Welcome and Introductions

Accounting Updates

- **SFS Upgrade (Susie Maloney)**
  - Testing is being done now
  - A document is being finalized to distribute to campus. It will list all tools being affected (e-Reimbursement, cost transfer, PAT tool, etc.) and deadlines before upgrade.
  - Upgrade is targeted for Oct 22, 2013 with the shared financial system down from October 16-22, 2013.

- **Travel Flexibilities (Rusty Haines)**
  - Since the last Financial Management Meeting, the new contract with Fox World Travel (FWT) went into effect (August 1, 2013)
  - Concur (the online booking tool) can be accessed via Accounting Services’ travel website, [http://www.bussvc.wisc.edu/acct/travel/index.html](http://www.bussvc.wisc.edu/acct/travel/index.html)
  - One objective is to increase travel reimbursements in the future. By consolidating travel through Concur/FWT, savings will help offset the increasing travel costs.
  - Concur training is available. The first three two-hour sessions will be offered August 22. Two more days of Concur training sessions will be offered (September and October). Attendance is encouraged. Register on OHRD: [https://www.ohrd.wisc.edu/OHRDCatalogPortal/Default.aspx?tabid=29](https://www.ohrd.wisc.edu/OHRDCatalogPortal/Default.aspx?tabid=29)

- **Guided Expense Tool (GET) (Stefanie Merucci)**
  - Information on Slides 7-13 was reviewed. See PowerPoint.
  - Completing an expense report using GET was demonstrated to show the highlights of the tool.

- **Foundation Overview (Geoffrey McCloskey/Steve Hudson)**
  - Geoff and Steve explained what the Foundation is and what it does. Slides 14-32 provide details of their presentation. See PowerPoint.

Purchasing Updates

- **Computer Bundles (Lori Voss)**
  - Information on Slides 33-45 was reviewed. See PowerPoint.
• **Shop@UW (Mike Matschull)**
  - New vendors added this week: Qiagen and Fastenal.
  - See Shop@UW updates at: http://www.bussvc.wisc.edu/shopuw/shopuw.html
  - Training is available. Training schedule: http://www.bussvc.wisc.edu/shopuw/training-schedule.html
  - Shop@UW will NOT be affected by SFS outage for update.

• **Other Strategic Purchasing Updates (Mike Hardiman)**
  - E-Commerce is the most efficient way to purchase. We have reduced paper invoices by 57%.
  - Consolidating spend transactions to fewer vendors allows us to capture savings.
  - Looking ahead, the aim is to consolidate SKUs
  - Slides 48-57 provide details and examples of consolidating vendors and consolidating SKUs. See PowerPoint

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**Future Meeting Dates**
Financial Management Meetings will be held at 21 N. Park St. in Rooms 1106 & 1108
9:30-11:30AM
October 8, 2013
December 10, 2013

**2014**
February 11, 2014
April 15, 2014
June 10, 2014
August 12, 2014
October 14, 2014
December 9, 2014