



RE: UXT Extra Session: Expenses - Foundation Expenses on Expense Reports

From Haberman, Amanda <amanda.haberman@wisconsin.edu>

Date Wed 12/4/2024 11:55 AM

To Jane Rolfsmeyer <jrolfsmeyer@wisc.edu>

 1 attachment (104 KB)

Foundation_Expenses_To Complete.docx;

Hi Jane,

Attached is the form for System. Responses are in Red.

Amanda Haberman

From: Jane Rolfsmeyer <jrolfsmeyer@wisc.edu>

Sent: Thursday, November 7, 2024 5:25 PM

To: Housley, Janelle <janelle.housley@uwss.wisconsin.edu>; Jay McDermott <mcdermottja@uwplatt.edu>; muell223 <muell223@uwm.edu>; Jay Beiser <jbeiser@wisc.edu>; Jeanne ROTTER <jeanne.rotter@fammed.wisc.edu>; Jeff Henslin <jghenslin@wisc.edu>; Jenson, Jeff <jeff.jenson@uwss.wisconsin.edu>; Jenn Carson <jennifer.carson@wisc.edu>; Jenna Weidner <jenna.weidner@wisc.edu>; Jenna Wepfer <jwepfer@medicine.wisc.edu>; jennifer.klippel@wisc.edu; Jennifer Gardner <jennifer.gardner@wisc.edu>; JENNIFER ROLTGEN <jennifer.roltgen@wisc.edu>; Agerholm, Jennifer A <agerholm@uwp.edu>; Jennifer Kuhr <kuhr2@rsp.wisc.edu>; jhess <jhess@uwsp.edu>; Jenny Nelson <jenny.nelson@wisc.edu>; Jenny Hoerth <hoerthj@uwosh.edu>; Jeremiah Hill <hill293@uwm.edu>; Jeremy Traska <jeremy.traska@wisc.edu>; Crain, Jesse <jcrain@uwsp.edu>; Jessica Gile <gile2@wisc.edu>; jessica.wipperfurth <jessica.wipperfurth@wisc.edu>; Jessica J Russell <russelj@uwm.edu>; Roberts, Jessica <jessica.roberts@uwex.wisconsin.edu>; Rasmussen, Jessica <jessica.rasmussen@uwss.wisconsin.edu>; Laeseke, Jessica <jessica.laeseke@wisconsin.edu>; Koch, Jessica <kochj@uww.edu>; JILL E FOLKERTS <capps@wisc.edu>; Jill Koeller <jillian.koeller@wisc.edu>; bangartj <bangartj@uwosh.edu>; Jingyi Zhao <zhao84@uwm.edu>; JOANNE VACCARO <vaccaro2@wisc.edu>; Hermesen, Jodi <jodi.hermesen@uwsp.edu>; Sumpter, Jodi L <sumpterj@uww.edu>; john.jameson@wisc.edu; John Stauffer <john.stauffer@wisc.edu>; John Varda <john.varda@wisc.edu>; John D Kempken <kempken@uwm.edu>; Brevin Ryan <bryan@uwlax.edu>; Jonathan Wolf <jonathan.wolf@wisc.edu>; JORDAN RODDY <jroddy@rsp.wisc.edu>; Filer, Josh L <FilerJL27@uww.edu>; Lengyel, Julia <julia.lengyel@wisconsin.edu>; Julie A Steinle <julie.steinle@wisc.edu>; Julie Throckmorton <jjthrockmort@wisc.edu>; Julie K Neumeister <neumeisterj@uwplatt.edu>; Carlena Goddeau <cgoddeau@uwlax.edu>; Brooks, Justin <brooks@uwp.edu>; Kaitlin Jacobson <kaitlin.jacobson@wisc.edu>; Hathorn, Kaitlyn <kaitlyn.hathorn@business.wisconsin.edu>; Karen Lynn Beres <karenls2@uwm.edu>; kmkroes@uwm.edu; KARENNE M GIGUERE <karenne.giguere@wisc.edu>; Thompson, Kari <kathomps@uwsp.edu>; Karl C Harris <harriskc@uwm.edu>; Karla R Thompson <krthompson@wisc.edu>; Kate Hawley <kate.hawley@wisc.edu>; Jore, Katie <kjore@uwsp.edu>; Kathy Dodds <kathleen.dodds@pbswisconsin.org>; Cody Pittman <cpittman@uwlax.edu>; Kathryn Rasmussen <knrasmussen3@wisc.edu>; Kathryn Watkins <watkinsk@uwp.edu>; cbauer1 <cbauer1@uwlax.edu>; kathy.bear@wisc.edu; Kathy Hall <kathy.hall@wisc.edu>; Kathy L Heath <zheath@uwm.edu>; Kathy R Wagner <wagnerkath@uwplatt.edu>; Katie Austin <katie.austin@wisc.edu>; Kowalkiewicz, Katie G <kowalkik@uww.edu>;

<tmhahn@wisc.edu>; Hintzet@uwplatt.edu; Timia Joseph <timia.joseph@rsp.wisc.edu>; Tim Kachel <tkachel@wisc.edu>; kazmareks@uwstout.edu; Tina M DeJesus <dejesust@uwplatt.edu>; Tissa Jojo Thottan <tissajojo.thottan@wisc.edu>; Bertram, Tom <tbertram@uwsp.edu>; Traci Luft <luftt@uwosh.edu>; Minter, Vicki <minterv@uwstout.edu>; Vanerem, Tracy <vaneremt@uwgb.edu>; Sullivan, Frances P <fsulliva@uwsuper.edu>; Trisha Linssen <linssent@uwgb.edu>; Troy Suski <troy.suski@housing.wisc.edu>; Besaw, James L <jbesaw1@uwsuper.edu>; koflanag@uwsuper.edu; Gregory, Laura L <lgregor1@uwsuper.edu>; Viki Prochaska <viki.prochaska@wisc.edu>; Yasi Rezai <rezai@wisc.edu>; Zachary L Picknell <zachary.picknell@wisc.edu>; jnm@athletics.wisc.edu; Angie Seitler <angela.seitler@wisc.edu>; SARAH M HART MCGUINNIS <hartmcguinni@WISC.EDU>; KATHY RETZ <kjretz@wisc.edu>; Dundee McNair <dmcnair@wisc.edu>; nburton@uwsa.edu; mollen@uwm.edu; selnerj <selnerj@uwgb.edu>; Rachel Hoskins <rhoskins2@uwlax.edu>; Beth Treffert <btreffer@uwsp.edu>; Hintz, Ginger <ginger.hintz@wisconsin.edu>; Heimstreet, Bob <bob.heimstreet@wisconsin.edu>; rochelle.cushman@wisc.edu; Millard, Steven <millards@uwgb.edu>; Charlotte Roraff <croraff@uwlax.edu>; Erin Hanson <ehanson@uwlax.edu>; Klebesadel, Jack <klebesad@uwp.edu>; Kara L McCarville <mccarvillek@uwplatt.edu>; steven.j.stocker@uwr.edu; Duckworth, Brad <brad.duckworth@uwsp.edu>; Naatz, Duey <naatzd@uwstout.edu>; Bursik, Nicholas D <nbursik@uwsuper.edu>; BRIGGS, PETER A <briggsp@uwm.edu>; BARANP@UWM.EDU; BSM@athletics.wisc.edu; SCHEMMA@UWP.EDU; RYANNE E BRECKENRIDGE <breckenridgr@uwplatt.edu>; Crystal Lanning <crystal.lanning@uwr.edu>; Diane Gilbert <dgilbert@uwsp.edu>; Casey.Zwettler@supportuw.org; hurts@uwec.edu; ryskosar@uwec.edu; Seuferer, Shawn Rae <seufersr@uwec.edu>; MAASSELL@uwec.edu; OLSONMMA@uwec.edu; STUCZYRM@uwec.edu; LAGESSAR@UWEC.EDU; LARSOKAR@uwec.edu; mbuchholz@uwlax.edu; kslaby@uwlax.edu; Totoraitis, Alyssa <alyssa.totoraitis@wisconsin.edu>; Brian P Klinger <briank@uwm.edu>
Cc: ELIZABETH R DRESSEL <erdressel@wisc.edu>; Graig Brooks <graig.brooks@wisc.edu>
Subject: Re: UXT Extra Session: Expenses - Foundation Expenses on Expense Reports

External Email: Use caution responding, opening attachments, or clicking on links.

Good afternoon everyone,

If you were able to attend the session today, thank you for your participation! The recording and materials are located on the User Experience Testing (UXT) Sharepoint site in the Finance Extra UXT Sessions > Expenses folder. [Here is the link to the Sharepoint site.](#)

I've also attached a copy of the PowerPoint presentation, other documents discussed today, and a list of mapped roles in the Wisc6 UXT Workday tenant that may be helpful when testing and proxy.

The attached document, "Foundation Expenses To Complete" was the homework that was discussed during the meeting. Please have one person from your campus complete the Foundation-related document and return to jrolfsmeyer@wisc.edu by December 20th. This Foundation-related information will be added to a website that Workday users will have access to for reference when completing an expense report. If you have any questions, please don't hesitate to reach out to Graig Brooks, Liz Dressel or Jane Rolfsmeyer and we will be happy to help.

If you have questions, feedback, Sharepoint/UXT tenant security access changes or security access additions, please reach out to your applicable ATP Campus Project Manager. They will be responsible for logging any requests to the ATP project team and keeping you updated on your issue.

Name of Campus and Foundation (each campus and Foundation will have it's own page)

UW System Foundation

Confirm Foundation/Customer Account information is complete and accurate in Workday

Find Customers report, Select “Primary Foundation” and click the magnifying glass next to your Foundation name, Click on Addresses and Contacts, Customer Contacts.

University of Wisconsin-Superior Foundation, Inc. Customer

Customer ID: UWSUP_CUS_99998 Address: PO Box 2000 Superior, WI 54880 United States of America give2uws@uwsuper.edu

Approval Status: Approved Navigate Customer Hierarchy

Overview Addresses and Contacts Contracts Invoices and Payments Financial Snapshot Assigned Roles Custom Reports Process History

Contact Information Customer Contacts Connection Map Document Delivery

Add Set Up Bill-To Contacts

1 Item

Contact	Primary Bill-To Contact	Bill-To Contact	Default Bill-To Contact	Phone Number	Email Address	Email Documents	Comments	
Jeanne Thompson	Yes	Yes	Yes		jthomp51@uwsuper.edu	Customer Invoice		Edit Remove

If this is not accurate please email Kirk Anderson kdanderson3@wisc.edu with any changes.

Provide an example of Foundation Account Numbers and Foundation Name (Naming Convention) to be on the website so employees can complete in their Expense Report

112904770 University of Wisconsin System Fund

Item Details

Attendee(s) * X Graig Brooks X Jane Rolfsmeyer X Michael Jordan (Bulls) X Mickey Mouse (Disney)

Number of Persons * 4

Account Number * 987654321

Business Reason * Meal overage for recruiting dinner

Merchant Harvey House

Foundation Account Name Professor Rolfsmeyer's Foundation Account

List of names/email addresses/phone numbers of who to contact with any Foundation account questions. (likely the Expense Foundation Specialist at a minimum)

Amanda Haberman

Any additional policies or information you would like to have on this page for go live or any links to existing pages

None

Please send completed information to Jane Rolfsmeyer at Jane Rolfsmeyer jrolfsmeyer@wisc.edu by December 20th.