

Staying Connected



FINANCIAL MANAGERS' MEETING

June 8, 2020



WISCONSIN

Agenda

Welcome/Introduction	Dan Langer	5 minutes
Cash Management Updates	Omar Siddiqi	20 minutes
WISDM Decommissioning	Lea Erickson	5 minutes
AR/BI Updates	Tricia Johnson	15 minutes
Travel Updates	Rusty Haines	15 minutes
Procurement Automation	Liv Goff	5 minutes
Disbursements Updates	Mark Domaszek/Jennifer Roltgen	10 minutes
Encrypting Sensitive Data	Imad Mouchayleh	10 minutes
Open Q&A	Subject to Questions	

Cash Management Updates

Omar Siddiqi

Financial Information Management – Cash Management
Division of Business Services



Unidentified Deposits

Background

- Deposits received via Checks/ACH/Wires into the main deposit account with US Bank
- Incoming Department Wire/ACH Form or Check Deposit Form submitted to Cash Management
(<https://businessservices.wisc.edu/documents/incoming-department-wire-ach-form/>)
- Deposits not traceable back to campus departments held in clearing account PRJ38CM as 'unidentified deposits.' Examples:

Type of Deposit ▾	Check Issuer's Name or Wire/ACH Originator's Name ▾	Amount ▾	Bank Deposit Date mm/dd/yyyy ▾
CHECK	SAFC	12,075.00	6/5/2019
WIRE/ACH	DEPOSIT CUSTOMER DEPOSIT	12,018.94	6/24/2019
WIRE/ACH	WIRETRF SBAD TREAS 310	21,542.02	02/21/2020
CHECK	INDIANA UNIVERSITY CK	12,131.00	2/6/2020
CHECK	PHOTONIS	11375	3/24/2020

Unidentified Deposits (Cont.)

- Unidentified deposits balance is **\$1,000,518***, with transactions dating back many years.
[\(https://businessservices.wisc.edu/documents/claim-unidentified-deposits/\)](https://businessservices.wisc.edu/documents/claim-unidentified-deposits/)
** current as of June 1, 2020*
- Total represents ~500 unidentified/unclaimed transactions. Approx 40 transactions (>\$5,000)= \$760K.

Period	Balance (in 000s of \$)	% of total
2014- 2017	57	6%
2018	30	3%
2019	182	18%
2020	731	73%
Total	1,000	100%

Unidentified Deposits (Cont.)

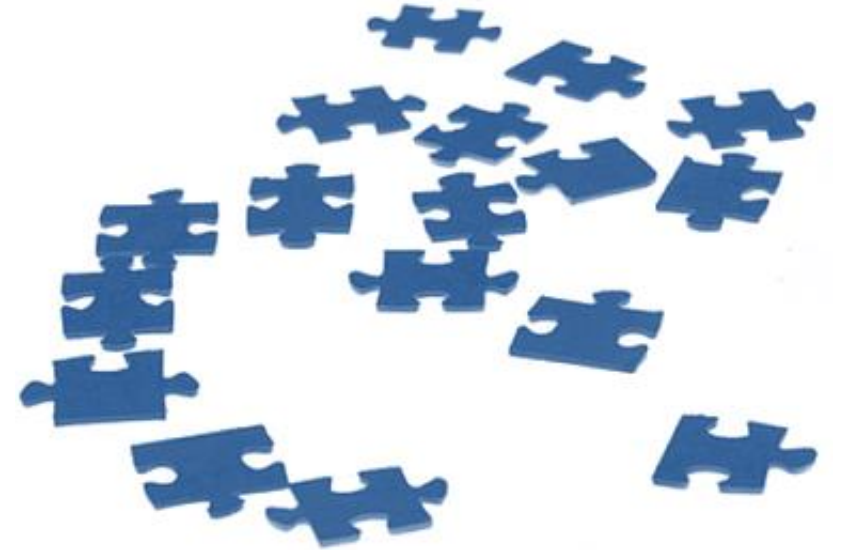
Measures taken to identify appropriate recipients:

- Review information provided in the bank remittance detail
- Follow up with campus departments that have previously claimed deposits from payor
- Contact payors' to request information on campus recipients
- Publish list of unidentified deposits held in PRJ38CM at least once monthly
- Notify Financial Managers via email each time list is updated

Unidentified Deposits (Cont.)

Challenges:

- Time consuming research with little or no information
- High volume of transactions
- Monthly reconciliations of clearing account
- Manual tracking of unidentified deposits and manual transfer entries to reallocate deposits



Unidentified Deposits (Cont.)

How can we avoid posting items to unidentified?

- Submit Incoming Wire/ACH forms for expected payments ahead of time.
- Best option to post items correctly upon receipt of deposits until a centralized AR system is in place.

Other Useful Tips:

- Wire fee covered by the sender.
- Request customers to include invoice # they are paying and/or department name so we can reach you if we have any queries.

Unidentified Deposits (Cont.)

Important
Information

Incoming Department Wire/ACH Form

University of Wisconsin – Madison
Accounting Services – Cash Management
Suite 6101, 21 North Park Street, Madison WI 53715-1218

You must download this form (top, right hand navigation bar) in order for the fillable fields to be visible. Please complete this form, save, and email to Cash Management (cashmgt@busvsc.wisc.edu) with *Incoming Wire, Dollar Amount, and Customer Name* in the subject line. For example, "Incoming Wire, \$1,000, Merck" would be in the subject line to indicate an incoming wire is anticipated for \$1,000 from Merck. Also include in the email an invoice or supporting documentation for the wire or ACH.

Customer Information (person/company sending the wire/ACH)

Name:
Address:
City, State, Zip:
Country:
Communication Date:
(The date you communicated the amount due and bank information to the payee/customer.)

Accounting Details

Dollar Amount: (please use commas and a decimal point, ex \$1,000.00)
Check one: ☐ Exact Amount ☐ Estimated Amount
Department ID: Fund:
Program: Project: Account:
Department Invoice No.: (if applicable)

Your Information

Name:
Department:
Phone:
Fax:
email:

Unclaimed Deposits Policy

- At present no policy exists relating to unclaimed deposits. The unclaimed balances accumulate over time and have no designated use for operational, budgeting, investing or financial planning purposes.
- Cash Management is introducing a new policy on unclaimed deposits effective **July 1, 2020**.
- The objective of the policy is to encourage turn over of unclaimed funds to appropriate recipients in a timely manner and put funds into use if remain unclaimed for extended periods of time.
- Proposed policy is consistent with general practices in Higher Ed and has been vetted by various stakeholders on campus.

Unclaimed Deposits Policy (Cont.)

Policy Detail

- Beginning **July 1, 2020**, any new unclaimed balances older than 12 months at the end of each fiscal year (i.e June 30), will be transferred to General Fund revenue account for redistribution to priority program areas as established by executive leadership.
- Current unclaimed balances:

The following timelines have been established to claim balances as they currently appear on the unclaimed deposits listing:

AGING OF FUNDS	DEADLINE TO CLAIM
Fiscal Year 2019 and Newer Balances	June 30, 2021
Fiscal Year 2018 and Older Balances	September 30, 2020

- Once transfer occurs, the funds can no longer be claimed by departments. In rare circumstances, exceptions may be allowed but such requests will be assessed on a case by case basis and decision to approve at the sole discretion of the Assistant Vice Chancellor/Controller.

Questions?

Supporting Tools/Resources:

- [Unclaimed Deposits Policy](#)
- [Incoming Department Wire/ACH Form](#)
- [Check Deposit Form](#)



Refund of Receipts Form

- Cash Management and Disbursements teams have worked closely to introduce a new version of Refund of Receipts (RoR) form to establish improved controls and ease of use for users.
- RoR form is used for refunds to the original payee associated with receipt of revenue collected by the University. Examples:
 - Returned or defective merchandise
 - Incomplete services
 - Cancelled conferences/events etc., in compliance with established University policies and procedures.
- [Updated RoR form](#) is being issued for use by campus effective as of June 15, 2020. Cash Management will continue to accept old version of RoR forms to be phased out by June 30, 2020.
- Detailed instructions to properly fill out the RoR form will be provided on the intranet.
- Student tuition related refunds/adjustments and housing refunds are largely handled through Student Information System and are **not** to be submitted using RoR forms.

Refund of Receipts Form (Cont.)

Improved Controls

- Original journal ID (i.e. JRR, IUJ) to be listed to verify original deposit (REQUIRED);
- Invoice details (i.e. Unique invoice number, invoice date) provided to validate appropriate recipients (REQUIRED);
- Review of authorized dean/division signatory approvals (REQUIRED); and
- Supporting documentation with the refund request (REQUIRED).

New Features

- Option to select single (one-time) vendor and recurrent vendors using a drop down menu.
- Sales tax computed automatically by selecting the appropriate county included in a drop down menu option.

Refund of Receipts Form (Cont.)

Directions: You will need to enable macros before filling out the form (check at top-left). Fill in all highlighted cells. Do not print this page; use the Printable Form on the second tab. (Print button at bottom will print the correct page.)

Refund of Receipts Worksheet

Please visit the Business Services website below for additional instructions and guidelines.
<https://businessservices.wisc.edu/documents/refunds-of-receipts-sales-credits/>

Payee Information

Do not enter Department information; enter only payee (refund recipient) information in this section.

Persistent Vendor: * Not a Persistent Vendor *
 Name (Last Name, First):
 Phone:
 Email:

Payee Mailing Address

Please provide the payee mailing address. Payments cannot be mailed to UW-Madison campus addresses.

Mailing Address 1:
 Mailing Address 2:
 City:
 State:
 Postal:
 Country:

Original Transaction Information

Original Journal ID (JRR, IUJ):
 Did the original transaction collect sales tax? * No Tax Collected *
 If yes, in which county was sales tax collected?

If there was an invoice, please provide invoice information; otherwise provide a reference number for the refund.

Reference / Invoice Number:
 Invoice Date:

Business Purpose for Refund

Please provide information and justification of why, when, who, and where.

Please provide the message that will display on the check to explain the refund to the recipient. (70 character max.)

Foreign Payments: Wire Transfer / Draft Check Information

Wire Transfers are used to send funds electronically to another country.
 Draft Checks are used to send funds via check in a foreign currency.

Is this a Wire Transfer or Draft? No

Delivery/Handling Options

How will the payment be sent? Send as check (RG)

Submitter Information

Please enter your department contact information in case there are questions about this payment.

Department Contact Name:
 Department Contact Phone:
 Department Contact Email:

Funding Information

Amount: The amount of money being refunded in US Dollars (USD).

Account: The four-digit code used to categorize the nature of the transaction.

Fund: The three-digit code used to identify the funding source.

Project: The seven-character code used to identify the project.

Department: The six-digit code used to identify the department (UDDS) to charge.

If the UDDS normally starts with an "A" or has a space, please remove these characters to get a six-digit code.

Program: The one-character code used to assign program costs.

Tax/Class: The code used for sales tax information or to give other specific information about the payment.

For more information on the parts of a funding string, please refer to the Coding Information page:
<https://businessservices.wisc.edu/accounting/codes/>

Amount	Account	Fund	Project	Department	Program	Tax Code (Class Code)
					R	

\$- Gross Refund

WISDM Decommissioning

Lea Erickson

Financial Information Management - Financial Reporting, Analysis & Systems
Division of Business Services



WISDM Decommissioning

- UWSystem has notified us that **WISDM will be decommissioned on October 29, 2020.**
- All user facing modules of WISER have been rolled out. Any enhancements will only be done in WISER going forward (example: new AR/BI pages).
- A communication was sent to all WISDM users on May 28th, 2020.
- Dataview Users: **This will not affect the WISDM Dataviews.** At the present time there are no WISER Dataviews, so the WISDM Dataviews will continue to function as the data warehouse until such time as WISER Dataviews are available. Significant notice will be provided before any such change will take effect.

WISER Training



- In order to help users prepare for this transition to WISER, we will be offering new training sessions: “**WISER for WISDM Users.**” Links to each individual session are included in the communication.
- If you do not have experience in either system, or are new to the university, we will continue to also offer sessions of our "**Introduction to WISER**" class, which is the primary class recommended for new hires.
<https://www.talent.wisc.edu/Catalog/Default.aspx?tabid=29&SeriesKey=545>.
- For those looking for specific Grants Management Training: Existing WISDM users should attend "**RED: Highlights of WISER Projects for Grants Management**" and new staff should attend "RED: WISER for Grants Management".
<https://www.talent.wisc.edu/OHRDCatalogPortal/default.aspx?serieskey=356>

AR/BI Updates

Tricia Johnson

Financial Information Management – Non-Sponsored Accounts Receivable

Division of Business Services



Policy & Procedure Review Steps



Policy & Procedure Structure

- One policy
- Six procedures
 1. Requesting Customers Procedure
 2. Creating a Bill Procedure
 3. Cancellation or Adjustment of an Invoice Procedure
 4. Write-Off Procedure
 5. Declined Payment Procedure
 6. Refunding a Payment Procedure



Policy & Procedures for non-sponsored accounts receivable provides guidance and parameters for the centralized accounts receivable department and campus departments using the centralized AR option.

Policy & Procedures Link:

<https://businessservices.wisc.edu/policies-and-procedures/#AccountsReceivablePolicyProcedure>

Interested in using the centralized option for
Accounts Receivable?

Email us: uwmsnar@bussvc.wisc.edu

New WISER Functions for Centralized Accounts Receivable Invoices

Drilling into Transactions in WISER:

- Can get to invoices by either Find Departments or Find Detailed Transactions.
- Clicking on the invoice number in the Line Description will bring up invoice detail page.
- All non-sponsored invoices have a source of BIN.
- Transactions can be found in revenue funding strings for billing areas and expense funding strings for intra-unit customers.

The screenshot shows the WISER application interface. At the top, there is a header with the WISER logo, a 'Main Menu' dropdown, and a 'Home' button. Below the header, the interface is divided into several sections:

- Departments**: Contains a link 'Find Departments' which is circled in red.
- Projects**: Contains links 'Find Awards/Projects', 'My Projects', 'My Awards', 'Award Modifications Search', 'WISPER Search', and 'Sponsored AR Search'.
- AP/PO**: Contains a link 'Find POs, Vouchers, Vendors'.
- ARBI**: Contains links 'Find Invoices' and 'Find Customers'.
- Expenses**: Contains a link 'Find Expense Reports'.
- Payroll**: Contains links 'Find Salaries & Encumbrances' and 'Find Tuition Remission'.
- Detail**: Contains a link 'Find Detailed Transactions' which is circled in red.

Transaction Detail - totaling \$868.08

« 1 » 1 - 8 of 8

Amount	Posted Date	Line Descr	Jrnl Ln Ref	Jrnl ID	Jrnl Date ▲	Fund	Dept	Project	Program	Account	Class	Source
\$100.00	05/04/2020	AR0015199	ARMSN	BIN0550675	05/01/2020	128	024131		6	9300		BIN
\$-7.35	05/06/2020	AMER EXPRESS 1480704774 ACH DP	05/05/2020	JRR0324734	05/06/2020	128	024131		6	9300		INT

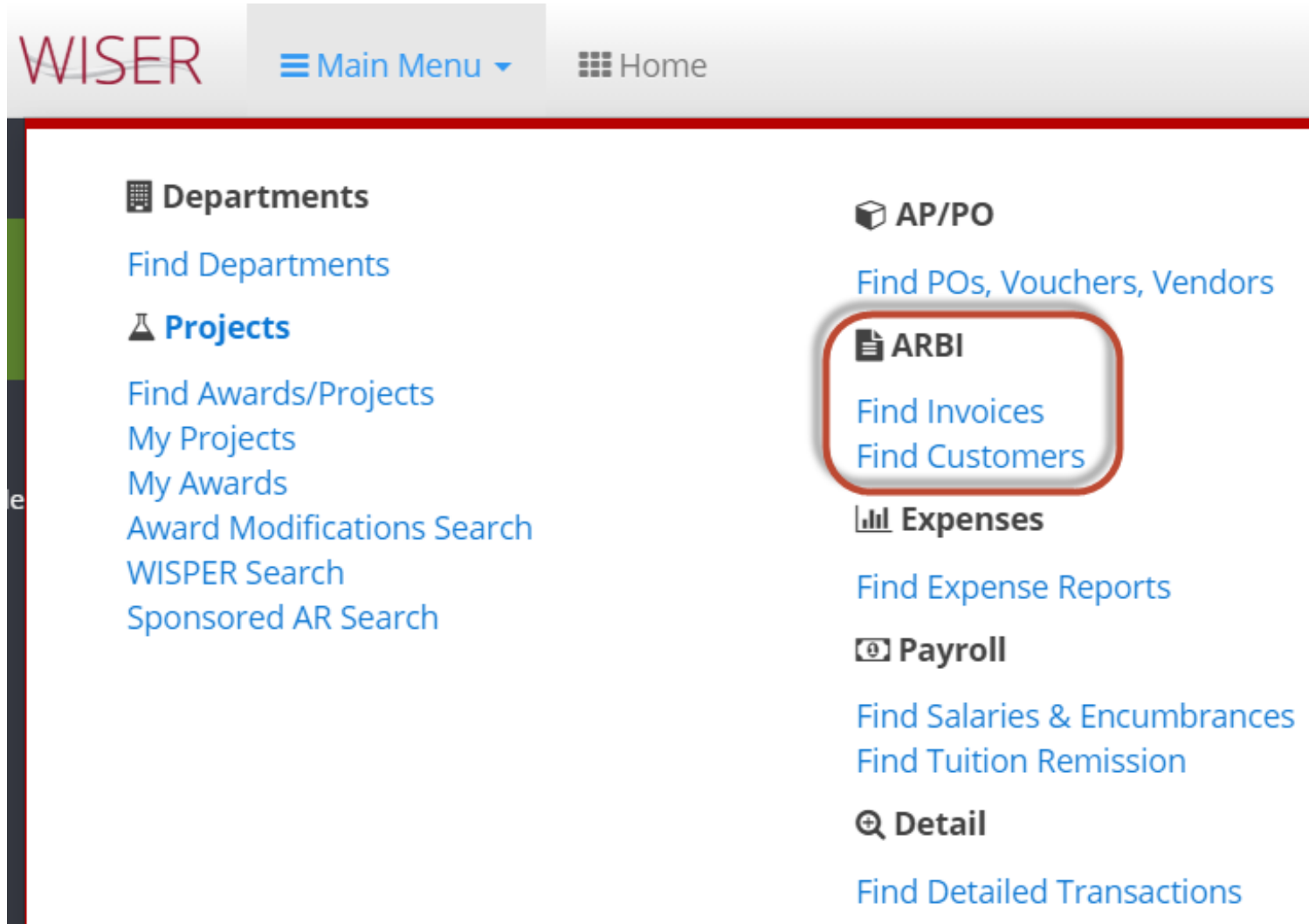
Invoice Detail Page

AR0001248 Invoice

Billing Unit ARMSN	Invoice Date 04/17/2019	Customer AR-0000904 Wisconsin Historical Society Press	Status Closed	Due Date 05/17/2019
Total Amount \$80.00	Sales Tax Amount \$0.00			

Attachments

	Name	Description
	104924_Detail_Report_-_Marketing_Team_Offsite.pdf	
	ARMSNAR00012480.pdf	Invoice Image



- Additional WISER pages for current AR/BI users
- Current AR/BI users should watch for detailed training coming soon!

Travel Updates

Rusty Haines
Disbursements - Travel & Cards
Division of Business Services



Update on Unused Airline Tickets

- Statistics as of 6/1/2020: 4,500 tickets, \$2.3MM
- Negotiation with “Big 4” (Delta, United, American, Southwest) resulted in a UATP card solution. Why it makes sense:
 - ✓ Opportunity to fully utilize unused ticket value when travel commences without expending “new” funds to purchase tickets
 - ✓ Recognizes there may be travelers who do not have future business travel plans/unwilling to fly and ensure those tickets are used.
 - ✓ Booking future flights will be “business as usual” through Concur or directly with Travel, Inc.
 - ✓ Division/Department will be made whole for converted tickets
 - ✓ Will include non-COVID unused tickets as well
 - ✓ FAQs coming

Travel Policy Changes Effective July 1, 2020

- Previously proposed broad changes put on hold due to COVID
- Changes effective July 1:
 - ✓ 2 recognized exemptions to airfare policy
 - ✓ Permitted use of Airbnb
 - ✓ Prepayment of lodging when required
 - ✓ Passport fees when required for business travel
 - ✓ Real ID costs will not be reimbursed
 - ✓ Up to mid-size SUV allowed without further justification
 - ✓ Day trip meal allowance allowed when a meal is provided
 - ✓ 90 day accountable plan applies to resubmitted expense reports

Transition to Travel Incorporated July 1, 2020

- Starting July 1 Travel Incorporated is University's employee travel service provider
 - Fox continues to provide group travel (>10 travelers) services
 - Anthony Travel continues to service Athletic travel
- Travel Incorporated training/open house registration and contact information on [UW TravelWise](#)
- Existing Concur profiles and Administrative Groups will be migrated to Travel Incorporated
- [Service Fee Comparison](#) to Fox service fees



Procurement Automation Update

Liv Goff

Disbursements

Division of Business Services



Call to action

Take the survey

Volunteer to support configuration or testing

Visit the website

PROCURE-TO-PAY AUTOMATION

Goal

The goal of the Procure-to-Pay (P2P) Automation project is to streamline and standardize purchasing, payments, supplier management, sourcing, and contracting across the UW System, while strengthening internal controls.

Scope

- Implementation of a suite of integrated modules supporting source-to-settle transactions
- Integration to SFS/PeopleSoft
- Analysis of campus shadow/bolt-on systems for potential replacement
- Merging the UW-Madison Vendor File and UWSA Shared Vendor

TAKE THE P2P SURVEY

What is the survey about?

Ease of use and level of satisfaction with current purchasing and payables tools

Who should take the survey?

Employees who use Contracts, Requisitions/POs, DPs, PIRs, PCards, Shop@UW, or P2P reporting tools to fulfill their job duties

How can the survey be accessed?

- Emails were sent to several distribution lists including FMM
- The link is on the project website
- Share the link with colleagues

How would you rate your satisfaction with the tools currently supporting purchasing and payments?

	Very satisfied	Moderately satisfied	Neither satisfied or dissatisfied	Moderately dissatisfied	Very dissatisfied	Not Applicable
Contracts	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Direct Payment (DP)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Payment-to-Individual (PIR)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Purchasing Cards	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Purchasing Requisitions	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Shop@UW (eCommerce)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

How would you rate your overall satisfaction with the tools currently supporting purchasing and payments? 1 being not satisfied and 100 being very satisfied.

0 10 20 30 40 50 60 70 80 90 100

1 

VOLUNTEER TO SUPPORT CONFIGURATION OR TESTING

Configuration Focus Group

Call for: ~40 individuals

Participants would help by:

- Conducting a critical review of the configuration and provide feedback to ensure design and build meets the needs of diverse users
- Validating feedback has been integrated into the tool
- Becoming superusers of the tool so they help review and refine training documents, job aids, and other materials
- Training campus users in their area
- Supporting go-live activities in their area
- Being a resource to other users on campus including after deployment
- Providing feedback on adoption

Design and Configuration Timing:

- Procurement module – July to September
- A/P modules – September to November

User Acceptance Testing (UAT) Group

Call for: ~100 individuals

Participants would help by :

- Testing the new system
- Performing end-user validation
- Supporting go-live campus activity in their area
- Reviewing and provide feedback on training materials, job aids, user documentation
- Being a resource to other users on campus

UAT Timing:

- Engage in October for testing in November through March

TO VOLUNTEER

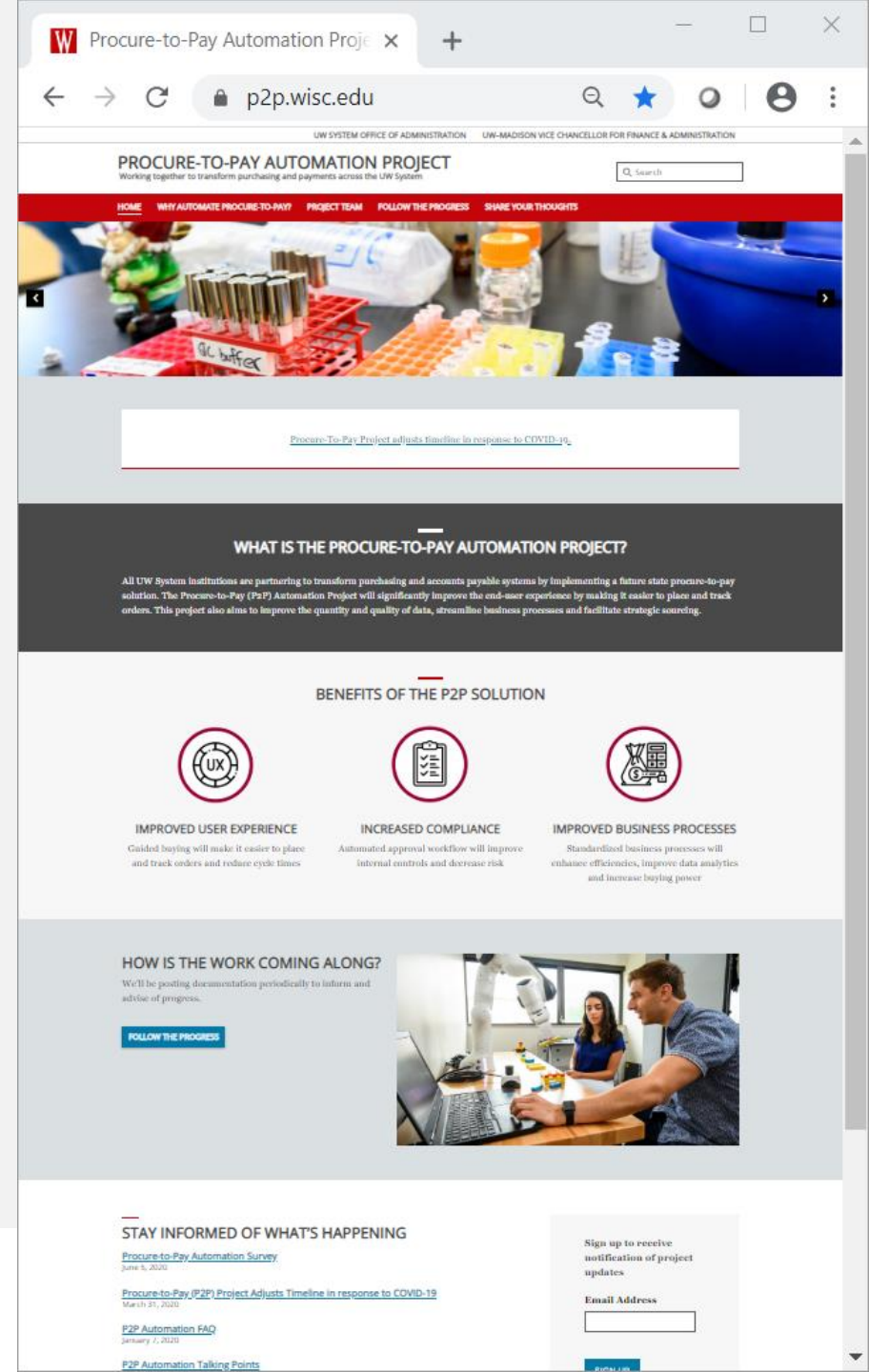
SUBMIT YOUR NAME, EMAIL ADDRESS AND PREFERENCE (CONFIGURATION OR TESTING) ON THE 'SHARE YOUR THOUGHTS' PAGE OF THE WEBSITE

VISIT THE PROJECT WEBSITE

p2p.wisc.edu

While you are there...

1. Bookmark the site
2. Sign-up for project updates
3. Take the survey
4. Communicate with the project team
 - Ask a question
 - Provide input
 - Volunteer
5. Download FAQs and talking points



Disbursements Updates

Mark Domaszek/Jennifer Roltgen

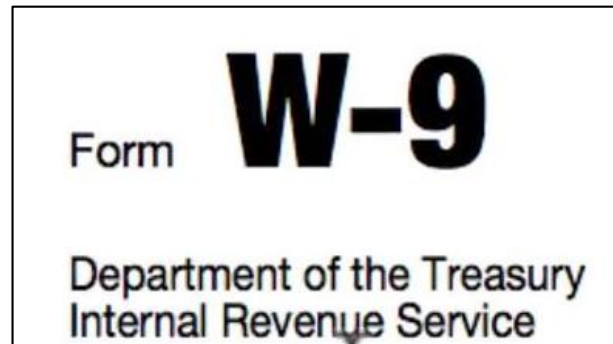
Disbursements

Division of Business Services



W-9 Required for Reqs Starting 10/1/2020

- Only required for new or reactivated vendors
- Continuation of supplier file clean up in preparation for SHARE conversion
- W-9s are used to accurately and uniquely identify suppliers and prevent the creation of duplicate vendors
- Communicated to delegated purchasing agents in March
- W-9s required for DPs and PIRs starting in November of 2019



International Checks Suspended Due to Covid

- US Postal Service (USPS) has temporarily suspended international mail acceptance for certain destinations
- Suspension affects a majority of countries worldwide
- Until further notice Disbursement Services will no longer attempt to mail international payments
- All payments to foreign countries must be sent via wire or draft
- Divisions will be contacted regarding existing payments that are being rejected by USPS for reissue as a wire



Updates to the Authorization to Sign Financial Form

- New use
- New forms added
- Removed Travel Advance
- Questions
- Link to form

<https://businessservices.wisc.edu/documents/authorization-to-sign-financial-forms/>





Authorization to Sign Financial Forms (Divisional Business Office)

Return to: Accounting Services, 21 N. Park Street, Suite 5301

Use to provide signature authorization for various transactions to Accounting Services. Submit an updated form as staffing changes occur and annually, with the beginning of each new State fiscal year.

School/College/Division:

Department ID:

				Forms [*] Authorized to Sign for FY
Name	Signature	Title	Phone No.	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Approved:

Dean/Director

Date

Forms^{*} :
Direct Payment = DP
Outgoing Wire/Draft Form = WIR
Payment to Individual = PIR
Refund of Receipts = ROR
Requisition = Req.

File name: Authorization_to_Sign.docx
Last Update: 2/10/2020

Encryption vs Encryption Permissions

Imad Mouchayleh

Financial Internal Control Advisory Services

Division of Business Services



Encryption is the process of encoding information by converting the original information, known as plaintext, into an alternative form known as ciphertext, where only authorized users can decipher a ciphertext back to plaintext and access the original information.

Users of Office 365 within the @wisc.edu domain and UW-Madison implementation of Office 365 can use Outlook Desktop (enclosed) or Outlook Web to encrypt a message. Both platforms use the same encryption setting.



File

Message

Insert

Options

Format Text

Review

Developer

Help

Aa

Themes

Colors

Colors

Fonts

Fonts

Effects

Effects

Page Color

Page Color

Bcc

From

Permission

Use Voting Buttons

Request a Delivery Receipt

Request a Read Receipt

Save Item

Send

To

Cc

Bcc

Subject

Set permission on this item

☒ Unrestricted Access

Encrypt-Only

Do Not Forward

UW-Madison - Confidential

UW-Madison - Confidential View Only

What Encryption Does and Means

Encrypting a message provides end-to-end and user-to-user protection.

Encryption protects a message in set no matter where the message resides and in transit.

Encryption does not prevent intercepting a message but denies the intelligible content to a would-be interceptor (potential hacker).

How to Decrypt or Decipher an Encrypted Message

Users within the @wisc.edu domain are not required to decrypt, decipher or obtain a passcode to view an encrypted message. Microsoft Office 365 automatically decrypts a message exchanged within the @wisc.edu domain and the UW-Madison implementation of Office 365.

Users outside the @wisc.edu domain i.e., @gmail.com, @yahoo.com, @hotmail.com, @icloud.com etc., will be prompted to an Outlook webpage to obtain a one-time passcode (decryption key) to view and read the message in a browser window.

What Encryption Permissions Do Or Mean

Encryption permissions are restrictions users set to restrict what other users can or cannot do after decrypting a message i.e., edit, save, copy, forward, forward as attachment, reply, CC, BCC, or print.

Users cannot remove the encryption permissions set by the sender.

Encryption permissions apply to the message content but not simultaneously to the attachment. For example, a user who receives a *“Do Not Forward”* restricted message, cannot forward, copy, edit, reply, CC, or BCC, and print the message itself, but will be able to download, save, and share/forward the attachment in a new message.

What Encryption Permissions Do Or Mean (Cont.)

Unrestricted Access

Is Outlook 365 default setting.

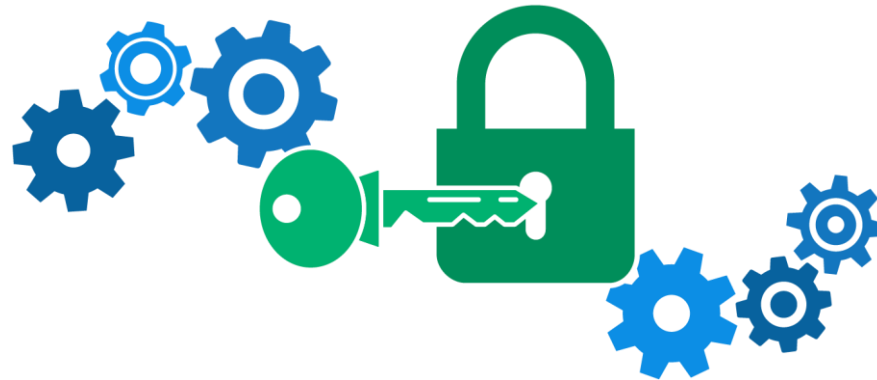
Users within and outside the @wisc.edu domain will have unrestricted access to view, edit, copy, save, forward, forward as attachment, reply, CC, BCC, save, and print the message and attachment.

Encrypt-Only

Encrypts a message end-to-end and user-to-user transmission within and outside the @wisc.edu domain.

Once decrypted, a message becomes unrestricted.

Users must separately encrypt an attachment (i.e., encrypt with a password a PDF file in adobe).



Do Not Forward

Users within the @wisc.edu domain will be able to only reply to the sender.

Users within and outside the @wisc.edu domain will not be able to copy, edit, save, forward, forward as attachment, print, CC, and BCC other users within or outside the @wisc.edu domain.

Users within and outside the @wisc.edu domain will be able to view, download, save, and share/forward the attachment with other users within and outside the @wisc.edu domain.

UW-Madison – Confidential

Can only be used within the @wisc.edu domain or UW-Madison implementation of Office 365.

Users within the @wisc.edu domain will be able to view, reply, forward, and forward as attachment the message and attachment to other users within or outside the @wisc.edu domain.

Users within the @wisc.edu domain will not be able to edit, copy, save, or print the message.

Users outside the @wisc.edu domain will be prompted to obtain a onetime passcode. Regardless, they will not be able to view or interact with either the message or attachment.

UW-Madison – Confidential View Only

Can only be used within the @wisc.edu domain or UW-Madison implementation of Office 365.

Users within the @wisc.edu domain will be able to only view the message and attachment.

Users within the @wisc.edu domain will not be able to edit, copy, save, print, forward, forward as attachment, reply, CC, or BCC users within and outside the @wisc.edu domain.

Open Q&A



Thank you for
joining!



Future Financial Managers' Meetings*

Rooms 1106 & 1108, 21 N Park Street When In-Person
9:30 a.m.

Tuesday, August 11, 2020
Tuesday, October 13, 2020
Tuesday, December 15, 2020

*Dates/times/location are subject to change

