TYPE	Process
ID	WYOPNP-3
Title	New/Change Request – Organization Code and/or Name
Version	2.0
Status	Published
Release Date	2024-08-01
Author	Meredith Bickell, Senior Director of Systems & Business Optimization

Purpose:

The document outlines requests related to departments and organizations.
1. New organization/department and Chart of Accounts code
2. New Chart of Accounts code for existing organization/department
3. Change organization/department name
4. Move organization/department within the Chart of Accounts enterprise structure
5. Close organization/department

The Organization code refers to where financial transactions are allocated, and these codes represent the University's Cost Centers.

Scope:

Requests can be submitted by or on behalf of the employee overseeing the organization/department such as the Dean or Director.

Summary:

Changes to WyoCloud related to requests for new organizations/departments and Chart of Accounts codes, requests to move within the Chart of Accounts enterprise structure and requests to close organizations/departments will only occur at the ending/beginning of fiscal years. These types of requests need to be submitted by February 15th to be included in the development process for the next fiscal year's budget within the WyoCloud Enterprise Performance Management (EPM) system.

Requests to change the name of organizations/departments can be submitted throughout the fiscal year, but approval may not be granted.

A Service Request ticket must be submitted to start the request process.

Details:

Part I: UW Campus User Submits Service Request

Request New or Change Organization/Department

1. Title *
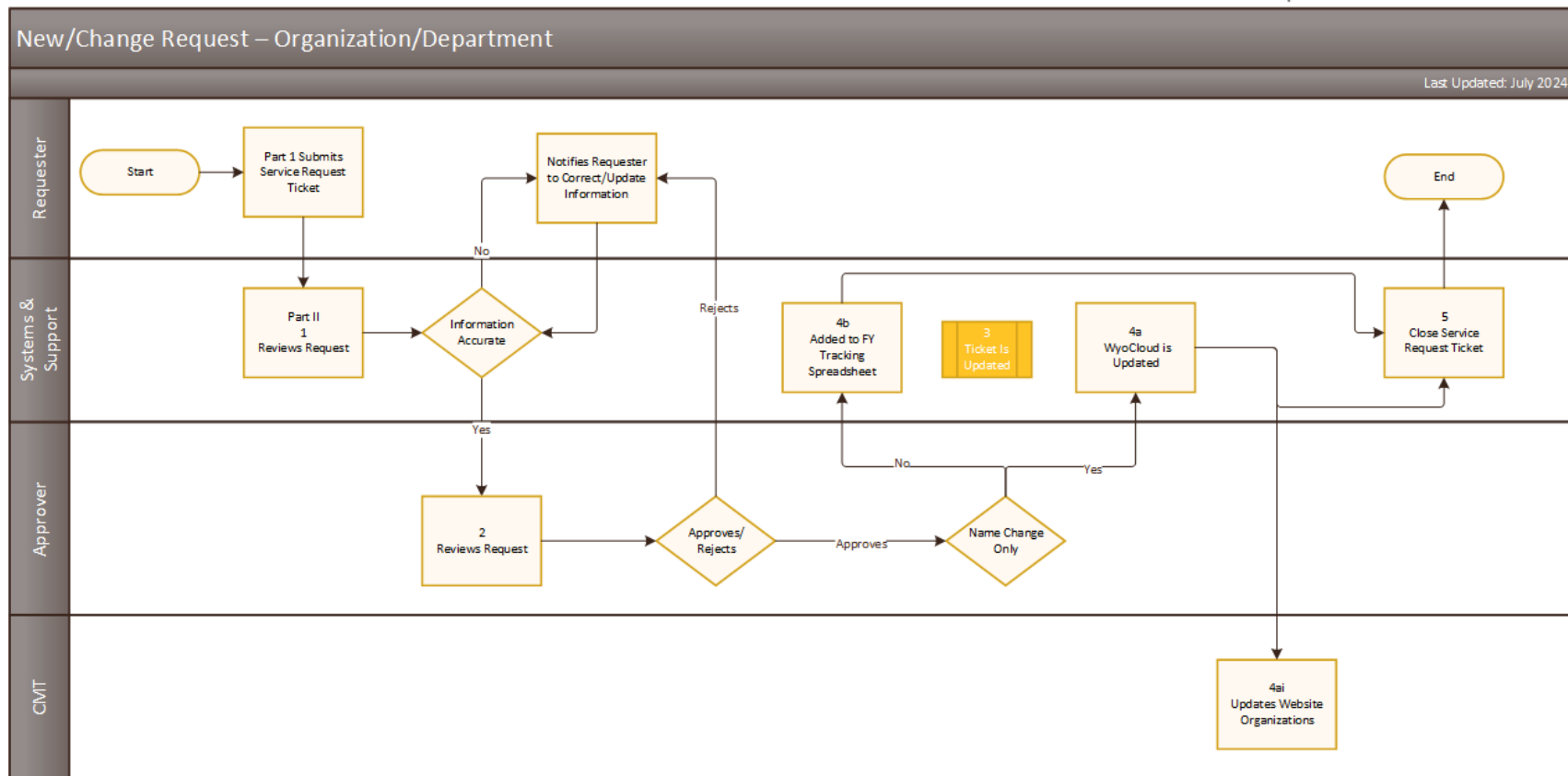   a. Enter: New/Change to Organization/Department

2. Requestor *
   a. Defaults to user
3. Acct/Dept *
   a. Defaults to Department of the Requestor
4. Request Type *
   a. Select: Request for Update
5. Update Type *
   a. Select: Change or New Organization Department
6. Type of Request *
   a. New
   b. Move
   c. Move/Rename
   d. Rename
   e. Close
   f. Other
7. Reason for Request *
8. Details of Request *
   a. Examples: Old/New name of organization/department; Subdivision under which the requested organization will be structured; Number of positions in the requested organization and their previous organizations
9. Requested Effective Start Date *
10. Select the Submit button to complete request

Part II: Review/Approval/Change Process

1. Request is received by the WyoCloud Systems & Support Team
   a. The request is reviewed to ensure information is correct
   b. The request is then routed for approval
2. Request is reviewed and approved/rejected by the Vice President of Budget & Finance
   a. Both the Budget Office and Accounting Office will review the request
3. The service request ticket is updated to notify the requestor of the outcome
4. If approved
   a. For name changes only – the WyoCloud support tech will complete the updates in WyoCloud: Chart of Accounts, HR Departments and Enterprise Performance Management (EPM)
      i. The Chart of Accounts Segment 5: Organization report will be updated
   b. All other changes will be added to the fiscal year tracking spreadsheet and the WyoCloud support tech will complete the updates in WyoCloud Enterprise Performance Manage (EPM)
      i. These changes will be reflected in WyoCloud Chart of Accounts and HR Departments on July 1
5. The service request ticket is closed

UNIVERSITY OF WYOMING

Diagram:

WyoCloud

UNIVERSITY OF WYOMING

New/Change Request – Organization/Department

Last Updated: July 2024

Requester
- Start
- Part 1 Submits Service Request Ticket
- Notifies Requester to Correct/Update Information
- End

Systems & Support
- Part II 1 Reviews Request
- Information Accurate (No / Yes)
- 4b Added to FY Tracking Spreadsheet
- 3 Ticket Is Updated
- 4a WyoCloud is Updated
- 5 Close Service Request Ticket

Approver
- 2 Reviews Request
- Approves/Rejects (Rejects / Approves)
- Name Change Only (No / Yes)

CMT
- 4ai Updates Website Organizations

Notes:
Approver: Vice President of Budget & Finance
   Both the Budget Office and Accounting Office will review and provide feedback
CMT: WyoCloud Content Manager & Training Analyst

UNIVERSITY OF WYOMING