AGENDA

SLU Business Manager Meeting
October 11, 2007
Busch Student Center, Room 172
9:00a.m.-10:30a.m.

1) Meeting Overview/Announcements: Linda Pizzo (10 minutes)
   • Sign in Sheet
   • Next meeting November 8th, Medical School-Lecture Hall A

2) Purchasing: Jeff Hovey (10 minutes)
   • Preferred vendors for new faculty/staff relocations
   • Automated faxing

3) eSeePay Overview and Implementation Timeline: Sharon Gajewski (20 minutes)

4) Q & A

5) eSeeIDO (Optional Session) - What you need to know to get started: Lisa Zoia and Linda Pizzo (30 minutes)
Meeting minutes of the Saint Louis University Business Managers held at 9:00 a.m. on Thursday, October 11, 2007 in the Busch Student Center room 172.

Business & Finance Staff Present:

Bruce Andres  LaDonna Davis  Mary Drexl  Sharon Gajewski
Jeff Hovey    Tom Meadows  Linda Pizzo  Jackie Siebert
Bob Woodruff  Lisa Zoia

HR Staff Present:

Number of Business Managers Present: 57

Linda Pizzo welcomed everyone to the meeting. Next month’s meeting will be held on November 8 at the HSC Campus, Medical School, Lecture Hall A. Please check the meeting schedule for the location of all future meetings. Next month’s meeting will include a presentation on the new Touchnet program.

Relocation Expenses for new hires - Jeff Hovey, Asst. Director of Procurement Services, reviewed the process for assisting with newly hired employees that need to relocate to the St. Louis area. Business Services met and interviewed potential vendors and has chosen what they see as the best five companies; A-Mrazek United Van Lines, Graebel Van Lines, Mayflower, North American Van Lines, and Wheaton World Wide Moving. For contact information on the preferred vendors, click here.

Auto Faxing of PO’s to Vendors – Business Services announced it now has control over the faxing process of Purchase Orders and they are being sent to vendors every 30 minutes instead of only twice each day.

eSeePay - Sharon Gajewski gave an update on bringing DPV’s on line. The eSeePay System is a SLU built module of the Employee Self Service to replace the paper DPV and has the added feature of creating payment requests from a comma delimited file. Online DPV’s are subject to Banner electronic approval. An online query function will allow for tracking the status of DPV’s. Anyone who is set up to complete on-line Requisitions will be automatically set up to use the eSeePay system. The new process will be accessed through Banner Self Service.

After Sharon Gajewski’s presentation, the meeting adjourned at 10:00 a.m. and there was an optional information session for the eSeeIDO, the new online IDO process. Linda Pizzo and Lisa Zoia signed on to the eSeeIDO system and went through mock transactions. Several Business Manager’s offered to participate in the pilot group and begin using the on line IDO. There will be an on-line manual for assisting with the on line IDO process and training and roll-out schedules will be announced in the near future. A quick reference guide was distributed to the business managers.

Linda Pizzo adjourned the meeting at 10:25 a.m.

Minutes respectfully submitted by Mary Drexl.
eSeeIDO Quick Reference Guide

After logging in to **Self Service Banner**, click the **Finance** tab.

Click the **eSeeIDO – Process an IDO** link to begin or to continue creating an online IDO.

**OR**

Click the **eSeeIDO – Query/Approval/Completion** link to query or to take action on an IDO such as approve, cancel, or if you are the service provider, complete the IDO.

**How to Process an IDO:**

On the **eSeeIDO – Request Entry** screen:

Click the **IDO’s with pending status** drop down to select a document previously saved (and not yet submitted) or documents that have been disapproved and have not been resubmitted.

**OR**

Pick from the **Service Type** drop down to select one of the predefined standard service types or Generic IDO.

After selecting the service type, you have the option to click the **Standing IDO** box if applicable and/or enter an **IDO number** to copy.
How to Process an IDO (continued):

On the eSeeIDO – Order Details screen, proceed with entering the IDO order details. The Order Details screen will indicate the information required based on the service type selected. All service types require a description of the service.

Enter the Expense Accounting Distribution and Amount(s). Press enter to validate your information and then click Submit now. Once the IDO is submitted the system assigns an IDO number and generates an e-mail notification to approvers.
How to Begin the Query, Approval or Completion of an IDO:

The **Query/Approval/Completion** screen allows you to retrieve all documents you have access to or you may limit your query based on selection criteria. Click **Find** to view the query results.

The query results show the documents based on the parameters you selected and will indicate the actions you may take for each particular document based on your responsibility. The possible actions are **View, Approve, Reject, Cancel, Partial Complete** and **Complete**. Proceed by clicking on the applicable action button.

Updated 12/18/08
How to Approve an IDO:
First complete the steps outlined on page 3 on the QueryApproval/Completion screen.

The approver may change the Transaction and Required dates, the Required Information, the Description, the service provider, the dollar amount, and/or the Activity Code. Changes to any of these fields generate an automated e-mail message to the requestor.

Click **Validate** if you make changes to verify that any changes are accepted by the system and then click **Approve**. Once the final approval is made, an encumbrance is generated in Banner Finance and an e-mail message is sent to the service provider.

### eSeeIDO - Order Details

<table>
<thead>
<tr>
<th>IDO Number</th>
<th>XR000591-0</th>
<th>IDO Status</th>
<th>Awaiting Approval</th>
</tr>
</thead>
<tbody>
<tr>
<td>Service Type</td>
<td>IT20459 - ITS Computer Purchases</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Standing IDO</td>
<td>N</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Transaction Date</td>
<td>26-SEP-2007</td>
<td>Required Date</td>
<td>03-OCT-2007</td>
</tr>
<tr>
<td>Requestor Name</td>
<td>Zola, Lisa M</td>
<td>Requestor Orgn</td>
<td>D010</td>
</tr>
<tr>
<td>Requestor Email</td>
<td>ZOIALM</td>
<td>Requestor Phone</td>
<td>314-977-2394</td>
</tr>
<tr>
<td>Your SLU Net ID</td>
<td>KRUSEPA</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Required Information:**
- Desktop Quantity: 2
- Laptop Quantity: 0
- Monitor Quantity: 0
- Delivery to Bldg Name: Sluis Center
- Delivery to Room #: 523
- Delivery to Name: Marsha McBride

**Description of Service (required):**
SLU standard model.

**Expense Accounting Distribution**

<table>
<thead>
<tr>
<th>Fund Code</th>
<th>Orgn Code</th>
<th>Acct Code</th>
<th>Actv Code</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>164999</td>
<td>D010</td>
<td>771027</td>
<td></td>
<td>1,900.00</td>
</tr>
</tbody>
</table>

**IDO Total:** $1,900.00

**Approval History:**

<table>
<thead>
<tr>
<th>Queue ID</th>
<th>Queue Level</th>
<th>Approver</th>
<th>Status</th>
<th>Last Action Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>D010</td>
<td>30</td>
<td>ZOIALM</td>
<td>Approval Pending</td>
<td>26-SEP-07</td>
</tr>
<tr>
<td>YFSV</td>
<td>90</td>
<td>DAVISLK</td>
<td>Approval Pending</td>
<td>26-SEP-07</td>
</tr>
<tr>
<td>YFSV</td>
<td>90</td>
<td>KRUSEPA</td>
<td>Approval Pending</td>
<td>26-SEP-07</td>
</tr>
<tr>
<td>YFSV</td>
<td>90</td>
<td>SCT_CHENG</td>
<td>Approval Pending</td>
<td>26-SEP-07</td>
</tr>
<tr>
<td>YFSV</td>
<td>90</td>
<td>ZOIALM</td>
<td>Approval Pending</td>
<td>26-SEP-07</td>
</tr>
</tbody>
</table>

**Actions:**
- Validate
- Undo ALL Changes
- Approve
- Reject
- Cancel Order
- Exit
How to Complete an IDO (Service Providers Only):
First complete the steps outlined on page 3 on the QueryApproval/Completion screen.

The service provider should enter a description (such as invoice details) at the Recovery Charges Description field. Enter the dollar amount(s), as appropriate, at the Recovery Accounts field.

Click Validate to verify that updates are accepted and then click Partial or Complete as appropriate. The associated encumbrance will be liquidated to zero and a journal entry debiting the requesting fund(s) and crediting the service provider fund(s) will be posted in Banner Finance. An automated e-mail message will also be generated to the requestor.
Moving Process for Relocating New Faculty/Staff Hires
Objectives of the moving process

- 1) Simplify the process for the BM and dept.
- 2) Receive competitive negotiated contract pricing in order to save dept. funds
- 3) Utilize moving vendors who are known to give good, consistent, reliable customer service
What is the Process?

- New Faculty/Staff person hired
- Eligible to receive moving expense reimbursement:
  
  1) Give the new hire the contact information for three of our preferred moving vendors

  2) New hire contacts the movers for quotes and forwards quotes back to the dept.

  3) New Hire and dept choose a vendor and build the REQ

  4) If move is over $5000 will need to submit at least three bids
Where can you find the preferred moving vendor list?

1) Vendor listing on the B&F website
   http://www.slu.edu/services/busfin/main/pages/busfin/polpro/89.html

2) Relocation Guide on the HR website
   http://www.slu.edu/services/HR/hremployeeeguide.html

   You will also receive it through email and the handout.
How can the local movers handle the long distance moves?

1) Each Preferred mover has agents in cities across the US

2) Agent generates the quote through our movers who are already established in Banner

3) Preferred movers will give the negotiated contract pricing
Advantages

1) New hire will not have to research and find movers in their area.

2) Save time for BM and dept
   - Less paperwork
   - Give new hire one sheet with contact info on it

3) Save money for the depts. through better rates
Preferred Moving Vendors

- **A-Mrazek United Van Lines**
  545 Leffingwell, St. Louis, MO 63122
  Contact Katy Jacobs k_jacobs@a-mrazek.com
  PH 314-822-4200    Fax 314-822-8297

- **Graebel Van Lines**
  1760 Enterprise Blvd. West Sacramento, CA Van Lines
  Contact Kara Alaimo kalaimo@graebel.com
  916-257-4779 – cell  916-580-3813 – fax
- **Mayflower Transit Dodge Moving & Storage Co.**
  13390 Lakefront Drive, Earth City, MO 63045
  Contact Terry Stieferman
twinkler@dodgemoving.com
  Phone 314-344-4300 ext.339 Fax 314-344-3363

- **North American Van Lines/Cord Moving and Storage**
  4101 Rider Trail North
  Earth City, MO 63045
  Contact Dean Kraatz deankra@cordmoving.com
  Phone 314-595-0527 Fax 314-291-6127
Wheaton World Wide Moving/Hazzard
900 S. Grand Blvd., St. Louis, MO 63103
Contact Dave Marty, Pat Hazzard
davemarty@hazzardmoving.com
314-772-9300 Phone    314-772-9303 Fax

QUESTIONS?