WyoCloud University Launch

November 1st, 2016

UNIVERSITY of WYOMING

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.
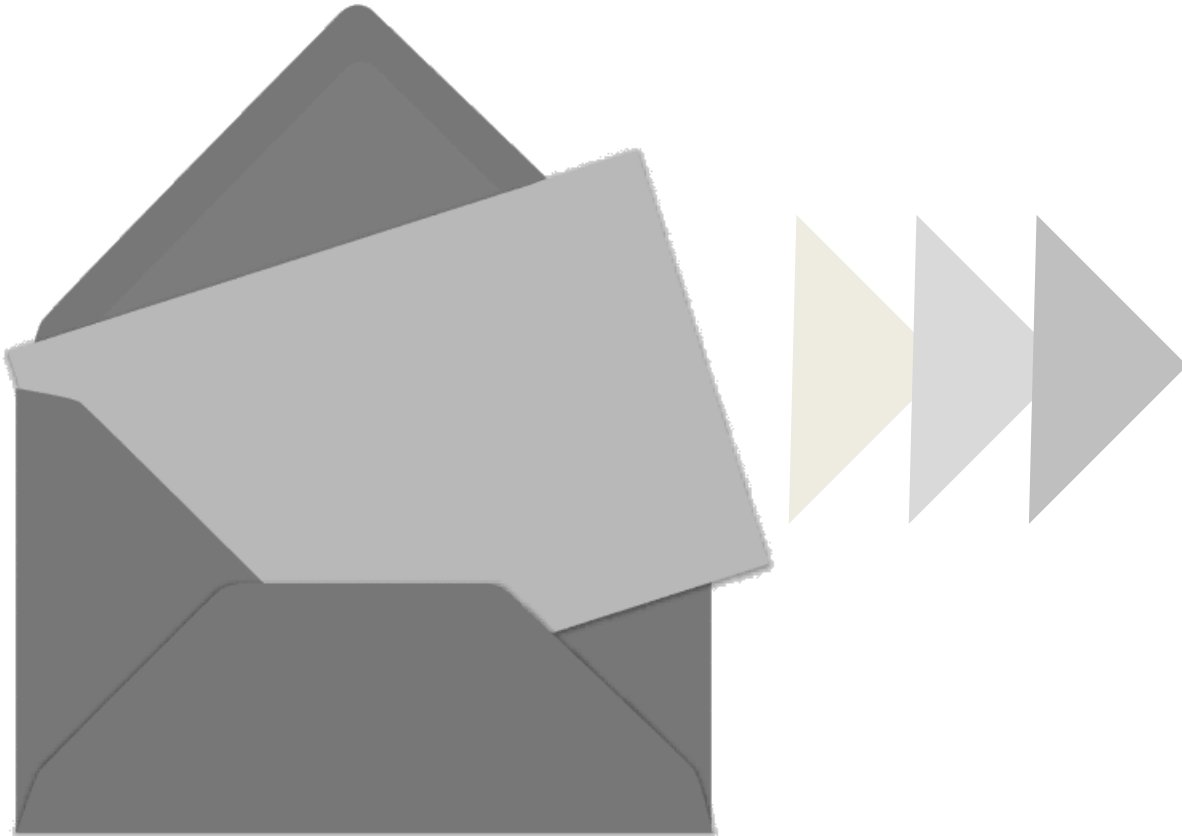
wyo-cloud@ uwyo.edu

Executive Steering Committee

Bill Mai

Robert Aylward

Bill Gern

Sara Axelson

Kate Miller

Why are we doing this?

98% increase

Budget

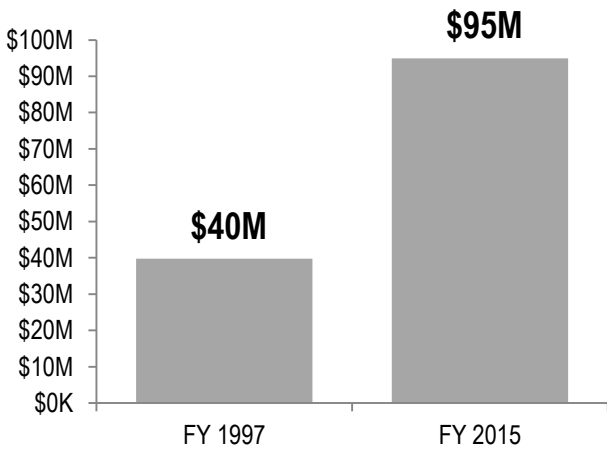|	FY 1997	FY 2016
	$136M	$270M

138% increase
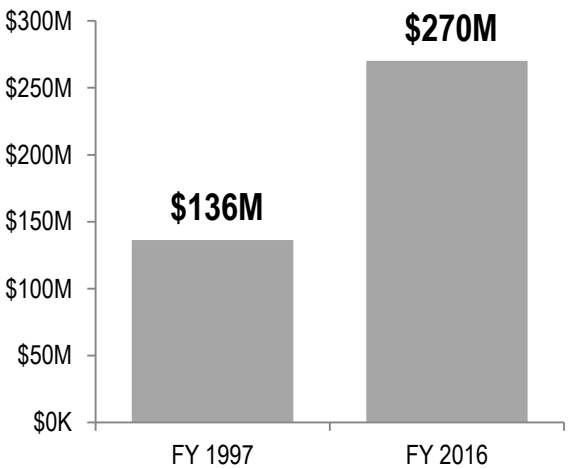
External Research Funding

	FY 1997	FY 2015
	$40M	$95M

14% increase

Total Enrollment

	FY 1997	FY 2016
	11,987	13,717

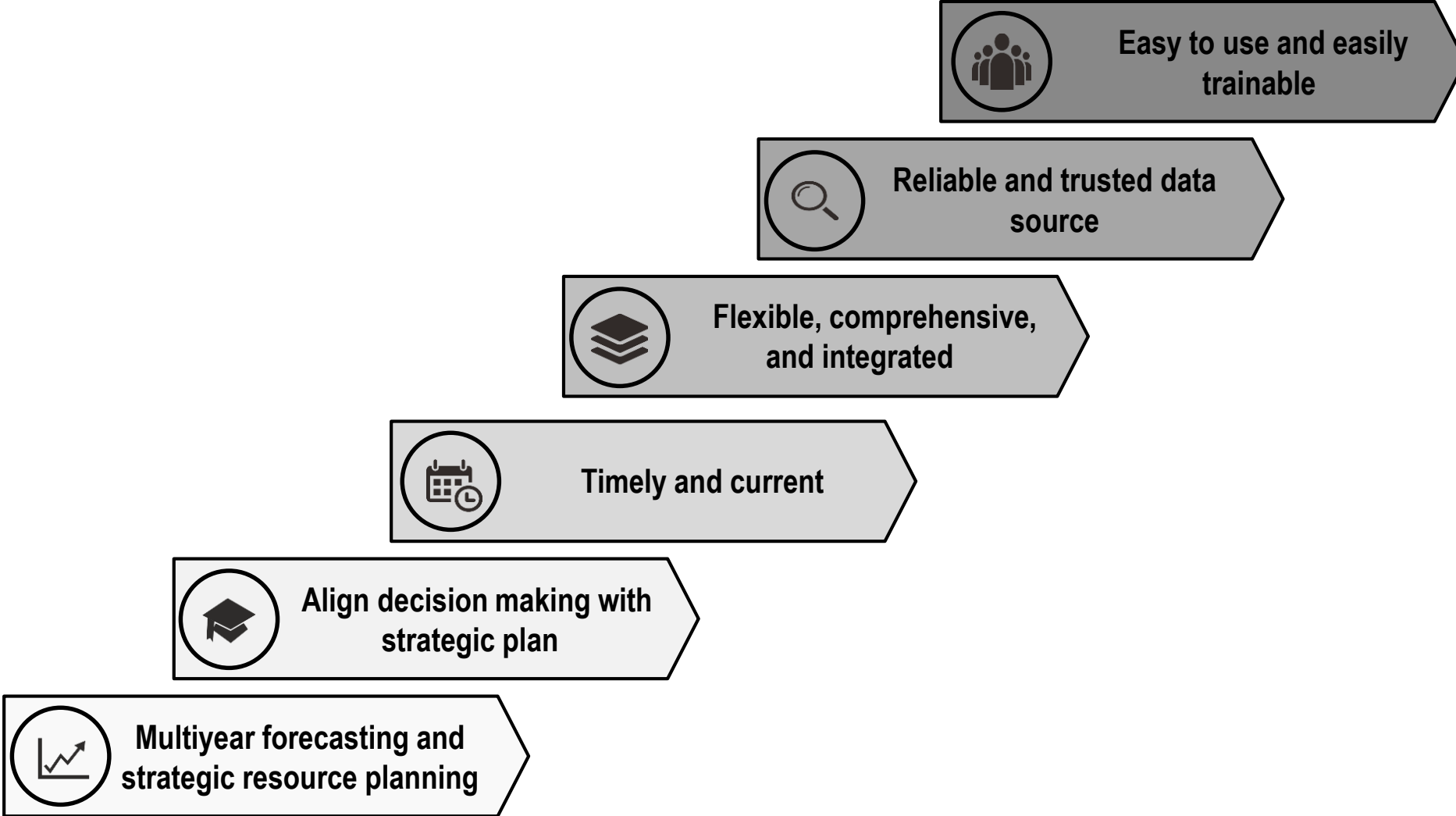# WyoCloud Program Overview
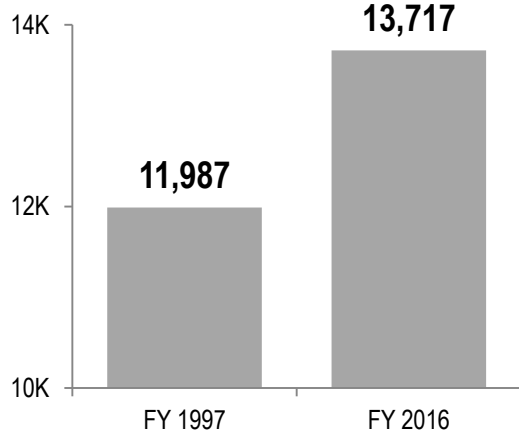
WyoCloud is a university-wide initiative to provide modern and sophisticated solutions for today's demands and challenges on our University. Over the next 3 years, the WyoCloud team will be implementing the following Oracle Fusion Cloud systems.

- 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

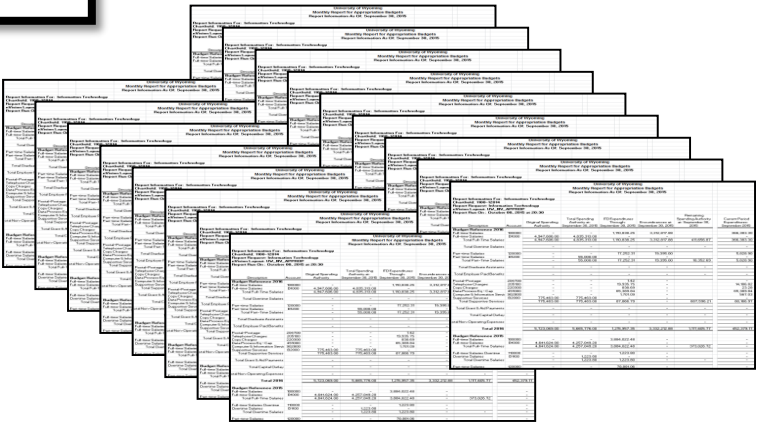The current implementation timeline outlines tasks over a 36 month period, resulting in a go-live for Financials in July 2017 and HCM in January 2019.
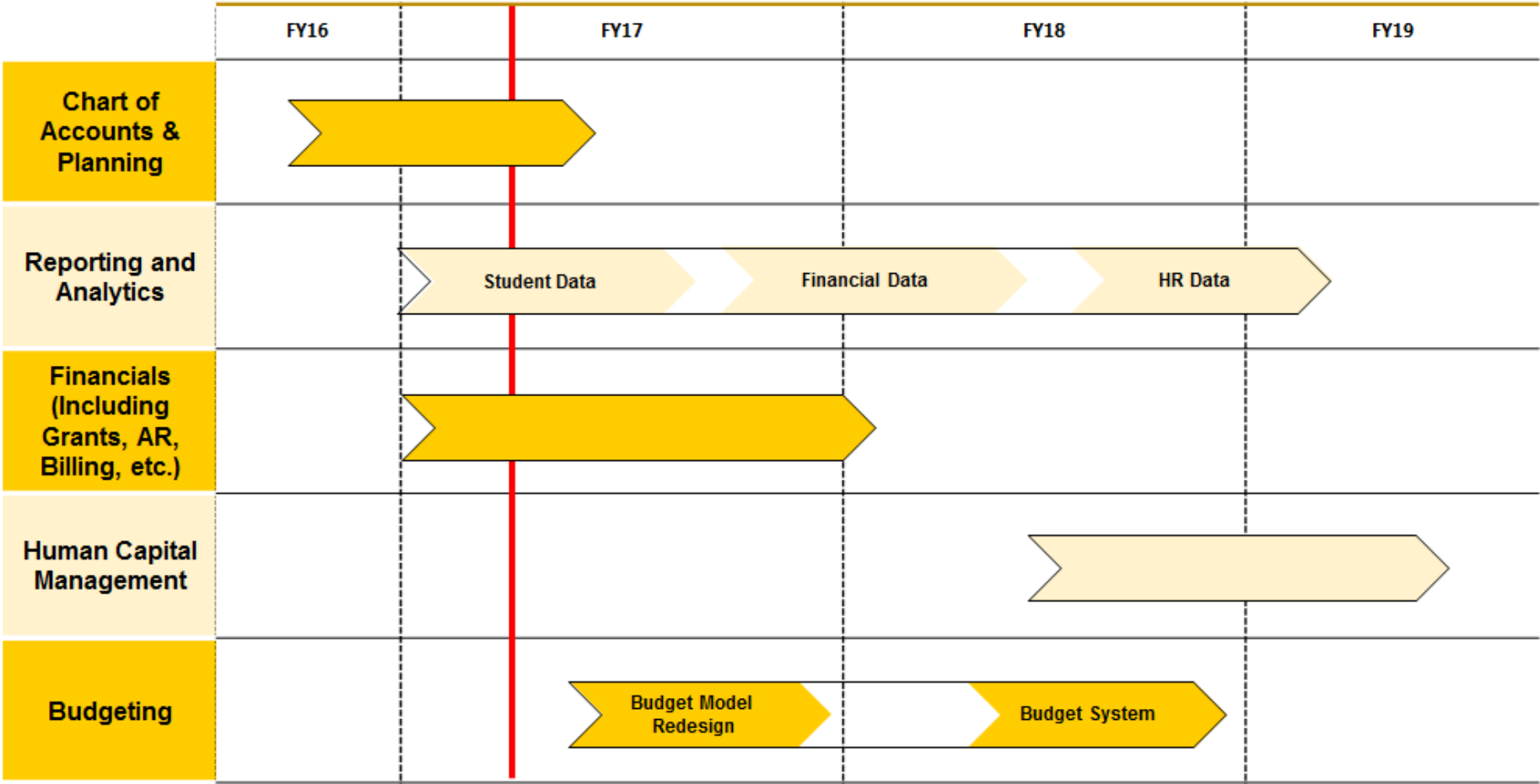
Upgrading the current back office systems provides the University of Wyoming with the ability to move to more contemporary solutions.
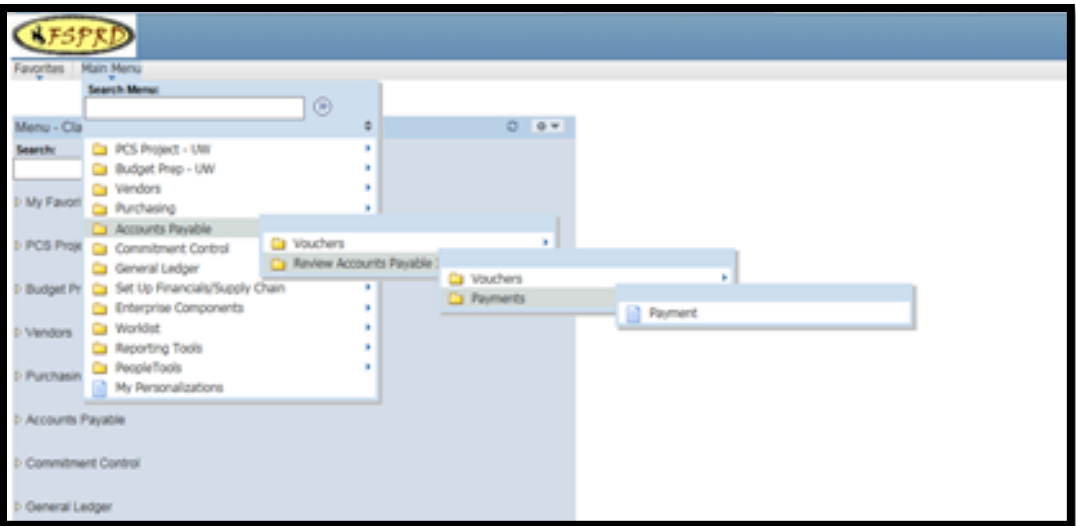
What UW's Systems Will Be

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

WyoCloud System Approach
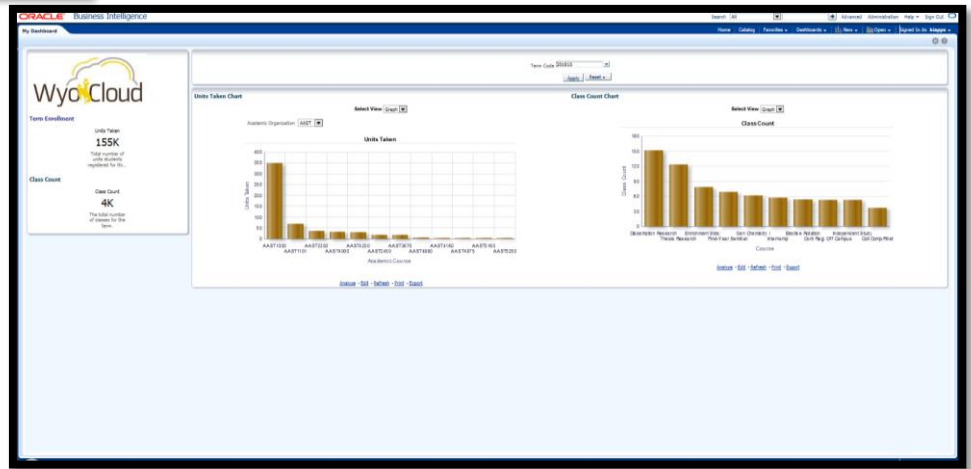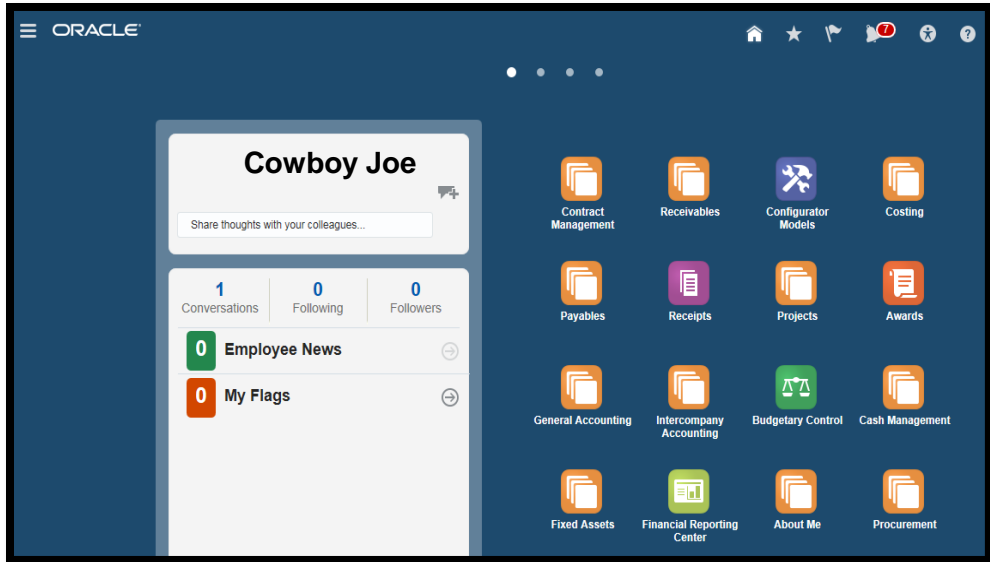
Requirements Driven

- Assumed Customization
- Scope Creep

Solution Driven

- Drives Improvement
- Quicker delivery to the user

Financial System

WyoCloud Financial System Progress

Oracle Fusion Cloud Implementation Timeline			Q3 2016		Q4 2016			Q1 2017			Q2 2017			Q3 2017	
Project Task	Start	Finish	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug
System Configuration Setup 1 (CS1)	9/26/2016	10/14/2016		⇨											
Conference Room Testing 1 (CR1)	10/24/2016	11/18/2016			⇨										
System Configuration Setup 2 (CS2)	11/27/2016	1/6/2017				⇨									
Conference Room Testing 2 (CR2)	1/16/2017	2/25/2017						⇨							
System and Integration Testing (SIT)	3/25/2017	4/22/2017								⇨					
User Acceptance Testing (UAT)	5/6/2017	5/27/2017										⇨			
End User Training	5/6/2017	5/27/2017										⇨			
Milestone- Go-Live	7/5/2017	7/5/2017												★	

The initial configuration of the financials system is complete and the first round of Conference Room Testing has begun with the core project team.

WyoCloud Campus Introduction and Training

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 (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

New Chart of Accounts Structure: General Ledger

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.

	Account	Entity	Fund Source	Organization	Expense Classification	Program	Activity
Definition	Categorizes the nature of the transaction as a specific type of revenue, expense, asset, liability, or fund balance	Identifies the major operational unit within the Business Unit	Tracks spending restrictions and designations and to categorize net position for external reporting	Represents the academic, administrative, or auxiliary unit responsible for, or affected by, a given transaction	Designates the purpose of the transaction as it applies to both internal and federal / other external reporting requirements	Associates transactions with a formalized set of on-going or cross-campus / location activities	Activity provides a tracking mechanism for purposes and activities that may range from institution-wide to department-specific
Use	What?	Who?	How?	Who?	Why?	Why?	Why?
Field Length	4	2	6	5	3	4	4
Type	Numeric	Numeric	Numeric	Numeric	Numeric	Numeric	Numeric
Required/ Conditional	Always Required	Always Required	Always Required	Always Required	Required (Expenses)	Conditional	Conditional
Example	Travel – Domestic-Air	University of Wyoming	Unrestricted-Operating	Chemistry	Instruction	MBA Program	Commencement

Current CoA vs Future CoA Mapping

The following chart includes examples of Math accounts mapped into the new CoA Structure.

| Current Chart of Accounts | | | Future Chart of Accounts | | | | | | |
Description	Fund	Org	Account	Entity	Fund	Organization	Expense Classification	Program	Activity
Mathematics (Block Grant)	1100	12137		University of Wyoming	Unrestricted-Operating	Mathematics	Instruction		
Math Summer School	1100	12100		University of Wyoming	Unrestricted-Operating	Mathematics	Instruction		Summer Session
Outreach Rev Share - Math	1700	20811		University of Wyoming	Unrestricted-Operating	Mathematics	Instruction		
IC-Mathematics	1501	12811		University of Wyoming	Unrestricted-Operating F&A Recovery	Mathematics	Instruction		
Les Shader Awards Mathematics	4400	17264		University of Wyoming	Restricted Expendable–True Endowment-Scholarship Les Shader Scholarship	Mathematics	Scholarship		
Catherine Gibbs Shaw Math	1600	17138		University of Wyoming	Restricted Expendable-Quasi Endowment-Ops Catherine Gibbs EnInc–Dept. Ops	Mathematics	Instruction		
Robert Spencer/Romy Angle Fisk	4400	21209		University of Wyoming	Restricted Expendable True Endowment-Dept Ops Spencer/Angle/Fisk Fund	Mathematics	Instruction		

Reporting

Reporting Vision

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

Student Reporting Content

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	Student Record	Student Financials
• Admission Application • Admissions Funnel • Application Evaluation • Application Status • External Academic Summary • External Test Scores • Student Recruiting • Student Response • Transfer Credit Snapshot	• Academic Class • Academic Plan Summary • Academic Program Details • Class Enrollment • Class Instructor • Class Meeting Pattern • Enrollment Requests • Institution Summary • Student Degrees • Term Enrollments	• Credit History • Payment Details • Payments and Charges • Cross Reference • Transaction Details • Financial Aid - Award • Disbursement • Financial Aid - Award • Summary Snapshot

Current State Reporting

The current reporting environment is manually intensive and static.

UW Enrollment Comparisons, Fall 2014-Fall 2016 - Day 15

	2014		2015		2016		1 Year Change		2 Year Change	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Total Students										
	12932		**12841**		**12607**		**-234**	**-1.8**	**-325**	**-2.5**
Classification based on credit hours										
Freshmen	2157	16.7	2189	17	2038	16.2	-151	-6.9	-119	-5.5
Sophomores	1672	12.9	1688	13.1	1707	13.5	19	1.1	35	2.1
Juniors	2064	16	2043	15.9	2143	17	100	4.9	79	3.8
Seniors	3652	28.2	3596	28	3406	27	-190	-5.3	-246	-6.7
Second Backelors	389	3	333	2.6	329	2.6	-4	-1.2	-60	-15.4
Non-degree undergrads	223	1.7	209	1.6	177	1.4	-32	-15.3	-46	-20.6
Undergraduates Subtotal	**10157**	**78.5**	**10058**	**78.2**	**9800**	**77.7**	**-258**	**-2.6**	**-357**	**-3.5**
Graduate/Professional	2405	18.6	2397	18.7	2423	19.2	26	1.1	18	0.7
Non-degree graduates	307	2.9	386	3	384	3	-2	-0.5	14	3.8
Graduate/Professional Subtotal	**2775**	**21.5**	**2783**	**21.7**	**2807**	**22.2**	**24**	**0.9**	**32**	**1.2**

Future State Reporting

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.

Change Agent Network
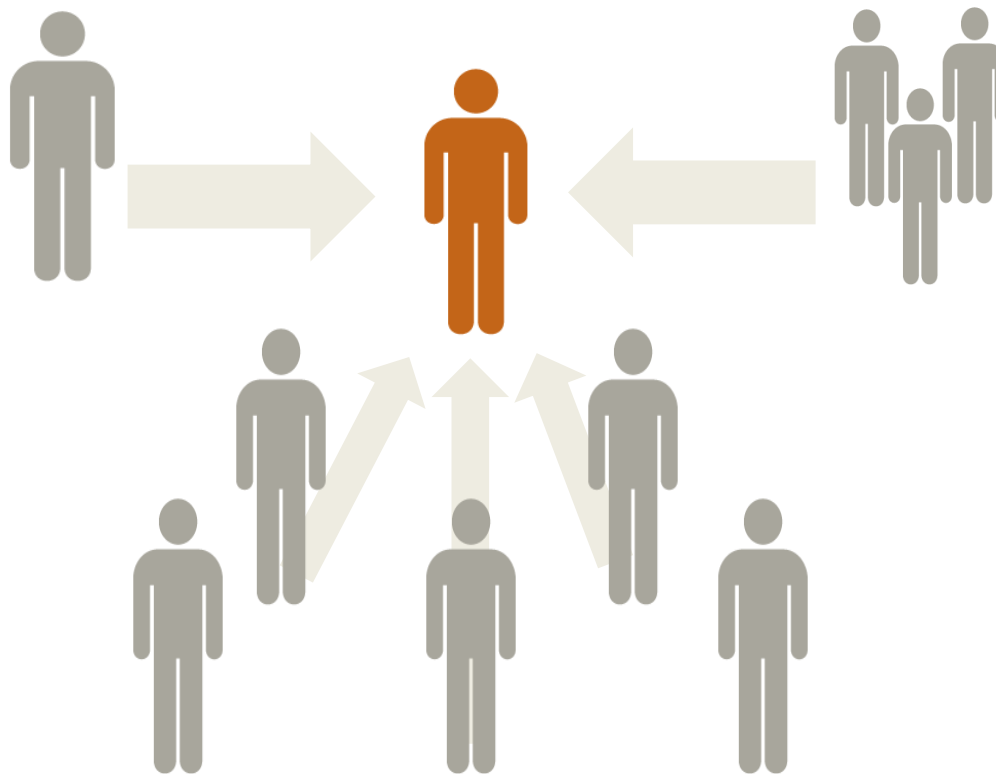
Members of the Change Agent Network will play an integral role in preparing UW community members for the changes they will experience over the next few years.

- 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/ for WyoCloud project updates and follow our social media channels

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