Change Agent Network Orientation

November 9th, 2016
A Word from Our Executive Sponsors..
Sponsorship, Management, and Communication

Executive Steering Committee

WyoCloud Project

Financials Human Resources Grants
Budget & Planning Supply Chain Management Reporting & Analytics

Schools & Departments Change Agents

Larger University of Wyoming Community
Why form a Change Agent Network?

You know UW and you know how to make this transition successful.

Creates additional – and less formal – communications channels

Help us anticipate risks and challenges based on your first-hand knowledge.
Promote WyoCloud with colleagues

Disseminate communication to your areas

Gather feedback pertaining to the change

Identify resistance

Route concerns to the project team

Act as a main point of contact for your areas during and after implementation
Campus Coordination

**Sponsorship Network**
wide influence | enable change | actively engaged

**Change Agent Network**
local influence | advocate change | direct feedback
Your Journey to WyoCloud

Apply new learning
You will learn new terminology and new ways of business; a necessary step in the journey is to leave behind the old and begin to use the new!

Integrate the changes
Remember we are all taking this journey together!

Hold each other accountable
At times we may forget the road we are traveling, so remind each other as we journey to the future!
Second Wednesday of every month from 2:30 - 4:00 p.m.

November 9
December 14
January 11
February 8
March 8
April 12
May 10
June 14
July 12

• **2:30 – 3:15 WyoCloud Updates**
  - Current Projects
  - Updates
  - Meet the Expert

• **3:15- 3:45 Change Agent Updates**
  - What are you hearing?
  - What meetings can we attend to offer resources and answer questions?
  - Open Dialogue / Outstanding Questions

• **3:45 – 4:00 Wrap Up and Questions**
<table>
<thead>
<tr>
<th>FY16</th>
<th>FY17</th>
<th>FY18</th>
<th>FY19</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Chart of Accounts &amp; Planning</strong></td>
<td><strong>Reporting and Analytics</strong></td>
<td><strong>Financials (Including Grants, AR, Billing, etc.)</strong></td>
<td><strong>Human Capital Management</strong></td>
</tr>
<tr>
<td><strong>Student Data</strong></td>
<td><strong>Financial Data</strong></td>
<td><strong>HR Data</strong></td>
<td><strong>Budget Model Redesign</strong></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td><strong>Budget System</strong></td>
</tr>
</tbody>
</table>
Change Agent Network Communication Plan

**Communications**
- October: WyoCloud Website Launch
- November: University Launch
- December: WyoCloud Roadshows
- January: WyoCloud Town Hall

**Ongoing Website updates**
- October: WyoCloud Town Hall
- November: Change Agent Network Orientation
- December: Change Agent Network Meeting and Roadshows
- January: WyoCloud Town Hall

**Campus Coordination**
- October: Prepared Change Agent invite list and materials
- November: Change Agent Network Orientation
- December: Change Agent Network Meeting and Roadshows
- January: WyoCloud Town Hall

**Communication from Change Agents to Campus Community**
WyoCloud Finance System Preview
Student Reporting
Student Reporting Content

Student reporting will leverage the pre-delivered content from Oracle as much as possible, with some customizations where required to meet Wyoming reporting needs. The Wyoming reporting team and Subject Matter Experts have selected the following reports as those that are both important to users and able to be populated using data from Banner.

<table>
<thead>
<tr>
<th>Admissions and Recruiting</th>
<th>Student Record</th>
<th>Student Financials</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Admission Application</td>
<td>• Academic Class</td>
<td>• Credit History</td>
</tr>
<tr>
<td>• Admissions Funnel</td>
<td>• Academic Plan Summary</td>
<td>• Payment Details</td>
</tr>
<tr>
<td>• Application Evaluation</td>
<td>• Academic Program Summary</td>
<td>• Payments and Charges</td>
</tr>
<tr>
<td>• Application Status</td>
<td>• Class Enrollment</td>
<td>• Cross Reference</td>
</tr>
<tr>
<td>• External Academic Summary</td>
<td>• Class Instructor</td>
<td>• Transaction Details</td>
</tr>
<tr>
<td>• External Test Scores</td>
<td>• Class Meeting Pattern</td>
<td>• Financial Aid - Award</td>
</tr>
<tr>
<td>• Student Recruiting</td>
<td>• Enrollment Requests</td>
<td>• Disbursement</td>
</tr>
<tr>
<td>• Student Response</td>
<td>• Institution Summary</td>
<td>• Financial Aid - Award</td>
</tr>
<tr>
<td>• Transfer Credit Snapshot</td>
<td>• Student Degrees</td>
<td>• Summary Snapshot</td>
</tr>
</tbody>
</table>
Future State Reporting

The future reporting environment is standardized, dynamic, and interactive.
Future Reporting Dashboard

Dashboard Pages

Prompts

Dashboard

Reports/Analyses
Student Reporting Demo
Chart of Accounts
What is the Chart of Accounts?

The University Chart of Account represents the structure through which financial transaction data is organized and reported.

- The CoA is used to organize the finances of the University and to segregate expenditures, revenue, assets, and liabilities in order to provide an understanding of the financial status of the University.

- The CoA supports financial and management reporting and serves as the basis for the fiscal administration of the University’s funds, programs, projects, organizations, and activities.

- The CoA may not support the detailed fiscal tracking of all institutional activities, but serves as the common language for financial transactions whether they are created directly in the financial system or generated in another major financial system or through a localized third party application.
Why Redesign the Chart of Accounts?

Redesigning the Chart of Accounts will help to resolve many of the financial and management reporting challenges faced by the University today.

- The current linear CoA structure makes it difficult for business managers to aggregate information to develop a holistic financial picture
- The current expense structure is convoluted allowing for personal discretion in how some expenses are allocated
- Many departments across campus reported that they required additional detail levels not currently available within PISTOL to provide useful financial and management reports
- Departments create their own Chart of Accounts within their “shadow” systems, utilizing Pistol reports (reports)
- The current CoA structure does not fully align with organizational structures maintained within other technology systems (e.g., HCM, Banner Student, Foundation, etc.)

Implementing a new financial technology solution represents an opportune time to redesign the University’s Chart of Accounts
New Chart of Accounts Structure: General Ledger

The Chart of Accounts structure consists of 7 General Ledger Chart Segments and utilizes the project accounting functionality delivered in the Grants Accounting Module to meet specific financial management needs.

<table>
<thead>
<tr>
<th>Account</th>
<th>Entity</th>
<th>Fund Source</th>
<th>Organization</th>
<th>Expense Classification</th>
<th>Program</th>
<th>Activity</th>
</tr>
</thead>
<tbody>
<tr>
<td>Categorizes the nature of the transaction as a specific type of revenue, expense, asset, liability, or fund balance</td>
<td>Identifies the major operational unit within the Business Unit</td>
<td>Tracks spending restrictions and designations and to categorize net position for external reporting</td>
<td>Represents the academic, administrative, or auxiliary unit responsible for, or affected by, a given transaction</td>
<td>Designates the purpose of the transaction as it applies to both internal and federal / other external reporting requirements</td>
<td>Associates transactions with a formalized set of on-going or cross-campus / location activities</td>
<td>Activity provides a tracking mechanism for purposes and activities that may range from institution-wide to department-specific</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Definition</th>
<th>Use</th>
<th>Field Length</th>
<th>Type</th>
<th>Required/Conditional</th>
<th>Example</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>4</td>
<td>2</td>
<td>6</td>
<td>5</td>
<td>University of Wyoming</td>
</tr>
<tr>
<td></td>
<td>Numeric</td>
<td>Numeric</td>
<td>Numeric</td>
<td>Numeric</td>
<td>Unrestricted-Operating</td>
</tr>
<tr>
<td></td>
<td>Always Required</td>
<td>Always Required</td>
<td>Always Required</td>
<td>Always Required</td>
<td>Chemistry</td>
</tr>
<tr>
<td></td>
<td>Required (Expenses)</td>
<td>Conditional</td>
<td>Conditional</td>
<td>MBA Program</td>
<td>Instruction</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Commencement</td>
</tr>
</tbody>
</table>
The following chart includes examples of Math accounts mapped into the new CoA Structure.

<table>
<thead>
<tr>
<th>Current Chart of Accounts</th>
<th>Future Chart of Accounts</th>
</tr>
</thead>
<tbody>
<tr>
<td>Description</td>
<td>Account</td>
</tr>
<tr>
<td>Mathematics (Block Grant)</td>
<td>1100</td>
</tr>
<tr>
<td>Math Summer School</td>
<td>1100</td>
</tr>
<tr>
<td>Outreach Rev Share - Math</td>
<td>1700</td>
</tr>
<tr>
<td>IC-Mathematics</td>
<td>1501</td>
</tr>
<tr>
<td>Les Shader Awards Mathematics</td>
<td>4400</td>
</tr>
<tr>
<td>Catherine Gibbs Shaw Math</td>
<td>1600</td>
</tr>
<tr>
<td>Robert Spencer/Romy Angle Fisk</td>
<td>4400</td>
</tr>
</tbody>
</table>
Go to [http://www.uwyo.edu/wyocloud/](http://www.uwyo.edu/wyocloud/) for WyoCloud project updates and follow our social media channels.

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Feedback and Questions

Next Change Agent Network Meeting

Wednesday, December 14th, 2016  3:00-4:00 pm
Education Auditorium (Education Building Room 55)