



## **Change Agent Network**

January 11<sup>th</sup>, 2017

# Agenda

## WyoCloud Website

- New layout and information on the WyoCloud website

## Meet the Experts

- Student Reporting demo by Sue Koller
- WyoCloud Finance System changes presented by Finance Leads

## Finance Cutoff Schedule

- Review items and cutoff dates for Finance System

## Training Approach

- Just In Time Training Approach and Training Course Plan

## Change Agent Open Discussion

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

# WyoCloud Website Refresh



Dedicated pages about the specific systems and processes that will be changing with WyoCloud



# **Meet the Experts:**

**Student Reporting Lead – Sue Koller**

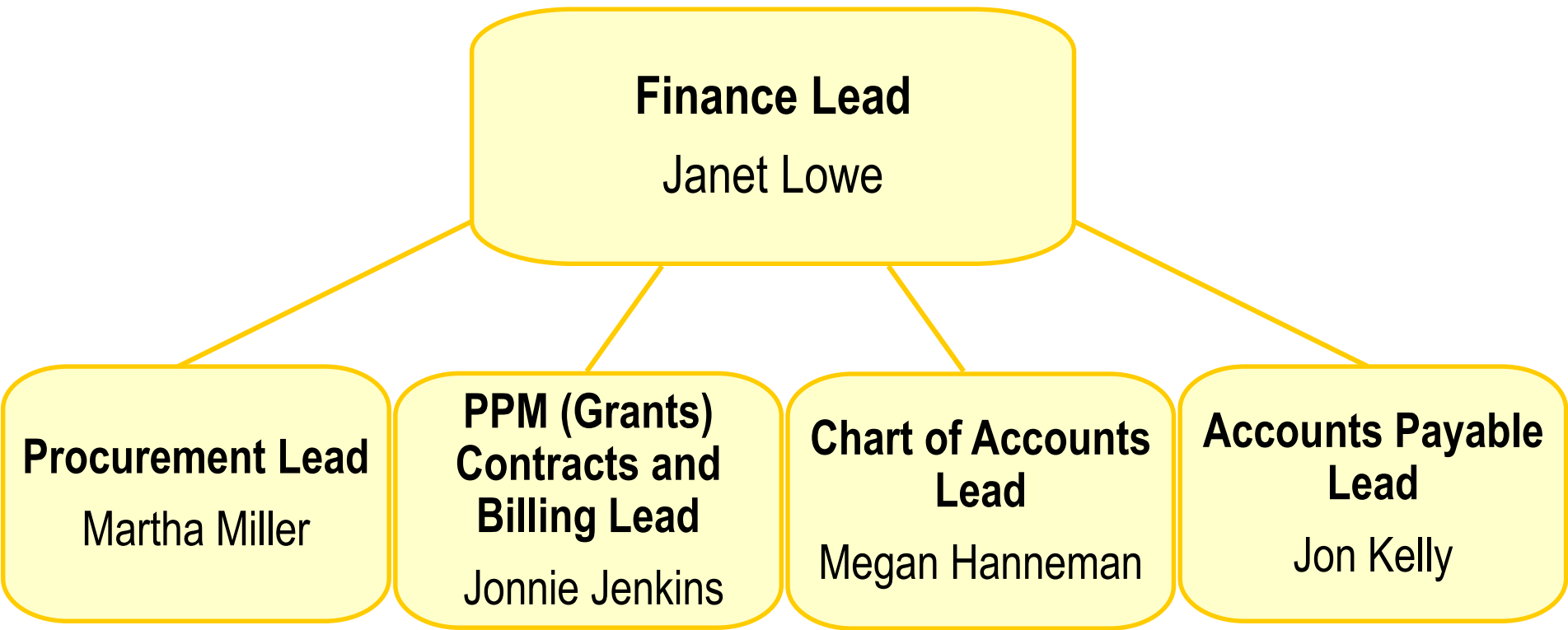
**Finance Leads - Martha Miller, Jonnie Jenkins, Jon Kelly,  
Megan Hanneman, and David Jewell**

# Student Reporting Demo



# Finance Leads







## New WyoCloud Terms

- Vendors = Suppliers
- Purchase Order = Requisition
- Requestor = UW employee who initiated the requisition

## New Process to Order Goods and Services

- Current State: Ask your department's accountant office to order office supplies
- Future State: Login to WyoCloud Procurement portal and place order yourself

## New Units of Measure on Requisitions

- Current State: Use the unit measure 'EA' (each) and include the ordered quantity on a PO attachment
- Future State: Services will be entered by dollar amount and goods will be entered by quantity ordered

## Payment Requests

- Current State: Paper form is mailed or walked to the Accounts Payable department
- Future State: Entered in WyoCloud directly by department.

## Invoices

- Invoices for requisitions and purchase orders will be handled by the Accounts Payable Department.

## New WyoCloud Terms

- Reimbursements = Expense Reports

## Submitted Expense Reports and Cash Advances for Employees

- Current State: Fill out a paper form and email it for approval
- Future State: Enter in the WyoCloud system and the report is routed to the appropriate approver

## WyoCloud Expense Mobile App

- Upload your receipts to your expense report using your phone's camera
- Enter expenses on the go as you accumulate them
- Expedite expense report submission process

## General Ledger

- New look with the new Chart of Accounts structure
- Drilldown to any level of detail to view balances and subledger transactions for your department

## Budgetary Control

- WyoCloud will be the central location to track UW's Budget and will allow the Budget Office to create and manage budgets at a granular level
- Current State: Managed manually in spreadsheets
- Future State: Managed in WyoCloud through an automated and controlled process with the ability to control on a segment-by-segment level

## Project Portfolio Management (PPM)

- Projects will have budgetary control at the budget category level.
- Reports can be generated for use internally as management reports or for external reporting to federal agencies.

## PPM Grants

- Complete financial tracking and reporting of Sponsored Research for UW
- Awards (Grants) will be set up with one or multiple Projects associated to the award, similar to the numbering scheme used in InfoEd today. Separate projects will be set up for cost share components and grants with any program income.

## PPM Capital Projects

- Allow UW Operations to better track Capital Project spending across budget categories.

# Cutoff Items and Dates for the Finance System



# Cutoff Schedule

Item	Cut Off Date	Comments
Chart of Accounts	1/31/17	No new values after January 31 <sup>st</sup> , 2017. Anything after January 31 <sup>st</sup> , 2017 will be subject to an approval process
Awards/Projects	5/30/17	Leverage pre-award process by May cutoff date to setup projects and awards
Suppliers	5/31/17	Exception if new suppliers are required for the last check run
Customers/Sponsors	5/31/17	
Sponsored Project Billing	6/15/17	Final bills and draw downs for expenses thru May 31 <sup>st</sup> ,2017 should be processed by June 15 <sup>th</sup> , 2017
General Ledger	6/23/17	Corrections for May need to be completed by June 23 <sup>rd</sup> , 2017
Accounts Payable Last Check Run	6/27/17	
Fixed Assets	6/27/17	
Purchase Orders	6/28/17	Includes POs and change orders
Procurement Card	6/30/17	All purchases from June 1 <sup>st</sup> through June 16 <sup>th</sup> should be reconciled by June 20 <sup>th</sup> . If there are any items unreconciled (for purchases through June 16 <sup>th</sup> ) on June 21 <sup>st</sup> , your defaults will be used and automatically charged.
Employees	6/30/17	Allows all employees to be paid by June 30, 2017

# Training Approach



Just In Time means end users will be trained close to the release of the replacement system.

Ex: Student Reporting training will begin within three weeks of go-live



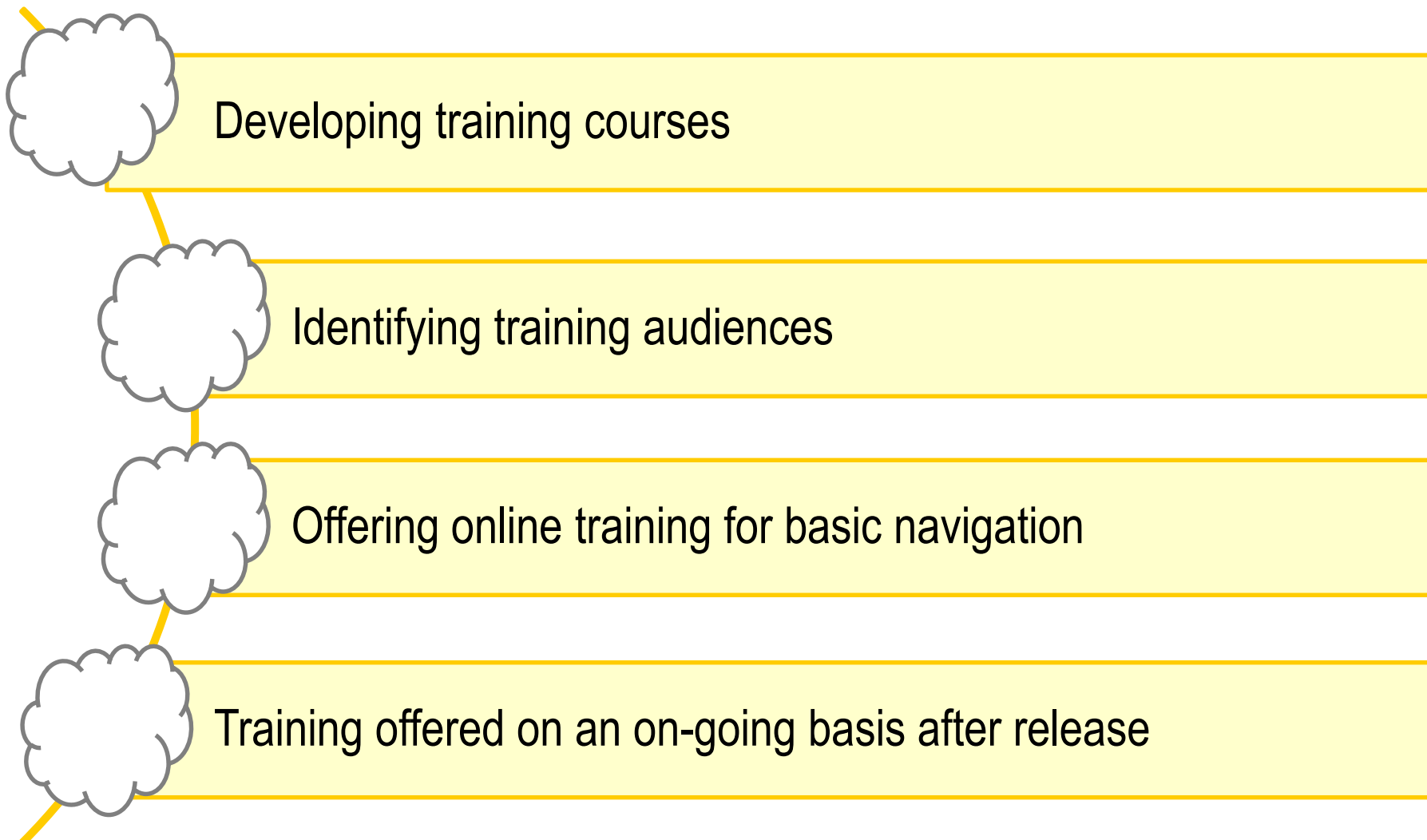
## Online Training

- Access when it is convenient for you
- Reference point for end users to return and review

## Open Labs

- Supplement to the online training
- Access to Subject Matter Experts for additional questions





# Change Agent Open Discussion

## Change Agent Network

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- What requests do you have for the upcoming meetings?

## Project Feedback

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

## Questions and Concerns

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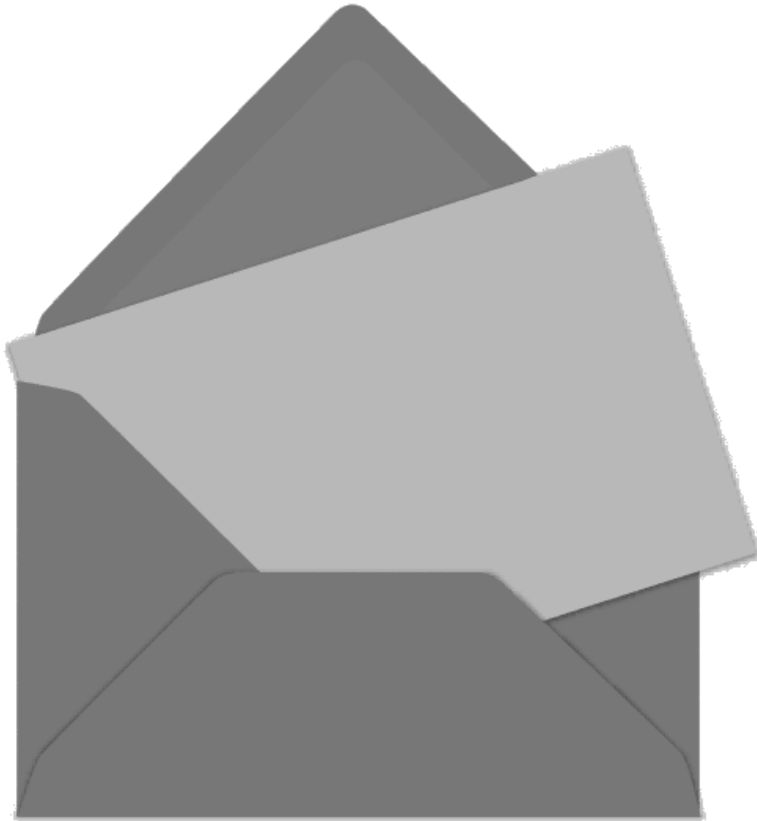
- What is keeping you up at night about WyoCloud?



# WyoCloud Resources

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

-  @WyoCloud
-  @WyoCloud
-  WyoCloud



**wyocloud@uwyo.edu**



## **Next Change Agent Network Meeting**

**Wednesday, February 8<sup>th</sup>, 2017      2:30 – 4:00 pm**  
Education Auditorium (Education Building Room 55)