SAINT LOUIS UNIVERSITY™

Business & Finance Division

What's New . . .

Business Managers' Meetings

The next Business Managers' Meeting is scheduled for Thursday, March 6, 2025. Invitations have been sent out.

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

Spend Management Projection

Thank you for all your assistance in completing the monthly spend management projections! Next spend management analysis is due to the Budget Office (budgetoffice@slu.edu) by March 20th, 2025.

- February – due **March 20th**
- March – due **April 20th**
- April – due **May 20th**
- May – due **June 20th**

FY26 Budget

The FY26 budget process is in full swing. We have not yet identified a date on which we will issue the budget bases, workbooks, supporting schedules, and guidelines. However, once issued, a budget refresher course will be recorded and available in Workday Learning. The due date for your budget materials will be communicated at a later date. Thank you for your partnership and patience!

Business Services

Agiloft Update

The contract type Software License will be inactivated over the weekend. Documents related to software should be entered into Agiloft under the Software Purchase contract type, which is available under the Purchasing and/or Equipment Agreement contract category. This will ensure that appropriate approvals are queued and there are no delays. Please reach out to Ellen Borowiak at ellen.borowiak@slu.edu with any questions.

Lowe's Punchout – Back in Billiken Buy!

Saint Louis University has re-enabled its Lowe's punchout in Billiken Buy. Here are two reference guides to help acclimate buyers to the punchout:

Lowe's Punchout Quick Tips – This punchout guide has helpful tips when ordering appliances.
Lowe's ePro | Ordering on Lowe's Punchout Site (youtube.com) – This brief video walks buyers through the Lowe's punchout site.

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.

If you need assistance with an in-store order, our local Lowe's rep's contact information is:

Roy Cherry:
E: roy.cherry@lowes.com
P: 618-491-3903

Human Resources
Dear Leaders,

Thank you for your engagement in the staff performance review process and for your feedback on resource considerations. We will continue to offer short, just-in-time trainings and user guides to meet our diverse needs throughout the year.

Based on your feedback, we are pleased to announce the opening of 2025 Staff Goals will occur earlier this year, on **Monday, March 3rd**. In early March, leaders will receive an inbox task within Workday to begin this process for staff.

To support goal setting, a learning path has been created with valuable content to support you in this process, including an opportunity to register for a brown bag session on March 18 to discuss goal setting with your peers. To get started, please review the attached pdf.

Also included in this note is a link to an on demand step-by-step job aid to help you navigate uploading goals into Workday.

Please reach out to training@slu.edu if you have any questions or if you are in need of additional support.

Goal-Setting Session

Join us for a brown bag session focused on goal setting. Whether you are working on establishing goals for your team members now or for the future, this workshop will provide you with actionable strategies. To get the most out of the workshop, please complete the learning path beforehand. To get started, click here to be taken to the learning path in Workday. Follow the steps below to easily navigate the learning path.

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1. Click Enroll (blue button, right side)
2. Click Submit when the new window appears
3. Click Start Program
4. Click Start Content
5. Click Launch Content (opens Percipio in a new webpage window)
6. Complete training, then close Percipio webpage window
7. Close External Content window in Workday
8. Click Go to Next Item (blue button in lower right hand corner) for the next training

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1. **Goal-Setting Percipio Benchmark (5 minutes)**
   This is a great place to start in recognizing where you are at in your goal-setting skills, and map out where you can begin to improve.
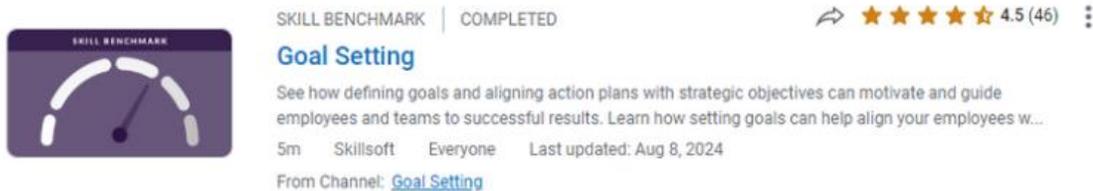
   SKILL BENCHMARK | COMPLETED   ★★★★☆ 4.5 (46)
   Goal Setting
   See how defining goals and aligning action plans with strategic objectives can motivate and guide employees and teams to successful results. Learn how setting goals can help align your employees w...
   5m   Skillsoft   Everyone   Last updated: Aug 8, 2024
   From Channel: Goal Setting

2. **Synchronize Goals to Optimize Your Team Percipio Training (26 minutes)**
   This training will be the baseline for our discussion on understanding how organizational initiatives and strategies set the tone and vision for effective individual goals.

   COURSE | STARTED   ★★★★☆ 4.5 (2417)
   Synchronize Goals to Optimize Your Team
   Most organizations have strategic plans that articulate their goals, but frequently, those goals are unknown to everyone except the executive team. This lack of transparency clouds the organization's a...
   25m 44s   Skillsoft   Everyone   Last updated: Mar 15, 2024
   From Channel: Leadership Foundations Goal Setting Driving Performance Building & Leading Teams
   From Aspire Journey: Content Strategy & Curation Journey

3. **Setting SMART Goals AI Simulator (10 minutes)**
   Put into practice what you've learned so far by utilizing the AI simulator feature on Percipio.

AI SIMULATOR

Setting SMART Goals

Effective goal-setting is critical for achieving success, both for the individual employee and the organization as a whole. In this performance review scenario, a Marketing Department manager is wo...

8m   Skillsoft   Everyone   Last updated: Aug 15, 2024

From Channel:

Goal Setting Measuring & Managing Performance Setting and Managing Priorities Managing Priorities Leadership Simulations

4. HR Brown Bag: Goal Setting (90 minutes)
   Join us at the Busch Student Center, Room 170, for our brown bag session on March 18 from 11:30-1:00 where we will discuss key concepts and identify barriers to successful goal setting. A brief demonstration on how to input goals into Workday will also be offered. Registration for this session is at the end of the learning path.

   If you have any questions, please contact training@slu.edu.

Sponsored Programs Financial Management (SPFM)

- A new SharePoint Site for SPA is now available. All job aids, forms, etc. are now housed in an updated SharePoint site called Sponsored Programs Financial Management and Accounting Group. Check it out!

- The Standard Operating Procedure (SOP) on Purchase Materials, Supplies, Travel and Other Grant Expenses has been updated to include the following new process and documentation:

  Supply Purchases made within 30 days from Award End Date:

  Supplies and equipment may not be purchased simply to use an unobligated balance remaining at the end of a project or used to restock inventory to replenish supplies used during the life of the project. Supply purchases near the end of an award period will require project-specific justification and/or sponsor approval. The Supply Purchases Made within 30 Days From Award End Date form is used to document the justification for purchase of supplies at the end of the grant and should be used when total supply purchases in the final month exceed $500. The completed form should be saved as an award attachment in Workday and is a required supporting document during the Reconciliation and Review process.

- Please ensure grants with supplies requests in the last 30 days of a grant's period of performance have this document completed and saved in Workday before initiating purchases.

- Published SOPs in PolicyStat:

PolicyStat Id	Title
17593019	Accounts Receivable Follow Up For Sponsored Programs Accounting
17593497	Cash Receipts for Sponsored Programs Accounting
17595368	Certify Grant Expenses (Labor And Non-Labor)
17632044	Cost Transfer Process
16767121	Create Labor Cost Allocations SOP
17632303	Ensure F&A Expense Is Properly Recorded & Reviewed In Workday
17594624	Letter of Credit Draw for Sponsored Programs Accounting
17573488	Monitoring Invoices, Receipts, etc. For High-Risk Subrecipients
16691260	Monthly Report of Transactions
17307430	Prepare And Issue Sponsor Invoice SOP
17594852	Process And Approve Journal Entries
17595062	Processing Grant Considerations, Professional Services, and Speaker/Lecture Fees on Sponsored Programs
17554850	Purchase Materials, Supplies, Travel, And Other Grant Expenses
17593855	Reconciling Grant Procurement Cards (P-Cards)
17593723	Review And Process Summer Salary
17588342	SPA Billing Schedule
17588727	SPA Sponsor Refund
17169032	SPA: Providing Documentation To Sponsor As Result Of SLU's High Risk Designation SOP

Workday Financials

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

Workday Accounting Structure Updates:

New Contract Custom Orgs:

Center for Additive Manufacturing

 Student Involvement Center

New Internal Service Provider:

 Research Computing Group

New Spend Category:
 Research Computing Group Charges

New Activity Code:
 PSCSPC PSC Sport Psychology Clinic

New Ledger Account:
 1992: Development Payment Clearing

New Sales Items:
 Clinical Space & Equipment Fee

 Gross Anatomy Lab Fee

 MSMS Technology Fee

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
Data Audit - Grants	A new column has been added to this report: Memo.	The report is available to the following security groups: Accountant, Accounting Manager, Administrative Accountant, Award Analyst, Award Approver, Award Billing Specialist, Award Contract Analyst, Award Contract Specialist, Award Contract Specialist (Unconstrained), Award Specialist, Award Specialist (Unconstrained), Award Task Analyst, Company Reporting - Grants Management, Conflict of Interest Approver, Cost Center Approver $100K, Cost Center Approver $200K, Cost Center Approver $25K, Cost Center Approver $2M, Cost Center Approver $50K,

		Cost Center Approver $5K, Cost Center Financial Analyst, Cost Center Manager, Director of Sponsored Program, Finance Administrator, Finance Analyst, Finance Auditor, Finance Executive, Function Financial Analyst, Fund 32 Grant Manager, Fund Financial Analyst, Fund Manager, Gift Financial Analyst, Gift Manager, Grant Approver 100k, Grant Approver 50k, Grant Approver E40, Grant Budget Specialist, Grant Financial Analyst, Grant Manager, HR Auditor, Lead Principal Investigator, Location Hierarchy Financial Analyst, Location Hierarchy Manager, Management Chain Manager, Multiple Principal Investigator, Payroll Auditor, Payroll Partner, Re-Award Specialist, Principal Investigator, Program Financial Analyst, Program Manager, Project Financial Analyst, Project Manager, Specialty Financial Analyst, Sponsored Programs Manager, Sponsored Programs Manager (Cost Center), System Auditor, University Commitment Office

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