



WYOCLOUD SYSTEM UPDATE CHANGES COMING MONDAY, MAY 20, 2019

Greetings,

The WyoCloud Team wanted to notify users of some changes that will be part of the system quarterly update **effective Monday, May 20**. Several of these changes were shared with campus at our recent deep dive. All changes will be reflected in the [Quick Reference Guides](#) on Monday. As a reminder, please be sure to log out of the system by **5:00 p.m. on Friday, May 17**. The system will be **unavailable through Monday, May 20 at 8:00am**.

Expense Report User Interface Enhancement

Oracle is updating the Expenses module to improve the expense entry screens for all users. At this time, this was an enhancement WyoCloud could opt in now or delay and therefore, we provided a demo and asked for feedback during Monday's deep dive session. If you were unable to attend, you can view the presentation in this WyoCast link: <https://wyocast.uwyo.edu/WyoCast/Play/3f2fa330c9184ef88e49bf500127adfa1d>.

After positive survey results of 75% in favor and 18% neutral of moving to the new layout, the WyoCloud team will opt in on this enhancement for this quarter's system update. The following improvements will become available after the upgrade:

- The Travel and Expenses homepage will allow users to modify the expense type and description, attach receipts and sort items by location and description.
- The Expense line item entry screen will combine all details of an expense into a single page, including itemizations
- Users can drag-and-drop receipts directly into an expense item

Travel and Expenses Homepage

Date	Type	Amount	Merchant	Location	Description	Attachments
3/28/2019 47 days old	P-Card	44.00 USD Card 9167	WYOMING ANALYTICAL LABS	Laramie, WY	*Add description	Add attachment
4/15/2019	P-Card	49.95 USD Card 9167	VISTA BEAM	NE, United States	*Add description	Add attachment

Expense Line Item Entry Screen

Split Funding 4/15/2019

Split Funding 4/15/2019 Add to Report Save and Close Cancel

* Date: 4/15/2019 Receipt missing

* Type: Split Funding

Expense Location: NE, United States

* Amount: USD 49.95

Billed Amount: 49.95USD

Attachments

Drag files here or click to add attachment

Ability to drag and drop attachments.
Note: Attachments should be included prior to filling out the Merchant name for personal reimbursements.

* Description: Testing for new upgrade expense layout and show split funding on the same screen.

All details, including itemization, appears on one page for the expense line entry.

* Merchant Name: VISTA BEAM

Itemization + - [icon] Remaining Balance: 0.00

* Type	* Date	Daily Amount	Days	* Amount (USD)
Lab Supplies	4/15/2019	29.95		29.95
Office Supplies	4/15/2019	20.00		20.00

Purchase Requisition AdHoc and Workflow

A few items are changing with purchase requisitions.

1. The AdHoc feature has been removed by Oracle as an option on Purchase Requisitions. This feature is still available on expense reports and non-PO invoices. The following features are available on purchase requisitions:
 - a. **Request Information** – To request more information from the requestor on the requisition.
 - b. **Delegate** – Delegates the approval for the specific item to another individual on your behalf. This function is *not recommended* and users should use Reassign or Route Task instead.
 - c. **Reassign** – Reassigns approval to another individual for a specific item and removes the original approver completely from the approval workflow. The reassigned approver will receive notifications for items that require action.
 - d. **Route Task** – The system acknowledges the initial approver’s approval of the expenditure and he/she can route the task to an additional user for secondary approval. This is similar to the AdHoc function; however, only one additional individual can have the task routed to them for approval versus a chain or a group of individuals.
2. Remember to utilize the listing of requisition categories with descriptions to assist you in coding purchase requisitions. The WyoCloud Requisition Categories list includes a full description of what kind of purchase the category can be used for. This list can be found on the Financial Affairs webpage under Policies & Reference Material within the Procurement section: <http://www.uwyo.edu/administration/financial-affairs/policies/>

Email Approval Notifications and New Features

The body of the email notification for approvals will look slightly differently with the Approve, Reject and Request Information buttons clearly identified at the top followed by transaction detail below. At the bottom of the transaction details, the approval workflow for the particular expense is displayed indicating all individuals included in the approval workflow. The colors will vary depending on the type of transaction (i.e., expense report, requisition, change order, etc.).

The screenshot displays an email notification for an expense approval. At the top, it reads "Expense Approval" followed by the name "Brittany Brito" and the amount "10.00 USD". Below this is the word "test" and the submission ID "EXP0056730423 Submitted on 5/14/2019". Three buttons are visible: "Approve" (highlighted in blue), "Reject", and "Request Information".

The "Expense Items" section contains a table with one entry:

Date	Description	Amount
4/30/2019	Advertising & Promotional Services	10.00 USD

Below the table, the text "test - test" is visible.

The "Approvals" section shows a workflow:

- A dashed box around "Laurie Sanchez" with an unselected radio button.
- A yellow bar with a clock icon, "Assigned to Brittany Brito", and the timestamp "5/14/2019 10:47 AM".
- A grey bar with an upward arrow icon, "Submitted by Shawn Sheen", and the timestamp "5/14/2019 10:47 AM".

Requisition Approval
\$159.26
Sheen, Shawn
feed

Approve
Reject
Request Information

Requisition: [R147377](#)

Lines

<small>feed</small>	<small>\$159.26</small>
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1 x \$159.26
 Charge Account: 10-63001-105-000001-13291-550-0000-0000-0

Approval History

Applications Development Framework Application Identity for Procurement
 David Sircin

Assigned to **Laurie Sanchez** 5/14/2019 3:33 PM

Submitted by **Shawn Sheen** 5/14/2019 3:33 PM
R147377.pdf

Approve
Reject
Request Information

[Task Details](#)

In addition, when using the BPM Worklist of Notification Bell, requesting information from the requestor can be requested by using the drop down arrow next to Approve and selecting Request Information. This is also where the approver can select Delegate, Reassign or Route Task as noted above.

Actions ▼
Approve
Reject

Request Information

Delegate

Reassign

Route Task

Add Comments

Add Attachment

Lastly, where approvers have the ability to add comments or attachments has changed. This option is now available after selecting Approve or Reject via email action buttons, through the Bell icon or through the BPM worklist view. Note – Any attachments will only be visible to the next individual in the approval workflow.

Approve **Action item through Bell icon or BPM Worklis**

Comment

Drag files here or click to add attachment

-----Please type your comments above this line----- **Email Example**

Note: Comment is required for this action.You can also add attachments to the task by attaching them to this email.

-----Do not edit below this line-----

Individual Working Session

The WyoCloud team offers *Individual Working Sessions* available to all employees who have questions or be available as you work through WyoCloud-related tasks. Currently, separate work sessions are available for HCM-related and finance-related transactions. The upcoming sessions are:

HCM Individual Working Session – Wednesday, May 22, 2:00-3:30PM, ITC 173

Financial Management Individual Working Session – Thursday, May 23, 10:00-11:30AM, ITC 173

All sessions are available for registration in the [Employee LearnCenter's Course Catalog](#). Either search Individual Working Session or browse the full catalog to WyoCloud then Financial Management or HCM subcategories.

Best,

The WyoCloud Team

Contact Information

The WyoCloud Team
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Need help with WyoCloud?
Contact the UW Help Desk
766-4357, Option #1
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