



WyoCloud Open Q&A Session Follow-up and Tips & Tricks August 3rd, 2017

Greetings,

Last week, the WyoCloud Team hosted an Open Q&A session and provided an opportunity for the community to ask questions about the WyoCloud Financial Management system, its functionality, and its impact on day-to-day responsibilities. Please note that the [WyoCast](#) from this session is available to view online. In addition, frequently asked questions will be posted to the [WyoCloud Knowledge Base](#).

Based on common themes that users shared with us during the Open Q&A session, we have provided some tips & tricks that will make working in the system more convenient and efficient:

1) Default Expense Classifications: Remember when you are submitting an expense transaction, you need to change the default expense classification, which is currently set to 999. Not sure what expense code to use? See our [expense classifications](#) list and their more detailed descriptions in the [CoA User Guide](#) (page 3).

2) Printing Documents – As the WyoCloud Team continues to update resources related to the WyoCloud Financial Management system, if you have printed documents in the past such as the CoA, please be sure to verify that you are using the most up-to-date version by checking the “revised as of” date on each document.

3) Direct Deposit – In order to receive your reimbursements electronically, enter your direct deposit information in the system. If you have not entered this information in WyoCloud, the default method of reimbursement will be a check. Detailed instructions on how to set up direct deposit can be found on the [WyoCloud Knowledge Base](#).

4) P-Cards – Please remember that you no longer need to submit a p-card log! All this information is now tied to the expense reports. With p-card information being available in a more timely manner, we encourage you to check the system often and code your transactions for payment in the system as soon as they are available. More information on p-cards can be found in our [P-Card Quick Reference Guide](#) on the WyoCloud Knowledge Base.

5) Requisition Attachments - Have questions on how to attach documents on a requisition? See the [Quick Reference Guide for Creating Requisition](#).

6) Procurement Categories - The Procurement Office has posted a list of categories on the [Procurement Services WyoGroup on WyoCourses](#) for departments to reference when creating requisitions. This list includes the description of the category along with the Natural Account code.

Have an idea on how to improve the WyoCloud system? Please contact the UW Help Desk and submit a ticket. This will help us track your requests as we build a better WyoCloud Financial Management System! The **UW Help Desk** is your first resource and quickest response for questions. You can also contact the Help Desk by emailing userhelp@uwyo.edu or by calling 766-4357 and selecting Option #1.

Thanks,

The WyoCloud Team