TYPE	Process
ID	WYOPNP-4
Title	New Request – Program or Activity Code
Version	2.0
Status	Published
Release Date	2024-08-01
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Purpose:

The document outlines requests for a new program or activity code to use in the University's Chart of Accounts.

Program – The segment pertains to the unique specialization within the department/organization. Codes are grouped by division/unit/department but can be used by departments from across campus if applicable.

Activity – The segment offers more opportunity to further differentiate a transaction for departmental or unit reporting purposes. This segment is definable by the department by using the generic codes that have been loaded into WyoCloud. There are placeholders for Project 1, Project 2, etc., Activity 1, Activity 2, etc., Game 1, Game 2, etc., Exhibit 1, Exhibit 2 and each department can assign what the code means for their use.

Scope:

Requests may be submitted by financial personnel within the department/organization such as the Business Manager, Accountant, etc.

Summary:

Requests for new program and activity codes can be made throughout the fiscal year and will be reviewed by the Budget and Accounting Offices prior to receiving final approval. For the new program or activity code to be available in WyoCloud Enterprise Performance Management (EPM), requests need to be submitted by February of the prior fiscal year.

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

Details:

Part I: UW Campus User Submits Service Request

Request New Program or Activity Code

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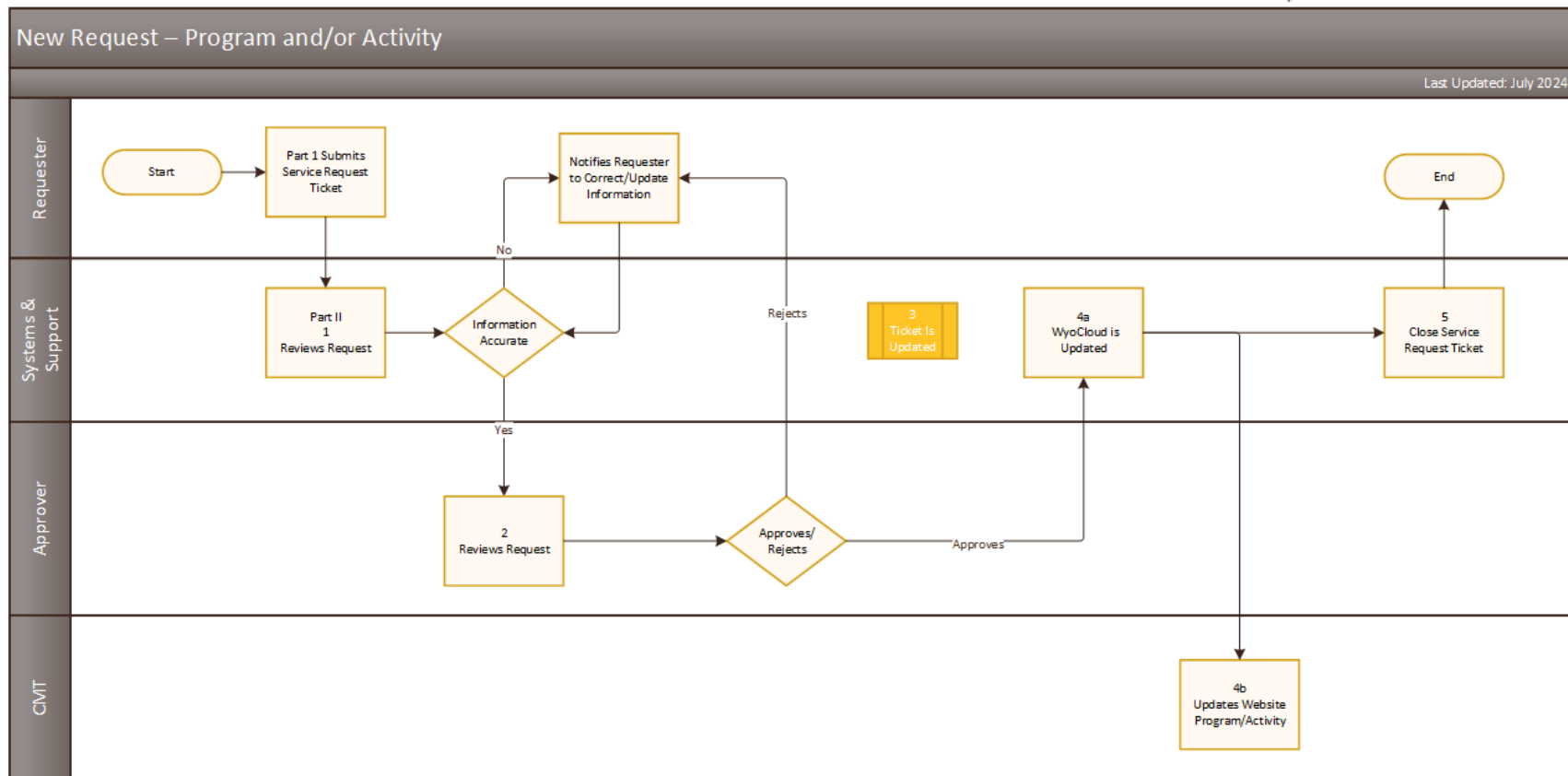   a. Enter: New/Change to Organization/Department
2. Requestor *

   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: new Program or Activity
6. Type of Request *
   a. Program Code
   b. Activity Code
7. Reason for Request*
8. Name of the Program or Activity *
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 Associate Vice President of Financial Affairs
   a. Both the Budget Office and Accounting Office will review and confirm the request
3. The service request ticket is updated to notify the requestor of the outcome
4. If approved
   a. The WyoCloud support tech will complete the updates in WyoCloud: Chart of Accounts and Enterprise Performance Management (EPM)
   b. Program: the Chart of Accounts Segment 7: Program report will be updated OR Activity: the Chart of Accounts Segment 8: Activity report will be updated
5. The service request ticket is closed

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Processes and Procedures

Diagram:

New Request – Program and/or Activity

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
- Rejects
- 3 Ticket Is Updated
- 4a WyoCloud is Updated
- 5 Close Service Request Ticket
- Yes

Approver
- 2 Reviews Request
- Approves/ Rejects
- Approves

CMT
- 4b Updates Website Program/Activity

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

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