

What's New . . .

September 2021

Business Managers' Meetings

The next Business Managers' Meeting is scheduled for Thursday, September 9, 2021, at 9:00 a.m. You can join the meeting using the following link:

<https://slu.zoom.us/j/97029124329?pwd=OFhYY3NoaWJ2Z2R0enVlenJ4cVd1dz09>

Meeting ID: 970 2912 4329

Password: 085881

If you would like to present at a future Business Manager Meeting or have suggestions for helpful content, contact Jessica Winet-Fleer at jessica.winetfleer@slu.edu. We would love to hear about best practices in your area as others could benefit as well.

Financial Planning & Budget Update

Budget Checks

Due to a change in the University Plan Structure for FY22, the SLUCare (81 and 82) and Grant (31 and 32) funds were inappropriately incurring budget checks. After researching the issue with our consultants and testing the solution in our sandbox environment, we have modified the University Plan Structure to exclude these funds therefore they should no longer experience budget checks for any business process. We apologize for the inconvenience and appreciate your patience while we resolved the issue.

Central Processing Center

Reviewing P Card Transactions After Verification

Cardholders:

- My Procurement Card Transaction Verifications report

OR

- Enter the PC# into the Workday Search bar

Approvers and Managers:

- Approvers see all the details of the transactions including attachments as transaction verifications are approved.
- Inbox archives – View the transaction including the attachments as Approver.
- Report of Transactions:
 - Once the transaction is approved, all details of the transaction are visible except the attachments.

- As Manager/Non-Approver, all details of the transactions are visible except the attachment. Contact the cardholder for attachments.

Workday Financials

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

Workday Financial Accounting Structure Updates

New Cost Centers:

- D741 Faculty Affairs (included in S07 Academic Affairs)
- D742 Business Operations (included in S07 Academic Affairs)
- D213-2 AHEAD Institute (included in D213 HCOR, see below)

Cost Center Name Changes:

- D362 Center for Accessibility and Disability Services (was **Disability Services**)
- D732 Academic Affairs Accreditation and Assessment (was **Academic Affairs Assessment**)
- D363 Summer and Extended Studies (was **Summer Winter Office**)

New Cost Center Hierarchy:

- E35 Vice President for Mission and Identity
 - Includes: D009 Mission and Identity; D027 Campus Ministry

Cost Center Hierarchy Changes:

- Moved D165 CSB Career Resources and D075 1818 Program to **S07 Academic Affairs**
- Changed the Reference ID and Code for existing Cost Center D213 to **D213-1** and renamed D213-1 **Health and Clinical Outcomes Research**
 - D213-1 and D213-2 roll up to Cost Center Hierarchy D213 HCOR and then S12 School of Medicine

Revenue Category Changes:

- Inactivated: Contract Revenue (515) & Patient Care Other (507)
 - Replaced with new revenue category hierarchy and new revenue categories for better transparency

Workday Financial Reporting Updates

New Reports

- **CR – FIN – Expense by Function and Fund**

Report Updates

- **CR – FIN – Budget vs Actuals by Org – SLUCare**
 - Added prompt for Cost Center Subtype

Reports in Progress

- **CR – FIN SLUCare Red & Black report**
- **CR – FIN Asset Shares**

Workday Financials Feature Release (2021R2 update)

The new version of Workday will be moved to production on **Sept 11, 2021**. Below are a couple highlights of the new features that will be available with this release:

Report and Task Filters

What's Changing: Workday makes it easier for you to keep track of where you are in Workday. Instead of displaying report and task filter prompts on a separate page, Workday displays a pop up where you can quickly specify filters and easily return to and complete your task.

Award Corrections

What's Changing: Award Corrections feature helps improve your awards processes. With this new feature, you can now:

- Route award corrections for review and approval.
- Eliminate the need to create new award versions through award amendments when making minor changes only.

When Workday releases this feature to Production, they will rename this task: Maintain Award Amendment Reasons will be renamed Maintain Award Amendment and Correction Reasons.

Business Services

Apple Purchases

Workday does not allow for attachments to be emailed to suppliers with purchase orders. As a result, all Apple purchase requisitions should reference the Apple quote number to allow orders to be processed. Users can add the Apple quote number to the item description or memo to supplier fields in the purchase requisition.

Item Description (located on the non-catalog request screen):

Requisition Currency *

Non-Catalog Request Type

- Request Goods
 Request Service

Goods Request Details

Item Description *

Supplier Item Identifier

Spend Category *

Supplier

Supplier Contract (empty)

Quantity *

Unit Cost

Memo to Suppliers (located on the checkout screen):

Requisition Information

Request Date *

Currency *

Credit Card

Requisition Type *

High Priority

Sourcing Buyer

Submitted by Heather Esmon

Memo to Suppliers

Internal Memo

Dell Marketing

SLU recently had a change in our Dell account representative. If you need to request a quote or follow up on the status of an existing purchase order, please reach out to:

Kenneth Edwards
Email: Kenneth.Edwards@Dell.com
Phone: 512-513-1981

If Kenneth cannot be reached, Andrea Sturm is also familiar with the SLU account. Her contact information is as follows:

Andrea Sturm
Phone: 636-594-9120
Andrea.Sturm@Dell.com

Amazon Business

With the return of staff and students to campus, the need to purchase from Amazon Business to deliver goods to an off-campus location should be significantly reduced. As a result, we encourage end users and departments to use the Amazon Business punchout catalog in Billiken Buy. If you have any questions about this process, please contact Anne Becker at anne.becker@slu.edu.

Updated Ship-To Locations in Workday

The following Workday locations have been updated in Workday:

Practice Pavilion – 3330 Laclede Avenue
Des Peres Medical Arts Pavilion – 2315 Dougherty Ferry Road

This change may impact the following procurement transactions in Workday:
Purchase requisitions routing for approval
Creation of change orders

If a user receives an error related to a ship-to location being outdated/recently updated, please clear the ship-to location, replace it with the updated location with the same name, and submit your transaction. If you have any questions on this process, please contact billikenbuyadmin@slu.edu.

Human Resources

Business Manager Programming Sessions

Last month, we focused on [Performance Evaluation-Interim check-ins](#).

All past sessions can be found in the "Business Manager" folder in SkillSoft. Click [here](#) to see a complete list of past sessions and access the recordings.

This month, we are pleased to announce a session on Agiloft 2.0 with Ellen Borowiak, Contracts Program Manager.

September 22 at 9am-10am

Click [here](#) to sign up.

In this class, we will review advanced topics in Agiloft, including the People & Companies Table, Reporting and Renewal/Related Contracts. This class assumes participants have basic knowledge of the system and contracting processes. A link to the essential Agiloft training can be found [here](#) and the contract management webpage is linked [here](#).

Next month, Dr. Jeremy Henson, Human Resources, will continue his series on Workday Performance Management.

In this class on Reviewing, Updating and Managing Goals, we will look at how to ensure that performance evaluations can be executed smoothly. It is imperative that employees' goals are updated and correct in

Workday. Business managers who have an awareness of the performance review timelines and steps associated with the review process can help managers stay on top of their performance review tasks and assist with their completion in Workday. This course will cover the process of reviewing, updating and managing goals ahead of the year-end review.

Click [here](#) to sign up.

Business Manager Programming sessions provide regular opportunities for training on Workday and other professional development topics designed specifically for SLU Business Managers. These sessions will focus on four main themes: (1) Reporting; (2) Budgeting; (3) Purchasing; and (4) Human Capital Management. Information on additional sessions and registration will be announced throughout 2021 in the HR Bulletin, What's New newsletter, Newslink, and Announcements on your Workday homepage. Please email training@slu.edu if you have any questions.

Office of 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 at the Office of University Compliance and Ethics homepage. See attached link: <https://www.slu.edu/compliance-ethics/hotline.php>.