



## WyoCloud Tips & Tricks September 14<sup>th</sup>, 2017

Greetings,

Based on feedback from users and departments around campus, the WyoCloud team has compiled some additional tips & tricks for you to increase your efficiency while using the WyoCloud Financial Management system. Please remember that all WyoCloud Financial Management Tips and Tricks emails can be found on the [WyoCloud Website](#).

### **Foundation Accounts**

All discretionary purchases using Foundation accounts are **NOT** allowable through UW or the WyoCloud system. A p-card is **NOT** acceptable to use for these purchases. Requests to pay a vendor or reimburse an employee still need to be completed by filling out a Form 100 request and sent to the Foundation. All Form 100 requests require original signatures and itemized receipts; depending on the type of expense, additional information may be required for processing.

Please refer to the discretionary guidelines located on the F-Reports drive under Forms & Policies to ensure an expense is allowable before purchasing. For questions regarding discretionary purchases, please contact Kaylyn Greenawalt at 766-3840 or [kgreenaw@uwyo.edu](mailto:kgreenaw@uwyo.edu). For all other Foundation accounting questions, please [email fdn-accounting@uwyo.edu](mailto:email_fdn-accounting@uwyo.edu).

### **Direct Deposit**

In order to receive your reimbursements electronically, you must 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](#).

### **Payment invoices on Purchase Orders**

- Invoices and special handling information (if needed) should be forwarded to Accounts Payable (now referred to as Payment Services) to begin the payment process for purchase orders. Attaching invoices and special handling information to requisition documents does not begin this process, as Payment Services cannot see this information in the system.
- Please only send or email invoices to Payment Services once. They are receiving duplicate invoices which have to be researched and removed from the system. Please direct any questions to Janet Wilson, [jwilso76@uwyo.edu](mailto:jwilso76@uwyo.edu).
- In order for payments to be made on Purchase Orders (POs), an invoice needs to be entered and the requester needs to process a receipt. A receipt should be processed for POs once goods or services have been received, not when the invoice has been entered. The WyoCloud system does not send emails indicating that invoices have been entered, and departments are asked to review their outstanding PO's. Payment Services has processed invoices on multiple POs that still need to have the receiving done.

### **Ad Hoc Approvers**

When approving a document, you should never add an ad hoc approver who is already listed as an approver in the workflow. The additional ad hoc approver will not receive the document, as they have already approved it; hence, nothing is gained by adding them as an ad hoc approver.



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Thanks,

The WyoCloud Team