

## What's New . . .

December 2023

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### Business Managers' Meetings

The next Business Managers' Meeting is scheduled for March 7, 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.

### Sponsored Programs Accounting

The Sponsored Program Accounting Team is pleased to announce the hire of Josiah Small and Sally Kelly.

Josiah joined in October as a Financial Analyst, overseeing cash payments and federal draws for research. Josiah has a wealth of expertise to bring to the Financial Analyst role after his tenure at Carrollton Bank of six and a half years.

Sally Kelly has joined us as the new Director of Sponsored Programs Accounting, overseeing invoicing and AR for research. Sally previously worked for SLU at the School of Medicine/SLUCare before transitioning to SMM, where she was the Manager of SLUCare financials.

Congratulations to Jonathan Frederick as he has accepted a modified role within Business & Finances as Director of Sponsored Programs Financial Management! In this role, which aligns with the President's Research Council's objectives, Jonathan will lead a team that will focus on the integrity of the University's sponsored program's financial records to ensure compliance with federal and contractual regulations before invoicing sponsors.

## **Controller's Office**

KPMG will begin work on the Uniform Guidance audit in December. They will be on campus for asset testing in January. We will provide more information when the dates are finalized.

## **Business Service**

### **Business Services – Change in Staffing**

Please join us in welcoming Jessica Winet-Fleer to the Business Services team! Jessica was hired in the Financial Planning and Budget department in 2020 and had extensive procurement experience before working at SLU. She will be assuming Andrew Chism's responsibilities when he leaves the University in early January. She can be reached at [Jessica.winetfleer@slu.edu](mailto:Jessica.winetfleer@slu.edu).

### **Amazon – Personal Purchases are Prohibited**

This is a friendly reminder that personal Amazon purchases made by SLU employees should not be delivered to SLU. The distribution dock will not be held responsible for delivering their personal packages or for lost shipments.

### **Staples Advantage – New Punchout User Guide**

Staples has released a new user guide that highlights many of the features/benefits of their eProcurement platform housed within Billiken Buy. Highlights include, but are not limited to:

- Checking Order Status & Tracking
- Frequently Purchased Items
- Creating Shopping Lists

The guide has been included with this newsletter and is also available on the Staples page in Billiken Buy.

[StaplesAdvantage.com User Guide New Header Experience for 3PP Customers.pdf](#)

### **Lowe's – Punchout User Guide**

Saint Louis University added the Lowe's punchout to its Billiken Buy marketplace in July. To help acclimate buyers to the new punchout, Lowe's shared a punchout guide with several helpful tips and tricks in it. The guide has been included with this newsletter and is also available on the Lowe's page in Billiken Buy.

Please note that if a buyer has a question or needs assistance with an order placed through the punchout, they can reach Customer Service easily at [eProSupport@lowes.com](mailto:eProSupport@lowes.com).

[Lowe's Punchout Quick Tips](#)

### **Billiken Buy/Workday Procurement Training 2024**

Workday Procurement and Billiken Buy training will be offered in 2024 through HR's Business Manager training program. The training content and schedule are under development now. These training sessions will be held virtually and available on-demand after in the Workday Learning console. Please note that these sessions are not limited to Business Managers and cover content applicable to all members of the buying community at Saint Louis University.

If you have ideas for helpful sessions, please email them to [anne.becker@slu.edu](mailto:anne.becker@slu.edu).

## **Central Processing Center**

Blackhawk gift card purchases:

We have a new Blackhawk account rep, Laurie MacBeth.

Please contact her at [laurie.macbeth@bhn.com](mailto:laurie.macbeth@bhn.com) with any login or ordering questions you may have.

If you are new to ordering with Blackhawk, please contact Laurie and she will walk you through the login and ordering process. A reminder that Blackhawk is the preferred method for gift card purchases. They are already set up in Workday as a supplier and they offer a wide variety of gift cards and Ecards.

Upcoming Concur training sessions:

- 1/16 Tuesday 10:00 am
- 2/21 Wednesday 10:00 am
- 3/12 Tuesday 10:00 am

Register via Workday>Learning

## Workday Financials

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



### Workday Announcements:

Workday users are experiencing issues with their Workday Inbox not automatically advancing to the next item. Workday is actively investigating this issue.

**Workaround:** Workday recommends you manually click on the next inbox item to continue. You can also refresh the page to update your inbox.

### Workday Accounting Structure Updates:

#### **New Internal Service Provider:**

Institutional Review Board (IRB)

#### **New Spend Category:**

**Gift Clearing Refund** posts to Ledger Account 1981: Gift Clearing.

#### **Spend Category Update:**

**Prepaid Insurance** posts to Ledger Account 5114: Insurance.

**Activity Codes** have been enabled to allow flowing to Finance reporting for Payroll Transactions.

### 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.*

**Report Name****Update/Description****Functional Area****Data Audit – Awards**

Data Audit – Awards has been updated with a new column: ALN/CFDA Number.

This report is available to the following Security Groups: Accounting Manager, Award Analyst, Award Approver, Award Billing Specialist, Award Contract Analyst and Specialist, Award Task Analyst, Conflict of Interest Approver, 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 Financial Analyst, 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.

<p><b>Data Audit – Programs and Program Hierarchies</b></p>	<p>Data Audit – Programs and Program Hierarchies has been updated with Cost Center Hierarchy level 2 and 3.</p>	<p>This report is available to the following Security Groups: Accountant, Accounting Manager, Administrative Accountant, Finance Admin, Finance Analyst, Finance Auditor, Payroll Admin, Program Financial Analyst.</p>
<p><b>Data Audit – Projects and Project Hierarchies</b></p>	<p>Data Audit – Project and Project Hierarchies has been updated with Cost Center Hierarchy level 2 and 3.</p>	<p>This report is available to the following Security Groups: Finance Analyst, Finance Auditor, Finance Executive, HR Auditor, Payroll Auditor, Project Admin, Project Billing Specialist, Project Financial Analyst, Project Hierarchy Approver, Project Hierarchy Manager, Project Manager, Student Auditor, System Auditor.</p>
<p><b>Data Audit – Gifts and Gift Hierarchies</b></p>	<p>Data Audit – Gifts and Gift Hierarchies have been updated with Cost Center Hierarchy levels 2 and 3.</p>	<p>This report is available to the following Security Groups: Accountant, Cost Center Approver, Finance Admin, Finance Analyst, Finance Executive, Gift Financial Analyst, Grant Approver E40, and University Commitment Office.</p>

<p><b>CR – FIN Fund Balance Cumulative Rev/Expenses/Transfer</b></p>	<p>CR – FIN Fund Balance Cumulative Rev/Expenses/Transfer has been updated with project start date, project end date, project group, project financial analyst, cost center hierarchy level 2, and cost center hierarchy level 3.</p>	<p>This report is available to the following Security Groups: Controller, Cost Center Approvers, Cost Center Financial Analyst, Cost Center Manager, Finance Auditor, Finance Organization Admin, Function Financial Analyst, Fund Manager, Fund 32 Grant Manager, Fund Financial Analyst, Gift Financial Analyst, Gift Manager, Grant Approvers, Grant Manager, Principal Investigator, Program Financial Analyst, Project Manager, Specialty Finance Analyst, University Commitment Office.</p>
<p><b>CR – FIN Find Supplier Payments Wimbledon</b></p>	<p>CR – FIN Find Supplier Payments Wimbledon report has been renamed to CR – FIN Transaction Detail by Org.</p>	<p>This report is available to the following Security Groups: Controller, Cost Center Approvers, Cost Center Financial Analyst, Cost Center Manager, Finance Auditor, Finance Organization Admin, Function Financial Analyst, Fund Manager, Gift Financial Analyst, Gift Manager, Grant Approvers, Grant Manager, Principal Investigator, Program</p>

		<p>Financial Analyst, Project Manager, Specialty Finance Analyst, University Commitment Office.</p>
<p><b>CR-FIN Operating Expense Budget Balance by Org</b></p>	<p>CR-FIN Operating Expense Budget Balance by Org has been updated to allow GAAP as a selection under the Book parameter.</p>	<p>This report is available to the following Security Groups: Central Finance Reporting, Controller, Cost Center Approvers, Cost Center Financial Analyst, Cost Center Manager, Finance Auditor, Finance Organization Admin, Function Financial Analyst, Fund Manager, Fund 32 Grant Manager, Fund Financial Analyst, Gift Financial Analyst, Gift Manager, Grant Approvers, Grant Manager, Grant Financial Analyst, HR Auditor, Principal Investigator, Payroll Auditor, Program Financial Analyst, Project Financial Analyst, Project Manager, Specialty Finance Analyst, University Commitment Office.</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>