Change Agent Network

March 8th, 2017

UNIVERSITY OF WYOMING

Agenda

Change Network Updates

- Change Champions Initial Meeting
- Ways to continue being involved

WyoCloud BI Student Reporting

- What to know about this past Monday's Go-Live

Meet the Experts

- WyoCloud Finance System changes presented by Finance Leads

Change Agent Open Discussion

- Feedback on Change Agent meetings, WyoCloud Newsletter, and Project

Change Champions

- **Change Champions** have now met for the first time!
  - Discussed strategies for reaching departments/schools
  - Working on setting up Departmental Roadshows for WyoCloud in their areas
- Our Change Champions include the following:

• **Christina Millemon**	• **Abbie Connally**
• **Brandi Hecker**	• **Laurie Mendick**
• **Samantha Fulton**	• **Cid Walck**
• **Mary Runner**	• **Winter Hansen**
• **Debbie Scarpelli**	• **Kathleen Eberhart**
• **Claire Zheng**	• **Rachel Ferrell**
• **Kimberly Messersmith**	• **Bethany Allen**
• **Shauna Bury**	• **Tori Holmquist**
• **Tracy Bennett**	• **Danika Salmans**
• **Kathleen Miller**	

Thank you for volunteering Change Champions!

- **Departmental Roadshows** will begin in March!
  - Members of the project team and Change Champions will present information about WyoCloud to areas across *all of campus* in order to engage the community and get everyone involved.
  - We encourage you to work with the Change Champions to think of dates/times (and potentially pre-organized departmental meetings) that we can visit your areas for a Roadshow in the coming months.

- Be on the look-out for optional **Deep Dive Sessions** for Change Agents and Champions, which will be separate from these meetings and will cover WyoCloud changes in more detail.
  - **PPM Grants**
    - *Wednesday, March 29th in the Education Auditorium from 2:30 – 4:00 p.m.*

Learning Opportunities

We want you to feel prepared and confident answering WyoCloud questions and sharing the upcoming changes we tell you here with your department. Let us help you!

- Look out for information related to a series of learning opportunities for you as Change Agents and Change Champions.
  - Sessions on **resistance management and the psychology of organizational change** led by University of Wyoming faculty members
  - More dates and details to come!

WyoCloud Survey #2: March 20th – March 31st

The WyoCloud Community Engagement surveys are meant to asses the level of engagement the campus community is feeling towards the launch of the WyoCloud systems.
Please encourage your units to provide the team feedback through the survey.
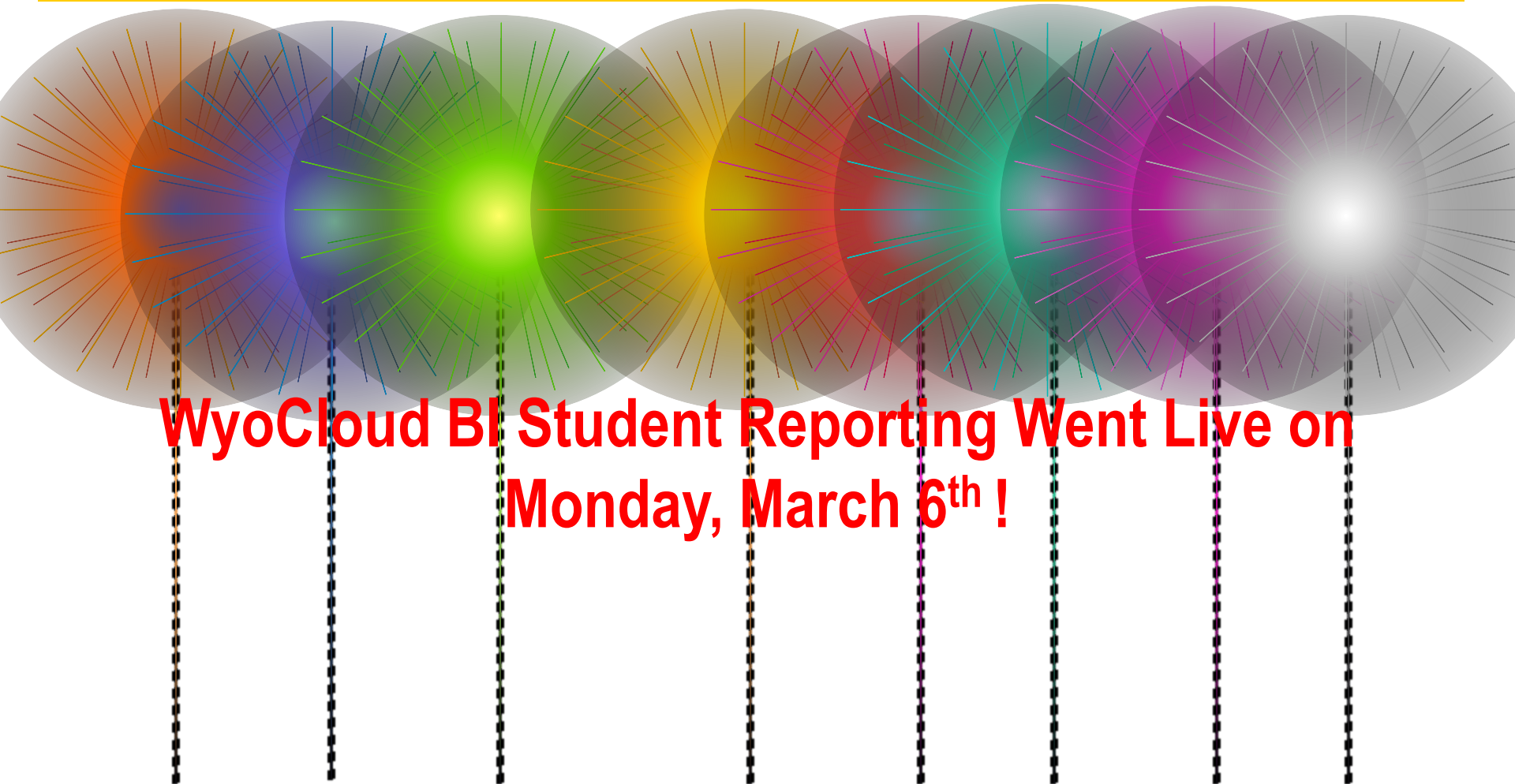
Initial Survey

November 2016

Final Survey

June 2017

Mid-Implementation Survey

March 2017

# WyoCloud BI Student Reporting Went Live on Monday, March 6th !

WyoCloud BI Student Reporting Go-Live

- Go-Live was covered at the Townhall hosted by Provost Kate Miller last Thursday, March 2nd

  o The Townhall was recorded through WyoCast— you can find the recording on the WyoCloud website

- The reporting system has a new official brand:

WyoCloud Student Reporting ➡️ **WyoCloud Business Intelligence (BI) Student Reporting**

WyoCloud Business Intelligence v. Operational Reporting
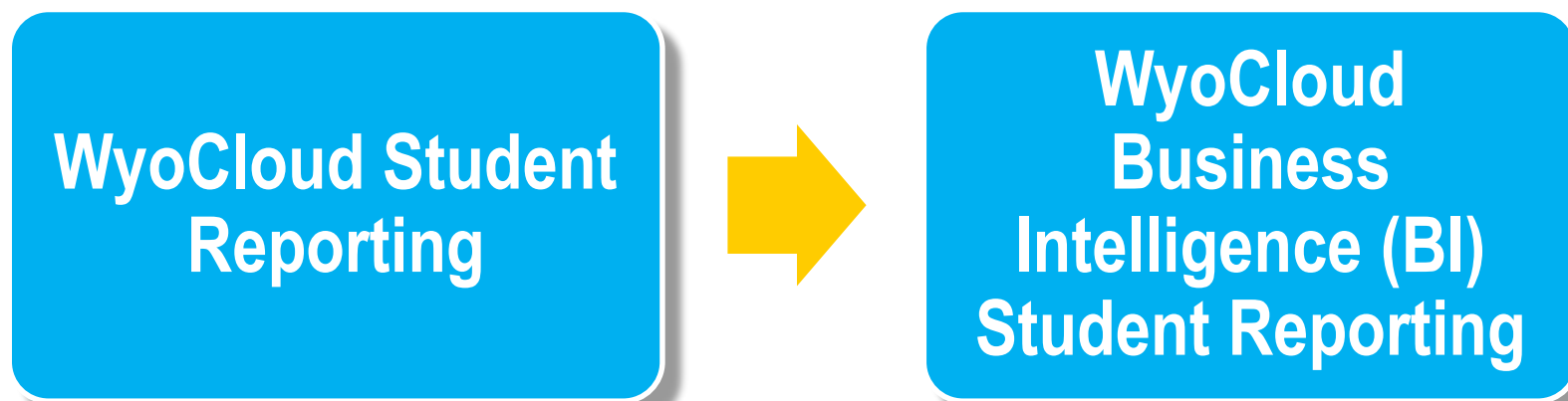
WyoCloud Business Intelligence (BI) Reporting

Enterprise (Combined)

HR

Finance

Student
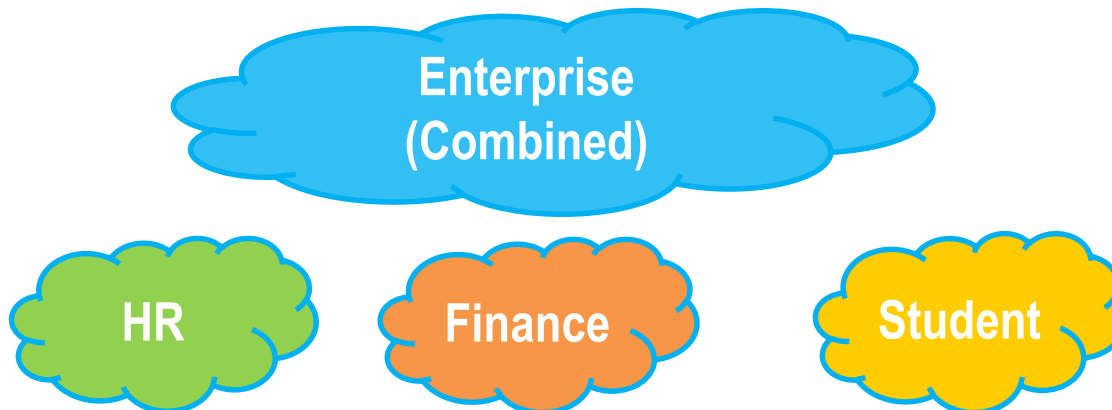
WyoCloud Operational Reporting

HR
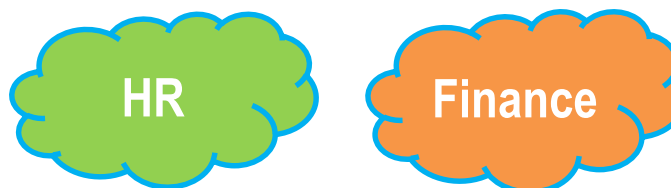
Finance

Meet the Experts:

Finance Leads - Martha Miller, Jonnie Jenkins, Jon Kelly, Megan Hanneman, and David Jewell

Procurement

Strategic Sourcing

- RFPs are being finalized for *computer hardware* and *office supplies*

Business Process Workflow Approvals

- New approvals are being added to the system based upon the type of item being procured (potentially hazardous materials, computers, grants, etc.)
- Approvals based on dollar thresholds
    - Up to 100k → Business Managers
    - 100 – 250k → Deans and AVP
    - 250k – 1 million → VP
    - Greater than 1 million → President

Travel & Expense

Departmental Delegation Option for Expense Reports

- Departments will have the option to allow individuals, such as faculty, to delegate expense reports to departmental staff

Delegate

Project Portfolio Management (PPM) & POET

What does POET mean and how is this information used in WyoCloud?

P — **Project**

- Project ID that's being charged
- One award can have multiple projects associated to it
- Project information houses attributes that the Fund Source, Expense Class, and Fund Class COA segments

O — **Organization**

- Project-owning organization/ department
- Maps to the COA organization segment

E — **Expenditure Type**

- Classification of expenditure
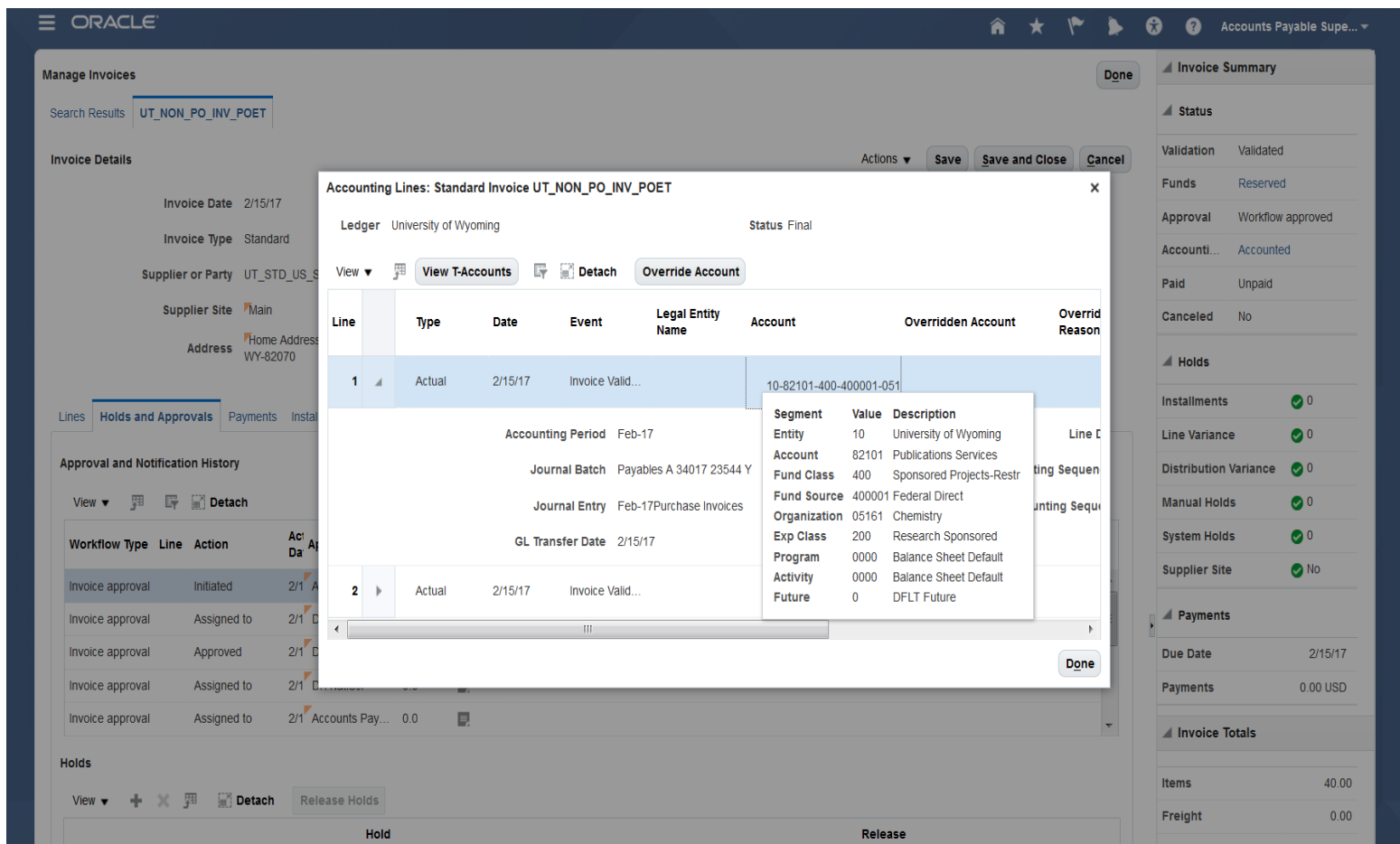- Maps to the natural account segment in the Chart of Accounts

T — **Task**

- UW grants will generally only have one task

From Chart of Accounts to PPM

When you need to make an invoice for one of your awards, you need to know the POET information so the award is charged correctly.

Interdepartmental Request Process Change

An Interdepartmental Request (IDR) will now be called an Interdepartmental Transfer (IDT). This process is changing significantly with WyoCloud and the project team will begin to communicate the changes soon.

Current State

Future State
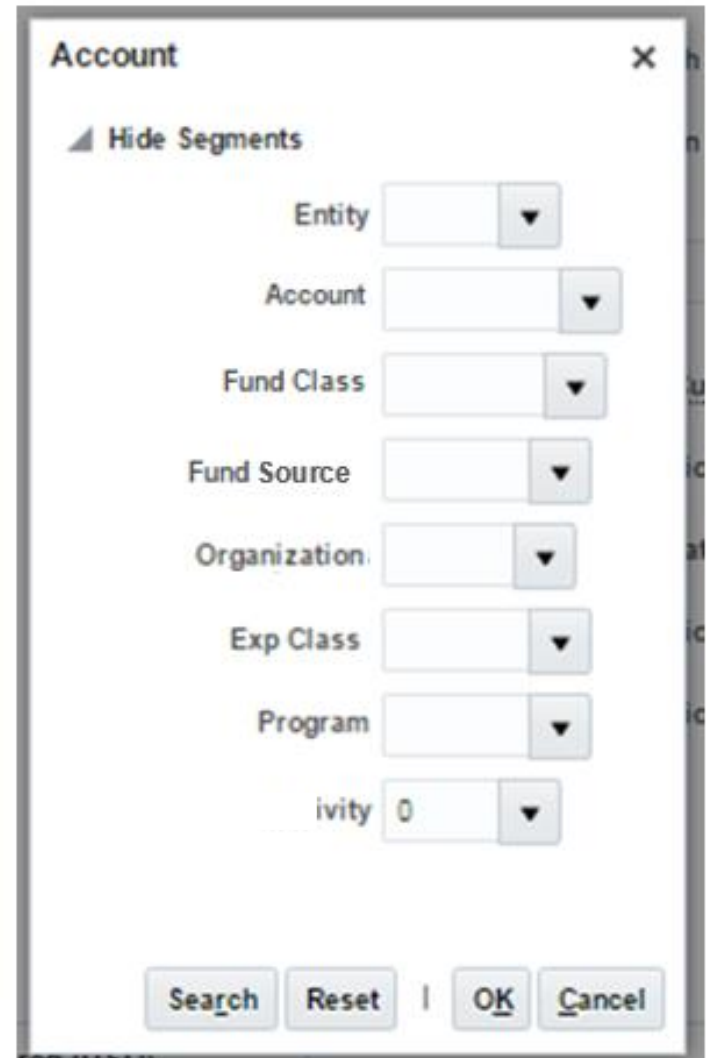
Chart of Accounts Update

Finalized segment values will be sent out soon for you to begin familiarizing yourself with.

- You may notice less detail in the expense accounts in the general ledger, but detail will be available through drilling through to subledgers.

- Training for the Chart of Accounts is being developed and will be piloted on this group first.

Responsibility shifting from Old Main and Accounting to fiscal managers utilizing the new system's financial reporting to make better and more informed decisions
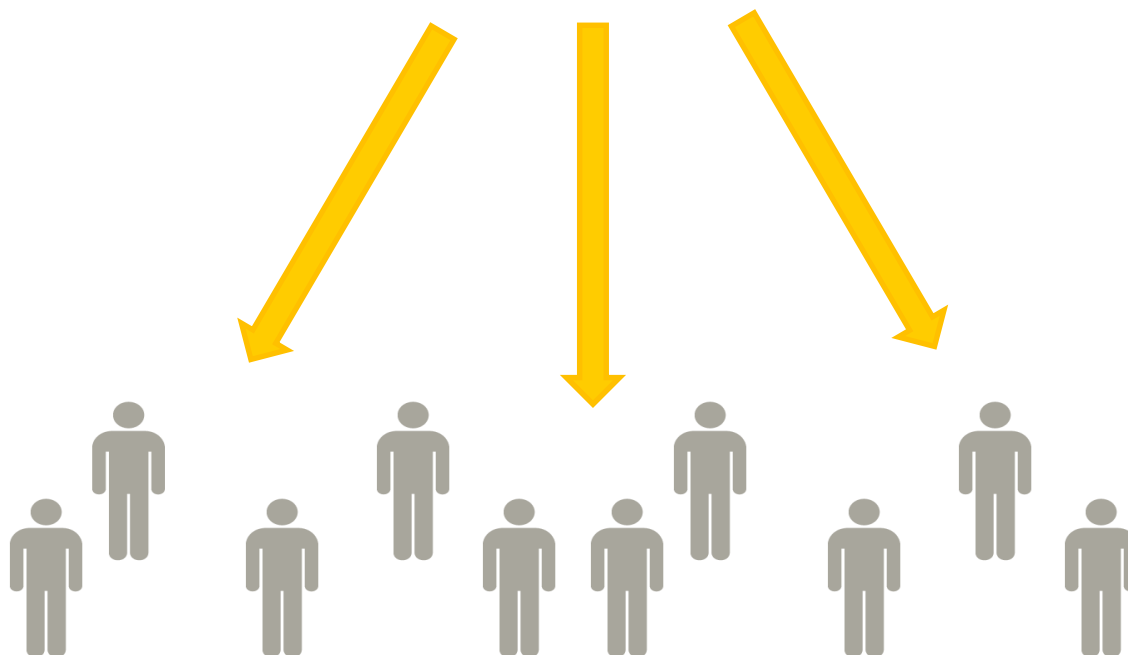
UW's New Structure for Budgeting, Planning & Reporting

College/Unit/Organization Name

	FY2018 ①	FY2018 ②	FY2018 ③	FY2018 ④	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
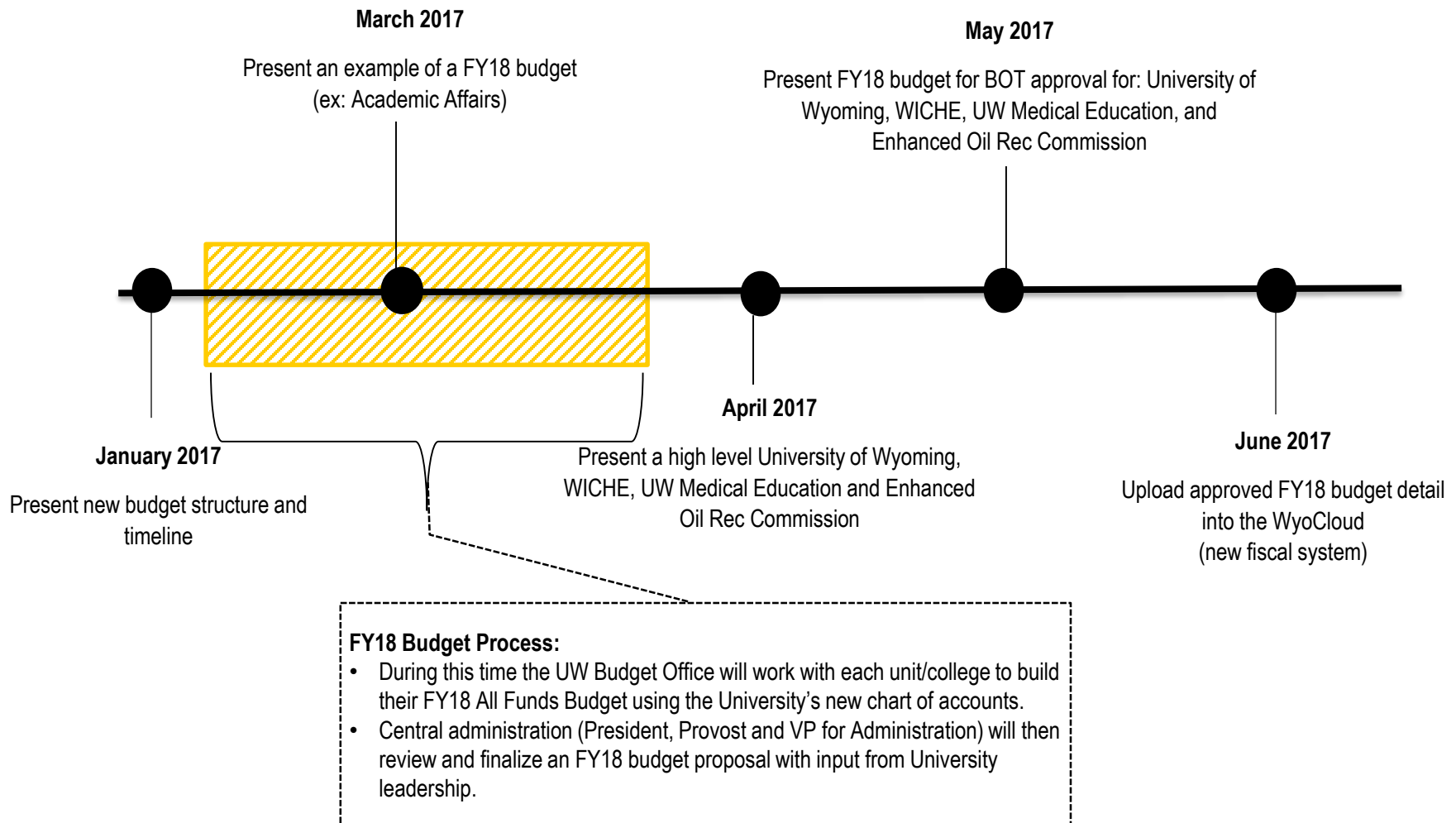
③ Restricted Expendable (Grants & Contracts)
- Externally sponsored federal, state, local, & private grants & contracts

④ Restricted Expendable (Gifts)
- Foundation/gift funds that have restrictions on their use

Proposed FY18 Budget Process & Timeline

March 2017

Present an example of a FY18 budget (ex: Academic Affairs)

May 2017

Present FY18 budget for BOT approval for: University of Wyoming, WICHE, UW Medical Education, and Enhanced Oil Rec Commission

April 2017

Present a high level University of Wyoming, WICHE, UW Medical Education and Enhanced Oil Rec Commission

January 2017

Present new budget structure and timeline

June 2017

Upload approved FY18 budget detail into the WyoCloud (new fiscal system)

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

October 2017

July 2017

1. The State of Wyoming Budget Division prepares a "standard" budget request for each agency which is based off the prior biennium's budget
2. The University then may develop an "exception" budget request

1. The Consensus Revenue Estimating Group (CREG) meets to develop revenue forecasts for the upcoming biennium for the State of Wyoming
2. Governor's office reviews budget compared to CREG forecasts to come up with proposal to state legislature

December 2017 / January 2018

The Legislature's Joint Appropriations Committee holds budget hearings for each agency and submits a state budget bill

August 2017

UW presents FY19-FY20 biennial budget request to Board of Trustees for approval

December 2017

The Governor and Wyoming Budget Division submit proposed budgets for the next biennium to the state legislature

February 2018 / Early March 2018

Legislative budget session

September 2017

The University submits its proposed budget to State of Wyoming Budget Division and presents the proposed budget to the governor's office for review.

Wyo Cloud

UNIVERSITY OF WYOMING FOUNDATION

TRAINING OPPORTUNITIES

REDUCTION OF PAPERWORK: NO MORE FORM 200

One of the benefits of the new UW Accounting system will be the elimination of the Foundation Form 200. Form 200 is used for Foundation Account to University Account transfers. Instead there has been an implementation of automatic transfers similar to scholarship transfers. This change is because the Foundation will be able to get the information currently required on Form 200 through the new system.

As of February all gift accounts with a negative UW balance and sufficient expendable funds held at the Foundation will be automatically transferred. There may still be occasions when we need addition information, if so we will reach out to you on an individual basis. If you have any questions please call Mary Ann Garman at 766-3939 or email at mag@uwyo.edu.

TRAINING OPPORTUNITIES

INDIVIDUALIZED TRAINING
LEAD BY: ANNA TERFEHR (ATERFEHR@UWYO.EDU)

When: By Appointment

Description: Individual or small group meetings will be informal discussions that are tailored to fit your needs as a

Change Agent Open Discussion

Change Agent Feedback

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

Next Change Agent Network Meeting

Wednesday, April 12th, 2017   2:30 – 4:30 pm
Education Auditorium (Education Building Room 55)