WyoCloud Town-Hall

March 2\textsuperscript{nd}, 2017
The Future of UW and Higher Education
Your Future with WyoCloud
Your Future with WyoCloud
Your Future with WyoCloud

**UW Executive Overview**

<table>
<thead>
<tr>
<th>Category</th>
<th>Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>Student Population</td>
<td>13,744</td>
</tr>
<tr>
<td>Degrees Awarded</td>
<td>2,857</td>
</tr>
<tr>
<td>First-Time Students</td>
<td>1,691</td>
</tr>
<tr>
<td>New Transfers</td>
<td>929</td>
</tr>
<tr>
<td>International Headcount</td>
<td>811</td>
</tr>
<tr>
<td>Minority Headcount</td>
<td>1,691</td>
</tr>
</tbody>
</table>

Student headcounts are based on Fall term only. Degrees awarded reflect the Academic Year.

**Headcount by Career Trend, Exec Overview**

**Percent of Headcount by Ethnicity, Exec Overview**

Academic Year refers to the entire school year (Example: Academic Year 2016 = 2015-16 and includes Fall 2015, Spring 2016 and Summer 2016).

Internal Links

UW Student Records
Townhall Agenda

About WyoCloud

WyoCloud Business Intelligence Student Reporting

WyoCloud Budget Model Redesign

WyoCloud Financial Management

WyoCloud Campus Engagement
Today’s fiscal climate provides UW with the opportune time to implement new systems that provide better data to allow better decision-making with our limited resources.

Current System Themes:

- Timing of Data Reporting
- Data Detail
- Data Aggregation & Roll-up Issues
- Technology System Integration
- Data Access and Governance
- Training and Business Process Variability
Our University has grown but our technology systems have not.
What is WyoCloud?

- Business Intelligence and Reporting
- Financial Management
- Human Capital Management
- Supply Chain Management
- Grants Management
- Budgeting
WyoCloud Timeline

- **July 2016**
  - Business Intelligence & Reporting
    - Student
  - Financial Management System

- **July 2017**
  - Human Resource
  - Human Capital Management

- **July 2018**
  - Budgeting
    - Budget Model Redesign
    - Budget System
WyoCloud will make UW more efficient. What does that mean for you? Your job and role may change – **not disappear**.

- Training is a guiding principle of the WyoCloud project.
- UW is committed to ensuring our employees have the knowledge and ability to do their jobs with the new systems.
- WyoCloud can only be successful if we invest in our people.
WyoCloud is following a Just-in-Time training approach.

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

The WyoCloud team will be utilizing many different training models.

- Online training
- Instructor led training
- Open labs with project subject matter experts
Townhall Agenda

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WyoCloud Campus Engagement
WyoCloud Business Intelligence: Student Reporting

To Be Released March 6th
What does WyoCloud Business Intelligence Student Reporting mean to University of Wyoming?
Training is required to access the system. If you have Banner access, you will receive an email today with more information about the online training through WyoCourses.
WyoCloud Business Intelligence Student Reporting
What WyoCloud is…

- Additional business intelligence reports to be used for decision making
- Available to all with Banner access
- Required training

What WyoCloud isn’t…

- A replacement for Banner
- Day-to-day operational and transactional reports
- The final product…
WyoCloud Business Intelligence Phases

March 6th, 2017

Business Intelligence Student Reporting

May 2017

Additional Business Intelligence Student Reporting

July 2017

Financial Management Reporting

July 2017

Human Capital Management Reporting

July 2018
Submit your feedback for how WyoCloud Business Intelligence Student Reporting can be improved to serve UW better.
Townhall Agenda

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Resources are more limited at UW than ever before. We have to evolve with this new environment to become a more data informed campus to make better decisions as an institution.
Responsibility shifting from Old Main and Accounting to fiscal managers utilizing the new system’s financial reporting to make better and more informed decisions.
Present an example of a FY18 budget (ex: Academic Affairs)

Present FY18 budget for BOT approval for: University of Wyoming, WICHE, UW Medical Education, and Enhanced Oil Rec Commission

Present a high level University of Wyoming, WICHE, UW Medical Education and Enhanced Oil Rec Commission

Upload approved FY18 budget detail into the WyoCloud (new fiscal system)

FY18 Budget Process:
- During this time the UW Budget Office will work with each unit/college to build their FY18 All Funds Budget using the University's new chart of accounts.
- Central administration (President, Provost and VP for Administration) will then review and finalize an FY18 budget proposal with input from University leadership.
To better track spend and revenues at UW, we have redesigned the University’s Chart of Accounts.
If your job requires entering and tracking expenses and revenues for your area, the WyoCloud team is committed to training you on the new Chart of Accounts values so you can feel confident performing your daily tasks.

- Training
- Cheat Sheets
- Open Labs
Our Chart of Accounts Task Force!

Megan Hanneman
Ashlie Reese
Aaron Courtney
Juanita Carroll
Janet Lowe
David Jewell
Townhall Agenda

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WyoCloud Campus Engagement
WyoCloud Financial Management System

To Be Released July 2017
As much as 60% of some business and financial staff’s time is spent maintaining shadow systems.

13.3 Average number of business days to receive a travel and expense reimbursement.

43 Average number of business days to have a new research grant account number setup.

12.5 Average number of business days to generate a check after a payment request has been submitted.
WyoCloud Financial Management will be the first of the major management systems to be migrated to the cloud replacing PISTOL. What does this mean for you? Less paper forms and faster processing & approvals.
A big policy change for UW will be the implementation of DocuSign electronic signatures for outside contracts. Outside contracts will be routed to appropriate signature authorities electronically by the legal office in hours – not days.

Quickly and securely access and sign documents

Easily upload and send documents for others to sign

Send reminders and check signing status any time
WyoCloud Finance: Approval Workflow

The approval process for requisitions, change orders, expense reports, and payment requests will have approvals built in the system for each dollar amount threshold for better resource planning and utilization.

<table>
<thead>
<tr>
<th>Approval Level</th>
<th>Dollar Amount Range</th>
</tr>
</thead>
<tbody>
<tr>
<td>Business Managers</td>
<td>up to $99,999.99</td>
</tr>
<tr>
<td>Associate VP/ Dean / Director</td>
<td>$100,000 - $249,999.99</td>
</tr>
<tr>
<td>VP</td>
<td>$250,000 - $999,999.99</td>
</tr>
<tr>
<td>President</td>
<td>$1,000,000 and above</td>
</tr>
</tbody>
</table>
You can login to WyoCloud to buy computers and laptops, office supplies, and scientific materials at the best price from preferred vendors. These orders will be processed and approved quickly since the vendors will already have contracts with the University.
WyoCloud Finance: Travel & Expense

WyoCloud Travel & Expense will make getting reimbursed easier and more efficient.

- Expense App
- Delegation
- Travel Policy Change
With the WyoCloud Expense App, snap photos of your receipts on the go and edit your expenses to be imported directly into your expense report in WyoCloud.
With WyoCloud, more electronic self-service functionality is available to UW than ever before. Through feedback from business managers, we know that self-service functionality isn’t ideal for all of campus. **Delegation for expense reports is available if allowed by your department.**
University of Wyoming official travel policy will change to providing per diem for meals while traveling. The per diem amount will be based on federal rates, but departments will have discretion to set rates that do not exceed that amount.

Per diem is a daily allowance for expenses—a specific amount of money an organization gives an employee, per day to cover living expenses when traveling for work.
Project Portfolio Management (PPM) = How Grants and Capital Projects will be tracked in WyoCloud
Project Portfolio Management (PPM) for Grants will be a means of complete financial tracking and reporting of Sponsored Research for UW.
At the project level, expenditures are recorded and tracked against budgeted amounts, based on POET information:
- Project, Organization, Expenditure Type, Task
- Multiple projects can roll up to a single award

In the future, an award represents the grant.

A grants contract is created (by the system) once an award is created. There is a one-to-one relationship between an award and a contract.
Associated projects are displayed with high-level financial information.

Specific project-level detail and budget to actuals values can be seen.

Additional detail is also captured at the budget category level.
Townhall Agenda

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WyoCloud Finance System

WyoCloud Campus Engagement
Campus Coordination

Change Agents
Resources across campus that meet monthly with the project team to learn updates and spread communication

Change Champions
Volunteers to take a more active role in the project to meet with the team weekly to plan communication and training strategies
Thank you to our Change Agents and Change Champions! Please stand and be recognized.
In system implementations, faculty members are often not involved even when they are directly impacted by the system changes. WyoCloud is making a targeted effort to engage faculty by forming a focus group.

Email wyocloud@uwyo.edu to volunteer or provide feedback
Departmental Roadshows

We want to come to you!
The WyoCloud team is in the process of setting up roadshows across campus. Our goal is to talk to each department by the end of May about the WyoCloud changes specifically impacting them.

Past Roadshows

- Engineering Department Chairs
- A&S Staff
- Library
- Student Affairs Directors
- Enrollment Management
- Union

Email wyocloud@uwyo.edu to invite the WyoCloud team to your department or work with your change agent to setup a time!
WyoCloud Social Media Channels

WyoCloud
@WyoCloud

LIKE US ON
facebook

FOLLOW US ON
Instagram

FOLLOW US ON
twitter
Email
wyocloud@uwyo.edu
Questions?