**Agenda**

**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
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
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.

Conference Room Testing 2
January – February 2017

System Integration Testing
April 2017

User Acceptance Testing and End User Training
May 2017

Finance System Go-Live
July 2017
Finance System: Meet the Leads

Finance Lead
Janet Lowe

- Procurement Lead
  Martha Miller

- PPM (Grants) Contracts and Billing Lead
  Jonnie Jenkins

- Chart of Accounts Lead
  Megan Hanneman

- Accounts Payable Lead
  Jon Kelly
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

Begin New Structure Training
April 2017

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

Structure used to show a transaction’s financial impact

Account 987654 + Fund 4845 + Org. / Dept. ID 56743 + Project 61265 + Budget Year 2016 = Today’s COA
Must select a value for the eight mandatory segments.
<table>
<thead>
<tr>
<th>Entity</th>
<th>Major operational unit within business unit</th>
</tr>
</thead>
<tbody>
<tr>
<td>Account</td>
<td>Specific type of revenue / expense</td>
</tr>
<tr>
<td>Fund Class</td>
<td>Spending category / class</td>
</tr>
<tr>
<td>Fund Source</td>
<td>Spending restrictions</td>
</tr>
<tr>
<td>Organization</td>
<td>Unit responsible for or affected by transaction</td>
</tr>
<tr>
<td>Expense Classification</td>
<td>Purpose of Transaction</td>
</tr>
<tr>
<td>Program</td>
<td>Associates transactions with a formalized set of activities</td>
</tr>
<tr>
<td>Activity</td>
<td>Tracking mechanism for purposes and activities</td>
</tr>
<tr>
<td>Entity</td>
<td>University of Wyoming</td>
</tr>
<tr>
<td>-----------------</td>
<td>-----------------------</td>
</tr>
<tr>
<td>Account</td>
<td>Supplies – Office Expense</td>
</tr>
<tr>
<td>Fund Class</td>
<td>Unrestricted Operating</td>
</tr>
<tr>
<td>Fund Source</td>
<td>Unrestricted Operating</td>
</tr>
<tr>
<td>Organization</td>
<td>College of Business- Dean’s Office</td>
</tr>
<tr>
<td>Expense Classification</td>
<td>Academic Support</td>
</tr>
<tr>
<td>Program</td>
<td>MBA Program</td>
</tr>
<tr>
<td>Activity</td>
<td>Conference A</td>
</tr>
</tbody>
</table>
Project Portfolio Management

- **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**
Transaction detail will live in subledgers.

- Procurement Requisition Detail
- Payables Invoice Detail
- General Ledger Expenses in Summary
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.)?
Meet the Expert Q & A
WyoCloud Community Engagement
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.

Initial Survey
November 2016

Mid-Implementation Survey
March 2017

Final Survey
June 2017
## WyoCloud Community Engagement Survey Results

### Engagement Questions

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

**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

1. I am familiar with WyoCloud and the systems and processes it will impact.
2. I know where to get answers to my questions about changes that will impact me.
3. I believe I will receive the training and support I need to perform my job after WyoCloud is implemented.
4. I believe in the future the WyoCloud implementation will improve my efficiency.
5. I am motivated to participate in the WyoCloud change effort.

Legend:
- President's Office
- Athletics
- Research
- Administration
- Academic Affairs
- Student Affairs
- IT
- Development
WyoCloud Community Engagement Survey Results

**Average Agreement with Statements, by Job Level**

- **N = 297**

**Categories:**
- I am familiar with WyoCloud and the systems and processes it will impact.
- I know where to get answers to my questions about changes that will impact me.
- I believe I will receive the training and support I need to perform my job after WyoCloud is implemented.
- I believe in the future the WyoCloud implementation will improve my efficiency.
- I am motivated to participate in the WyoCloud change effort.

**Colors Represent:**
- Faculty
- Academic Staff
- Non-Academic Staff
WyoCloud Community Engagement Survey Results

Average Agreement with Statements, by Tenure

N = 297

- I am familiar with WyoCloud and the systems and processes it will impact.
- I know where to get answers to my questions about changes that will impact me.
- I believe I will receive the training and support I need to perform my job after WyoCloud is implemented.
- I believe in the future the WyoCloud implementation will improve my efficiency.
- I am motivated to participate in the WyoCloud change effort.

Legend:
- 0 - 5 years
- 6 - 10 years
- 11 - 15 years
- 16+ years
Community Engagement Result Analysis

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.
Community Engagement Next Steps

COMMUNICATION

- Increase Targeted Communications
- Increase Website Reach
- Change Agent Toolkit
- Increase Communication with Faculty and Academic Employees
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 Feedback

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?
Go to [http://www.uwyo.edu/wyocloud/](http://www.uwyo.edu/wyocloud/) for WyoCloud project updates and follow our social media channels.
Next Change Agent Network Meeting

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