WyoCloud University Launch

November 1st, 2016
Email your Questions

If during the University Launch you have any questions, please email wyo-cloud@uwyo.edu to be answered during the Question & Answer Session.
Executive Steering Committee

Bill Mai

Robert Aylward

Bill Gern

Sara Axelson

Kate Miller
A Word from Our Executive Sponsors..
Why are we doing this?

98% increase

Budget

$136M
FY 1997

$270M
FY 2016

138% increase

External Research Funding

$40M
FY 1997

$95M
FY 2015

14% increase

Total Enrollment

11,987
FY 1997

13,717
FY 2016
WyoCloud Program Overview

WyoCloud is a university-wide initiative to provide modern and sophisticated solutions for today’s demands and challenges on our University. Over the next 3 years, the WyoCloud team will be implementing the following Oracle Fusion Cloud systems.

- Enterprise Resource Planning (Financials)
- Human Capital Management
- Grants Management
- Budgeting & Planning
- Supply Chain Management
- Reporting & Analytic
WyoCloud Guiding Principles

- Easy to use and easily trainable
- Reliable and trusted data source
- Flexible, comprehensive, and integrated
- Timely and current
- Align decision making with strategic plan
- Multiyear forecasting and strategic resource planning
WyoCloud Implementation Timeline

The current implementation timeline outlines tasks over a 36 month period, resulting in a go-live for Financials in July 2017 and HCM in January 2019.

**Chart of Accounts & Planning**

**Reporting and Analytics**
- Student Data
- Financial Data
- HR Data

**Financials (Including Grants, AR, Billing, etc.)**

**Human Capital Management**

**Budgeting**
- Budget Model Redesign
- Budget System
Upgrading the current back office systems provides the University of Wyoming with the ability to move to more contemporary solutions.
What UW’s Systems Will Be

Intuitive dashboards and interactive reporting is the future for UW systems.
WyoCloud System Approach

Requirements Driven
- Assumed Customization
- Scope Creep

Solution Driven
- Drives Improvement
- Quicker delivery to the user
Financial System
WyoCloud Financial System Progress

The initial configuration of the financials system is complete and the first round of Conference Room Testing has begun with the core project team.
The WyoCloud team and UW SME’s will be continually testing and refining the system now until go-live in July. The university community will be hands-on in the new system when User Acceptance Testing and Training begins in May.

- System end users will be performing User Acceptance Testing to ensure the system is ready to go-live by conducting and validating business processes

- Role-based training will be delivered from the beginning of May through go-live focusing on what is needed to successfully perform job-related tasks in newly implemented systems

- The Change Agent Network will help the WyoCloud team to identify end users, identify effective UW specific training, and gauge campus readiness for the new system from now until go-live
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.
- 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.
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>Definition</th>
<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>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Field Length</td>
<td>4</td>
<td>2</td>
<td>6</td>
<td>5</td>
<td>3</td>
<td>4</td>
<td>4</td>
</tr>
<tr>
<td>Type</td>
<td>Numeric</td>
<td>Numeric</td>
<td>Numeric</td>
<td>Numeric</td>
<td>Numeric</td>
<td>Numeric</td>
<td>Numeric</td>
</tr>
<tr>
<td>Required/Conditional</td>
<td>Always Required</td>
<td>Always Required</td>
<td>Always Required</td>
<td>Always Required</td>
<td>Required (Expenses)</td>
<td>Conditional</td>
<td>Conditional</td>
</tr>
<tr>
<td>Example</td>
<td>Travel – Domestic-Air</td>
<td>University of Wyoming</td>
<td>Unrestricted-Operating</td>
<td>Chemistry</td>
<td>Instruction</td>
<td>MBA Program</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>
<th>Account</th>
<th>Entity</th>
<th>Fund</th>
<th>Organization</th>
<th>Expense Classification</th>
<th>Program</th>
<th>Activity</th>
</tr>
</thead>
<tbody>
<tr>
<td>Description</td>
<td></td>
<td>Fund</td>
<td>Org</td>
<td>Entity</td>
<td>Fund</td>
<td>Organization</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mathematics (Block Grant)</td>
<td></td>
<td>1100</td>
<td>12137</td>
<td>University of Wyoming</td>
<td>Unrestricted-Operating</td>
<td>Mathematics</td>
<td>Instruction</td>
<td></td>
</tr>
<tr>
<td>Math Summer School</td>
<td></td>
<td>1100</td>
<td>12100</td>
<td>University of Wyoming</td>
<td>Unrestricted-Operating</td>
<td>Mathematics</td>
<td>Instruction</td>
<td></td>
</tr>
<tr>
<td>Outreach Rev Share - Math</td>
<td></td>
<td>1700</td>
<td>20811</td>
<td>University of Wyoming</td>
<td>Unrestricted-Operating</td>
<td>Mathematics</td>
<td>Instruction</td>
<td></td>
</tr>
<tr>
<td>IC-Mathematics</td>
<td></td>
<td>1501</td>
<td>12811</td>
<td>University of Wyoming</td>
<td>Unrestricted-Operating F&amp;A Recovery</td>
<td>Mathematics</td>
<td>Instruction</td>
<td></td>
</tr>
<tr>
<td>Les Shader Awards Mathematics</td>
<td></td>
<td>4400</td>
<td>17264</td>
<td>University of Wyoming</td>
<td>Restricted Expendable–True Endowment-Scholarship Les Shader Scholarship</td>
<td>Mathematics</td>
<td>Scholarship</td>
<td></td>
</tr>
<tr>
<td>Catherine Gibbs Shaw Math</td>
<td></td>
<td>1600</td>
<td>17138</td>
<td>University of Wyoming</td>
<td>Restricted Expendable-Quasi Endowment-Ops Catherine Gibbs EnInc–Dept. Ops</td>
<td>Mathematics</td>
<td>Instruction</td>
<td></td>
</tr>
<tr>
<td>Robert Spencer/Romy Angle Fisk</td>
<td></td>
<td>4400</td>
<td>21209</td>
<td>University of Wyoming</td>
<td>Restricted Expendable True Endowment-Dept Ops Spencer/Angle/Fisk Fund</td>
<td>Mathematics</td>
<td>Instruction</td>
<td></td>
</tr>
</tbody>
</table>
Reporting
Accelerate the achievement of University objectives by creating a data driven culture built upon a solution that provides high quality and governed information within the framework of modern business intelligence methodologies and technologies.

**Goal 1**
Deploy a robust self-service Business Intelligence environment and promote decentralized reporting and analytics

**Goal 2**
Empower stakeholders to easily retrieve and analyze data for more effective University decision making

**Goal 3**
Promote and support a data driven culture with a unified analytic information platform and robust data querying facility

**Goal 4**
Provide reliable, consistent and timely enterprise reporting capability that appropriately secures information across all functional areas.
Future Reporting Dashboard

Dashboard Pages

Prompts

Dashboard

Reports/Analyses
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.

### Admissions and Recruiting
- Admission Application
- Admissions Funnel
- Application Evaluation
- Application Status
- External Academic Summary
- External Test Scores
- Student Recruiting
- Student Response
- Transfer Credit Snapshot

### Student Record
- Academic Class
- Academic Plan Summary
- Academic Program Details
- Class Enrollment
- Class Instructor
- Class Meeting Pattern
- Enrollment Requests
- Institution Summary
- Student Degrees
- Term Enrollments

### Student Financials
- Credit History
- Payment Details
- Payments and Charges
- Cross Reference
- Transaction Details
- Financial Aid - Award
- Disbursement
- Financial Aid - Award
- Summary Snapshot
The current reporting environment is manually intensive and static.

<table>
<thead>
<tr>
<th>Classification based on credit hours</th>
<th>2014</th>
<th>2015</th>
<th>2016</th>
<th>1 Year Change</th>
<th>2 Year Change</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Number</td>
<td>Percent</td>
<td>Number</td>
<td>Percent</td>
<td>Number</td>
</tr>
<tr>
<td>Total Students</td>
<td>12932</td>
<td>1.67</td>
<td>12841</td>
<td>1.7</td>
<td>12607</td>
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<tr>
<td>Freshmen</td>
<td>2157</td>
<td>16.7</td>
<td>2189</td>
<td>17</td>
<td>2038</td>
</tr>
<tr>
<td>Sophomores</td>
<td>1672</td>
<td>12.9</td>
<td>1688</td>
<td>13.1</td>
<td>1707</td>
</tr>
<tr>
<td>Juniors</td>
<td>2064</td>
<td>16</td>
<td>2043</td>
<td>15.9</td>
<td>2143</td>
</tr>
<tr>
<td>Seniors</td>
<td>3652</td>
<td>28.2</td>
<td>3596</td>
<td>28</td>
<td>3406</td>
</tr>
<tr>
<td>Second Bachelor</td>
<td>389</td>
<td>3</td>
<td>333</td>
<td>2.6</td>
<td>329</td>
</tr>
<tr>
<td>Non-degree undergrads</td>
<td>223</td>
<td>1.7</td>
<td>209</td>
<td>1.6</td>
<td>177</td>
</tr>
<tr>
<td>Undergraduates Subtotal</td>
<td>10157</td>
<td>78.5</td>
<td>10058</td>
<td>78.2</td>
<td>9800</td>
</tr>
<tr>
<td>Graduate/Professional</td>
<td>2405</td>
<td>18.6</td>
<td>2397</td>
<td>18.7</td>
<td>2423</td>
</tr>
<tr>
<td>Non-degree graduates</td>
<td>307</td>
<td>2.9</td>
<td>386</td>
<td>3</td>
<td>384</td>
</tr>
<tr>
<td>Graduate/Professional Subtotal</td>
<td>2775</td>
<td>21.5</td>
<td>2783</td>
<td>21.7</td>
<td>2807</td>
</tr>
</tbody>
</table>
The future reporting environment is standardized, dynamic, and interactive.
Student Reporting Demo
Organizational Transformation
The WyoCloud teams are coordinating with people in your area: business partners who are helping us make decisions about process, and our change network, who work in partnership with the WyoCloud team to disseminate messages and provide feedback about your area’s training needs. All are dedicated to our community being prepared and enabled to successfully operate in our new system after go-live.
Members of the Change Agent Network will play an integral role in preparing UW community members for the changes they will experience over the next few years.

- Learn about, and in some cases identify, impending process changes and impacts to schools/department
- Serve as a resource to your colleagues for questions and concerns about the WyoCloud project
- Contribute valuable feedback for training and communication initiatives
- Attend monthly one hour meeting to keep you up to date with the status of the project
Can I be a Change Agent?

If you are interested in representing your school/department as a Change Agent, please email wyo-cloud@uwyo.edu. The first Change Agent Network meeting is November 9th in the Education Auditorium from 3-4 P.M.
Go to [http://www.uwyo.edu/wyocloud/](http://www.uwyo.edu/wyocloud/) for WyoCloud project updates and follow our social media channels.

- [@WyoCloud](https://www.instagram.com/wyocloud/)
- [@WyoCloud](https://twitter.com/wyocloud)
- [WyoCloud](https://www.facebook.com/wyo.cloud)