

# WolfieONE

## *Change Leader Network Training – Part 1*

Nov 14, 2024

Office of Change Management

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**FAR  
BEYOND**

# Agenda

- Recap
- Change Management
- WolfieONE – High Level Changes
- Chart of Accounts (COA)
- Oracle Cloud Overview
  - WolfieONE Modules; ERP, EPM, HCM
  - Processes under each module
- HCM Known Change Impacts
- Next Steps

# RECAP

# Change Leader Network (CLN)

# What is a Change Leader Network?

- *An integral part of the Change Management Methodology at Stony Brook*
- *A **peer-led** group of influencers and impacted users across Stony Brook who will assist in building **awareness, active listening and gathering concerns, promoting buy-in, and providing support** to stakeholders impacted by the project*
- *An indispensable asset to drive and support change adoption*



**We are here**

Conduct training(s)  
Socialize Network  
Leverage for driving change  
Provide Support, as needed  
Gather feedback

# Getting Started with Change Management

# The Change Curve

It is natural for anyone to prefer the status quo, not because they are against change, but because humans naturally gravitate towards maintaining things as they are.

WHAT	WHY	WHEN	WHERE	WHO	HOW
CM focuses on the human factors of organizational change. CM guides people to prepare, embrace and support the transformation effectively and adopt to their new environment quickly – all without resistance and repercussions to productivity.	Whatever a project's goals and outcomes are dependent on individuals accepting and using a solution & allows employees to understand and work effectively during the adoption.	Whenever an organization has to change the way it works – and requires people to do their jobs differently.	Whenever change has an impact. It depends on factors such as the scope of the change, number of impacted employees, type of change, variation in change, timing, urgency, etc.	<b>Enable Change</b> Project and Change Management Teams  <b>Lead Change</b> Systems, Leaders, Managers, Change Champions and Change Agents  <b>Assist Change</b> Impacted Users	A structured change management approach enhances the change stability of an organization, maximizes project adoption rates, and optimizes the people side of a project.

Change Management at Stony Brook

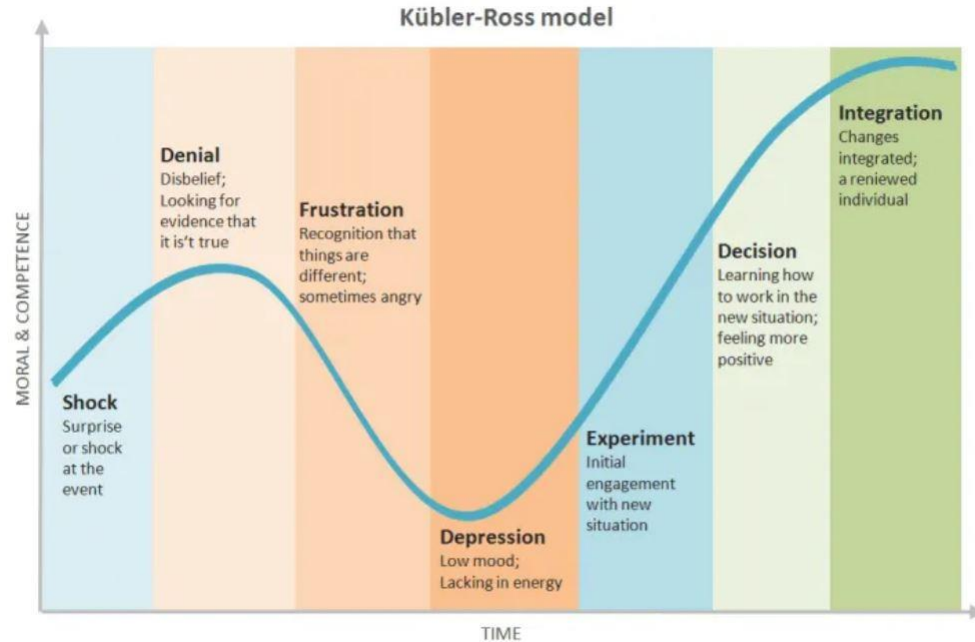
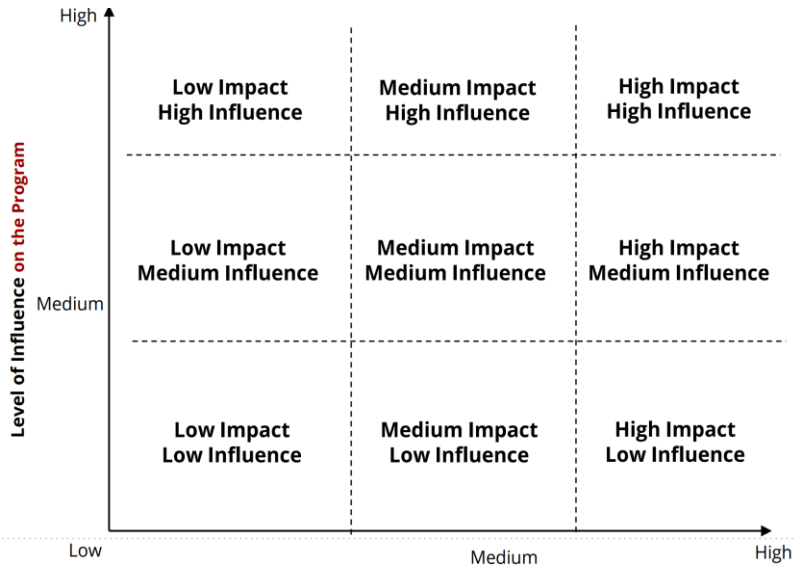


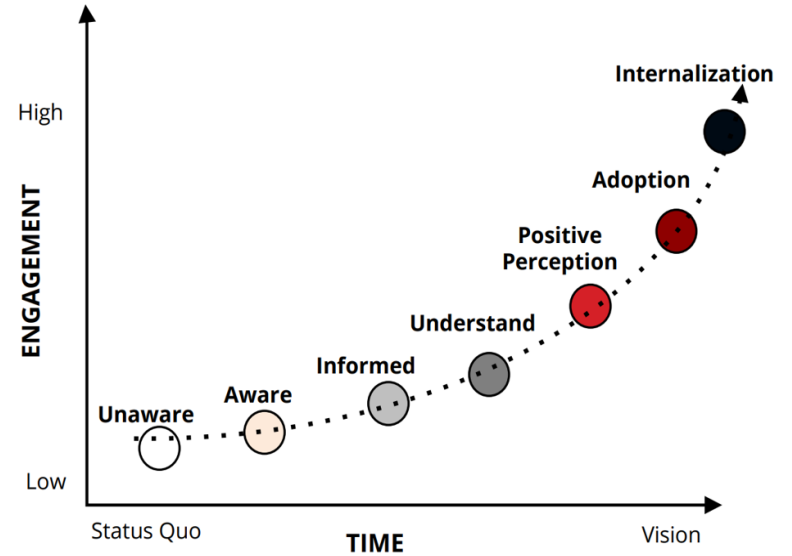
Image from Cleverism.com

# CM POLL

# Change Management Foundations



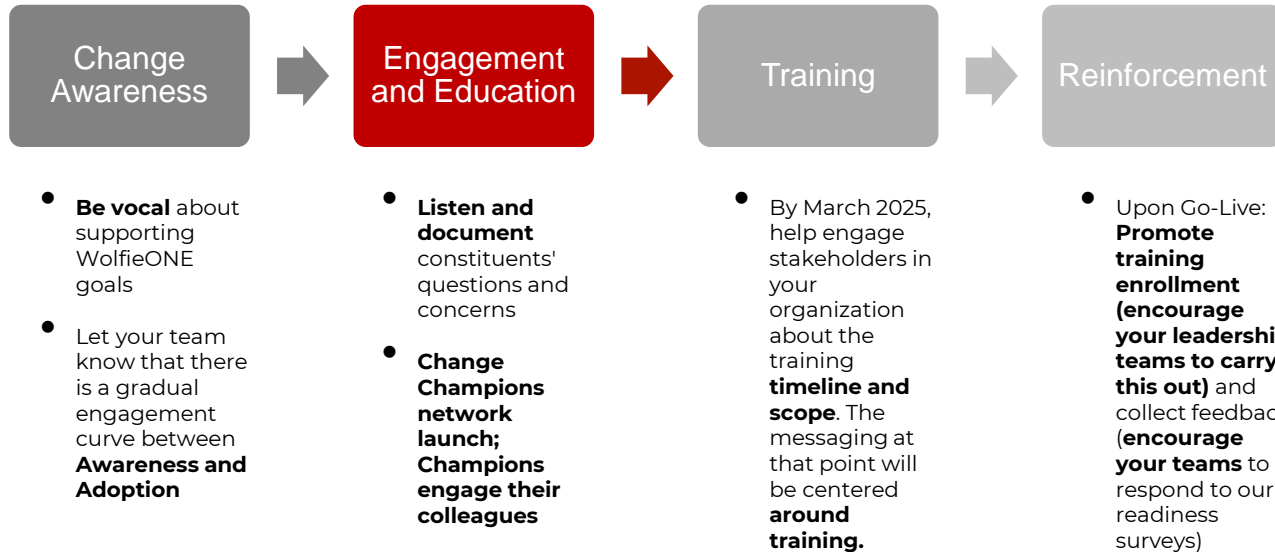
Stakeholder's Level of Impact **by the Program**



The Engagement Curve



# Change Management



# Workstreams relevant to educational campuswide efforts:

- **Enterprise Resource Management: all things Accounting & Reconciliation!**

Note: Student receivables and SIS are not changing (Campus Solutions).

- **Human Capital Management: HR processes**

What's not changing: Interfolio, Handshake, Kronos, and HealthStream

- **Enterprise Performance Management: Budgeting, planning and forecasting.**

- Technology: Integrations, **Reporting (queries, out of the box, custom, FDI)**, Conversion.

- Change Management & Project Management Office

- Enterprise Data Management- net new area

- Security and Controls (Depts. will need education on persona-to-role mapping)

- [Analytics](#) (Fusion Data Intelligence); more broadly trained upon closer to go-live- see Appendix

# WolfieONE - Changes

# What's Changing?

CURRENT STATE SYSTEMS/PROCESS	FUTURE STATE SYSTEMS/PROCESS
Inconsistency across processes and practices	Standardize processes and practices (80/20)
Oracle/ <b>PeopleSoft</b> software for Finance	Enterprise Resource Planning (ERP) Cloud
Oracle/ <b>PeopleSoft</b> software for Human Resources	Human Capital Management (HCM) Cloud
<b>Campus Budget Module</b> (CBM) for Budget and Planning	Enterprise Performance Management (EPM)
<b>SOLAR</b> (time and attendance; employee information, NOT the student side)	Human Capital Management (HCM) for reporting time and attendance
Recruiting and onboarding in <b>Taleo</b>	Oracle Recruiting Cloud (HCM)
CPR (Capital Planning, construction)	E-builder, which will integrate with EPM

# What's not changing?

## CURRENT STATE

## FUTURE STATE INTEGRATIONS

Jaggaer (WolfMART) SUNY system-wide SaaS solution for Procurement	Possible retrofit for some fields with the new COA, integration with Oracle, end-user will continue to use Jaggaer in the same way
Concur for travel & expense reimbursement	End-user will continue to use Concur in the same way as in the current state but will have to know their COA Org and Fund Source.
Hospital - Finance (Lawson)	Hospital finance professionals will continue to use their current COA in Lawson. Exception: patient refunds team in accounting, and budget officers.
Student Information Systems	The student records (both academic and tuition/fin aid) side of SOLAR will remain the same. <b>Students' employee records will exist separately from their Academic record in WolfieONE.</b>
Hospital usage of Kronos	Will integrate with SUNY system for payroll purposes.
Interfolio	Faculty will be hired in Interfolio and then their data will flow to WolfieONE (Core HR) for onboarding.
HealthStream	The hospital will continue to use HealthStream, and it will integrate with the Learn module of HCM.

# Chart of Accounts (COA)

# COA POLL

# Terminology

**Hierarchy:** a structure that provides summarized nodes used to report on all the "children" that fall below it. Oracle gives the ability to rearrange the children values into alternative hierarchies that also summarize the reporting view.

The **parent and child** levels are part of the hierarchy for each segment in the chart of accounts.

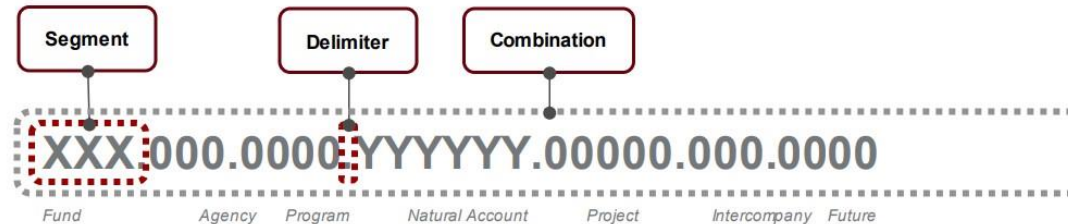
The **child** represents the lowest level in the hierarchy. The child values are the values used when entering transactions.

The **parent(s)** represent reporting nodes that group the child values that are found below the parent in the hierarchy. Parent(s) are used for efficient reporting and queries.

**Chart Segment:** Every segment is a critical dimension in representing some aspect of the business – legal, financial, operational, management – “tagging” every transaction, like a hashtag or a label. The future state “golden rule” is for each segment to have a **single and standard use** for every segment across departments. No “co-mingling” of purposes.

**Attribute:** acts like a static tag of the chart segments to provide an alternative way to write reports. Example: Academic vs. Non-academic Orgs.

**Chartstring:** The combined segment values, in a fixed order, is called a chartstring. Every event on a transaction that has a financial impact generates accounting entries, posting it to a combination of segment values in the General Ledger. This illustrates what a chartstring looks like:



\*For illustration purpose only



# New Chart Segments

**Entity** – Major institutional operating unit (e.g., SBF, SBU).

**Org** – An operating area that is responsible or benefits from the specific transaction. The area must have intended permanence and must have an employee and/or a financial budget greater than \$100,000.

**Fund Type** – A classification of the funds based on how the funds are allowed to be used.

**Fund Source** – A self-balancing set of accounts categorized by purpose, ownership, responsibility or restriction.

**Account** – Nature of the transaction (e.g., asset, liability, expense, revenue, net position).

**Classification** – A classification of the balance sheet, revenue or expense transaction.

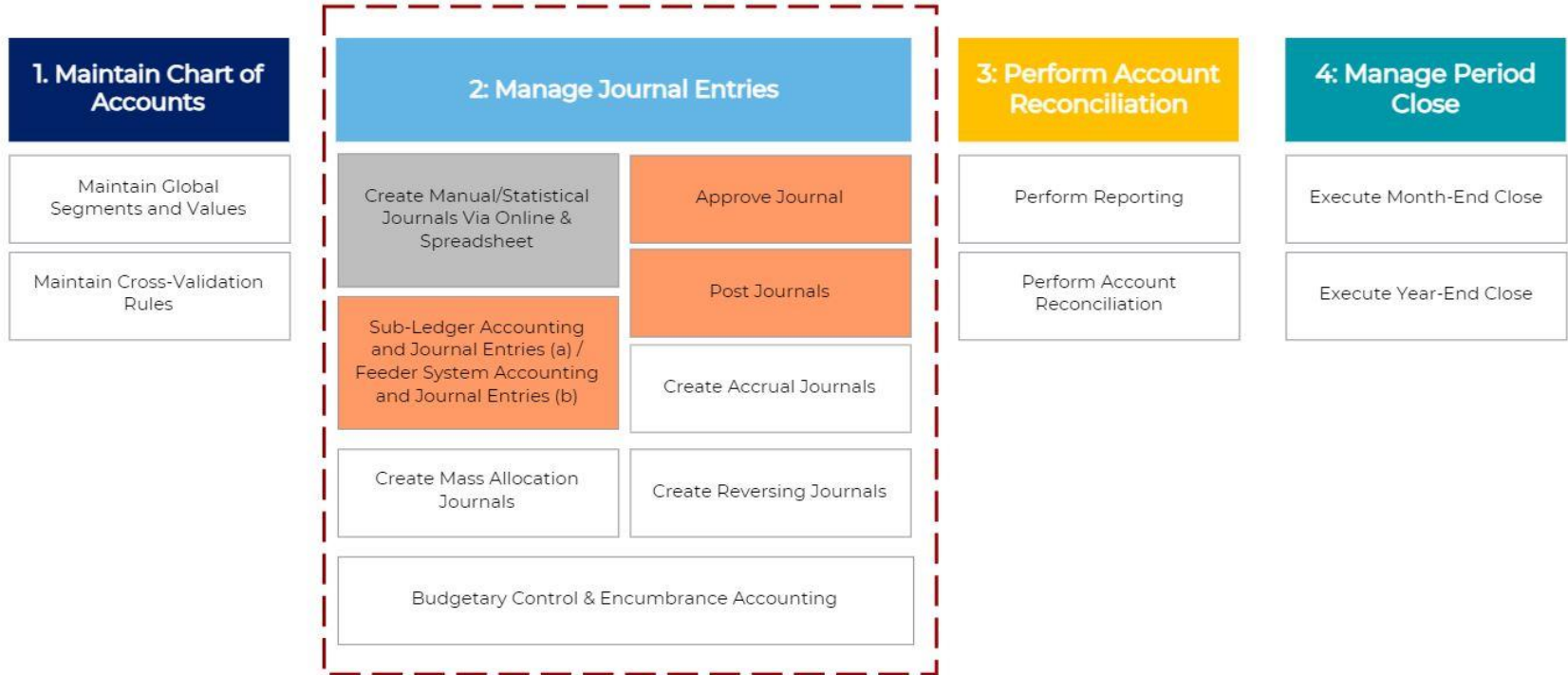
**Initiative** – Cross-organization used segment to identify activity for organization initiatives and/or where two or more departments contribute.

**Budget Year** – An identification of the budget year for prior budget spending.

**Future** – A segment that allows for growth in the future.

# Oracle Cloud Overview

# ERP General Ledger breakdown



# ERP Example of Receivables breakdown

## 1. Manage Customers

Manage Customer Records

## 2: Manage Receivables

Process Invoice – Import  
Process Invoice - Manual

Adjust Invoices  
Process Credit Memo

Deep Dive – SBU/SBF  
Specific Business Process

## 3: Manage Cash Receipts

Record Cash/Check  
Receipts

MISC Receipts

Process Refund

Reverse, Reapply, Write-  
Off, On Account

Deep Dive – SBU/SBF  
Specific Business Process

## 4: Close Receivables Close

Customer Statements  
Invoice Template

Execute Month-End Close

Collections (TBD)

Deep Dive – SBU/SBF  
Specific Business Process

# ERP Fixed Assets breakdown



# ERP Cash Management breakdown

Manage Cash Management

1. Manage Bank Master Data

2: Manage Bank Account Transfer

3: Receive Bank Statements

4: Reconcile Bank Statement

# ERP Payables (Refunds only)

Types of refunds:

- Student
- Patient
- Department
- AR credit to an external party

Manage Payments

1. Manage Suppliers

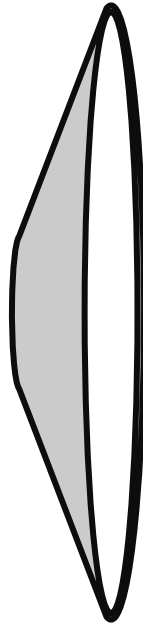
2: Manage Period Close

3: Manage Payables Invoices

# EPM

## Benefits:

- Systematized central planning and forecasting system
- Real-time budget vs. actuals reporting for the academic & research enterprise
- Systematized handshake between workforce planning and authorization to recruit
- Scholarship Discount Model
- Base / Fiscal Planning
- Overhead and Fringe Cost Planning



### Budget Formulation

Non-Personnel Expenses Entry at COA level;  
Revenue Entry at COA level; Strategic Planning  
Driver-based Revenue Modeling; Target Setting

### Budget Management

Multi-year Forecasting/  
Projections  
Budget Adjustments (COA level)  
Commitment Planning

### Workforce Planning

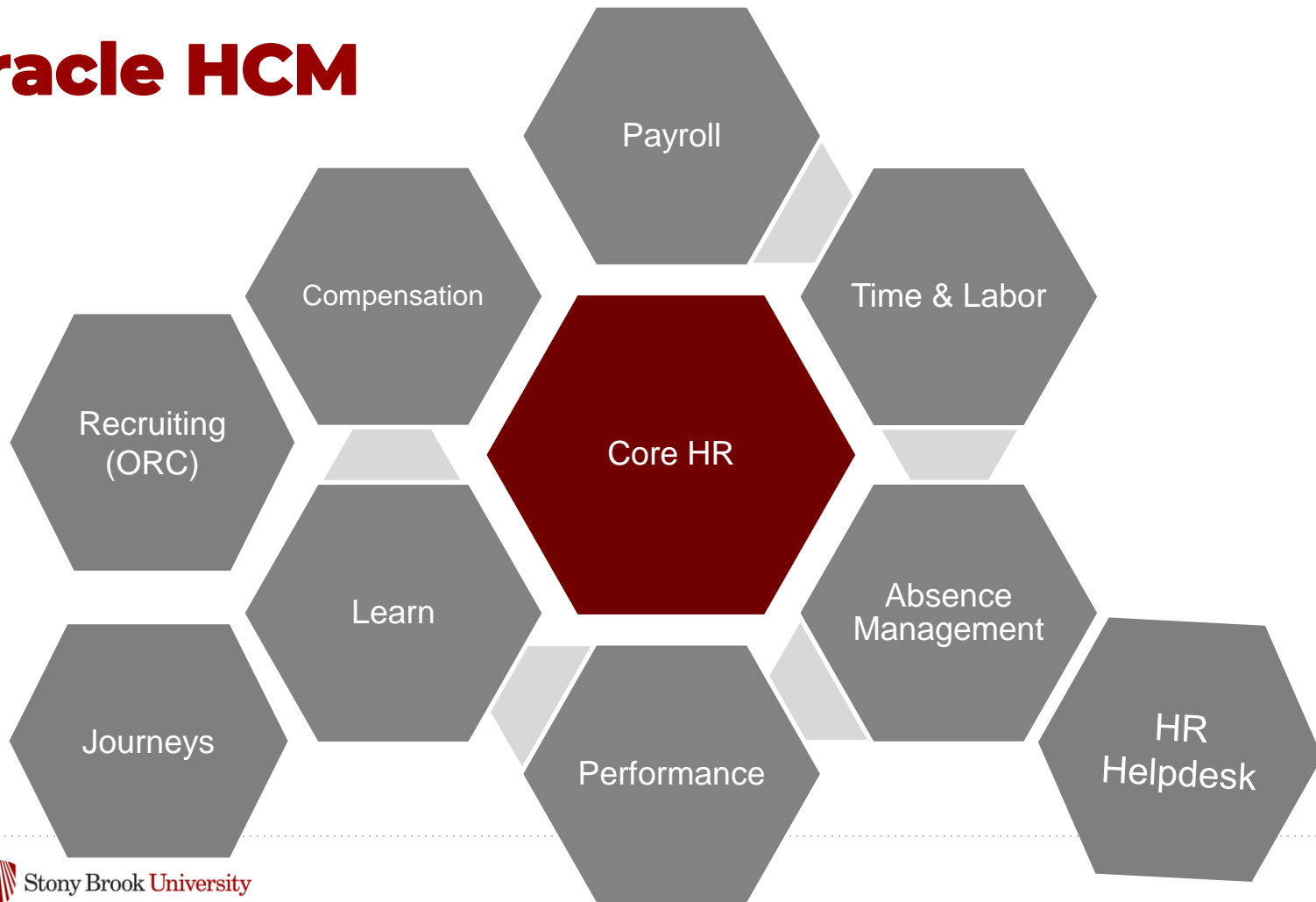
Manage Existing Positions  
Manage Vacant Positions  
Create New Positions  
Allocations/ Costing/ Splits

### Reporting

Ad hoc Reporting (SmartView)  
Narrative Reporting  
Management Reporting  
Executive Dashboards



# Oracle HCM



# HCM Change Impacts

# Known HCM change impacts to all employees:

- HCM Employee Self-service
  - HCM Manager Self-service
  - HCM Learn module- net new
  - HCM: HR Helpdesk – net new
- 
- ERP Departments who bill external parties will need to learn the Receivables module, and will rely less on central accounting, while moving away from QuickBooks
  - Financial reporting: leveraging the new COA for queries (specific searches using the segments and values, particularly the parent nodes to see all the transactions that roll up to it)

# Human Capital Management Summary



The HCM changes align to the **Guiding Principles, minimizing manual processes and paper forms**, reducing risk or human errors and leveraging guided flows to show the user what data needs to be entered, where, and by whom.

Leveraging **Journeys – a NEW concept** – will improve the employee experience and save time. Examples: Pre-employment check process, onboarding, or signing up for benefits (employee self service). Core HR Journeys include Voluntary Reduction in Work Schedule, Offboarding, and any type of leave, like FMLA.

**New reports** will be available for Managers (both ad-hoc and delivered Oracle reports for HR Administrators and Managers). All fields (including customizable) in WolfieONE are reportable.

Approvals will be in the system, for most processes, **instead of offline via e-mail or paper form.**

Total compensation statement (all rewards visible in one place).

The move to Standard Review Period for annual evaluations, making evaluations more consistent (instead of a rolling one-year lookback).

Removing or eliminating the need for DocuSign (leveraging Oracle functionality) for most/all (recruiting and onboarding) processes.

# Human Capital Management Trends

	Current state	Future state
<b>Core HR</b>	<p>Using PeopleSoft HCM and pulling data from emails. Employee data for various entities is stored across various systems.</p>	<p>This is the support structure for all HCM modules and employee data. New business processes <b>enhance the overall user experience</b>. State (University, Hospital, LISVH) and RF employee data will be housed in one <b>unified platform</b>.</p> <p>Standard <b>level of approvals (3)</b> across all HR processes will reduce the time it takes to complete transactions.</p> <p><b>Multiple assignment employment model</b> will accommodate specific scenarios for additional duties and pay elements.</p> <p><b>Accountability:</b> better <b>visibility into the workflow</b> (who needs to take action).</p> <p>The Position Synchronization feature will allow assignment fields to be pulled directly from the setup, eliminating duplicate entry and discrepancies with external systems.</p>
<b>Recruiting &amp; Onboarding</b>	<p><b>Faculty:</b> Interfolio is utilized for recruitment; onboarding is paper based (manual entry into PeopleSoft.)</p> <p><b>Graduate Student Employees:</b> Onboarding is via DocuSign; manual entry into PeopleSoft.</p> <p><b>Staff:</b> Recruitment &amp; Onboarding occur in Taleo with data integration into PeopleSoft.</p>	<p><b>Consistency</b> of onboarding processes across Stony Brook entities and departments. Standardization of recruiting procedures for staff (excluding Faculty recruitment). Seamless recruiting and <b>applicant tracking</b> (instead of having items via e-mail, pdf forms, and items in Taleo or DocuSign). Having an <b>all-in-one system</b> (data flows from ORC to Core HR).</p> <p><b>End-to-end process in Oracle Recruiting Cloud for staff.</b> Expediting candidates to new hires, eliminating manual entry (less risk of human error).</p> <p><b>Standardized</b> offer letter &amp; acceptance processes for all ensures a consistent electronic delivery and transparency.</p> <p>Pre-employment check process for Faculty and Staff will be delivered in a seamless manner. Ability to leverage RMI &amp; <b>Journeys</b> to ensure candidates complete all their required tasks. Recruiters will no longer use the current requisition templates.</p>

# Human Capital Management Trends

	Current state	Future state
<b>Analytics</b>	Multiple sources for reports.	Leveraging system functionality with the ability to consume data from a <b>single source of truth</b> . It allows users <b>to create ad-hoc reports</b> (tailored to the user's parameters) that can be shared and inherits security from the user role.  Ability <b>to leverage hundreds of “seeded” (out-of-the-box) reports, which can be delivered on a scheduled basis.</b>
<b>Employee Self-service</b>	E-mail exchanges with HR Administrators. Manual entry of employee details, which has margin for errors.	<b>Empowering employees to initiate changes to their personal record.</b> Employees can own and manage their data through an intuitive interface and track the status of their requests. Employees will see their person profile, which includes their skills and qualifications.  This <b>reduces risk for the institution:</b> eliminates the errors due to manual data entry from paper / email into the system.
<b>Learning Management System</b>	No unified learning platform. Departments/VP areas are using disparate solutions, which are not connected. Manual entry for the completion of courses/ measurement is tracked on spreadsheets.	<b>Automation of training deployment and assessments.</b> Ability to <b>centrally host</b> training resources, <b>track completion/ measurement</b> (compliance training analytics) and view all employee training reporting in one <b>single platform</b> . Personalized learning recommendations based on <b>Job Families (Example: HR or Information Technology)</b> .  Flexible course structure supports various learning needs. Allowing managers to assign training to their teams. Social Learning through communities & discussions is a new capability.

# Human Capital Management Trends

	Current state	Future state
<b>HR Helpdesk</b>	Emails for support requests go to HR administrators through HR shared mailboxes.	<p><b>Improved customer service:</b> HR agents will handle, delegate, or escalate tickets. Auto routing of the ticket to the appropriate group and in-system ability to reassign the ticket to another agent. Employees can <b>view the status</b> of their tickets.</p> <p>Employee will be able to <b>look for policies</b> in knowledge management system, saving time. Based on analytics on the tickets, the project team can proactively work on improving system set-up and processes to improve the user experience.</p>
<b>Performance Management</b>	Employees receive hard copies of performance documents.	<p><b>Digitalization:</b> Performance Management will be electronic and consistent for employees. Employees will be able to see their past performance documents in one central location. New ability to send <b>performance documents through automation</b> (or trigger the performance program manually).</p> <p><b>AI functionality</b> to summarize reviews (managers will still have final authority). Check-ins, Feedback Request, Goals as expectations will be new concepts. Approval (in system) will route to HR and Employee Relations. Manager Self-Service and Employee Self-Service will be crucial to the performance and goal process.</p>
<b>Manager Self-service</b>	Managers reach out to HR for support.	<p>In-system approval workflows for all HCM modules:</p> <p><b>Empowering managers to review and take actions</b> on their direct and indirect reports. This enables effective team management, <b>fostering autonomy and accountability.</b></p>
<b>Compensation Administration</b>	Requests via email or Taleo. Discretionary raises are done by distributing spreadsheets to depts. and collecting the responses, then central HR uploading to 2 payroll systems (Oracle EBS and PayServ).	<p><b>Better analysis of salary surveys at the job level enables the institution to calculate the most appropriate salary</b> for the job market. Automation of <b>compensation rosters</b> to perform salary increases, such as across-the-board merit increases, within WolfieONE.</p> <p><b>Discretionary raises</b> will be done within the system without the manual intervention (creating and dispersing spreadsheets). VP Areas will no longer need to split out and send spreadsheets and then collect them for submission to HR.</p>

# Human Capital Management Trends

	Current state	Future state
<b>Payroll</b>	<p>Manual entries into PayServ, PeopleSoft HCM, and RF EBS (entry errors risk). Manual reviews and approvals.</p> <p>Current state nomenclature includes “earn codes” and “comp rate codes”.</p>	<p>Employees will <b>enter their own bank details</b> into WolfieONE for direct deposit.</p> <p><b>Payroll/Labor costing:</b> splitting costs when the employee’s salary is going to be funded from different sources (Different initiatives or <b>fund sources</b>)</p> <p>RF employees do not currently have labor costing in PeopleSoft , RF employees labor distribution will be integrated into WolfieONE, improving reporting capabilities.</p> <p>New nomenclature and processes will require training, such as “update” vs. “correct”, and “save” vs. “submit”.</p>
<b>Absence Management</b>	<p><i>University:</i> Accrual banks are manually calculated for employees who submit paper time sheets. They are calculated automatically for employees who submit their time in SOLAR. Time off requests are tracked separately from time entry. <i>Hospital and LISVH employees-</i> enter absences in Kronos system.</p>	<p><i>University:</i> Absence Management is a separate functional area from Time and Labor of WolfieONE, which will pull data from Core HR and Time and Labor <b>to calculate accruals</b>. HR administrators will need training on entering leaves that were approved outside the system.</p> <p>Employees will need training on the <b>absence attestation</b>.</p> <p>Employees will be able to <b>submit time off requests to their managers, and if approved will automatically be added to their timecards in Time and Labor</b>.</p> <p><i>Note: Hospital and LISVH employees will enter absences in Kronos system (no change).</i></p>
<b>Time and Labor</b>	<p><i>University employees- Paper forms and SOLAR.</i> HR administrators do manual entry. Additional pay components (e.g. overtime, compensatory pay, on call/recall, etc.) are manually reviewed and entered in external payroll systems.</p> <p><b><i>Hospital and LISVH employees-</i></b> enter time in Kronos system.</p>	<p><i>University: this module will replace paper and SOLAR time entry.</i></p> <p>Review and approval will take place in the system before payroll processes. <b>Managers will need training on approvals.</b> All employees will require <b>training on logging their time, including lost time due to absences.</b> The policy around time entry for terminations will change: the <b>last day of work will be the last day employees can log their time.</b> Entering time <b>promptly</b> upon deadlines will impact other modules, Employee should submit time sheet on time or managers have to submit the timecard on behalf of teams.</p> <p>Additional pay components (overtime, meals, compensatory time) will be calculated automatically and sent to external payroll systems (EBS and Payserv).</p> <p>HR Administrators must review the dashboard to know the group time cards statuses, fix the errors if any. (data verification for new hire/termination/transfer cases). <i>Hospital and LISVH employees will enter time in Kronos system (no change).</i></p>



## Current State



Home Page

[Share My Information](#)

**SB ALERT** [SB Alert Emergency Information](#)

[SB Alert - Registration](#)

**Security and Personal Data**

[Change My Solar Password](#), [Addresses](#), [Names](#), [Phone Numbers](#), [Email Address](#)

**Campus Personal Information**

[Communication Preferences](#), [FERPA Release/Suppress](#)

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**For Employees**

[State Time Reporting](#), [Payroll and Compensation](#), [Benefits](#), [Learning and Development](#), [Compliance](#)

**COVID-19**

[COVID-19 Affirmation Document](#)

**Manage Student Workforce**

[Department Assignments](#), [List SA/FWS Emp in Department](#), [End Student Assignment](#), [SA/FWS](#)

**Student Time Sheets**

[Approve Time Sheets](#), [View FWS Balance](#), [List Not Approved Time Sheets](#), [Time Sheet History](#)

## Manager Self-service Future State:

JC  
John Cloud

### Employment Info

#### Assignment

**Legal Employer**  
Stony Brook University

**Business Unit**  
SBU Business Unit

**Job Code**  
1700

**Job**  
Account Clerk

**Business Title**  
Account Clerk

**Department**  
ACP Administration-35137800

**Grade**  
02\_004

**Step**  
HR

**Location Code**  
648

**Location**  
Grounds Garage

**Position Code**

**Actions**

- Add Assignment
- Additional Assignment Info
- Change Location
- Change Manager
- Change Salary
- Change Working Hours
- Create Work Relationship
- Direct Reports
- Eligible Jobs
- Employment Contracts
- Employment Start Dates
- Individual Compensation
- Promote
- Promote and Change Position
- Seniority Dates
- Termination
- Transfer

# Employee Self-service Tiles



James Gates



## Personal Details

Details about yourself, such as name, date of birth, marital status, and national identifier.



## Identification Info

View and edit your passport, driver license, visa, and citizenship info.



## Contact Info

Add or update ways you can be reached, such as phone, email, and address.



## Family and Emergency Contacts

Add family and friends to contact in case of emergency.



## Document Records

Manage your document records and associated attachments, such as birth and marriage certificates, awards, and recognition.



## Employment Info

Details about your assignment, such as legal employer, business unit, department, and location.



## Additional Assignment Info

View more details about your assignment.



## My Compensation

View your compensation details, such as salary and personal contributions.

# Learn

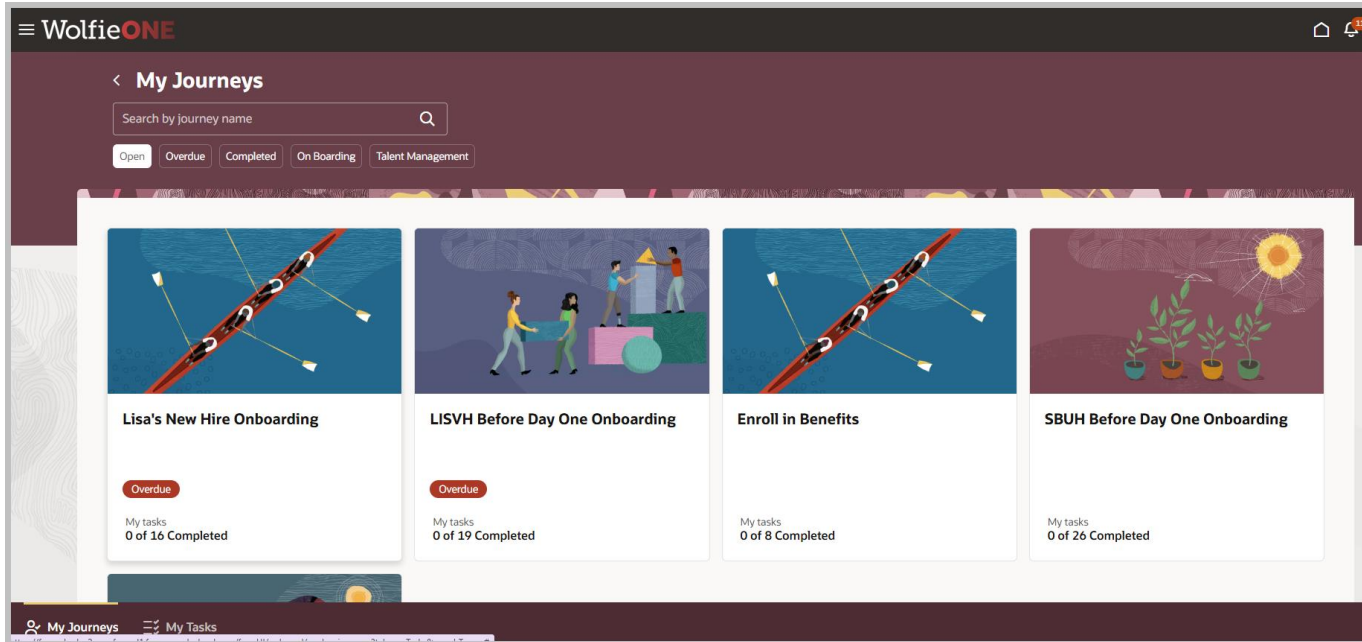
The screenshot displays the 'My Learning Experiences' page in the WolfieONE system. The page features a dark header with the 'WolfieONE' logo, a home icon, a notification bell with a '4' badge, and the 'MU' logo. Below the header, the title 'My Learning Experiences' is centered, with 'Actions' and 'View Transcript' buttons to the right. A search bar is positioned below the title, followed by filter buttons for 'Enrollments To do', 'Completed Date', 'Enrolled on Date', and 'Clear (1)'. The main content area shows '2 results' and a 'Sort By Due date' dropdown menu. Two course cards are displayed, each with the Stony Brook logo and a status indicator.

Course Title	Assigned by	Status	Due Date
SC-900: Security, Compliance and Identit...	Assigned by Human Resources ...	Not Started, required	12/18/24
Antitrust Law: Antitrust Law Compliance	Assigned by Nursing Education ...	Not Started, overdue	10/31/24

# Sample Journeys



# Sample Journeys



We can develop eligibility profiles around Journeys (If I meet that criteria, then the Journey is assigned to me). The Manager can assign journeys, via Manager self-service.

# TIME / ROLE POLL

# Next Steps

# Change Champion Action Plan

Know, Share, Do | Nov 2024 – Jan 2025



## Know This!

- ❑ By 12/02: Review the WolfieONE website in detail, including:
  - ❑ Nov: Which processes fall under ERP, HCM and EPM
  - ❑ Timeline update: Build Sprints go until Spring 2025, we will then enter Testing
  - ❑ Dec: Review Frequently Asked Questions (FAQs) & let us know what to add
  - ❑ Jan 2025: Action Plan will be released by the OCM team



## Share This!

- ❑ Identify peers who are “your **counterparts**”
- ❑ Identify the department ongoing meetings at which WolfieONE can be an agenda item & ask for time during those meeting to present
- ❑ January: join team meetings to deliver program updates (refer to talking points provided in this session and the OCM meeting-in-a-box)



## Do This!

- ❑ Save the WolfieONE website resources to your bookmarks (print the QR code that will be provided by OCM and post it in your office!)
- ❑ ASAP: Set **reminders** to spend just 15 min biweekly on the WolfieONE website
- ❑ Dec 2024: Share the WolfieONE website, personal note from the eNewsletter (excerpt that has meaning) with select colleagues- “Did you know”?
- ❑ Jan 2025: Share notable feedback and questions from colleagues with OCM

Customized Email Signature Add-On

Email Templates, Newsletters, and Vetted Responses

Zoom Backgrounds

Copy/paste the WolfieONE logo (top right) and add to your e-mail signature, along with:

**“Proud Change Champion, ask me about WolfieONE!”**



# OCM Contacts



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# Appendix

# Example of COA search for Account values

Manage Shorthand Aliases

Search

\* Chart of Accounts SBU CoA Structure Instance

Search Results

View Format + X [Icons] Freeze Detach Wrap

* Name	ENTITY	ORG	FUND TYPE	FUND SOURCE
Dept 314010	100	314010	101	10500001
Accounting Ope...	100	314010	101	10500001
Chase Bank				

Search and Select: ACCOUNT

Search Advanced

Match  All  Any

Value 56702

Description

Search Reset

Value	Description
567020	Other Expense - GNS Subject Costs
567021	Other Expense - OTR Miscellaneous Ot...
567022	Other Expense - OTR Collection Fees
567023	Other Expense - OTR IP TTO Enforcem...
567024	Other Expense - OTR IP TTO Marketing
567025	Other Expense - OTR IP TTO Develop...
567026	Other Expense - Dietetics and Nutrition
567027	Other Expense - Indirect Debt Service E...
567028	Other Expense - Miscellaneous

OK Cancel

BUDGET YEAR FUTURE1 Description Enabled

425	000000	Dept 314010	Yes
25	000000	Accounting Operating Fund Adjust...	Yes
	000000	Chase bank	Yes

# Example of COA Alias and segments on a financial transaction (drop down menu)

▲ Hide Segments

Alias Accounting Operating Fund ▼

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ENTITY 100 ▼ Stony Brook University

ORG 314010 ▼

FUND TYPE 101 ▼ Unrestricted Operating

FUND SOURCE 10500001 ▼ Administrator's Office

ACCOUNT 567028 ▼ Other Expense - Miscellaneous

CLASSIFICATION 00000 ▼ Default Classification

INITIATIVE 00000000 ▼ Default Initiative

BUDGET YEAR 2425 ▼ 2024-2025 State Budget Cycle

FUTURE1 000000 ▼ Default Future1

Search Reset | OK Cancel

Drive university-wide strategic initiatives with a transparent, data-driven, and seamless user-focused experience to limit friction and support business continuity for all members of our community.



**TRANSPARENCY  
AND INCLUSION**



**GOVERNANCE**



**SINGLE SOURCE  
OF TRUTH**



**OPTIMIZED  
OPERATIONS &  
PROCESSES**



**TRANSFORMATION**



**STONY BROOK  
FIRST**

# Wolfie**ONE**

# Analytics

Fusion Data Intelligence (FDI) is Oracle's reporting platform, comprised of several applications, such as Fusion ERP Analytics and Fusion HCM Analytics. These customizable tools empower all users to understand how each part of the business impacts company goals and strategy.

- **Gain consistent and combined data across departments** with a [prebuilt, single analytics data model](#) for Oracle Cloud Application data that can also include any external data.
- **Get all your important KPIs and metrics all in one place** to make quick decisions with a [library of ready-to-use, best practice KPIs](#).
- **Predict and understand how your business processes** across departments affect business outcomes with [cross-subject area business views](#) and [prebuilt machine learning \(ML\)](#).

# HCM Processes in Scope

Level 1  
Workstream

## HCM

Level 2  
Process area

Core HR

Workforce  
Compensation

HR Helpdesk

Oracle  
Recruiting Cloud

Performance  
Management

Level 3  
Sub-processes

Assignment &  
Data Changes

Initiating  
Compensation  
Processes

Submit ticket

Requisition  
Management

Goal  
Management

Position Changes

Managing  
Compensation  
Processes

Manage issue

Apply External &  
Internal

Annual  
Performance  
Evaluation

Hires/Rehires

Closing  
Compensation  
Processes

View status

Candidate  
Management

Anytime  
Documents

Pay Rate  
Changes

Candidate  
Selection Process

Feedback

Terminations

Manage ICPs

Interview  
Management

Check-Ins

Leaves

Offer  
Management

Profile  
Management

Earnings Dist.  
Changes

Pre-Employment  
Checks

Skills and  
Qualifications

Level 4  
Sub-processes



# Process Scope

Level 1  
Workstream

## HCM

Level 2  
Process area

Payroll

Learning  
Management

Health & Safety\*

Time & Labor

Absence  
Management

Level 3  
Sub-processes

Manage payroll relationship  
and associations

Design/Re-design  
Learning Content

Logging Safety  
Incidents

Capture time

Manage Time offs

Manage Tax withholding  
information

Manage Catalog

Managing Safety  
Incidents

Approve time

Long Term  
Leaves

Manage Organization  
payment method

Scheduling & Logistics  
- ILT/Virtual

Closing Safety  
Incidents

Transfer time

Accruals and  
Compensatory plans

Manage Personal bank  
details

Manage Learner  
Cancellations

Manage Worker  
Schedule

Workflows

Element  
transactions

Cancelling the Course

Various time  
off PTOs and other  
leaves

Manage employee  
address details

Deliver Class/Virtual  
Training

Works' comp,  
Disability leaves (short  
and long term)

Manage payroll  
definition

Manage Course  
Completion

Learning  
Measurement  
& Reporting

Absence approval and  
workflow for PTOs  
(Sick leave)

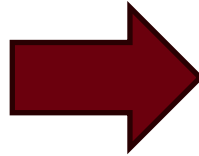
Level 4  
Sub-processes

# Other Topic External Billing

## Current State

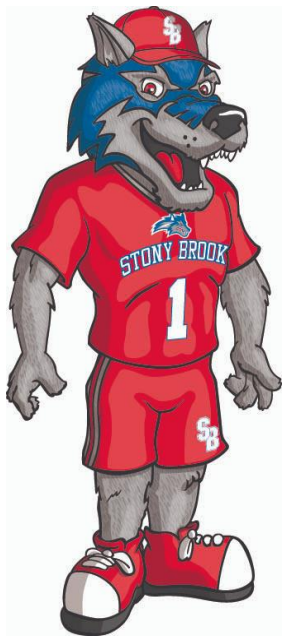


Receivable Ledger							
Print Date: 3/19/2022					Total Receivable: ₹ 13,450.00		
Invoice Date	Invoice Number	Customer	Total Amount	Due Date	Balance	Payment Date	Payment 1
05/15	A1102	Customer 1	₹ 20,000.00	12/30/15	₹ 13,000.00		₹ 1,500.00
05/16	B2300	Customer 2	₹ 1,000.00	02/05/16	₹ 450.00		₹ 150.00
					₹ -		



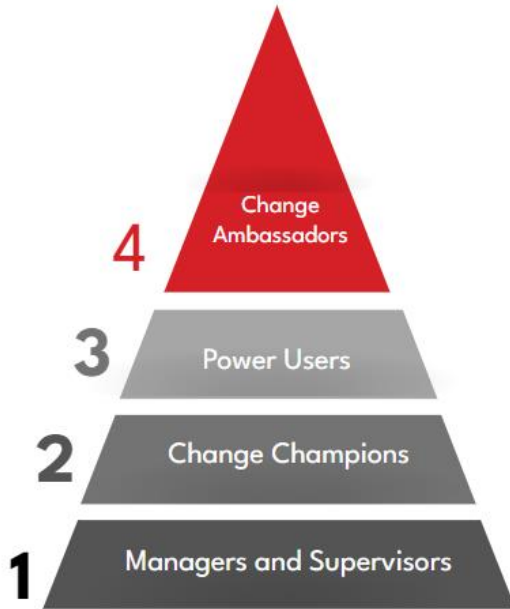
## Future State

- Standard tool for everyone
- Central set of customers
- More available reports
- Improved receivables visibility
- Better receivables management



# Change Champion Network

The following represents the various “nodes” in our network:



**NOW: Be vocal** about supporting WolfieONE goals and changes.

**Listen and document** constituents' questions and concerns (pass it to OCM) in your regular meetings and informal chats.

Carry our message to your peers. OCM will provide materials (eNewsletters, toolkit).

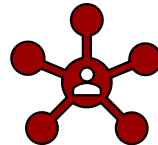


By **January next** year, help engage stakeholders in your organization about **change impacts**, the training **timeline and process/systems scope**. The messaging at that point will be centered **around training**.

Align with OCM team on the cadence of peer network meetings.



Upon Go-Live: **Promote training enrollment** and collect feedback; **encourage your peers** to respond to our **readiness surveys!**



**That's you, the center of this influence network!**

# What is up next:

## Toolkit

- What are you expected to do? – Action plan, meeting-in-a-box
- Cascade information (eNewsletter)
- How? Comm channels in dept., meetings, events
- Where to find resources? Website, calendar
- ERP Change impacts
- COA specific examples
- EPM Change impacts

## Message bank (key themes)

The time is NOW: Build foundation knowledge, so as to prepare for formal training. Change is gradual and must be broken into small bites.

Peak-end rule: people will remember the most meaningful/intense part of their experience and their last portion

Nudges are visual and timely reminders to encourage the right behaviors that align with adoption and modernization.

# Change Network | Highly Impacted groups

HR professionals  
Finance administrators  
Asst. to the Chair  
Capital Planning  
Student Affairs  
Enterprise Risk Management  
IFR Managers  
DoIT  
HRIS  
Hospital HR  
SBF  
Bursar's  
HSC - Health Science Center  
School of Medicine

Communications  
University Advancement  
OVPR /RF  
Accounting (incl. procurement)  
Institutional Effectiveness  
President's office  
School of Dental Medicine  
Government and Community Relations  
Athletics  
School of Nursing  
Labor relations  
Procurement  
OEA (Office of Equity and Access)  
Academic(Dean, Chair, Faculty)

**A full list of Change Champions will be on the [WolfieONE website!](#)**

# Change Champion Expectations

Change Champions will actively champion WolfieONE, foster smooth adoption through communication and promotion, and provide invaluable feedback perspective to the program.



## Learn & Engage

Attend monthly one-hour Change Leader Network meetings

Attend program and/or workstream-related events and activities (webinars, roadshows, townhalls, etc.)



## Foster Two-Way Communication

Influence colleagues to adopt change:

- Collect concerns, questions, & feedback from peers & community, share with program team
- Spread awareness & key information from program to peers & community
- Share ideas for strategies to best engage schools and units



## Participate

May be selected to participate in key implementation activities or recommend individuals to participate:

- User acceptance testing (UAT)
- Train-the-trainer
- End-user training

### Time Commitment:

- **3-5 hours total in 2024**
- 2-3 hours per month in 2025
- Oct 2024 – Dec 2025

### The role of Change Champions does **NOT** include:

- Decision-making
- Providing input on functional design



# Meeting Cadence

**2024:** only **one more educational meetings** after this one, **minimal time commitment**

**Begin your journey** with a recap of the Town Hall: [WolfieONE Town Hall April 2024.pdf \(stonybrook.edu\)](#)

**2025:** At the Change Champions' discretion, how often to meet with peers.

Feedback loop through the feedback form and Change Readiness Survey:

- The OCM Feedback form should be used regularly to inform OCM of any updates. OCM team will bring up the topics from the feedback form in the next meeting:

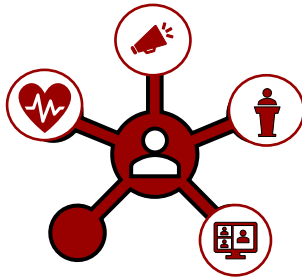
[Feedback | Change Management \(stonybrook.edu\)](#)

- The Change Readiness Survey is your key tool (get your peers to fill it out)

# Why is a Change Leader Network needed?

Promote **understanding** to assist employees in understanding changes, dealing with uncertainty and ambiguity as the program progresses through implementation

**Accelerate the adoption** of the change by quickly disseminating timely and accurate information and build trust through communication and feedback



**Advocate** positive change through face-to-face and informal communications that are required to **change behaviors** and attitudes

Build a **community of early adopters** who value the opportunity to try out new technology first and get a chance to demonstrate their leadership skills

Build **accountability** and **ownership** by empowering Change Champions to gather feedback from stakeholders, answer questions and resolve concerns without having to wait or rely only on “formal, official” communications

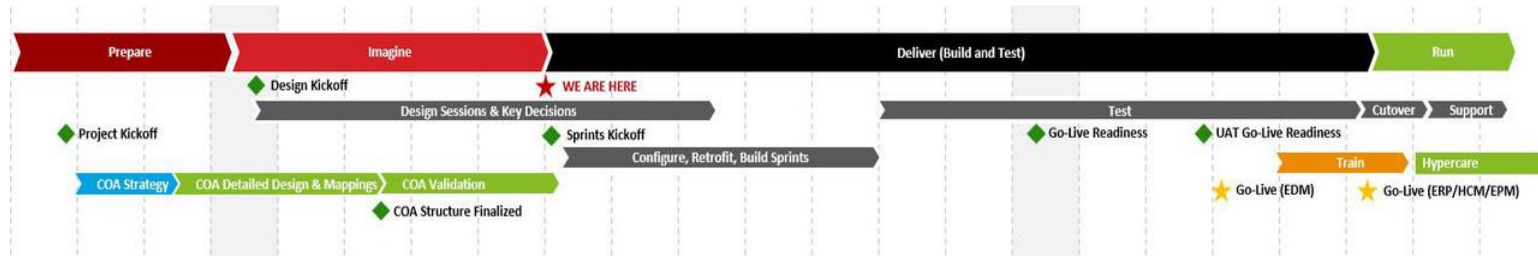
## Vision Statement

**Drive university-wide strategic initiatives with a transparent, data-driven, and seamless user-focused experience to limit friction and support business continuity for all members of our community.**

# Project Phases

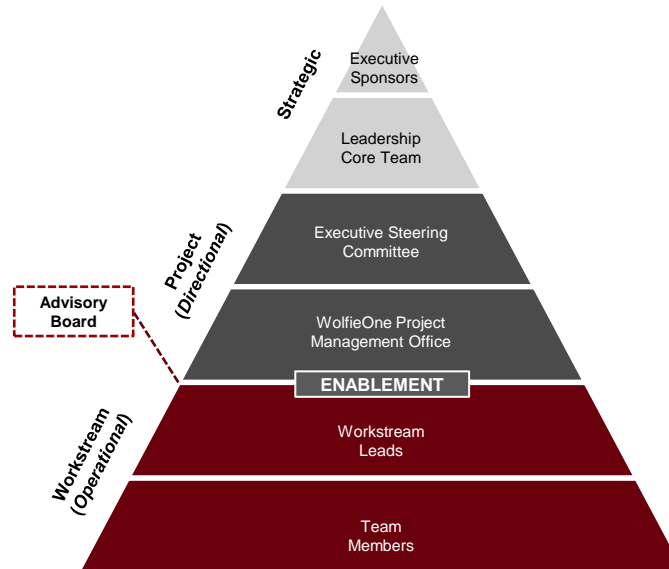
ERP & HCM are in Build/configure, while going through an iterative process to make decisions about certain system components still in Design, before moving those processes and user stories into “Sprinting” mode. Enterprise Performance Management is in Design.

Once we configure the system, we test, make adjustments, test again, then train the trainers, who will in turn train the end users.



# Project Governance

Stony Brook and Deloitte team members have dedicated escalation channels to the project leadership stakeholders – driving efficiency and consistency in the decision-making process leads to better communication and fewer bottlenecks.



# Guiding Principles

- Collaborate cross-functionally
- Be transparent in decision making
- Communicate fully, seeking input and feedback

- Put Stony Brook interests above anything else
- Make strategic decisions that support the mission of our university and hospitals
- Leverage every opportunity to elevate Stony Brook's reputation



- Adhere to the governance structure in place
- Respect the authority of the governing bodies
- Refer to the guiding principles to guide organizational decision making during day-to-day activities

- De-siloed and transparent data
- Adopt and practice data governance
- Develop trust in system data

- Self-service
- Improve policies and practices
- Build for the long-term
- Data-empowered decision making

- Streamline workflows
- Simplify operations
- Redesign processes based on higher education best practices

# Entity Scope ERP & HCM

The purpose of this Entity Scope view is to articulate how user populations within the below entities will align with respect to Day 1 Future-state WolfieONE application use and/or data integration. The Legal Entities that will be configured in Oracle is separate from this scope view.

Functional Area	Entity									
	SB University	SB Foundation	FSA	Research Foundation <sup>3</sup>	SB Medicine					
					SBUH <sup>1</sup>	LISVH <sup>1</sup>	CPMP	ELI <sup>2</sup>	SBSH <sup>2</sup>	Other Affiliates <sup>2</sup>
ERP (Finance)	Yes	Yes	No	Integrate	Integrate	Integrate	No	No	No	No
HCM (HR)	Yes	No	No	Yes	Yes	Yes	No	No	No	No

Definition	
Yes	Populations within this entity <u>will</u> log on to WolfieONE Oracle Cloud to transact and/or perform reporting activities.
No	Populations within this entity <u>will not</u> log on to WolfieONE Oracle Cloud to transact and/or perform reporting activities.
Integrate	Data from this entity will integrate with WolfieONE Oracle Cloud.
Notes	
<ol style="list-style-type: none"> <li><b>SBUH / LISVH:</b> EPM at summary level - they have their own budget system for daily operations. ERP – integrate for URAS reporting purposes – they have their own GL. Will load audited financial statement data to FCCS for consolidated financial reporting.</li> <li><b>ELI/SBSH/Other SBM Affiliates:</b> These entities will load audited financial statement data to FCCS for consolidated financial reporting.</li> <li><b>RF:</b> HCM consideration – RF employees include select CPMP and SBF staff.</li> </ol>	