



Change Agent Network

April 12th, 2017

Agenda

**Introduction:
Jeanne Durr**



Introduction, Associate VP of Human Resources

**WyoCloud
Survey #2**



Analysis of Survey #2 Results

Timelines



Project, Training, and System Cut-Off Timelines

**Training
Spotlight**



What to know about training before the Financial Management System Go-Live in mid-July

Q&A Session



Your questions about WyoCloud answered

**Change
Agent Open
Discussion**



Feedback on Change Agent meetings, WyoCloud Newsletter, and Project

Introduction: Jeanne Durr

Associate VP of Human Resources

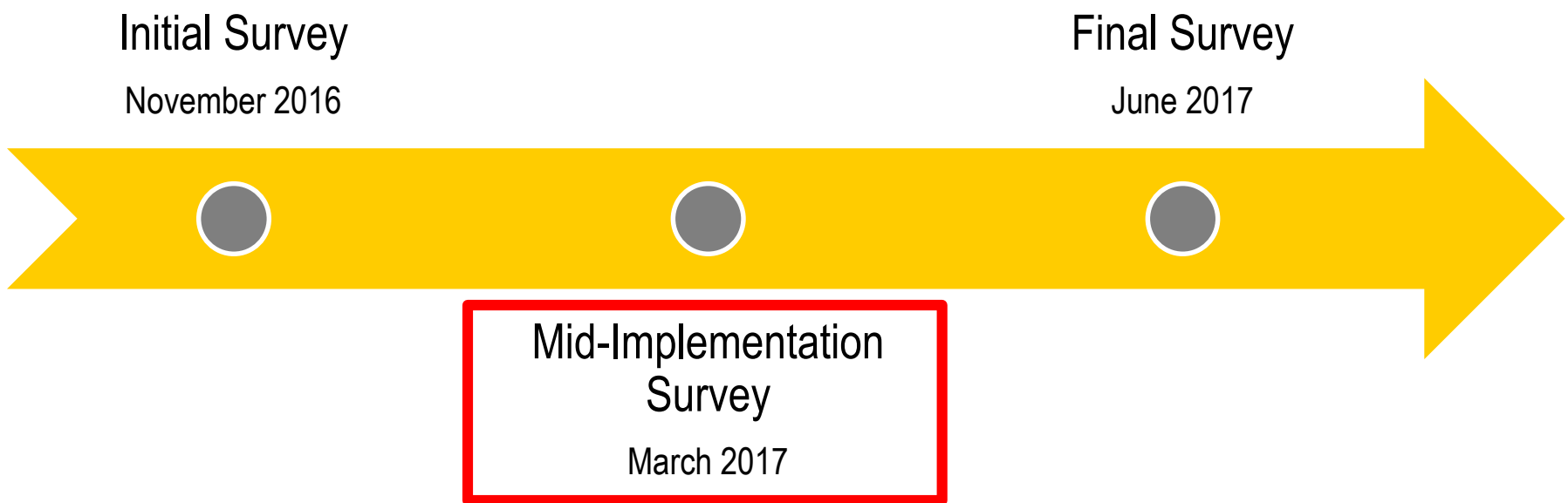


WyoCloud Survey #2



WyoCloud Survey #2: March 22nd – April 5th

The WyoCloud Community Engagement surveys are meant to assess the level of engagement and readiness the campus community is feeling towards the launch of the WyoCloud systems.



<u>Engagement Questions</u>	<u>Average Rating</u>
I am familiar with WyoCloud and the systems and processes it will impact.	3.48
I know where to get answers to my questions about changes that will impact me.	3.13
I believe I will receive the training and support I need to perform my job after WyoCloud is implemented.	3.53
I believe in the future the WyoCloud implementation will improve my efficiency.	3.63
I am motivated to participate in the WyoCloud change effort.	3.90

Survey Scale:
1 = Strongly Disagree 2 = Disagree 3 = Neutral 4 = Agree 5 = Strongly Agree



WyoCloud Survey #1 vs. Survey #2 Results

Engagement Questions

#1 Avg.

#2 Avg.

I am familiar with WyoCloud and the systems and processes it will impact.

2.08

3.48

I know where to get answers to my questions about changes that will impact me.

2.02

3.13

I believe I will receive the training and support I need to perform my job after WyoCloud is implemented.

2.95

3.53

I believe in the future the WyoCloud implementation will improve my efficiency.

3.11

3.63

I am motivated to participate in the WyoCloud change effort.

3.46

3.90

Survey Scale:

1 = Strongly Disagree 2 = Disagree 3 = Neutral 4 = Agree 5 = Strongly Agree

What did the survey results reveal to our team?

1. Change Agents and Champions would like more exposure to what **processes** will look like within the actual system.
2. Our team should begin to distribute more **information** about the project throughout the general campus community.
3. More specific details on the project and training **timelines** are needed.
4. We must equip Change Agents with practical ways to facilitate **change** and address **resistance** within their areas.
5. The community needs some insight into what **training** will look like for the Financial Management System.

Example of Actions Taken



- Deep Dive Sessions
- Example Videos inside the System
- Poster Campaign

Examples of What Is Coming



- Cross-Walk Sheets of Old to New Chart of Accounts Values
- Laminated Sheets for Faculty on Preparing Travel Expense Items
- Online “How-To” guides
- Online forum for Change Agents for sharing tips with each other and asking questions
- Contact information for system issues

Expense Report: EXP0013608687 Save Submit Cancel

* Purpose: going to chicago

Missing Images Reason: [Redacted]

Attachments: None +

Status: Saved

Report Total

Payment Method: Check

Employer Pays You: 340.00 USD

340.00 USD

I have read and I accept the University of Wyoming travel and expense policies.

Expense Items

Actions: + Add Existing Apply Project Apply Account

Per Diem - Chicago, IL breakfast and lunch	3/20/17 Penguins.jpg +X Imaged receipt required	40.00 USD	X
Commercial Airline trip to chicago	3/20/17 Tulips.jpg +X Imaged receipt required	300.00 USD	X

Grab these on your way out of the meeting!

WyoCloud COMING SOON JULY 2017

Why A Cloud?

You mean WyoCloud, the next step for the University of Wyoming in modernizing processes and data

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

Questions? Email wyocloud@uwyo.edu

Find us: @WyoCloud

WyoCloud

CHART OF ACCOUNTS

"What's Changing?"

The University of Wyoming is revising its Chart of Accounts with the implementation of WyoCloud this July 2017! What exactly is changing?

Current State

- PISTOL does not provide enough detail for some departments on campus
- "Shadow" Chart of Accounts (e.g. Peachtree, MS Excel, Sage 50, QuickBooks)
- Misalignment with organizational structures maintained within other technology systems (e.g., HCM, Banner Student, Foundation, etc.)

Future State with WyoCloud

- A new Chart of Accounts structure with eight General Ledger chart segments
- Utilization of project accounting functionality to track sponsored grants, research funds, and capital projects

Account	Chart Segment Definition	Chart Segment Example
Entity	Identify the major operations and within the business unit	University of Wyoming
Account	Categorize the nature of the transaction in a specific type of revenue, expense, asset, liability, or fund balance	Tutorial Domestic Aid
Fund Class	Define the overall spending category or class of fund and sector	Unrestricted Operating
Fund Source	Track spending methodologies and designations and to categorize the number of general accounts	Unrestricted Operating
Organization	Map across the academic, administrative, or auxiliary unit and indicate the nature of the activity or project transaction	Management & Marketing
Exp Class	Designates the program of the transaction as it applies to general, special, and other account types and organizations	Instruction
Program	Associate line items with the individual unit of operating or state campus - location activities	MSA Program
Activity	Identify operations or management functions and activities that use those from activities within departments	Guest Speaker 1

For more information on the new Chart of Accounts and WyoCloud, you can:

- 1) Visit our website at <http://www.uwyo.edu/wyocloud/chart-of-accounts/>
- 2) Email our team at wyocloud@uwyo.edu
- 3) Follow us on social media @WyoCloud

WyoCloud

Town-Hall

Hosted By
President Laurie Nichols

When: Tuesday, April 25th 1-3pm

Where: Arts and Sciences Auditorium

Will be streamed through
WwoCast

Link on the WwoCloud Website

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

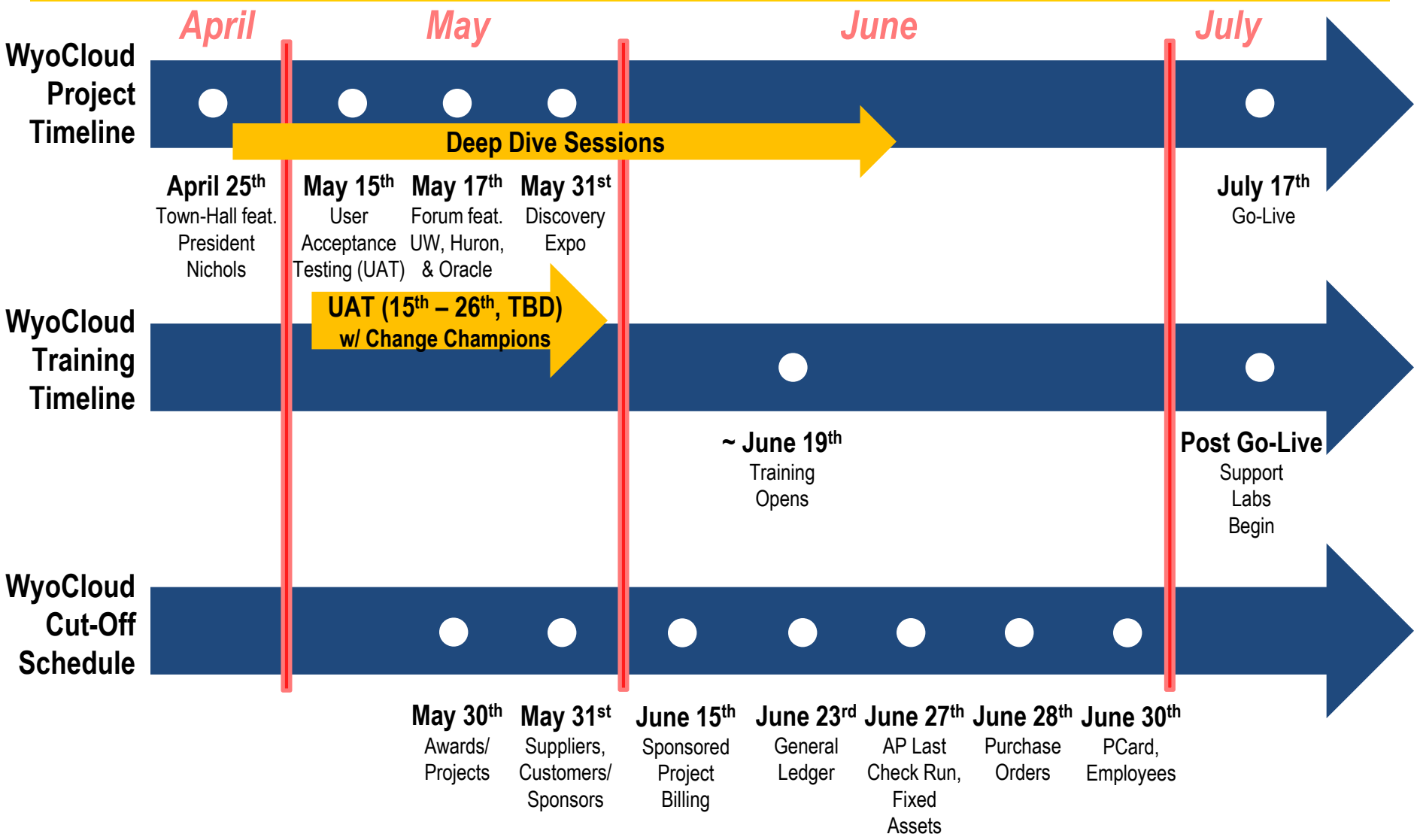
Questions? Email wwocloud@uwyo.edu

Find us: @WwoCloud

Timelines



Training and Project Timeline



Project Cut-Off Schedule

Item	Cut Off Date	Comments
Chart of Accounts	1/31/17	No new values after January 31 st , 2017. Anything after January 31 st , 2017 will be subject to an approval process
Awards/Projects	5/30/17	Leverage pre-award process by May cutoff date to setup projects and awards
Suppliers	5/31/17	Exception if new suppliers are required for the last check run
Customers/Sponsors	5/31/17	
Sponsored Project Billing	6/15/17	Final bills and draw downs for expenses thru May 31 st ,2017 should be processed by June 15 th , 2017
General Ledger	6/23/17	Corrections for May need to be completed by June 23 rd , 2017
Accounts Payable Last Check Run	6/27/17	
Fixed Assets	6/27/17	
Purchase Orders	6/28/17	Includes POs and change orders
Procurement Card	6/30/17	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.
Employees	6/30/17	Allows all employees to be paid by June 30, 2017



Tuesday, April 25th
A&S Auditorium (1:00 - 3:00pm)

- Words from President Nichols on the system and the benefits it will bring to the University
- Additional project updates



Wednesday, April 26th

Education Auditorium (1:00 – 2:00pm)

- Dr. Nicholas Prince from the College of Business (Marketing & Management) will discuss practical ways to facilitate WyoCloud changes in your areas and to address resistance you may encounter in your areas
- *Look out for a questionnaire before the event*



Wednesday, May 10th

Education Auditorium (2:30 - 4:30pm)

- Regular monthly Change Agent Network meeting
- Additional project updates and more important information about training and Go-Live preparation



Wednesday, May 17th

Location and Time TBD

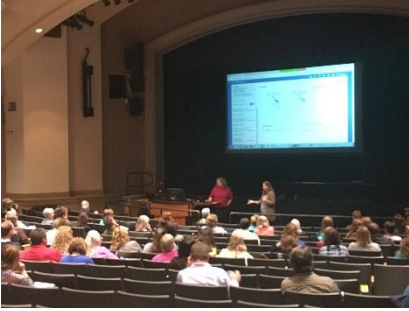
- Visit from Huron Consulting and Oracle leadership to discuss the WyoCloud project and how it is setting the stage for the future of business in higher education
- Open invite to campus
- Details TBD, more information to come



Wednesday, May 31st

Wyoming Union Central Ballroom

- *All-Day* User Experience
- *Kiosks* set around the room with functional area experts
- *Hands-on walkthroughs* on laptops and information about each functional area (Travel Expenses, Creating Requisitions, Grants Management, etc.)
- **PRIZES**



April – June

Locations Vary

Past Deep Dives

- Budgeting – David Jewell
- Grants Management – Jonnie Jenkins

Future Deep Dives

Dates, Times, Locations TBD

- Expenses and AP
- Procurement
- General Accounting
- July – Year End: What to Know
- Additional PPM Grants Management

Training Spotlight



Training Spotlight

*These training methods are confirmed at this point for the Financial Management System.
More details to come.*



Online, On-Demand Training



In-Person Support Labs



In-Person Training Sessions?



Opens Late June (~6/19)

Online, On-Demand

- *On-demand, self-paced*
- Ability to *repeat courses* at your desire
- Each course should take approximately *1 hour or less*
- Courses *assigned based on your role* at the University
- *Quick Reference Guides* available after completion for some courses



Opens Late June (~6/19)

Online, On-Demand

- **All University Users Will Complete:**
 1. *Online Basic Navigation Training*
 2. *Creating an Expense Report*
- **Based on Your Role, You May Complete Courses Such As:**
 1. *Processing Journal Entries*
 2. *Requesting Cash Advances*
 3. *Creating a Requisition*

NOTE: Some users may only complete the first 2 trainings mentioned that are required of all users. Others (users in Old Main, for instance) may need to complete as many as 10 or more courses.



Open Post-Go-Live

In-Person, Locations Vary

- Labs administered by *functional area experts*
- *Drop in* during a range of times, bring questions about the training while working in the actual system
- *Will continue well after Go-Live*



- Training opportunities will be available frequently and well after Go-Live
- We would love to hear your feedback
- More training announcements to come!

Questions and Answers

Change Agents Open Discussion

Change Agent Network

- What requests do you have for the upcoming meetings?

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?



WyoCloud Resources

Go to <http://www.uwyo.edu/wyocloud/> for WyoCloud project updates and follow our social media channels.

-  @WyoCloud
-  @WyoCloud
-  WyoCloud

WyoCloud Town-Hall feat. President Nichols

Tuesday, April 25th, 2017 1:00 – 3:00 pm
Arts & Sciences Auditorium

Managing Organizational Change and Resistance feat. Dr. Nicholas Prince

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

Next Change Agent Network Meeting

Wednesday, May 10th, 2017 2:30 – 4:30 pm
Education Auditorium (Education Building Room 55)

WyoCloud Forum feat. UW, Huron, & Oracle Leadership

Wednesday, May 17th, 2017 Time TBD
Location TBD

WyoCloud Financial Management System Discovery Expo

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

Additional Deep Dive Sessions

April – June

Dates, Times, Locations TBD

- *Expenses and AP*
- *Procurement*
- *General Accounting*
- *July – Year End: What to Know*
- *Additional PPM Grants Management*