

## What's New . . .

September 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, room 100 (Sanctuary), 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: [Heather Kotsybar](#). We would love to hear about best practices in your area, which may also help others.

---

### Risk Management

Risk Management would like to remind everyone now that the semester has started that if you have new employees (including student workers) who will be driving on behalf of the University, they need to fill out an MVLRC. This includes golf cart drivers.

For those departments who use the Supervision platform to monitor your drivers, please log in and make sure that your list is current. We pay a monthly fee for monitoring services for each active employee.

Please refer to the Risk Management-Automobile Information section for links and more information.

<https://www.slu.edu/facilities/risk-management-insurance/automobile-insurance.php>

### Central Processing Center Reminders

- Upcoming Concur Expense Report training sessions:

9/19, Tuesday 10:00 a.m.

10/19, Thursday 10:00 a.m.

11/14, Tuesday 10:00 a.m.

Register via Workday>Learning module

- Direct deposit ACH is the University's preferred and required payment form.
- A completed vendor direct deposit/ach authorization form should be submitted with a new supplier request in Workday.
- When an actual invoice # does not exist on the invoice/backup documentation, please remember to use the date format of '01012023' as the invoice #.
- All P card transactions should be submitted in Workday by the cardholder and verified in Workday by all approvers, each month, by the monthly deadline which is: The third business day of the month for all prior months' transactions.

## Cannonball Conference- Preconference Webinar

This year, the Cannonball Picnic is being expanded to an all-day event called the Cannonball Conference. As a pre-conference offering, organizers are partnering with ComPsych to help us kick off the Cannonball Conference with an online webinar. The webinar will be Tuesday, Sept. 26.

[Read more](#)



Cannonball Conference  
Thursday, October 26, 2023  
Busch Student Center

## Workday Financials

Questions or issues with Workday Financials? Contact [wdfinance@slu.edu](mailto:wdfinance@slu.edu)




### Workday Tips:

#### Maintain Customer Invoice Collections:

The notes section on the *Maintain Customer Invoice Collections* task acts as a comment field to write periodic updates on the invoice:



Note Content

Normal ▼ **B** *I* U A ▼   

Enter notes/updates here

All note content will be listed on the Notes tab when viewing a Customer Invoice:

Invoice Lines    Currency Rate    Receivables Distribution    Line Distribution    Attachments    Contract Lines    Business Process    Errors & Warnings    Printing Runs    **Notes**

Notes 1 item

Note	Created On	Person	Note Content
Q	08/29/2023 10:13:31.710 AM	The name of the individual who created the note will be listed here	Enter notes/updates here

To allow the follow-up date to appear on the Maintain Customer Invoice Collection, the on hold or in collection checkboxes must be selected:

**Maintain:**

On Hold

In Collection

Exclude From Dunning Letter

Followup Date

**Customer Invoice Layout for Grants:**

The *Customer Invoice Layout for Grants* has been updated with the new address:

3545 Lindell Blvd

Third Floor

St. Louis, MO 63103

**Workday Accounting Structure Updates:**

**Cost Center Name Changes**

**D735** University Undergraduate Core Committee has changed to **University Undergraduate Core**.

**New Cost Center Hierarchy**

**S75** Research Institutes (Superior is E70 Vice President for Research)

**New Cost Center**

**D769** Siquemfield Center for Advanced Economic Research (SCAER) is included in **S75 Research Institutes**.

**Cost Center Hierarchy Changes**

The following Cost Centers in the Cost Center Hierarchy have changed from E70 to S75:

**D758** Water Institute

**D759** Taylor Geospatial Institute

**D766** Institute for Drug and Biotherapeutic Innovation (IDBI)

**D767** Center for Additive Manufacturing (CAM)

**D768** SURGE

**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](mailto:wdfinance@slu.edu) with any questions.*

<b>Report Name</b>	<b>Update/Description</b>	<b>Functional Area</b>
<b>CR-FIN Itemized Billable Transactions Summary by Object Class (Dashboard)</b>	<p>The CR-FIN Itemized Billable Transactions Summary by Object Class report <u>should not</u> be used for analysis purposes, due to variance with Trial Balance.</p> <p>Please use CR-Fin Budget vs Actual – Award/Grants By Grant and CR-FIN Expense By Supplier</p>	Both reports are available to those who manage financials based on their Organizations.
<b>CR-FIN Award Proposal Report</b>	New columns have been added to the CR-FIN Award Proposal report: Process Date and Time Initiated and Process Data and Time Completed.	This report is available to the following Security Groups: Accounting Manager, Award Contract Specialist, Award Specialist, Finance Analyst, Finance Auditor, Finance Executive, Pre-Award Analyst, Pre-Award Specialist, Sponsored Programs Manager.
<b>CR-FIN Income Statement</b>	Custom Contract Org is now available as a drill down option on the CR-FIN Income Statement report.	This report is available to the following Security Groups: Award Analyst, Award Contract Analyst, Award Task Analyst, Cost Center Manager, Finance Auditor, Gift Manager, Grant Approver, Grant Financial Analyst, Grant Manager, Lead

		Principal Investigator, Manger, Pre-Award Specialist, Principal Investigator, Program Financial Analyst, Program Manager, Project Financial Analyst, Project Manager, Region Costing Manager, Region Financial Analyst, Sponsored Programs Manager, University Commitment Office.
<b>Data Audit - Grants</b>	New columns have been added to the Data Audit – Grants report: Grant Hierarchy Top Node and Grant Hierarchy Name.	This report is available to the following Security Groups: Accountant, Accounting Manager, Administrative Accountant, Award Analyst, Award Approver, Award Billing Specialist, Award Contract Analyst and Specialist, Award Task Analyst, Cost Center Approver, Cost Center Financial Analyst and Manager, Director of Sponsored Programs, Finance Admin, Finance Analyst, Finance Executive, Fund Manager, Gift Financial Analyst and Manger, Grant Approver, Grant Manager, Grant Approver, Principal Investigator, Pre-Award Specialist, Program Financial Analyst and Manager, Project Financial Analyst and Manager, Sponsored Programs Manager, University Commitment Office.
<b>CR-FIN Effort Certification Status Report – Cost Center</b>	A new report has been added to Production. This report includes Effort Certification, Cost Center for Primary Position, Start Date, End Date, Status, Awaiting Persons, Is Effort Certification Change Multi-Company, and Has Attachments.	This report is available to the following security groups: Award Specialist, Cost Center Manager, Fund Manager, Grant Financial Analyst, Grant Manager, Payroll Auditor, Program Manager, and Region Costing Manager.
<b>CR-FIN Internal Service Delivery by Org</b>	A new column has been added to the CR-FIN Internal Service Delivery by Org report: Spend Category.	This report is available to the following security groups: Accountant, Accounting

		<p>Manager, Administrative Accountant, Cost Center Financial Analyst, Cost Center Manager, Finance Analyst, Finance Auditor, Finance Executive, Fund Financial Analyst, Fund Manager, Gift Financial Analyst, Gift Manager, Grant Financial Analyst, Grant Manager, Internal Catalog Data Entry Specialist, Program Financial Analyst, Program Manager, Project Financial Analyst, Project Manager, Region Costing Manager, Region Financial Analyst, Special Financial Analyst.</p>
<p><b>CR-FIN Monthly Report of Transactions - Grants</b></p>	<p>A new report has been added to Production. This report includes Award, Grant, Spend Category, Initiating Spend Transaction, Initiating Spend Transaction – Class of Instance, Supplier, Object Class, Journal, Journal Line, Accounting Date, and Ledger/Budget Debit minus Credit.</p>	<p>This report is available to those who manage Grants based on their Organizations.</p>

**Workday Update**

Twice a year, in March and September, Workday releases feature upgrades designed to increase functionality and enhance the user experience. While most updates coming this weekend (9/9) will center around back-end improvements (which end-users will not notice), a few exciting changes are in the works with this round of updates.

- **Improved Look for Team Org Chart** – When reviewing Org charts in Workday (found after selecting the Team icon from a Worker’s Profile page), you will notice larger employee/position cards and enhanced color contrast for easier reading and navigation.
- **Real-Time Validation for Required Form Fields** – Allows errors to display during data entry instead of waiting for the user to hit submit and receive the error.

- **New Manager Experience on Homepage** – If you are someone that manages people you will see a new section on your homepage entitled 'Important Dates'. This will give you a quick glance at your team's upcoming time off, birthdays, anniversaries, and University Holidays.

## **Business Services**

### **Amazon Business Rogue User Account Consolidation**

*Saint Louis University signed a domain agreement with Amazon Business in 2022, granting SLU ownership of all Amazon accounts with email addresses containing sltu.edu or health.slu.edu email domains. We are in the process of adding Amazon Business accounts for P-Card holders and removing Amazon.com accounts with the sltu.edu and health.slu.edu domains. In the coming weeks, we will be sending out targeted communications to affected account holders on how they should access their accounts for future purchases. Business Services will audit these accounts and repeat this process on an annual basis.*

*Please note, all Saint Louis University Amazon purchases should be made through this central Amazon Business account through Billiken Buy. Questions on this or future Amazon Business emails can be directed to [anne.becker@sltu.edu](mailto:anne.becker@sltu.edu).*

### **DRC Consignment Shop Purchasing Guidelines**

*Updated purchasing guidelines for buying products from the DRC consignment closet have been included with this newsletter. Some key reminders include:*

- 1. Purchase orders should be created prior to pulling the product from the consignment closet.*
- 2. Purchase order numbers should be referenced when pulling the products from the consignment closet to minimize billing issues.*

*A link to the purchasing guidelines can be found [here](#) for future reference.*

### **Airgas**

*It has been brought to Business Services' attention that departments across campus have experienced ongoing service and delivery issues with Airgas. We have been in contact with Airgas, and they have reassured us that they are addressing these issues. They have hired several delivery drivers and are working through a backlog in their plant that impacts mostly specialty gases. This backlog may result in delivery delays of 1-2 weeks. As a result, we recommend placing gas orders well in advance. If you have any Airgas deliveries issues, please reach out to Mary Lynn Thompson at [marylynn.thompson@sltu.edu](mailto:marylynn.thompson@sltu.edu) for assistance.*

## **Other News**

Please welcome Heather Kotsybar to the Business and Finance division as of July 1st. Heather assumed the role of Project Manager for CFO Initiatives encompassing Human Resources, Business & Finance, and Facilities Services. She has been at SLU since September, 2020 as Co-Manager of the COVID-19 Response Team reporting to the President's office. Heather looks forward to continuing her partnerships with fellow colleagues to assist them and the University.

## 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>