



UNIVERSITY OF WYOMING



## Upcoming Financial Services Training Opportunities

Please see below upcoming instructor-led training opportunities:

### Financial Management Onboarding Training

This training provides an introductory-level training on the financial processes, policies, and procedures that employees with a financial responsibility should be aware of in their positions. Any employee with a financial responsibility is encouraged to attend. If you cannot attend this session, additional sessions will be scheduled beginning in July. This training is scheduled for:

**Friday, June 25<sup>th</sup> from 8:00 a.m. – 12:00 p.m. via ZOOM**

Employees can register for the course within the Learning App under My Profile in WyoCloud Financial Management. Type the keyword “Financial” into the Search Bar to easily locate the course. A direct link to the course is here: [Financial Management Onboarding Training](#).

After enrolling in an offering, employees should add the training to their calendar by clicking on “Add to Calendar” next to the enrollment. The meeting invitation will include the zoom information that users will need.

### Fund Balance Training

This training will cover how to view fund balance (i.e., beginning year net position) for accounts that carry a balance (ex. Designated Operating) from year to year. This training will aid campus end-users in budgeting their fund balance and tracking the balance throughout the year. The next training session is scheduled for:

**Thursday, June 24<sup>th</sup> from 1:00 p.m. – 3:00 p.m. via ZOOM**

Employees can register for the course within the Learning App under My Profile in WyoCloud Financial Management. Type the keyword “fund” into the Search Bar to easily locate the course. A direct link to the course is here: [Fund Balance Training](#).

After enrolling in an offering, employees should add the training to their calendar by clicking on “Add to Calendar” next to the enrollment. The meeting invitation will include the zoom information that users will need.

### Account Analysis (WyoCloud) Pivot Tables Training

This workshop will cover how to use basic pivot table features to analyze and interpret your WyoCloud Financial Management account and budget data. It also includes additional features to further leverage the Account Analysis report. The training focuses on using pre-built end-of-month financial spreadsheets and does not cover how to export data directly from WyoCloud Financial Management. The next training is scheduled for:

**Thursday, July 22<sup>nd</sup> from 9:00 a.m. – 10:30 a.m. via ZOOM**

Employees can register for the course within the Learning App under My Profile in WyoCloud Financial Management. Type the keyword “account” into the Search Bar to easily locate the course. A direct link to the course is here: [Account Analysis WyoCloud Pivot Tables Training](#).

After enrolling in an offering, employees should add the training to their calendar by clicking on “Add to Calendar” next to the enrollment. The meeting invitation will include the zoom information that users will need.

### **Account Analysis Report Training (Understanding the Columns)**

The Financial Affairs team offers a training focused on the Account Analysis report to provide more detailed information on how to read and understand the data in the report. The next training is scheduled for:

**Wednesday, July 29<sup>th</sup> from 10:00 a.m. – 12:00 p.m. via ZOOM**

Employees can register for the course within the Learning App under My Profile in WyoCloud Financial Management. Type the keyword “account” into the Search Bar to easily locate the course. A direct link to the course is here: [Account Analysis Report Training](#).

After enrolling in an offering, employees should add the training to their calendar by clicking on “Add to Calendar” next to the enrollment. The meeting invitation will include the zoom information that users will need.

Please note, this training does not cover pivot tables. We encourage users to attend a PivotTables class and/or the WyoCloud PivotTables class as noted above. Basic PivotTable trainings are often available for registration through the IT training catalog: <http://uwittraining.uwyo.edu>.

If you have any questions on these courses, please contact Kaylyn Greenawalt at [kgreenaw@uwyo.edu](mailto:kgreenaw@uwyo.edu).

### **Contact Information**

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