



Change Agent Network

February 8th, 2017

Empower Change Agents

- How to become more involved – be a Change Champion!
- Engaging the community with Department Roadshows
- Learning opportunities for Change Agents and Champions

Student Reporting

- What to know for go-live on March 6th

Meet the Experts

- WyoCloud Finance System, Chart of Accounts, and Budgeting changes presented by the WyoCloud Leads

Change Agent Open Discussion

- Feedback on Change Agent meetings, WyoCloud Project and any questions/concerns



**Email wyocloud@uwyo.edu
to volunteer to be a Change
Champion!**

Deadline: Wednesday, February 15th

Change Champions will have a **more involved and direct role with the WyoCloud team** to encourage and drive change on campus. This group will champion outreach and be the voice of this project.



Engage in Department Roadshow Campaign

Participate in focus groups to address resistance

Be the first to test the new system and training

Be a positive (and creative) advocate for WyoCloud

Thank you Aira Saukatis!



Department Roadshow Campaign will begin in March



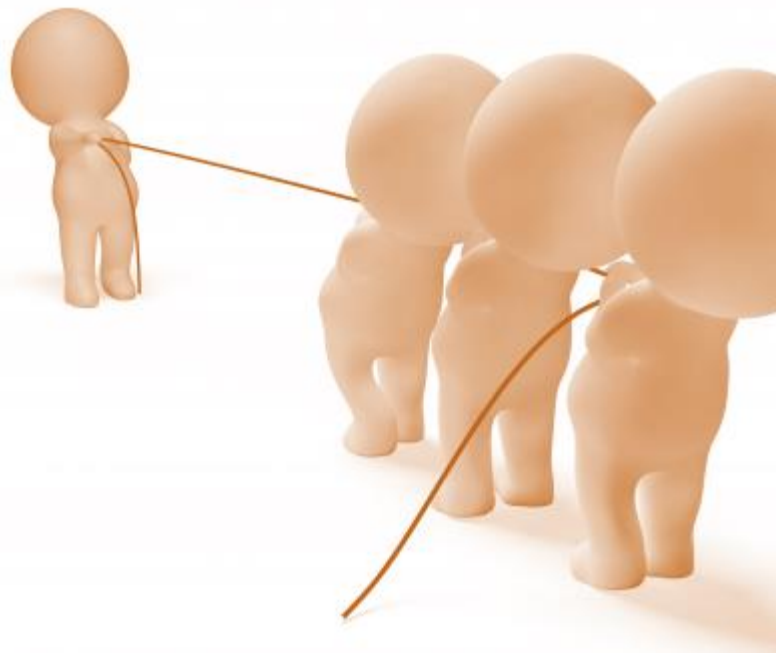
Members of the project team and Change Champions will present information about WyoCloud across campus to create awareness and address resistance

We want you to feel prepared and confident to share information on the WyoCloud changes and address resistance. More information to come on opportunities for you to learn from UW faculty about how to deal with change.

Resistance Management

Psychology of Organizational Change

Presentation Skills





Change Agent Checklist

Volunteer to be a Change Champion

- Email wyocloud@uwyo.edu if you would like to volunteer to be a Change Champion or nominate a colleague

Identify Resistance and Excitement

- Identify resistant individuals for the project team to meet with to address concerns and resistance
- Identify individuals excited about the WyoCloud project to get more involved with the project team

Brainstorm Existing Meetings for the Department Roadshow Campaign

- Brainstorm existing meetings in your departments, schools, and units for the WyoCloud team to get on the agenda for the Department Roadshow Campaign in March

Recruit More Change Agents

- If you have any colleagues who are interested in WyoCloud, bring them to the monthly meeting and email wyocloud@uwyo.edu to have them added to the invite

Student Reporting Go-Live



**Complete
User
Acceptance
Testing**
February 15th



**Online
Training
Opens**
March 6th

**Student
Reporting
Go-Live**
March 6th

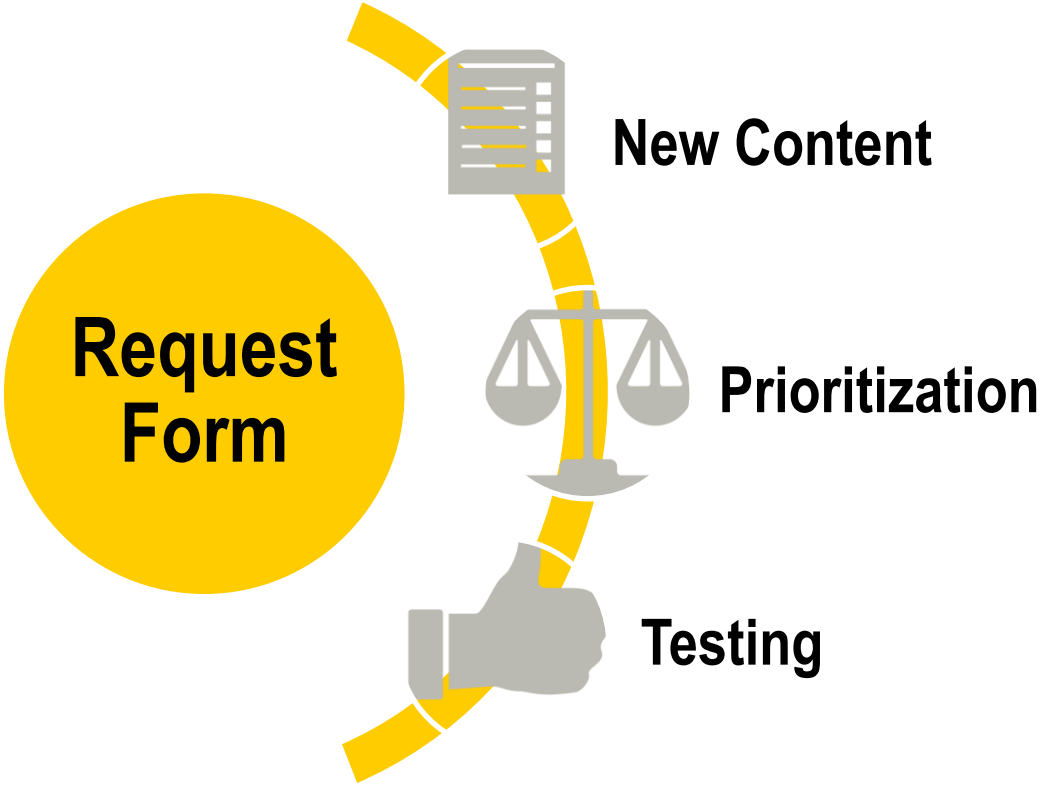
Required for System Access

- Training is required to gain access to the Student Reporting WyoCloud system
- 30 minute self-paced online training to learn basic navigation
- Training through WyoCourses will be released on March 6th with a communication sent the week prior to all users with Banner access
- Email will be sent with your system access details after online training is complete

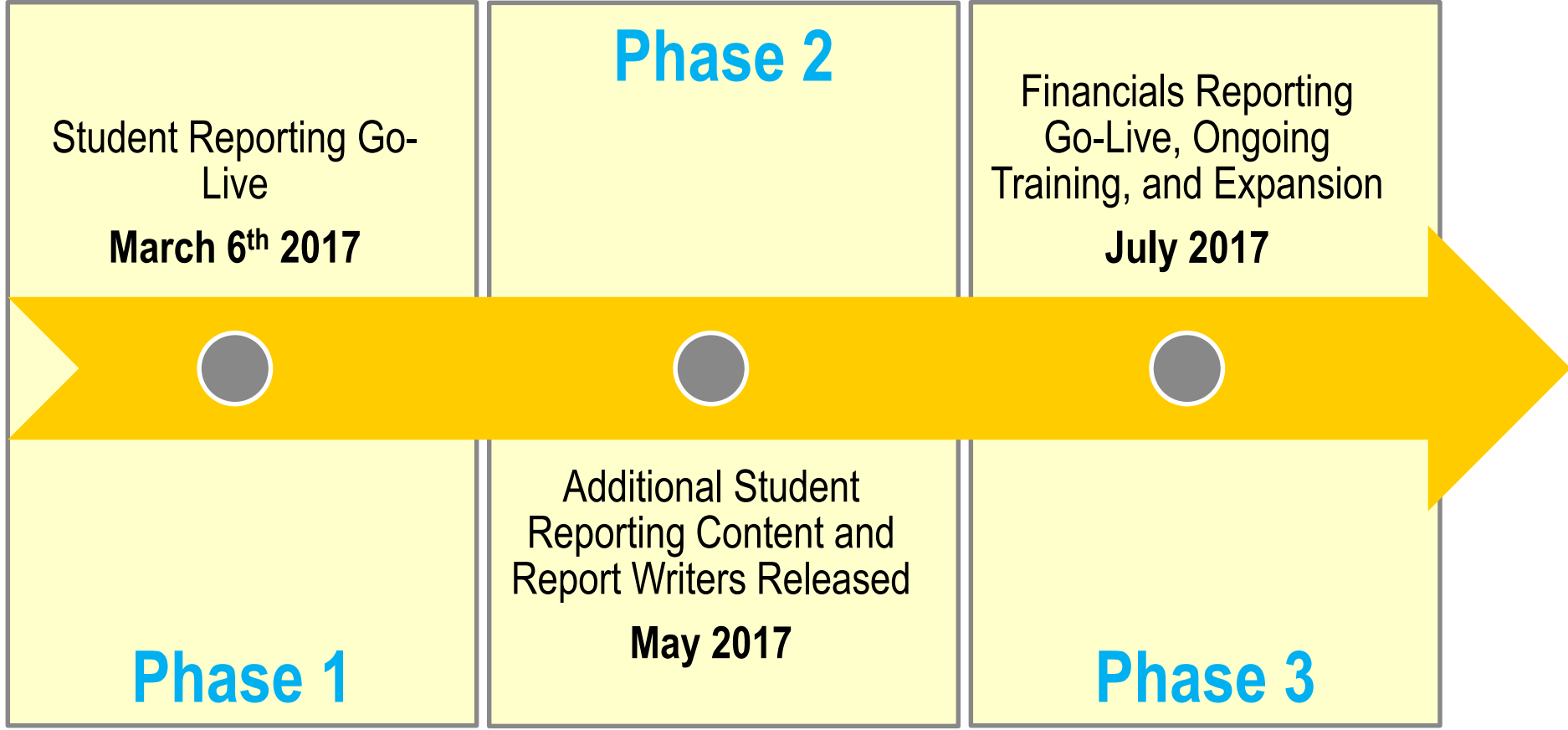


What's Next for the WyoCloud Reporting team?

After the Student Reporting go-live in March, the reporting team will need UW's collaboration to implement a phased rollout of additional reporting content.



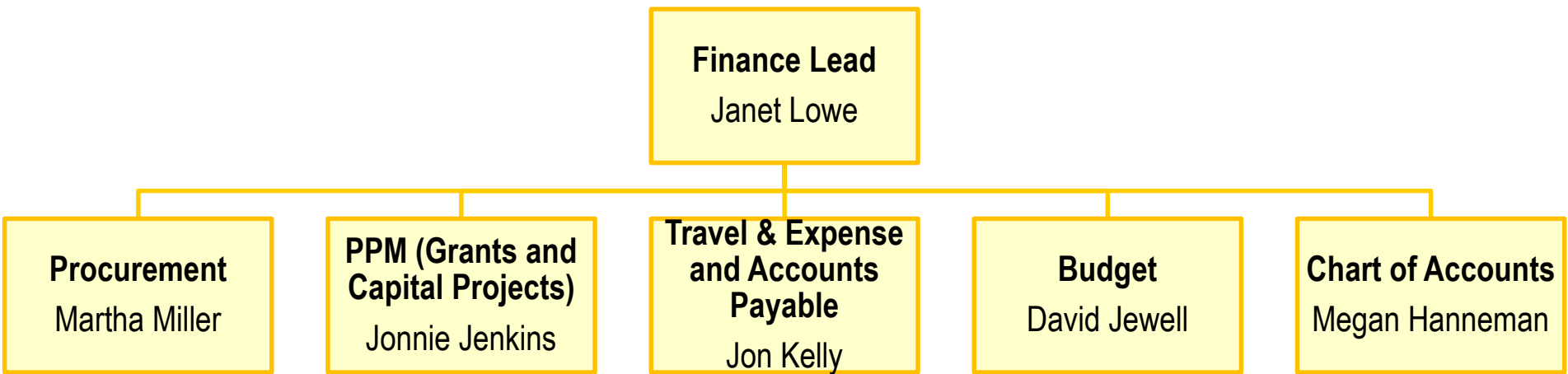
Reporting Phased Rollout



Meet the Experts



Meet the Experts



Potential Faculty Delegation Option for Expense Reports

- Through conversations with business managers participating in CR2 testing, the WyoCloud team is now exploring the option for faculty to delegate the process of filling out an expense report to department accountants

Procurement Card Processing through the Expense Module

- The project team is considering using the Expense module for Pcard processing, which would flow through the module just like other expenses
- Cardholder would deal with reconciliation in that case

Procurement, Expense, and Accounts Payable Approval Workflow for Requisitions

- The project team is currently discussing and working through how to alter the delivered workflow to include the ability for department accountants to change/correct requisitions
 - Based on business manager feedback in CR2

Approval Workflow based on Dollar Amount

- Approvals would be configured to route to certain additional approvers based on dollar amounts:
 - Up to 100k → Business Managers
 - 100 – 250k → Deans and AVP
 - 250k – 1 million → VP
 - Greater than 1 million → President



Travel & Expense- Expense Report Demo

Expense Report: EXP0009020978

Save Submit Cancel

* Purpose CR2_TEST

Report Total
550.00 USD

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

Missing Images Reason

Attachments None +

Status Saved

Expense Items

Actions + Add Existing Apply Project Apply Account

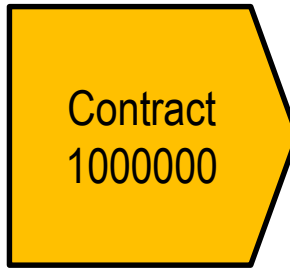
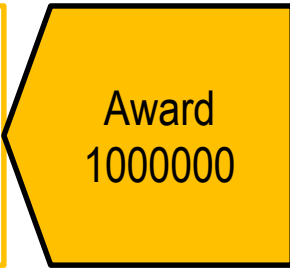
Dinner-with-participants - WY, United States test_dinner with participants	1/26/17 Dinner-with-participants.PNG +X Imaged receipt required	150.00 USD	X
Commercial Airline - WY, United States test_commercial airline	1/26/17 Commercial Airline.PNG +X Imaged receipt required	250.00 USD	X
Dinner - WY, United States test_dinner	1/26/17 Dinner.PNG +X Imaged receipt required	150.00 USD	X

Strategic Sourcing

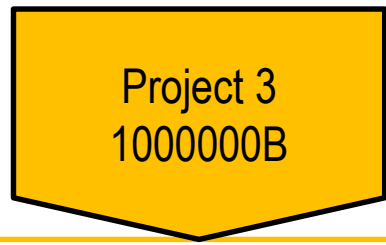
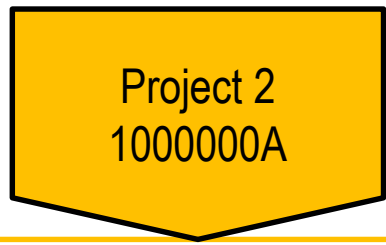
- Purchasing portal through WyoCloud to purchase computers and laptops, scientific supplies, and office supplies by submitting a requisition.
- UW currently has an RFP for office supplies out for solicitation
- All items sold through the purchasing portal will be the preferred vendor for the University
 - Less time spent searching for products online and comparing prices
 - Aligns with the University goal to better manage and use resources—vendor products will be at the best negotiated price
 - Faster requisition (PO) processing since contracts will already be negotiated and agreed upon

Project Portfolio Management (Grants and Capital Projects)

- An award is, in the future state, going to be representative of a grant
- Awards will have a **primary org (dept), sponsor, and funding**



- A contract is created once an award is created
- Grants contracts drive **billing and revenue recognition**



- Projects are going to be the where expenditures are recorded and tracked against based on **POET information**
 - Project, Organization, Expenditure Type, Task
- **Multiple projects can roll up to a single award**
- Cost share is going to be captured in a **separate, internally funded, cost share project**
- Projects will have unique **funding allocations, budgets, and project-owning orgs (which may be different that the primary grant-owning org)**
- Projects are also where reporting information such as **funding source**, and information about **federal direct vs. passthrough**, resides

Simplified Grant Setup Business Process

	Description
1 Create award	<ul style="list-style-type: none">Award 1000000 is created, triggering contract 1000000 creation
2 Create associate project(s)	<ul style="list-style-type: none">Project 1000000 created for externally funded research, 1000000CS created for the cost share component
3 Add award funding	<ul style="list-style-type: none">\$2M is added to the award – \$1.5M coming from the sponsor, \$500K coming from UW
4 Allocate any project funding	<ul style="list-style-type: none">\$1.5M is allocated to project 1000000, and \$500K is allocated to 1000000CS
5 Specify and baseline project budgets	<ul style="list-style-type: none">Each project is budgeted according to federal budgeting categories such as salaries, travel, equipment
6 Update and finalize contract	<ul style="list-style-type: none">Auto-created contract is reviewed for billing and revenue recognition accuracy



Award Homepage Sample View

Overview CR2 JJ Award Scenario QA - CR2 JJ Award Scenario QA (120,000.00)

Actions Edit

Currency = US Dollar

Financial Performance

Period Type Inception-to-Date 1/24/17 Budget Period 2017 1/24/17 - 1/23/18

As Of 2/1/17 10:33 AM

Funding Amount 120,000.00

Award Projects

CR2 JJ Award A - Prj 1... (50,000.00) CR2 JJ Award A - Prj 1CS Budget Amount 0.00 Consumed Amount 0.00 Available Amount 0.00 Unbudgeted Amount 50,000.00	CR2 JJ Award Scenario ... (70,000.00) CR2 JJ Award Scenario QA Budget Amount 40,000.00 Consumed Amount 5,184.00 Available Amount 34,816.00 ! Unbudgeted Amount 30,000.00
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Financial Details

View Control Budget Lines

Task or Resource	Budget Amount	Consumed Amount	Available Amount
▶ CR2 JJ Award Scenario QA	40,000.00	5,184.00	34,816.00
◀ Domestic Travel	5,000.00	3,000.00	2,000.00
Funds Consumption Details (Consumed Amount 3,000.00)			
Purchase Requisitions	Supplier Invoices	Expenditure Items	3,000.00
Purchase Orders	External Commitments		
▶ F&A	10,000.00	600.00	9,400.00
◀ Publication Costs	20,000.00	1,584.00	18,416.00
Funds Consumption Details (Consumed Amount 1,584.00)			
Purchase Requisitions	Supplier Invoices	1,584.00	Expenditure Items
Purchase Orders	External Commitments		



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CR2 JJ Award A - Prj 1... (50,000.00)	0.00	0.00	0.00	50,000.00
CR2 JJ Award A - Prj 1CS				
CR2 JJ Award Scenario ... (70,000.00)	40,000.00	5,184.00	34,816.00	30,000.00
CR2 JJ Award Scenario QA				

Associated projects are displayed with high-level financial information

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CR2 JJ Award A - Prj 1CS	CR2 JJ Award Scenario QA
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Consumed Amount 0.00	Consumed Amount 5,184.00
Available Amount 0.00	Available Amount 34,816.00 !
Unbudgeted Amount 50,000.00	Unbudgeted Amount 30,000.00

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

Financial Details

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Financial Details

Additional detail is also captured at the budget category level

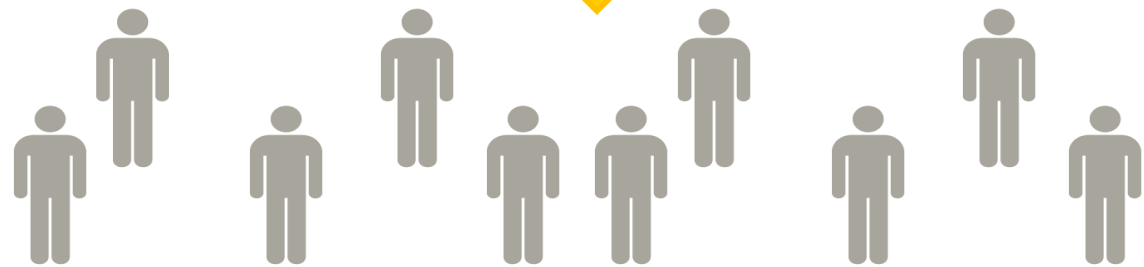
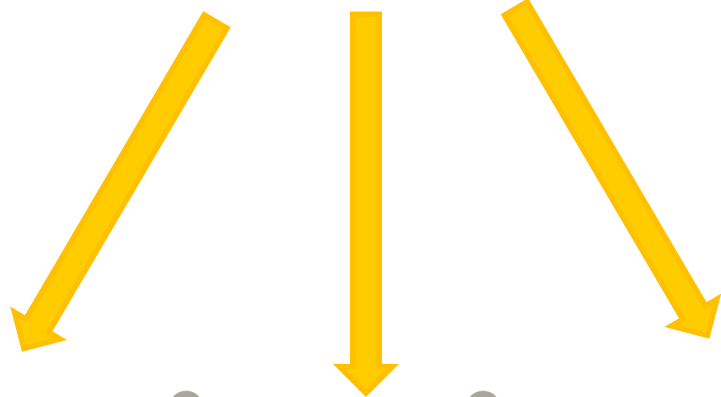
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Budget Update

David Jewell



Responsibility shifting from Old Main and Accounting to fiscal managers utilizing the new system's financial reporting to make better and more informed decisions





UW's New Structure for Budgeting, Planning & Reporting

College/Unit/Organization Name	1	2	3	4			
	FY2018	FY2018	FY2018	FY2018	FY2018	FY2019	FY2020
	BUDGET	BUDGET	BUDGET	BUDGET	BUDGET	FORECAST	FORECAST
	UNRESTRICTED OPERATING	DESIGNATED OPERATING	RESTRICTED EXPENDABLE (Grants & Contracts)	RESTRICTED EXPENDABLE (Gifts)	ALL FUNDS	ALL FUNDS	ALL FUNDS
1 Revenues							
2 Total Tuition	-	-	-	-	-	-	-
3 Total Student Financial Aid	-	-	-	-	-	-	-
4 Total Educational Fees	-	-	-	-	-	-	-
5 Total Tuition & Educational Fees, Net	-	-	-	-	-	-	-
6 Total Room & Board and Other Auxiliary Services, Net	-	-	-	-	-	-	-
7 Total Other Sales of Goods & Services	-	-	-	-	-	-	-
8 Total Sales of Goods & Services	-	-	-	-	-	-	-
9 Grants & Contracts	-	-	-	-	-	-	-
10 Total Grants & Contracts	-	-	-	-	-	-	-
11 Total Other Operating Revenue	-	-	-	-	-	-	-
12 Total Operating Revenues	-	-	-	-	-	-	-
13 Total Non-Operating Revenues	-	-	-	-	-	-	-
14 Total Appropriations	-	-	-	-	-	-	-
15 Total Gifts	-	-	-	-	-	-	-
16 Total Sales & Services of Educational Activities	-	-	-	-	-	-	-
17 Total Investment Income	-	-	-	-	-	-	-
18 Total Other Non-Operating Revenues	-	-	-	-	-	-	-
19 Total Non-Operating Revenues	-	-	-	-	-	-	-
20 Total Revenues	-	-	-	-	-	-	-
21 Expenses							
22 Total Salary/Wages Benefited	-	-	-	-	-	-	-
23 Total Salary/Wages Non Benefited	-	-	-	-	-	-	-
24 Total Graduate Assistant Pay	-	-	-	-	-	-	-
25 Total Supplemental Pay	-	-	-	-	-	-	-
26 Total Benefits Expense	-	-	-	-	-	-	-
27 Total Salaries, Wages & Benefits	-	-	-	-	-	-	-
28 Total Services and Fees	-	-	-	-	-	-	-
29 Total Travel and Entertainment	-	-	-	-	-	-	-
30 Total Supplies	-	-	-	-	-	-	-
31 Total Utilities	-	-	-	-	-	-	-
32 Total Repairs and Maintenance	-	-	-	-	-	-	-
33 Total Rentals and Leases	-	-	-	-	-	-	-
34 Total Interest Expense	-	-	-	-	-	-	-
35 Total Claims and Judgements	-	-	-	-	-	-	-
36 Total Other Expense	-	-	-	-	-	-	-
37 Total Operating Expenses	-	-	-	-	-	-	-
38 Total Capital Equipment & Vehicles	-	-	-	-	-	-	-
39 Total Depreciation and Amortization	-	-	-	-	-	-	-
40 Total Other Non-operating Expense	-	-	-	-	-	-	-
41 Total Non-Operating Expenses	-	-	-	-	-	-	-
42 Total Expenses	-	-	-	-	-	-	-
43 Net Results	-	-	-	-	-	-	-

1 Unrestricted Operating

- Will be comprised of the bulk of current Section I & II funds

2 Designated Operating

- Line-item appropriations
- Fees that are collected for a very specific purpose

3 Restricted Expendable (Grants & Contracts)

- Externally sponsored federal, state, local, & private grants & contracts

4 Restricted Expendable (Gifts)

- Foundation/gift funds that have restrictions on their use

Budget Frequently Asked Questions

Will there be a distinction between section I and section II funds?

How will we report to the state if there is no delineation between section I and section II money?

Will there still be a biennium?

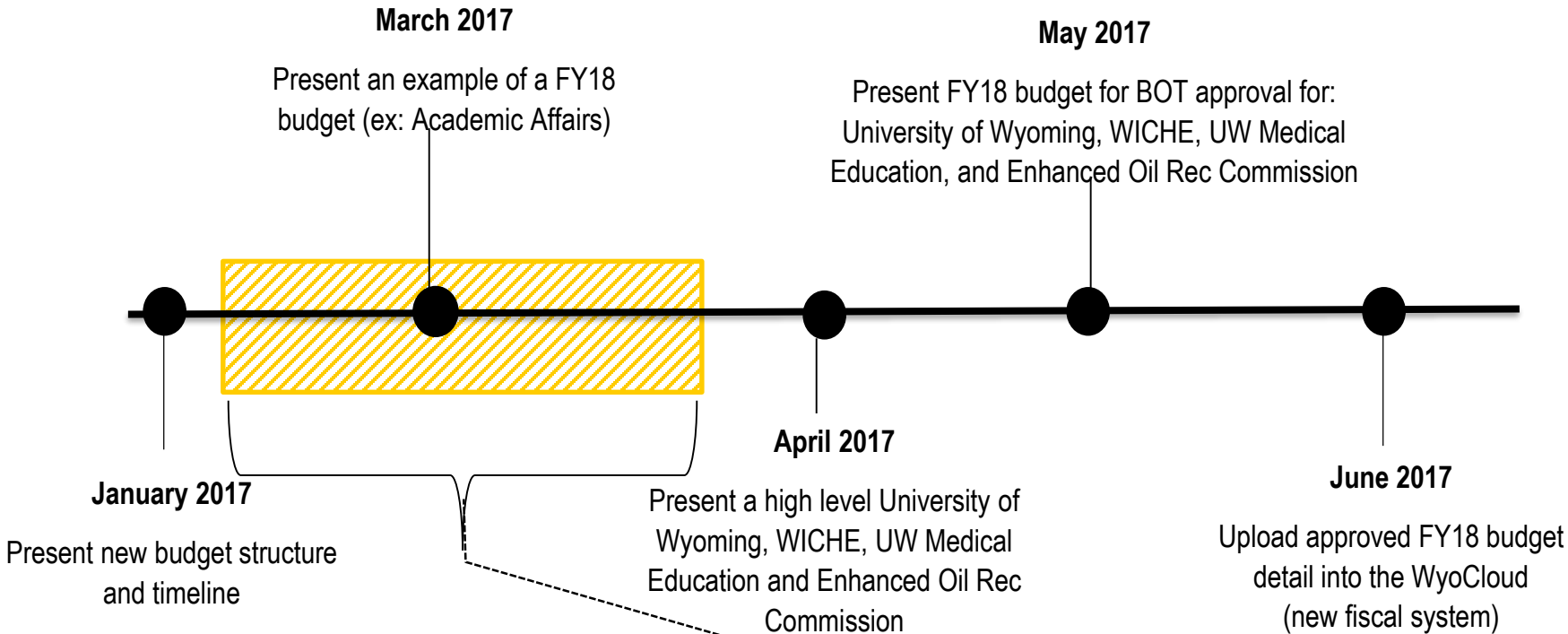
Will we revert funds back to the state?

How will funds roll forward?

How will we know what the policies and restrictions are going forward (i.e., budget transfers, B1000s, B2000s, etc.)?



Proposed FY18 Budget Process & Timeline

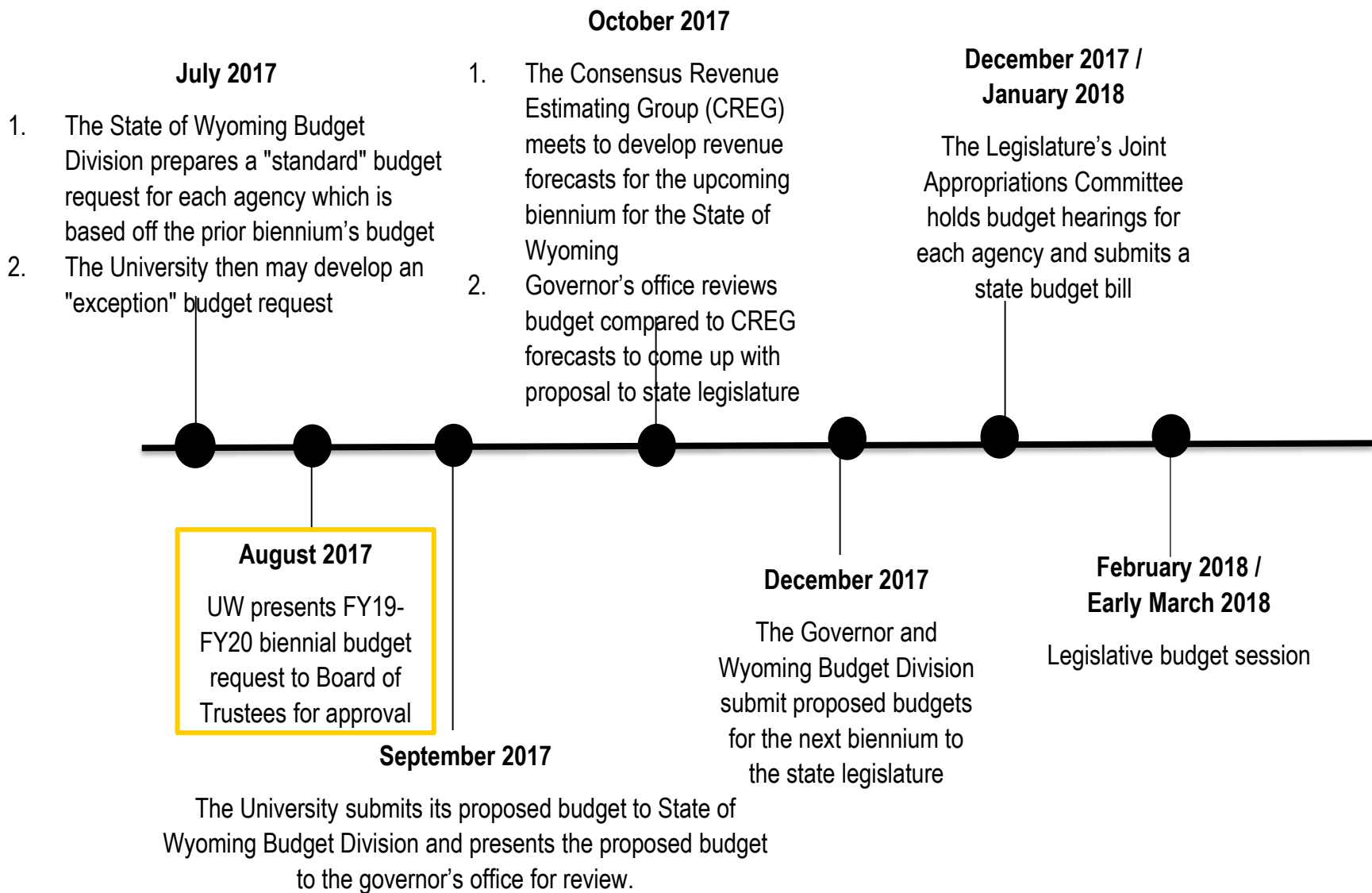


FY18 Budget Process:

- 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.



State of Wyoming: FY19-FY20 Biennium Budget Process



Three-Phase Response

We envision a multi-year, multi-phase approach to solving the problem.

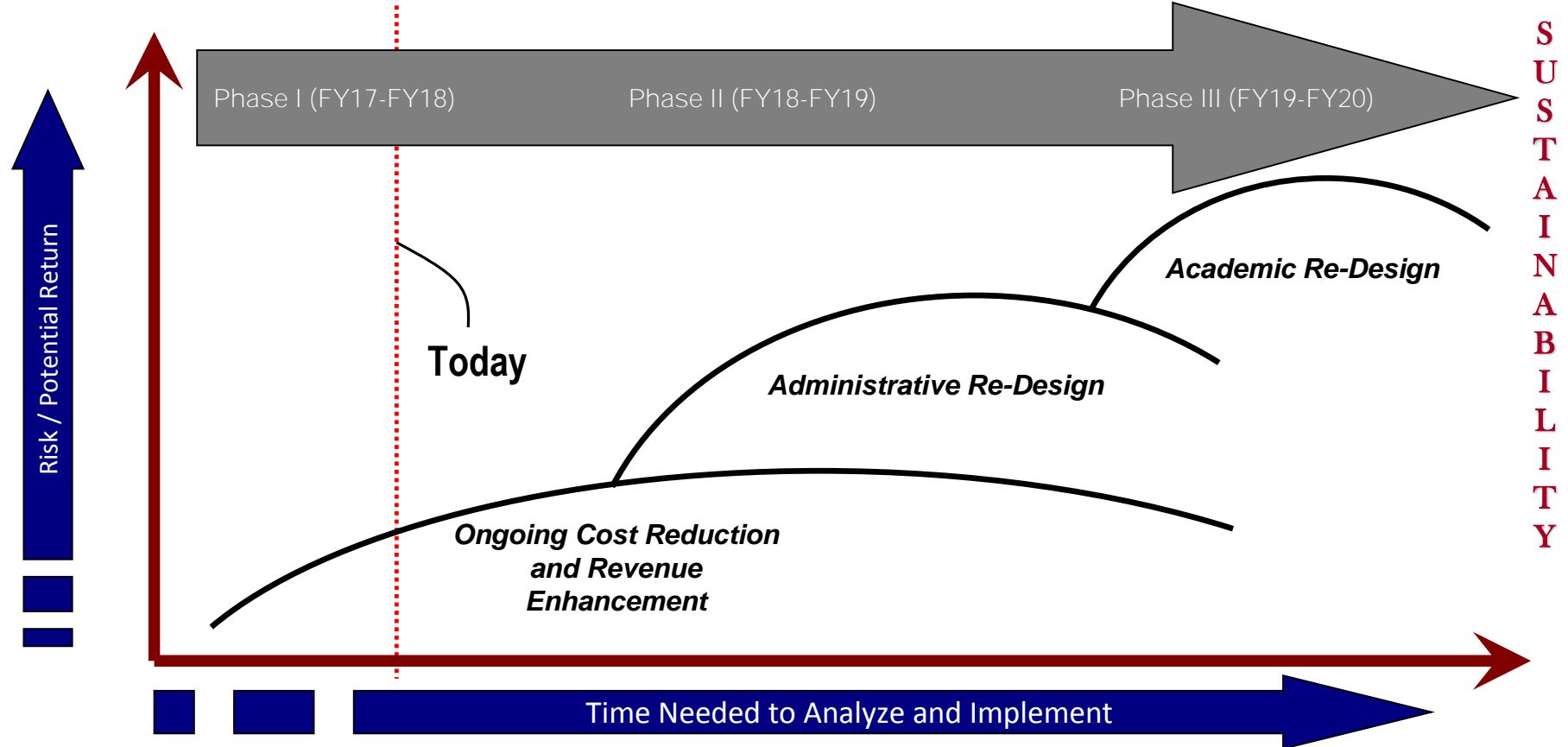


Chart of Accounts Update

Megan Hanneman

Finalized expense and revenue values will be sent out soon!

- View funds through the revenue and expense budget by entering funds in the revenue and expense chart fields
- Expense accounts will have less detail
 - Drill through the General Ledger to see details in the subledger.

Account

Hide Segments

Entity

Account

Fund Class

Fund Source

Organization

Exp Class

Program

Activity

Search Reset | OK Cancel

Change Agent 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

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Next Change Agent Network Meeting

Wednesday, March 8th, 2017 2:30 – 4:00 pm
Education Auditorium (Education Building Room 55)