WyoCloud Town-Hall

April 25th, 2017
The Future with WyoCloud
President Laurie Nichols

A Realistic Approach to Surviving Change
Jeanne Durr

Countdown to WyoCloud
Jen Chavez

Security & Training: Preparing for WyoCloud
Jen Chavez

Future WyoCloud Communications
Jen Chavez
The Future with WyoCloud
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The Eight Step Change Process

1. Establishing a sense of urgency
2. Creating the guiding coalition
3. Developing the vision and strategy
4. Communicating the change vision
5. Empowering people to effect change
6. Generating short-term wins
7. Consolidating gains, producing more change
8. Sustaining new approaches in the culture

Business Transformation
The Reality: The Valley (Pit) of Despair

- Begin Executing Change Plan
- Change Plan?
- Train Key Personnel in Change Leadership Skills
- Severity of Reaction to Change
- End of Old Way
- Valley of Despair
- Pity City
- Duration of disruption due to change
- Climb to Productivity
- Training

*Source: Val Larson 2002, iSixSigma LLC 2002*
Understanding Change

Want someone to accept change?

• First understand why someone may resist

Change is an emotional experience

Change always means loss

• Safety & Security

• Competence

• Relationships

• Mission & Purpose

Source: www.yourofficecoach.com
Acceptance requires planning

Caring

Control

Choice

Competence
Factors that increase resistance

- Important expectations about the future won’t be met
- Management is not trusted
- People don’t understand the reason for change
- There is a long period of uncertainty about what is going to happen
- Change is going to impact me more than others
- Many changes are happening at the same time
- Change has been ongoing, with little let-up
So What Does it Mean for Me?

Understand the negative responses to change

Be prepared for your own emotions

Find ways to care for yourself and embrace opportunities that might present themselves

Speak up when you identify issues
Let’s Talk

Idea?
Questions?
Comments?
Concerns?

Remember, we’re not the first group to experience this type of change, and we won’t be the last!
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WyoCloud Timeline

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

July 2017
- Student
- Financial
- Human Resource

July 2018
- Human Capital Management
- Budgeting
  - Budget Model Redesign
  - Budget System
WyoCloud Financial Management will be released to UW on Monday, July 17th which means we have **84 days** to prepare.

- **May**
  - Deep Dives and WyoCloud Expo
  - User Acceptance Testing

- **May – June**
  - Cutoff Dates

- **June – July**
  - Training

- **July 17**
  - WyoCloud Financial Management System Go-Live

**Today**

**May**

**June**

**July**

**Go-Live**
# Countdown to WyoCloud: May - June

## Cutoff Dates

<table>
<thead>
<tr>
<th>Item</th>
<th>Cutoff Date</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Awards/Projects</td>
<td>5/30/17</td>
<td>Leverage pre-award process by May cutoff date to setup projects and awards</td>
</tr>
<tr>
<td>Suppliers</td>
<td>5/31/17</td>
<td>Exception if new suppliers are required for the last check run</td>
</tr>
<tr>
<td>Customers/Sponsors</td>
<td>5/31/17</td>
<td></td>
</tr>
<tr>
<td>Sponsored Project Billing</td>
<td>6/15/17</td>
<td>Final bills and draw downs for expenses thru May 31(^{st}), 2017 should be processed by June 15(^{th}), 2017</td>
</tr>
<tr>
<td>General Ledger</td>
<td>6/23/17</td>
<td>Corrections for May need to be completed by June 23(^{rd}), 2017</td>
</tr>
<tr>
<td>Accounts Payable Last Check Run</td>
<td>6/27/17</td>
<td></td>
</tr>
</tbody>
</table>

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**May - June**

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**Go-Live**
## Cutoff Dates

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<tr>
<th>Item</th>
<th>Cutoff Date</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fixed Assets</td>
<td>6/27/17</td>
<td></td>
</tr>
<tr>
<td>Purchase Orders</td>
<td>6/28/17</td>
<td>Includes POs and change orders</td>
</tr>
<tr>
<td>Procurement Card</td>
<td>6/30/17</td>
<td>All purchases from June 1(^{st}) through June 16(^{th}) should be reconciled by June 20(^{th}). If there are any items unreconciled (for purchases through June 16(^{th})) on June 21(^{st}), your defaults will be used and automatically charged.</td>
</tr>
<tr>
<td>Employees</td>
<td>6/30/17</td>
<td>Allows all employees to be paid by June 30, 2017</td>
</tr>
</tbody>
</table>
Agenda

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With WyoCloud, UW is transitioning to a more open and transparent security approach. This approach helps to bring more consistency across our business practices.

- Giving the departments and colleges the latitude to determine how best to divide job duties within their organization
- Providing more flexibility to allow for cross training
- Facilitating an easier transition when someone transfers or a department is restructured
Training will be required for WyoCloud due to the open security approach. All Employees will have access to submit expense reports and make purchases.

Users across campus who have fiscal responsibilities will be given the same elevated privileges with additional training.

All UW employees will be required to complete training on Basic Navigation and Expense Reports. Creating Requisitions is optional but encouraged.
WyoCloud is following a Just-in-Time training approach.

Just-in-Time means users will be trained close to the release of the replacement system on July 17.

- **Online Training**
  - Released: June 19

- **In-Person Training**
  - June 27

- **WyoCloud**
  - Released: July 17

- **Open Labs**
  - Ongoing
Online Training will be offered for the following topics by role. Only the Basic Navigation and Entering an Expense Report courses will be required for system access for all users.

### Required for All
- Basic Navigation
- Entering an Expense Report

### Recommended for All
- Creating a Requisition

### Dependent on Role
- Modifying a Requisition
- Managing Expense Report
- Approvals
- Entering Encumbrances Manual
- Journals
- Processing PO Invoices
- Managing Requisition Approvals
- Self Service and Reporting
- Creating Spreadsheets for Journal Entries
- Cash Advance
- Receiving Goods/Services
- Managing Supplier Returns
- Creating a Supplier Agreement
- Creating an Agreement Contract
- Processing Non-PO Invoices

**June 19 – 26**
Training: Preparing for WyoCloud

WyoCloud is following a Just-in-Time training approach.

Just-in-Time means users will be trained close to the release of the replacement system on July 17.

- Online Training Released: June 19
- In-Person Training Released: June 27
- WyoCloud Released: July 17
- Open Labs: Ongoing
The WyoCloud team knows that campus wants to see the system and learn how to use WyoCloud as soon as possible. Before training, there are many events for you to become familiar with the system.

Deep Dive Sessions
May - June

WyoCloud Expo
May 31st
Preparing for Training: Deep Dive Sessions

Deep Dive Sessions

- Expense: Reimbursements, Cash Advances, and Payment Requests – May 3
- Procurement: Requisitions and Contracts – May 11
- PPM Grants: Charging expense and requisitions to projects – May 17
- General Accounting: Interdepartmental transfers, General Ledger, and journal entries – May 24
- Fiscal Year End: What does UW look like July 1? – June

Go-Live
Preparing for Training: WyoCloud Expo

WyoCloud Expo in the Central Ballroom  
May 31

- All-Day user Experience
- Kiosks set around the room with functional area experts
- Hands-on walkthroughs on laptops and information about each functional area (Expense reimbursements, creating requisitions, grants management, etc.)
- PRIZES!
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Campus Poster Campaign

Check out WyoCloud updates and information around campus

For more information, visit www.uwyo.edu/wyocloud/

Questions? Email wyocloud@uwyo.edu

Find us: @Wyocloud
The WyoCloud team is frequently updating the WyoCloud website with new information.

Check out the new Frequently Asked Questions and Training pages!
With the WyoCloud training and system being released over summer when many faculty and staff are away from campus or on vacation, we are working on communications to keep everyone included and informed.

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<tr>
<th>May</th>
<th>June</th>
<th>July</th>
<th>August</th>
</tr>
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<tbody>
<tr>
<td>Email of instructions to go out before close of semester and faculty focus group formed</td>
<td>Online Training accessible and targeted fiscal year cutoff communications</td>
<td>On-going communications about WyoCloud release and quick reference guides available</td>
<td>Optional In-Person Training and Open Labs for returning faculty</td>
</tr>
</tbody>
</table>
If you want to continue to prepare yourself for WyoCloud, we have opportunities for you to learn more leading up to WyoCloud’s release.

**Managing Organizational Change and Resistance feat. Dr. Nicholas Prince**

*Wednesday, April 26th, 2017 1:00 – 2:00 pm*
Education Auditorium (Education Building Room 55)

**WyoCloud Deep Dives**

**Expense: Reimbursements, Cash Advances, and Payment Requests**
*Wednesday, May 3rd, 2017 1:00 – 2:30 pm*
College of Agriculture Auditorium

**Procurement: Requisitions and Contracts**
*Thursday, May 11th, 2017 10:00 – 11:30 am*
Classroom Building 129
Upcoming Events

Deep Dives

PPM Grants: Charging expense and requisitions to projects
Wednesday, May 17th, 2017 1:00 – 2:30 pm
College of Agriculture Auditorium

General Accounting: Interdepartmental transfers, General Ledger, and journal entries
Wednesday, May 24th, 2017 1:00 – 2:30 pm
College of Agriculture Auditorium

Fiscal Year End: What does UW look like July 1?
June - Location TBA

WyoCloud Forum feat. UW, Huron, & Oracle Leadership

Wednesday, May 17th, 2017 9:30 – 10:30 am
Location TBD
Upcoming Events

WyoCloud Financial Management System Discovery Expo

Wednesday, May 31st, 2017    All-Day
Wyoming Union Central Ballroom

June Change Agent Network Meeting

Wednesday, June 14th, 2017    2:30 – 4:30 pm
Education Auditorium (Education Building Room 55)
Questions?
WyoCloud Social Media Channels

WyoCloud

@WyoCloud

@WyoCloud
Email
wyocloud@uwyo.edu