WyoCloud Planning and Budgeting Basics Quick Reference Guide

**FY2019 UW Budget Process Flow**

<table>
<thead>
<tr>
<th>Budget Office</th>
<th>Departments</th>
<th>Executive Council</th>
<th>Board of Trustees</th>
<th>Reporting</th>
</tr>
</thead>
<tbody>
<tr>
<td>Budget process kicks off with call letter</td>
<td>Prepare WyoCloud Planning and Budgeting for Annual Budget</td>
<td>Open WyoCloud Planning and Budgeting; Send out email notification</td>
<td>Hold budget planning kick-off meetings</td>
<td>Reviewing Future Year Budgets (real time budget numbers)</td>
</tr>
</tbody>
</table>

### Budget Process Flow

1. **Develop FY18 Forecast**
2. **Develop Position Budget**
3. **Develop FY18 Position Budget**
4. **Develop Operational Budget by Fund Class:**
   1. Unrestricted
   2. Designated Operating
   3. Restricted Grants and Contracts
   4. Restricted Gifts and Endowments
   5. Other (Maintenance, Capital)
5. **Develop Total Budget and Position Budget**
6. **Review and Finalize Budget**
   - March 12th – June 29th
   - Approve UW-wide budgets
   - Communicate budget decisions
   - BICS – Reviewing Current Year Budget
7. **Develop Forecast**
8. **Review Reports:**
   - Total Budget
   - Position Budget
9. **Load approved budget into WyoCloud Financial Management**

**FY2019 UW Budget Process Flow**

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<tr>
<th>Board of Trustees</th>
<th>VP's and Deans</th>
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### Timeline

- **Budget Kick off and Data loads**
  - Jan 1st - Jan 22nd
- **Develop Budget**
  - Feb 16th - March 12th
- **Review and Finalize Budget**
  - March 12th – June 29th
- **Develop Forecast**
  - Jan 22nd - Feb 16th

### Key Steps

- **Hold budget planning kick-off meetings**
- **Develop FY18 Forecast**
- **Develop Position Budget**
- **Develop Operational Budget by Fund Class**:
  - Unrestricted
  - Designated Operating
  - Restricted Grants and Contracts
  - Restricted Gifts and Endowments
  - Other (Maintenance, Capital)
- **Review and Finalize Budget**
  - Approve UW-wide budgets
  - Communicate budget decisions
- **Develop Forecast**
  - Jan 22nd - Feb 16th

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*Note: The diagram visually represents the process flow and timelines.*
**FY2019 Budget Development Timeline**

**Purpose:**
To outline the timeline for developing FY2018 forecasts and FY2019 budgets. Please contact the Budget & Planning Office with any questions.

- January 22nd WyoCloud Planning & Budgeting (WyoCloud Planning) module released/opened
- February 9th 5:00pm **Non-Academic Affairs Units’ FY2018 forecast** due to the Budget Office
- February 16th 5:00pm **Academic Affairs Units’ FY2018 forecast** due to the Budget Office
- March 5th 8:00am **Non-Academic Affairs Units’ FY2019 budgets** due to the Budget Office
- March 7th Materials due to Board of Trustee’s for FY2018 budget amendments
- March 12th 8:00am **Academic Affairs Units’ FY2019 budgets** due to the Budget Office
- March 12th Data migration to Budget Office version in WyoCloud Planning
- March 12-16th Budget Office review
- March 19th Data migration to Executive Council version in WyoCloud Planning
- March 19-April 6th **Division/College budget review sessions with President, VPs, and Deans**
- March 21-23rd **Board of Trustee’s meeting** (Main topic: **FY2018 budget amendments**)
- April 9th 8:00am Data migration to President's version in WyoCloud Planning
- April 9-13th President’s review
- April 16th Data migration to Board of Trustee’s version in WyoCloud Planning
- April 16th FY19 Budget materials are due to the BOT
- May 7-8th **Division & College budget hearings with Board of Trustees Budget Committee**
- June 13th **Board of Trustee’s conference call**
- June 29th Data migration to Final BOT approved version in WyoCloud Planning & FY2019 Budgetary Control in WyoCloud Financial Management
Upcoming WyoCloud Planning and Budgeting Trainings

All Planning Users of WyoCloud Planning and Budgeting are encouraged to complete all available trainings.

Required Online Training: Released January 8, 2018

All Planning users will receive an invitation from WyoCourses on January 8th to complete two online trainings for WyoCloud Planning and Budgeting. These required trainings will introduce Planning users to commonly used terms and basic features as well as how to navigate and enter data into the system. Completion is required to gain access to WyoCloud Planning and Budgeting. Additionally, it is a prerequisite to the in person Planning and Budgeting Process training.

- Introduction to WyoCloud Planning and Budgeting
- Navigating WyoCloud Planning and Budgeting

WyoCloud Planning and Budgeting Process:

In this course, Planning Users will understand the new budgeting process and how to perform the necessary budgeting process tasks and approvals in the WyoCloud Planning and Budgeting system. The two online courses are a prerequisite to this course.

Registration is available on WyoLearn: https://uwyo3.catalog.instructure.com/browse/14/22

Upcoming Classes:

- Thursday, January 11: 9 – 11 am, AS 320
- Friday, January 12: 9 – 11 am, AS 320
- Tuesday, January 16: 1 – 3 pm, CR 209 (also available via WyoCast)
- Wednesday, January 17: 9 – 11 am, AS 320
- Wednesday, January 17: 1 – 3 pm, AS 320
- Thursday, January 18: 9 – 11 am, AS 320
- Thursday, January 25: 9 – 11 am, EN 2109
- Friday, January 26: 9 – 11 am, EN 2109

Open Labs:

After the system is released on January 22nd, Open Labs will be offered as an opportunity for Planning Users to have their questions answered by Subject Matter Experts. Labs are scheduled throughout the fiscal year 2019 budgeting process.

Registration is available on WyoLearn: https://uwyo3.catalog.instructure.com/browse/14/22

Upcoming Labs:

- Wednesday, January 24: 9 – 11 am, ITC 173
- Thursday, January 25: 12:30 – 2:30 pm, ITC 173
- Tuesday, January 30: 9 – 11 am, ITC 173
- Tuesday, February 6: 9 – 11 am, ITC 173
- Tuesday, February 13: 9 – 11 am, ITC 173
- Thursday, February 22: 9 – 11 am, ITC 173
- Tuesday, February 27: 9 – 11 am, ITC 173
- Thursday, March 8: 9 – 11 am, ITC 173