



Change Agent Network

December 14th, 2016

Project Updates

- Student Reporting
- Finance System
- Chart of Accounts

Meet the Expert

- University of Wyoming's new Associate VP for Budgeting and Fiscal Planning

WyoCloud Community Engagement

- Initial survey results on WyoCloud campus awareness

Change Agent Call to Action

- Organize roadshows
- Feedback on Change Agent meetings, WyoCloud Newsletter, and Project

Project Updates



Project Update: Student Reporting

Completing report build checkpoints to solicit feedback on delivered reports with about 30 users campus-wide to prioritize report improvements for go-live.

User Acceptance
Testing
January 2017

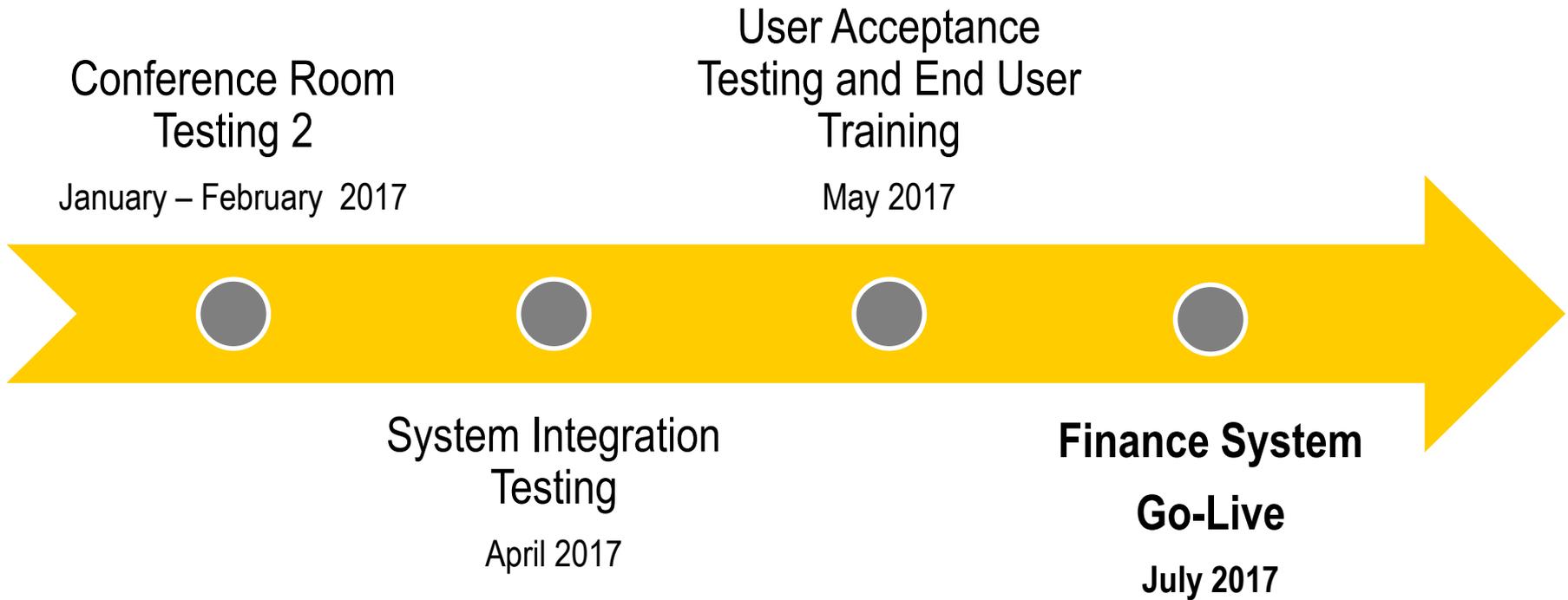
Student Reporting
Go-Live
March 6th, 2017

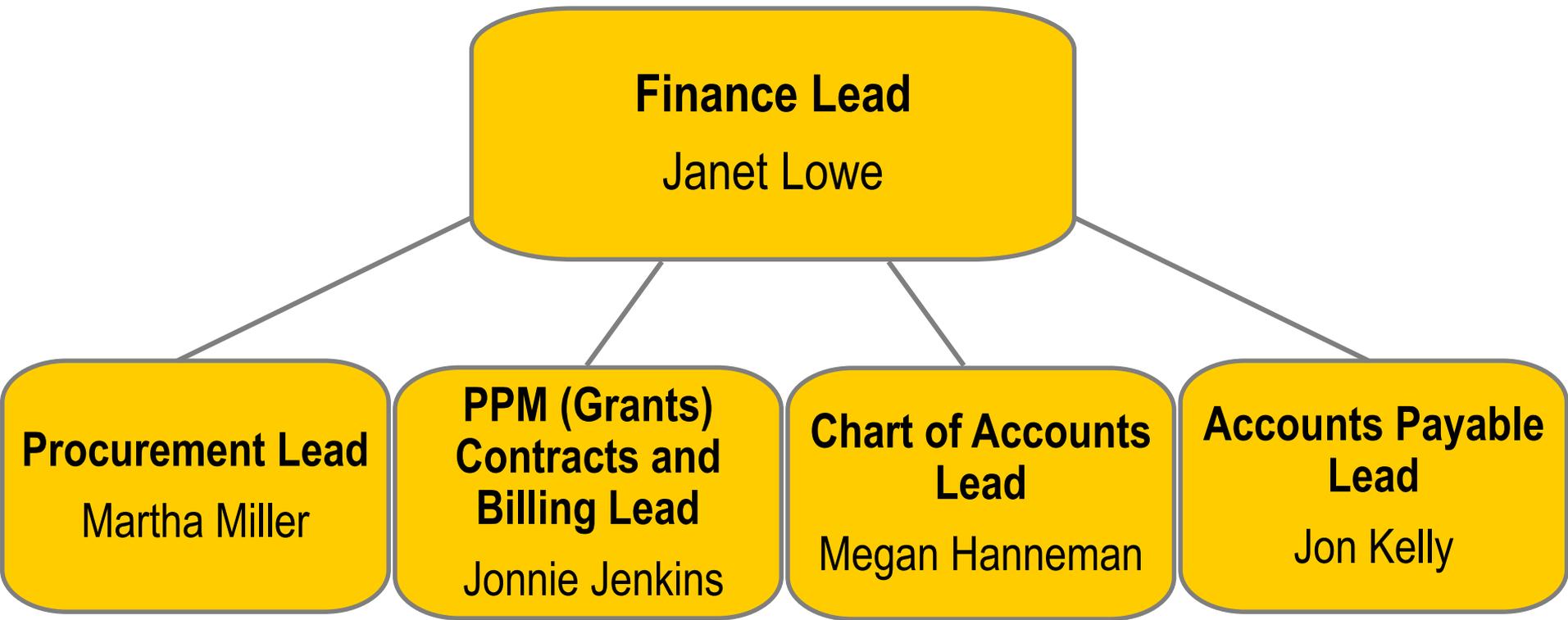
End User and Report
Builder Training
February 2017



Project Update: Finance System

Mapping business processes for UW's future state finance system, configuring the system for the second round of Conference Room testing, and mapping values from Pistol to the new system.





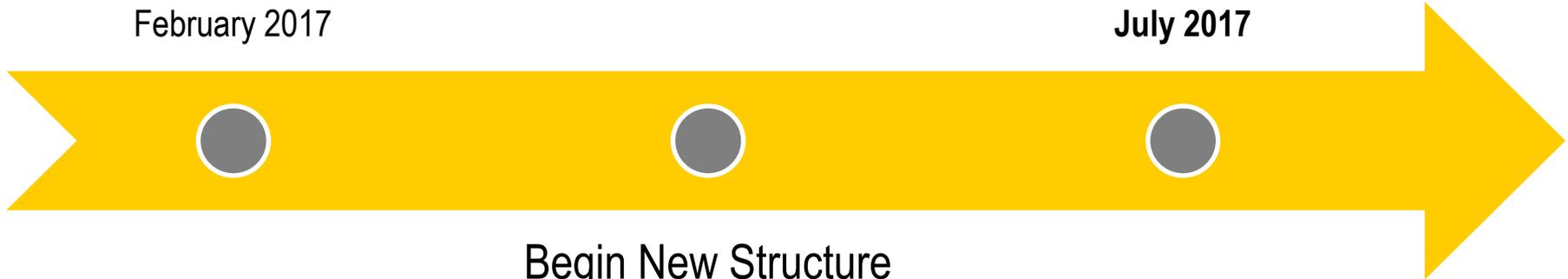
Project Update: Chart of Accounts

Continuing to map the remaining 20% of values to the new Chart of Accounts structure and working with the Finance team to import the initial CoA draft into the finance system for the next round of testing.

Finalize Segment Values
February 2017

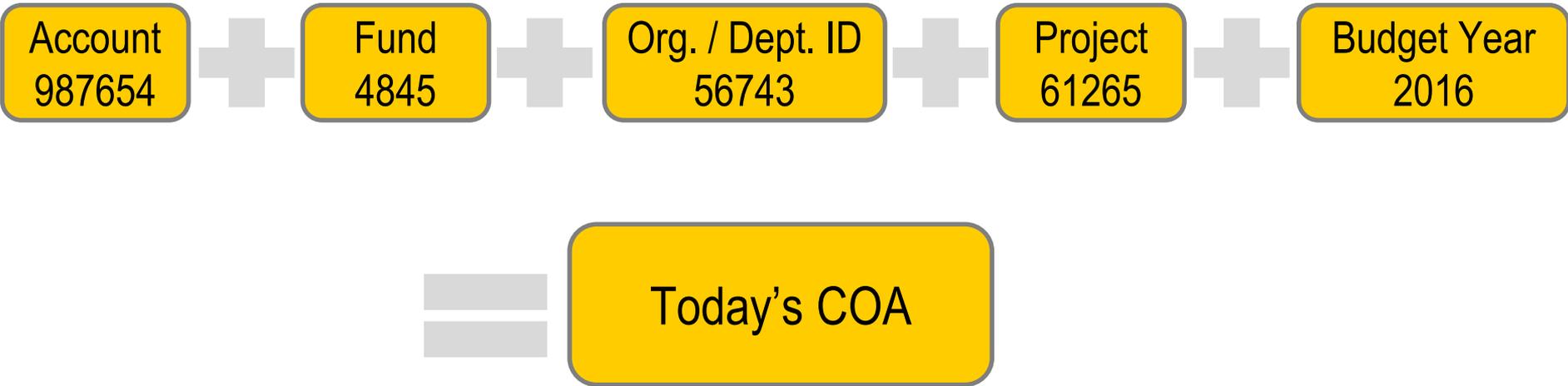
New Chart of Accounts Go-Live
(with Finance System)
July 2017

Begin New Structure Training
April 2017

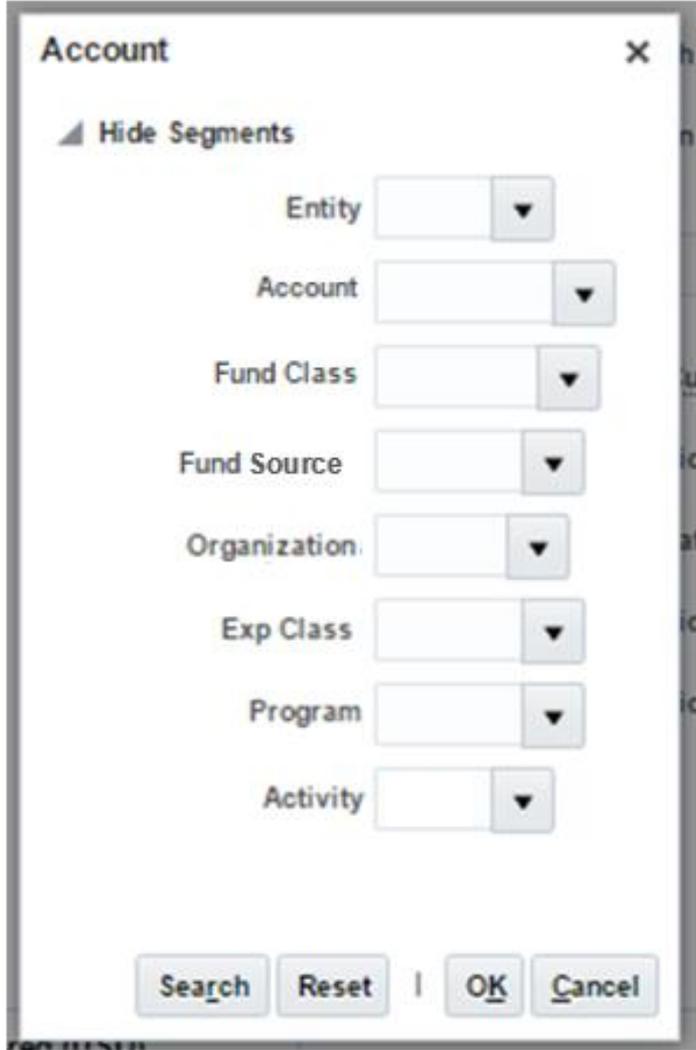


PISTOL Chart of Accounts

Structure used to show a transaction's financial impact



Must select a value for the **eight mandatory segments**



Account [X]

▲ Hide Segments

Entity [] ▼

Account [] ▼

Fund Class [] ▼

Fund Source [] ▼

Organization [] ▼

Exp Class [] ▼

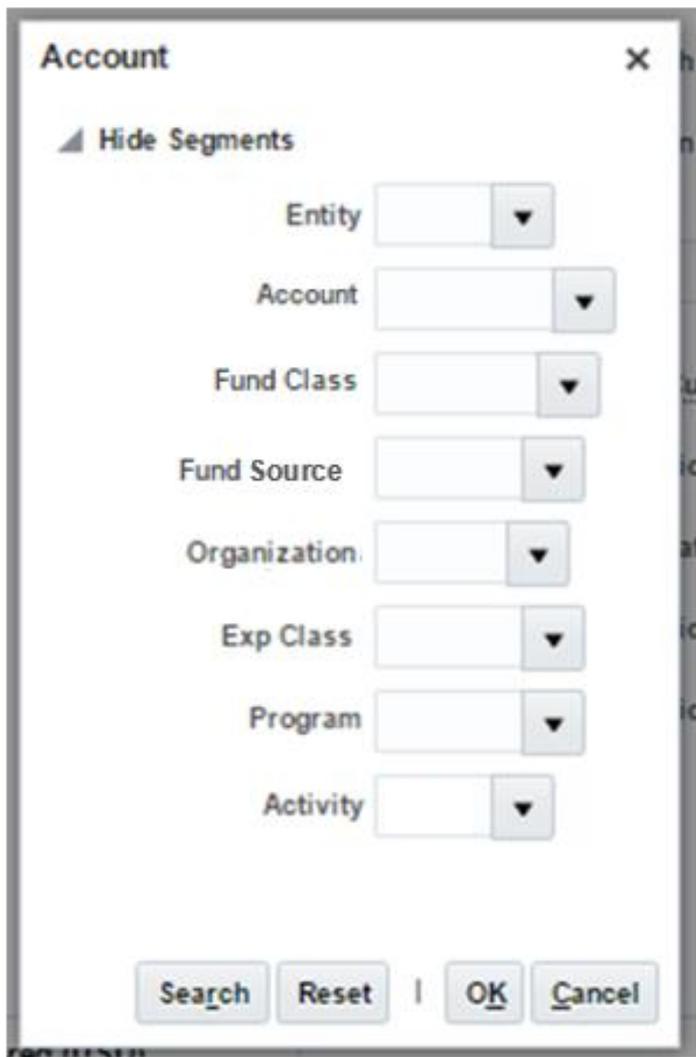
Program [] ▼

Activity [] ▼

Search | Reset | OK | Cancel

WyoCloud Chart of Accounts Segments

Entity	Major operational unit within business unit
Account	Specific type of revenue / expense
Fund Class	Spending category / class
Fund Source	Spending restrictions
Organization	Unit responsible for or affected by transaction
Expense Classification	Purpose of Transaction
Program	Associates transactions with a formalized set of activities
Activity	Tracking mechanism for purposes and activities



The screenshot shows a dialog box titled "Account" with a close button (X) in the top right corner. Below the title is a section labeled "Hide Segments" with a small triangle icon. The dialog contains eight dropdown menus, each with a label and a downward-pointing arrow: Entity, Account, Fund Class, Fund Source, Organization, Exp Class, Program, and Activity. At the bottom of the dialog are four buttons: "Search", "Reset", "OK", and "Cancel".



WyoCloud Chart of Accounts Segments

Entity	University of Wyoming
Account	Supplies – Office Expense
Fund Class	Unrestricted Operating
Fund Source	Unrestricted Operating
Organization	College of Business- Dean's Office
Expense Classification	Academic Support
Program	MBA Program
Activity	Conference A

Account [X]

▲ Hide Segments

Entity [] ▼

Account [] ▼

Fund Class [] ▼

Fund Source [] ▼

Organization [] ▼

Exp Class [] ▼

Program [] ▼

Activity [] ▼

[Search] [Reset] | [OK] [Cancel]

Grants

- Module used for project financial management and reporting

Faculty Funds

- Each will be assigned a unique **project number**

Capital Projects

- Enter project number and other information to automatically populate the chart of accounts

Other Data Tracking

Subledgers

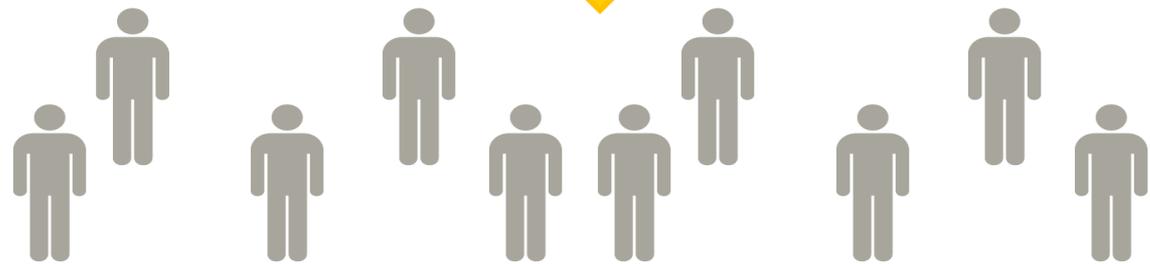
Transaction detail will live in subledgers.



Meet the Expert: David Jewell

**University of Wyoming's new Associate VP for Budgeting and
Fiscal Planning**

Responsibility shifting from Old Main and Accounting to fiscal managers utilizing the new system's financial reporting to make better and more informed decisions



Budget Frequently Asked Questions

- Will there be a distinction between section I and section II funds?
- How will we report to the state if there is no delineation between section I and section II money?
- Will there still be a biennium?
- Will we revert funds back to the state?
- How will funds roll forward?
- How will we know what the policies and restrictions are going forward (i.e., budget transfers, B1000s, B2000s, etc.)?



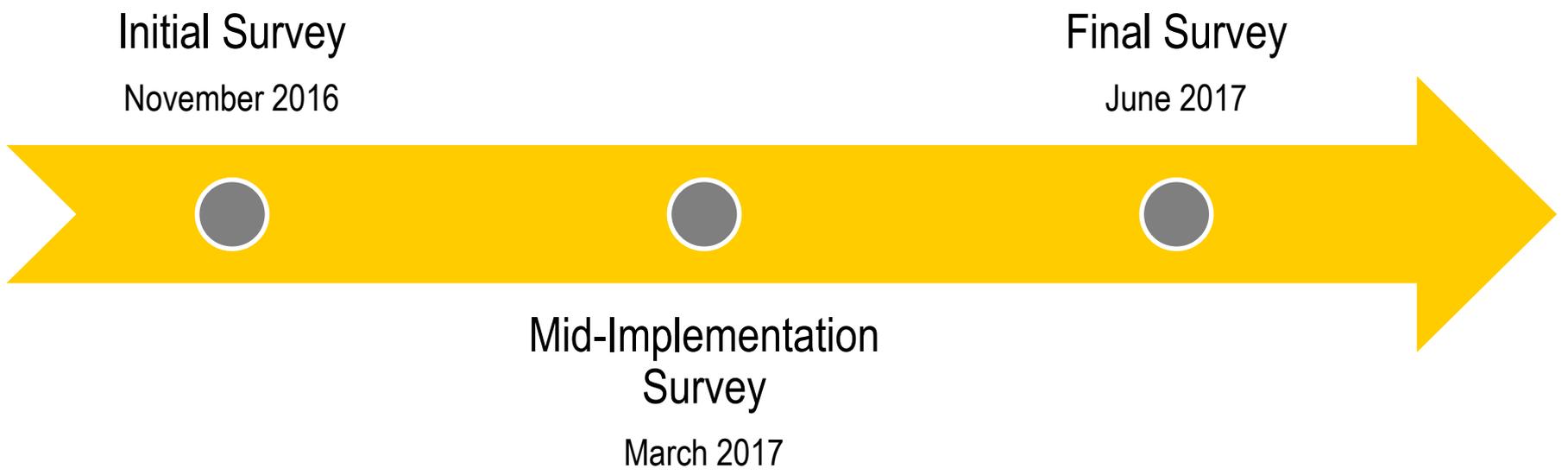


WyoCloud Community Engagement



WyoCloud Community Engagement Surveys

The WyoCloud Community Engagement survey is meant to assess the level of engagement the campus community is feeling towards the launch of the WyoCloud system.





WyoCloud Community Engagement Survey Results

<u>Engagement Questions</u>	<u>Average Rating</u>
I am familiar with WyoCloud and the systems and processes it will impact.	2.08
I know where to get answers to my questions about changes that will impact me.	2.02
I believe I will receive the training and support I need to perform my job after WyoCloud is implemented.	2.95
I believe in the future the WyoCloud implementation will improve my efficiency.	3.11
I am motivated to participate in the WyoCloud change effort.	3.46

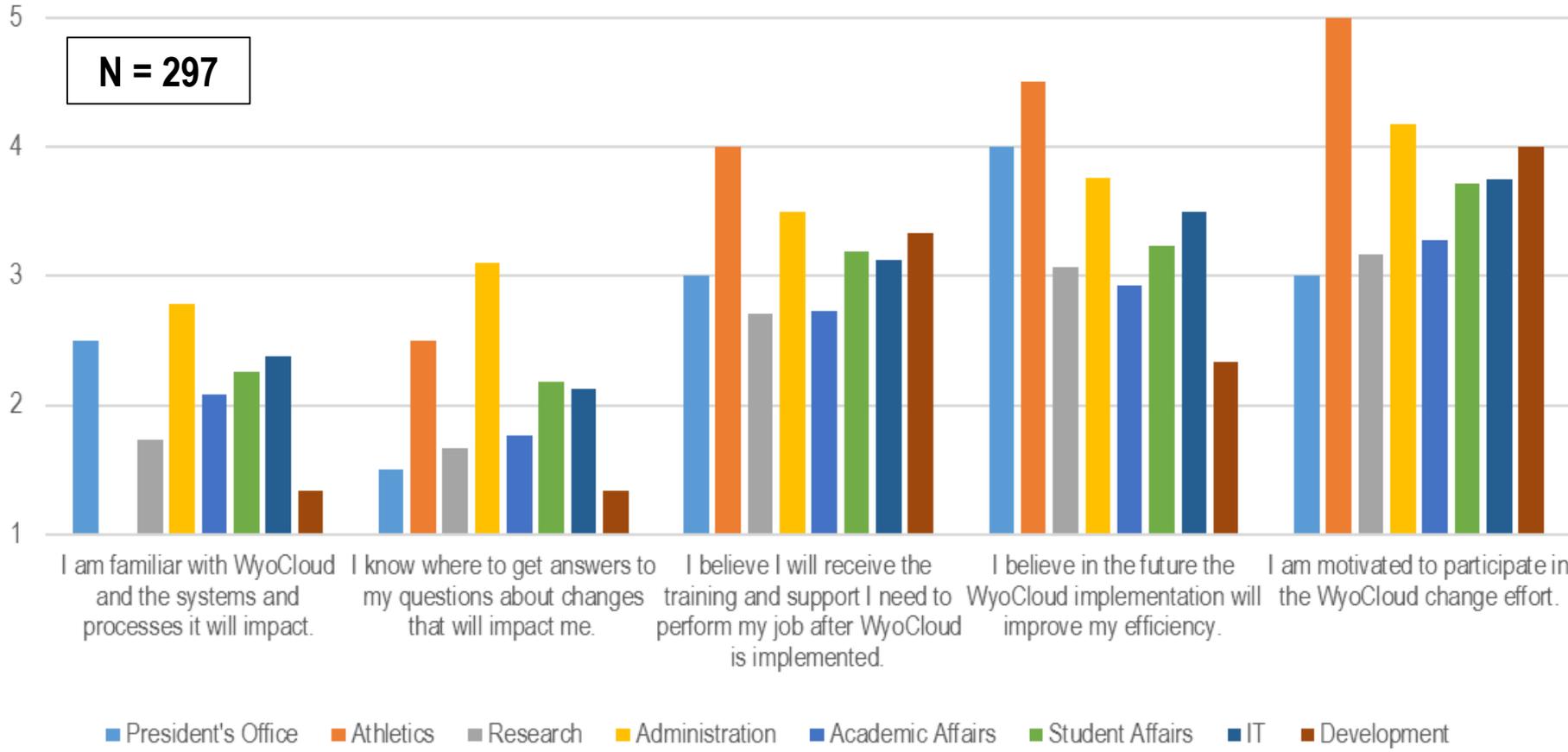
Survey scale:
 1 = Strongly Disagree 2 = Disagree 3 = Neutral 4 = Agree 5 = Strongly Agree

Note: 18% response rate; 1700 surveys sent

WyoCloud Community Engagement Survey Results

Average Agreement with Statements, by Department

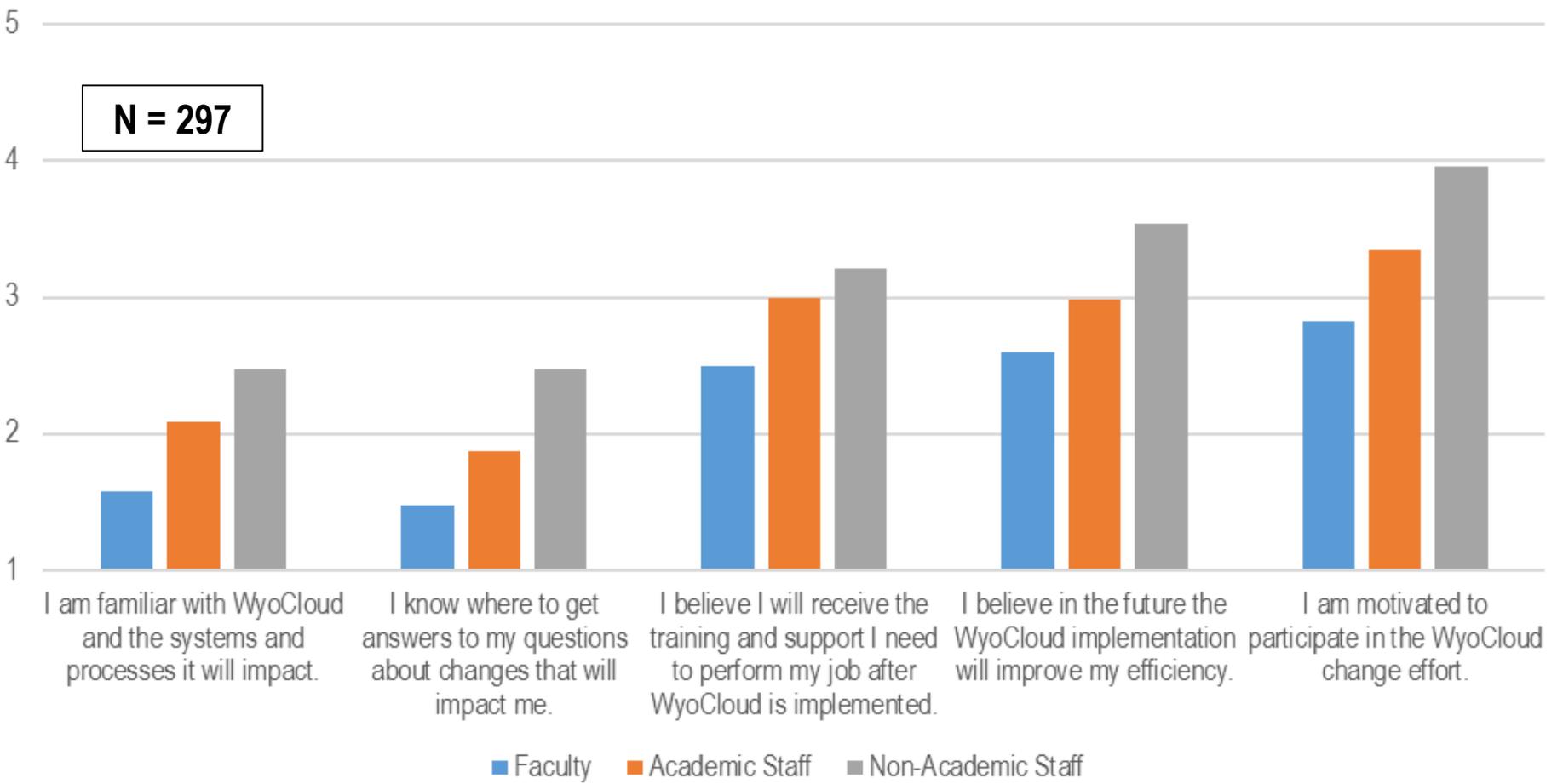
N = 297



WyoCloud Community Engagement Survey Results

Average Agreement with Statements, by Job Level

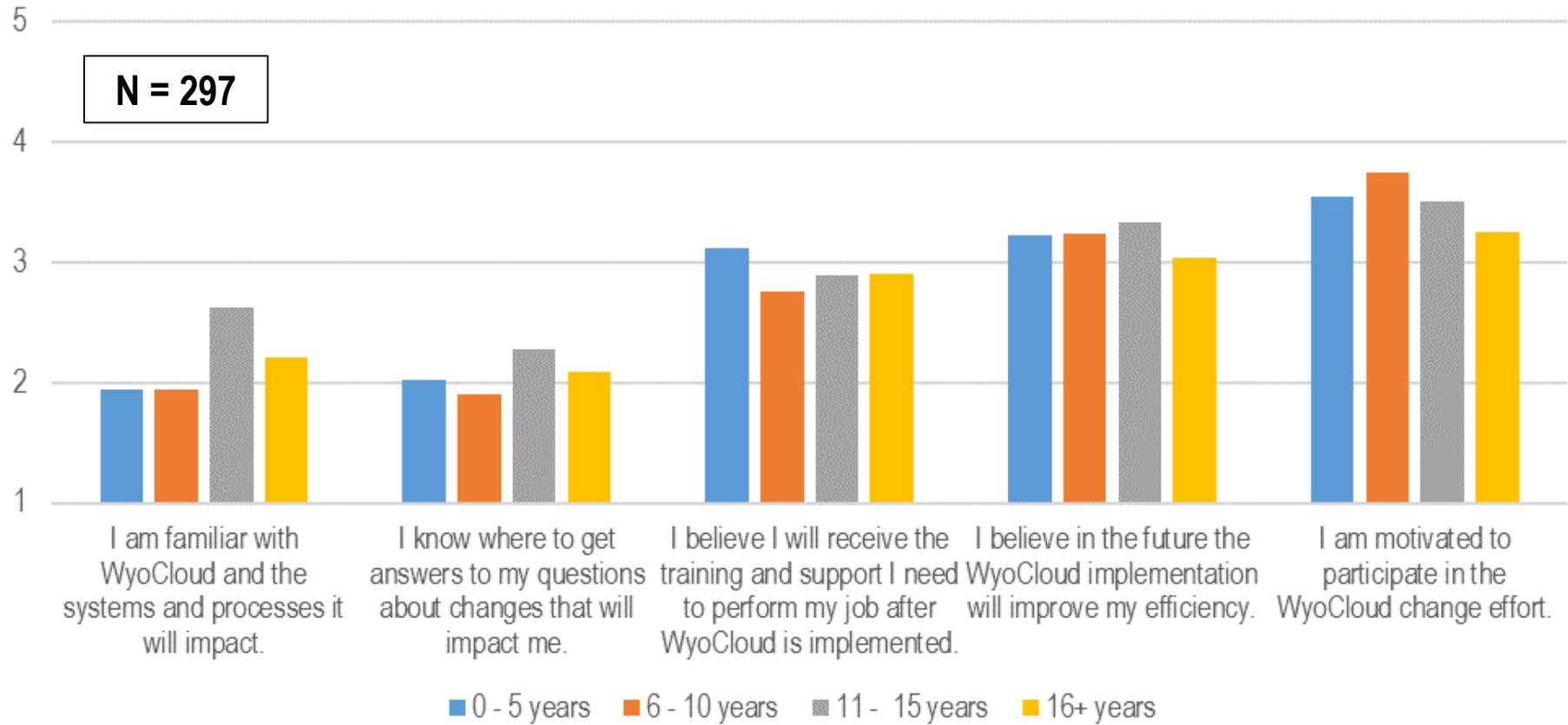
N = 297



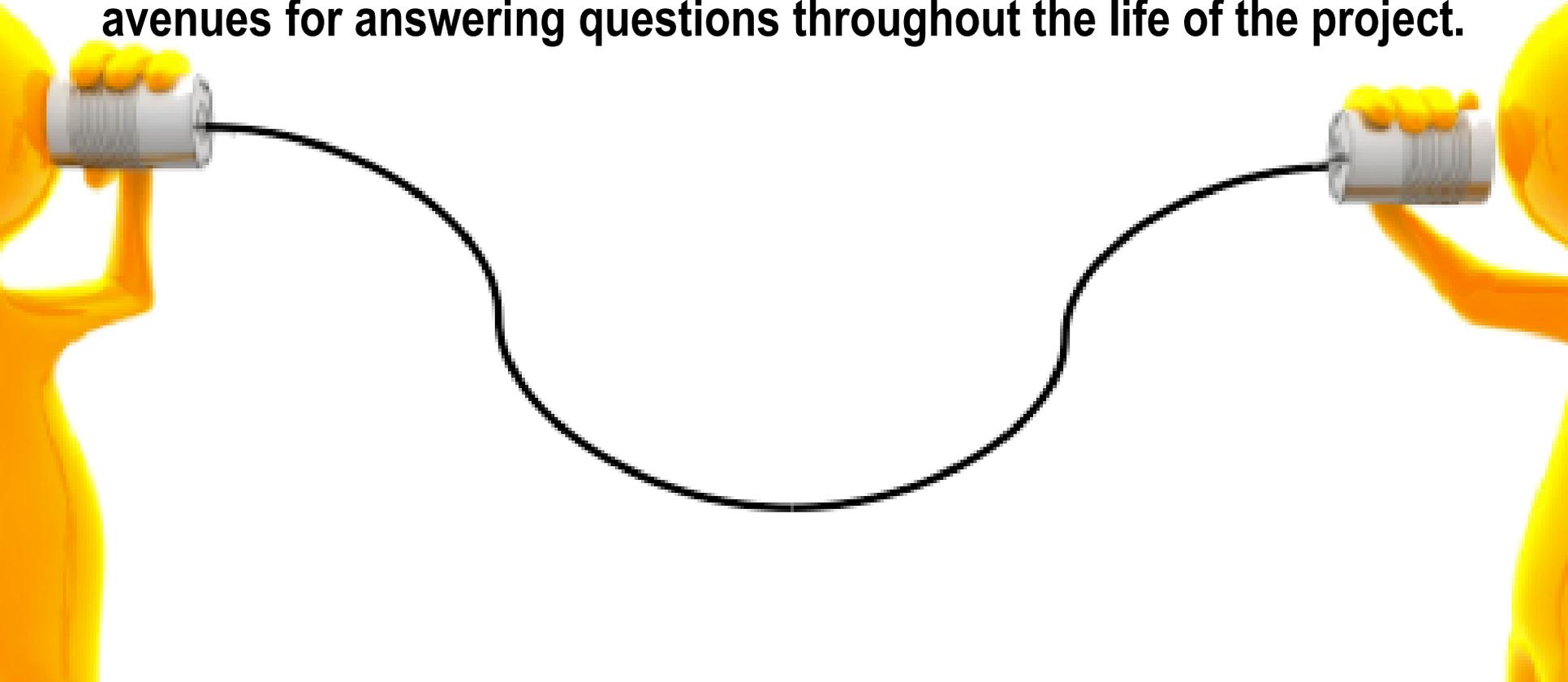
WyoCloud Community Engagement Survey Results

Average Agreement with Statements, by Tenure

N = 297



Overall, the community is excited to participate in the change and believes WyoCloud will increase work efficiency; however, the project team must continue to raise awareness as well as build avenues for answering questions throughout the life of the project.





COMMUNICATION



Change Agent Updates



Call to Action: WyoCloud Roadshows

The only way to increase WyoCloud awareness is to continue to communicate with the UW community.

Invite the WyoCloud team to present to your department!



Change Agent Network

- What is your vision for these meetings?
- Was the WyoCloud Newsletter useful for communicating to your department?

Project Feedback

- What are you hearing about WyoCloud?
- What can our team do to support you?

Questions and Concerns

- What is keeping you up at night about WyoCloud?



WyoCloud Resources

Go to <http://www.uwyo.edu/wyocloud/> for WyoCloud project updates and follow our social media channels.

-  @WyoCloud
-  @WyoCloud
-  WyoCloud



Next Change Agent Network Meeting

Wednesday, January 11th, 2017 2:30 – 4:00 pm
Education Auditorium (Education Building Room 55)