Business Managers’ Meetings

The next Business Managers’ Meeting is scheduled for Thursday, March 9, 2023, at 9:00 a.m. in Busch Student Center, 251A, located at 20 N. Grand Blvd, St. Louis, MO 63103.

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

Business Services

How to Create an RFQ in Billiken Buy

Workday Finance users have the option to request quotes from suppliers using Billiken Buy’s RFQ (request for quote) function. RFQs can be issued to meet Saint Louis University’s competitive bidding requirement (a purchase will exceed $10,000 - therefore three bids are required). It can also be used to request special pricing from a single supplier. Most suppliers in Billiken Buy are eligible to receive and respond to RFQs.

Please see the attached document for instructions on how to create an RFQ in Billiken Buy.

New StataCorp PO Processing Requirement

StataCorp provides statistical software to various departments across campus. We were notified recently that StataCorp is enforcing a new PO submission requirement and we are passing it along as an FYI for future purchase orders. You will still initiate your purchase requisition in Workday, and it will be sent to StataCorp via Billiken Buy; however, StataCorp requires that Buyers submit their approved purchase orders via the StataCorp website for processing. The site can be found at this link:

https://www.stata.com/order/purchase-order/

After clicking on that link, you will fill in the requested information, and upload a copy of your PO. The PO number will be the same for your order. You can download a copy of your PO PDF by clicking on the “purchase order” link in Billiken Buy:
These notes and a quick link to StataCorp’s order site have been added to StataCorp’s supplier profile in Billiken Buy.

Questions on this change can be sent to anne.becker@slu.edu.

**Workday Procurement and Billiken Buy Questions**

Any questions regarding Workday Procurement and Billiken Buy can be sent to anne.becker@slu.edu or billikenbuyadmin@slu.edu.

**Central Processing**

**Accounts Payable’s Top 10 Processing Reminders:**

1. Please do not enter service dates on Requisitions unless it is for a blanket order. Service date fields should be left blank unless for a blanket order.
2. Select a services line, not a goods line on all blanket orders.
3. Blanket order req type use for a PO is for the whole fiscal year. Do not submit a blanket order for one invoice.
4. Departments and approvers should be verifying addresses on Supplier Invoice Requests before submitting and approving. If the address is not in Workday that matches the back-up, then an email should be sent to supplieraccounts@slu.edu.
5. If you need PO's closed, please email accounts payable@slu.edu.
6. Invoices being sent to departments and not A/P should be forwarded to accounts payable@slu.edu along with the PO number, if it is not referenced on the invoice.
7. Provide vendors the blanket order number for the fiscal year. Blanket PO #s do not automatically go to vendors, it is the department's responsibility to be providing these PO numbers to the vendors.
8. Every order over $250 requires receipt in Workday. The person/department submitting the order is responsible for creating the receipt timely in Workday.
9. If an invoice # does not exist on the document, then please enter the date as the invoice # and use this format: '07012022'.
10. When requesting new supplier set up, a reminder that SLU's preferred form of payment is Direct Deposit ACH.
Grants/Research

The Workday 2022 R2 release featured the ability to build and configure the Correct Award Business Process. Previously, Correct Award was not a configurable BP. This new enhancement allows for grants management end users to make corrections to Awards, which will then be routed to appropriate reviewers, based on the correct award reason selected.

If you have questions regarding this new BP, please reach out to Matt Renaud at matt.renaud@slu.edu.

Workday Financials

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

Workday Reporting Updates

- CR FIN Report of Transactions — Org
  - New column for Last Moment Updated — useful at fiscal year-end for reviewing transactions with a June 30 Accounting Date

Workday Accounting Structure Updates

- New Cost Center Hierarchies
  - S01 School of Social Work (Superior is E30 Provost CCH)
  - S01-1 School of Social Work Operational (Superior is S01 CCH)
  - S01-2 School of Social Work Instructional (Superior is S01 CCH)

- Change to Name of Existing Cost Center Hierarchies (these names are not final)
  - S08 Parks College to School of Science and Engineering
  - S08-1 Parks College Operational to School of Science and Engineering Operational
  - S08-2 Parks College Instructional to School of Science and Engineering Instructional

- Change to Existing Cost Centers
  - D007-1 SSW-General
    - Moved from D007 Social Work / S11-2SW CPHSJ-Social Work to S01-1
  - D007-2 SSW-Social Work
    - Moved from D007/S11-2SW to S01-2
  - D007-3 SSW-Criminology & Criminal Justice
    - Moved from D007/S11-2SW to S01-2
  - D007-4 SSW-Urban Planning & Development
    - Moved from D007/S11-2SW to S01-2
o D007-5 SSW-Applied Behavioral Analysis
  - Moved from D007/S11-2SW to S01-2

o D078 Chemistry
  - Moved from S02-2 Arts and Sciences Instructional to S08-2

o D130 Computer Science
  - Moved from S02-2 to S08-2

o D150 Earth & Atmospheric Sciences
  - Moved from S02-2 to S08-2

o D574 Physics
  - Moved from S02-2 to S08-2

- Other
  - See Crosswalk: Financial Reports in the Workday Job Aid & Video Library for a listing of useful reports.

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.
How to Use the Request for Quote Function in Billiken Buy:

Workday Finance users have the option of requesting quotes from suppliers using Billiken Buy’s RFQ (request for quote) function. RFQs can be issued to meet Saint Louis University’s competitive bidding requirement (a purchase will exceed $10,000 - therefore three bids are required). It can also be used to request special pricing from a single supplier. Most suppliers in Billiken Buy are eligible to receive and respond to RFQs.

To create a “Request for Quote” in Billiken Buy, follow these steps:

Click on “Purchasing” on the marketplace menu and then select “Request Quote”:

Complete the RFQ required fields: RFQ Name, RFQ Description, and Response Date. Select “Continue”.

Select Apple Inc. from the Supplier drop-down menu (you can type it or scroll down), Click on “Add”. Repeat this step to add additional suppliers. Once you have added all the suppliers you wish to include in the RFQ, Click “Continue”:
You can add attachments on the next screen by dragging and dropping them or uploading them. Click “Last” to move the final screen before submitting your quote request.

**Request Quote**

Saint Louis University

Please confirm you want to send a request for quote to the following suppliers and then press Finish if you need to review the full details, click the previous button:

- **Name:** MacBook Air M1 8GB 256GB 1TB
- **Contact Name:** Zhenglin Lin
- **Contact Email:** zhenglin@slu.edu
- **Response Date:** 7/25/2022 8:00 PM
- **Suppliers:** Apple Inc.

You will be notified by email when suppliers have responded to your quote. At that time, you should review your quotes to determine which supplier’s quote best meets your needs.

You can initiate a purchase requisition by following this job aid and selecting “Connect to Supplier Website” to be taken into Billiken Buy:

**Create a Requisition: Standard Purchase Order**

Once in Billiken Buy, click on “Transactions” under the marketplace menu and select “View Requests for Quote”: 
Select the Request for Quote that you wish to view:

Requests for Quote

Review the Quote header details and select “View” to see each supplier’s response:

RFQ MacBook Air M2-Silver-24GB-1TB

Click “Add to Cart” to add the item(s) to your shopping cart from the quote you select and proceed to checkout:

Select Checkout to return your items to Workday and submit your purchase requisition.

Note: If your purchase amount exceeds $10,000 and required three bids, screenshots of the bids should be attached to your purchase requisition when the purchasing questionnaire is triggered.

If you have any questions or issues regarding this RFQ process, please reach out to billikenbuyadmin@slu.edu.