uniform Guidance Audit and SLU has corrected 4 of the 6 FY22 research-related audit findings. The last outstanding FY23 repeat finding is associated with the high number of cost transfers and totaled over \$4.5M. Cost transfers are reallocations of costs after the transaction has occurred.

The Office of the Vice President for Research and Sponsored Programs Financial Management is asking business managers and grant administration to help return SLU to "low risk" audit status by doing the following:

- Ensuring expenses are charged to your grant only if they are allowable and approved by the sponsor.
- Ensuring expenses are within the approved period of performance.

- Ensuring your grant is the expense's "final resting place."
- Utilizing Expense Guarantee Forms.

Thank you for the assistance! Feel free to reach out to John Kitners (john.kitners@slu.edu) with any questions.

Accounting

Accounting will be conducting its annual equipment verification this Spring. This is independent of any other verifications performed this fiscal year. Please return all verification forms by the date requested. Thank you for your cooperation with this process.

For questions regarding the annual equipment verification please contact, [Myesha Lawrence-Dukes](#).

Sponsored Programs Accounting

We would like to welcome Deja Cox, Manager of Sponsored Programs Accounting. Deja started on April 16th. Most recently, Deja served as controller of an electrical company. Prior to that, Deja had years of experience in accounting and risk management. We are thrilled to have her as part of our team. Please say hi or introduce yourself if you see her around.

Business Services

April Webinar Recording

Business Services held one procurement training session in April. 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:

[April Training Session: Purchasing Policies and Competitive Bidding Policy](#)

May Procurement Training Session: Blanket Orders

Description: In this class, we will review the Workday options for blanket orders. We will also cover topics including: When are blanket orders appropriate for a department? What training resources are available for blanket orders? What reporting options are available to manage them? We will also discuss important blanket order reminders related to fiscal year-end.

- **Time: Wednesday, May 22, at 9:00 am**
- **Presenter(s): Anne Becker**
- [Register Here](#)

Workday Finance

Workday Financials

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



Workday Tips:

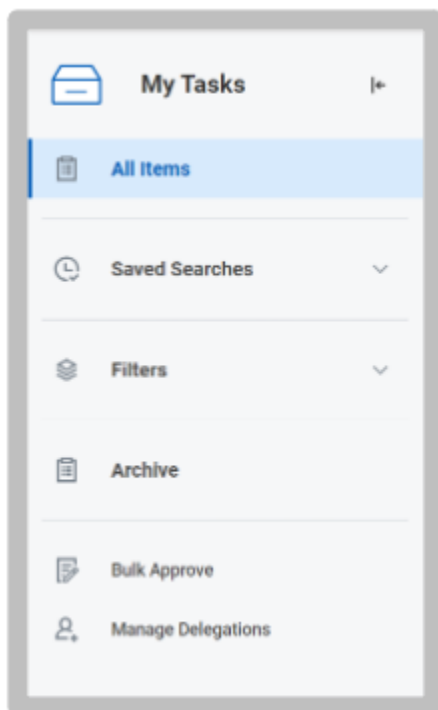
Manage Tasks: My Tasks (Inbox)

OVERVIEW

My Tasks is a redesigned inbox with enhanced search capabilities that enable users to easily filter, sort, and search for their tasks.

Navigation Panel of My Tasks

Navigate to your My Tasks icon by clicking the  in the top right corner.



1. Choose the **All-Items** tab to view your business process tasks, approvals, and to-dos.
2. Choose the **Saved Searches** tab to display all the saved searches you have created via Advanced search (more on this feature later in job aid).
3. Choose the **Filters** tab to view tasks using specific criteria.

4. Choose the **Archive tab** to access the status of your previous business processes from the last 90 days.

- To view items older than 90 days use the search bar to locate the task “View More Processes”.

5.(If applicable) Choose the **Bulk Approve** tab which gives you the ability to act on multiple approval tasks at once, but only for certain business processes and users with certain security groups.

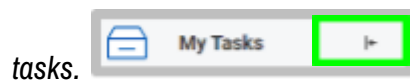
6.(If applicable) Choose the **Manage Delegation** tab to view your current delegations.



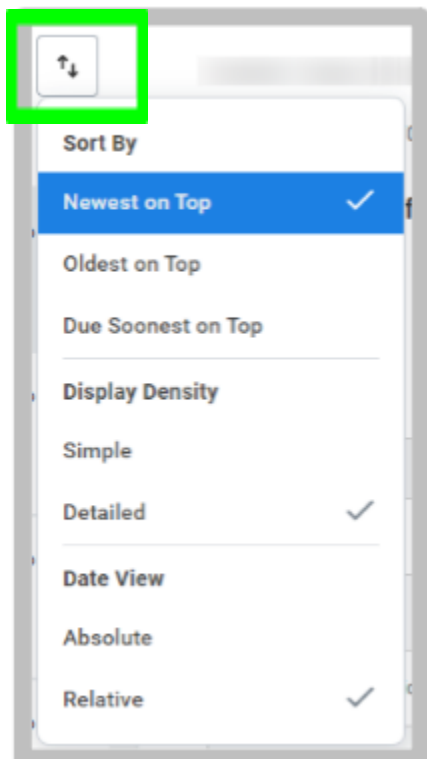
Note: To initiate a new Delegation, you will need to have a current approved absence.

My Tasks Features

7. The My Tasks navigational panel is collapsible, allowing for more screen real estate to complete your



8. Customize your sorting options within My Tasks



- i. Items can be sorted by Newest on Top, Oldest on Top, and Due Soonest on top.
- ii. Select your display density by either choosing Simple or Detailed.
Detailed provides more information to identify which tasks need your attention.
- iii. You can use the Date View display option to select how you want to view the date that you received a task. Use the:

- Absolute Date option to view the calendar date on which you received the task.



- Relative Date option to view how long ago you received a task.



- 9. Use the search functionality on the All Items, Archives, and Filters tabs to find a specific task.
- 10. My Tasks automatically removes tasks from your view once you complete them and adds new tasks it finds at the time of the refresh.
- 11. Click the star on any task and it will display in your Favorites filter.



Workday Accounting Structure Updates:

New Internal Service Provider: Billiken Parent and Family

New Ledger Account:

4503: Contract Revenue - Other

Ledger Account Name Change:

4603 Contract Revenue has changed to **Contract Revenue – CADE**

Revenue Category Posting Change:

Other Contract Revenue posts to new **Ledger Account 4503** (previously posted to Ledger Account 4500 Other Sources)

Revenue Categories Set to Inactive status:

Outside Client Noncompete Contract Revenue

SSM - GME Program Supervision and Support Contract Revenue SSM - Housestaff Contract Revenue

SSM - Income Guarantee Revenue

SSM - Mission Support Contract Revenue SSM - Noncompete Contract Revenue

SSM - Performance Bonuses Contract Revenue SSM - Professional Services Contract Revenue

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.

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>