**2012-2013 Action Plan and Progress Review**  
**Business and Financial Services**

The following Business and Financial Services Action Plan defines the major goals of the department that directly support the ASLS Division Focused Initiatives. Within BFS, Student Business Services, Procurement & Materials Management, and Accounting Services have established a number of additional department specific goals.

The following goals apply to all areas in Business and Financial Services and serve as the basis for goals and plans of the individual areas:

1. **Enhance Programs, Services, and Facilities**
2. **Enhance Service and Efficiency Through Technology**
3. **Improve Communication and Knowledge Sharing**
4. **Ensure Security and Integrity of Financial Activities Through Continuous Improvement of Internal Controls, Training and Monitoring**
5. **Implement an Organizational Structure that Maximizes the Use of Our Resources and Streamlines Work Processes**
6. **Provide Support for the University’s eStout Laptop Initiative**
7. **Implement a Training and Development plan**

### 1. Goal: Enhance Programs, Services, and Facilities

**Objective:** Implement the new UW-System travel policies and procedures.

**Progress Description:**
- Rolled out new airline travel booking tool and system website to the campus. Provided training sessions to the campus.
- New contract for FY14 will bring more changes

**Objective:** Evaluate Printing Service operations.

**Progress Description:**
- Analyzed current and future state financial models
- Established a Printing Services Review committee
  - Campus survey

### 2. Goal: Enhance Service and Efficiency through Technology

**Objective:** Eliminate duplication of work in the journal entry process.

**Progress Description:** Complete
- Implemented electronic upload process so departments and Accounting are only entering journal detail once as well as maintaining adequate supporting documentation.

**Objective:** Prepare for the Shared Financial Systems (SFS) upgrade

**Progress Description:** Waiting for test plan from UWSA

**Objective:** Add new forms to be processed through ImageNow

**Progress Description:**
- Expense/revenue/payroll transfers are being processed in ImageNow workflow
- Direct Payment forms are being processed in ImageNow workflow
**Objective:** Enhance Surplus operations by continuing to market our offerings through technology.

**Progress Description:**
- Current weekly email distribution is ~1500 people
- Began online auctions for unique items

### 3. Goal: Improve Communication and Knowledge Sharing

**Objective:** Provide additional Business Services training opportunities to campus staff and students

**Progress Description:**
- Student financial training – freshman orientation
- EDGE sessions:
  - Travel
  - Central Receiving
  - Surplus
  - University Stores
  - Purchasing
  - WisDM/ Hyperion
  - Mail/ Shipping Services
- New:
  - Travel Website (2 sessions)
  - Shop@UW (2 sessions)
  - BFS presentation at New Employee Orientation

### 4. Ensure Security and Integrity of Financial Activities Through Continuous Improvement of Internal Controls, Training and Monitoring

**Objective:** Review all forms and processes within Accounting Services for updates, necessity, and efficiencies.

**Progress Description:** Ongoing:
- Payment Request from the Foundation process and form revised to reduce the need to route Gift of Money form for established gifts (significant time savings)

**Objective:** Improve accuracy of the campus computer inventory.

**Progress Description:**
- Established Computer Inventory Committee
  - Revised Computer Inventory Administrative Procedure (set clear expectations)
  - Working with departments get inventory up-to-date

### 5. Implement an Organizational Structure that Maximizes the Use of Our Resources and Streamlines Work Processes

**Objective:** Migrate budget functions from BFS to new Budget Office

**Progress Description:** Complete

### 6. Provide Support for the University’s eStout Laptop Initiative

**Objective:** Foster collaboration between LTS, Purchasing, and Student Business Services that increases the efficiency of the student laptop order/return processes and identifies cost savings.

**Progress Description:** Ongoing
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<thead>
<tr>
<th>5. Implement a Training and Development plan</th>
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<tr>
<td><strong>Objective:</strong> Provide training and development opportunities to employees that contribute to excellence in performance, quality in department services, and positive and safe work environment for all BFS staff.</td>
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<tr>
<td><strong>Progress Description:</strong> Ongoing</td>
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