

WolfieONE

eNewsletter | December 2023

Welcome to the first WolfieONE eNewsletter!



WolfieONE



Video: Senior Vice President for Finance & Administration, Jed Shivers, introduces WolfieONE, Stony Brook's journey to a new ERP.

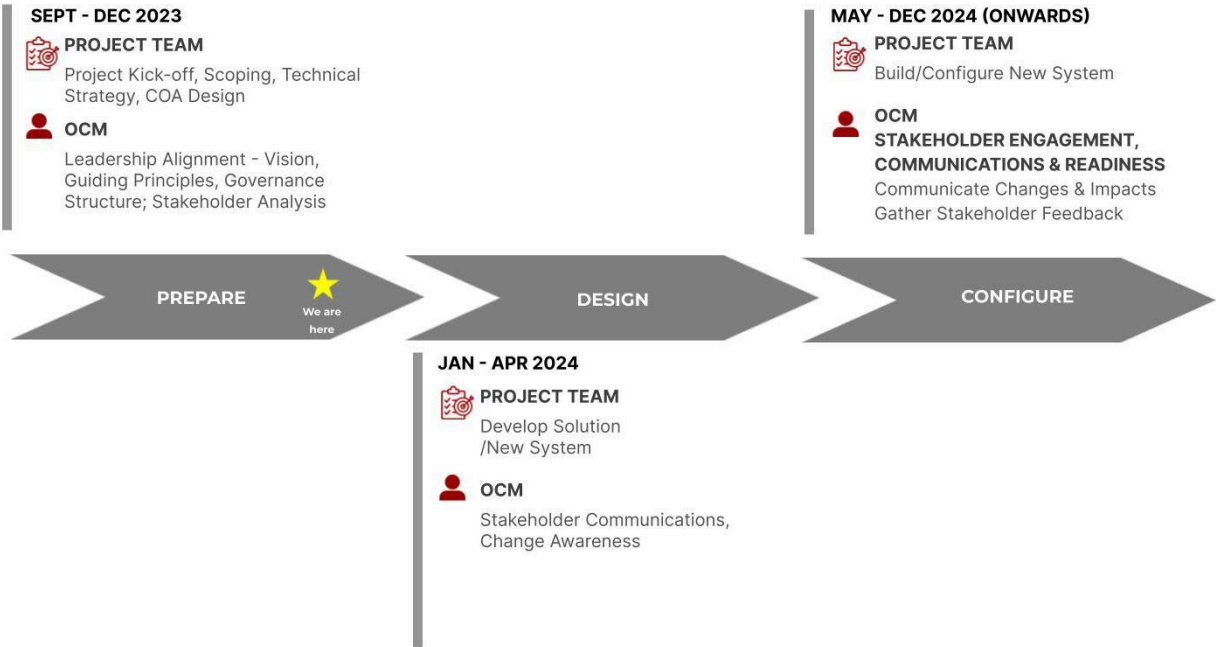
Each month, the Office of Change Management will be sending a digital update, mid-month, to the WolfieONE community. Major happenings, the latest project-related information including special shout-outs will be included, and our hope is that this will help you gain a better understanding of what's going on in the

project. As always, we welcome your [feedback](#) and ideas for future newsletters. This January, we will be hosting the Project Workstream Team kickoff, followed by our Road Show, in which we will be visiting all VP areas, to create project awareness. The next step will be to conduct a Town Hall for the broader community.

Communications Updates

We have been hard at work building the [WolfieONE website](#)! Learn more about the initiative, see project-related resources and much more! Check back often for updates.

Timeline: Summary of Activities



**This is a tentative timeline subject to change depending on actual project task completions. Visit the WolfieONE website periodically for updates and the latest version.*

Workstream Update: CoA

The Chart of Accounts (CoA) is the basic structure used to record the financial effects of transactions in Oracle Cloud (Financial Transformation). It consists of a pre-defined alphanumeric sequence, broken down into segments, to classify each

transaction. Each segment has a fixed list of values that must be used consistently by all WolfieONE users.

We need this standard tool to integrate all financial data, to generate entries that post to the General Ledger, to enable financial reporting, and to represent the business in financial terms to various stakeholder groups.

What's Happening: For the past four months, the CoA team has collected documentation and information from questionnaires and conducted a series of interviews with stakeholder groups that were identified by Project Leadership. As a result, the team produced a CoA current state assessment, including leading practices across Higher Education. Two workshops were hosted to share the Current State Assessment and Leading Practices with contributing partners and stakeholders.

What's Next: The next steps in building the new CoA will entail designing the future CoA segments and hierarchy along with complimentary data based on the Current State Assessment, leading practices, and future needs. Once this is complete, a plan to gather CoA values and conduct mapping of those values will be created. The CoA team will collaborate with other workstreams, partners and stakeholders to share the future state CoA.

Spotlight and Shout Outs



Stony Brook's Sara Lehmann: Sara is a critical member of the Chart of Accounts and overall Finance teams for the WolfieONE ERP implementation. Not only does she have years of applicable Stony Brook experience, but she also brings into conversation the various SUNY reporting needs and user needs. Sara is also a strong accountant who provides valuable insights and brings great ideas to every meeting! ***Thank you***

Sara for all your hard work and contribution! - Cassandra Amadio, Assistant Vice President for Accounting and University Controller

Sara's Response: The success of our ERP implementation is highly dependent on the quality of our project team. Our team has made disseminating information and stakeholder needs a top priority. Our goal is to reduce complexity with standardization. We are taking an in-depth look at our processes, reporting, data capture, and integrations, to develop a robust, systematic approach for implementing our ERP. This is a complex, multi-layered project that involves working with cross-functional teams, managing stakeholders needs, and making strategic decisions that impact the University as a whole, while also expanding and diversifying my professional career. The growth opportunities are invaluable, both organizationally and personally.

Our Partners at Deloitte: I can't say enough about our Deloitte partners from a Chart of Accounts and Finance teams perspective – they have been absolutely fantastic to work with and brought to the table valuable leading practice insights as well as experience from other university implementations. Additionally and maybe even more importantly, they are great people to work with and bring fun to an otherwise boring topic!

Thanks Cassie Amadio for shouting out members of our team and our partners on this project!

Leadership Lab

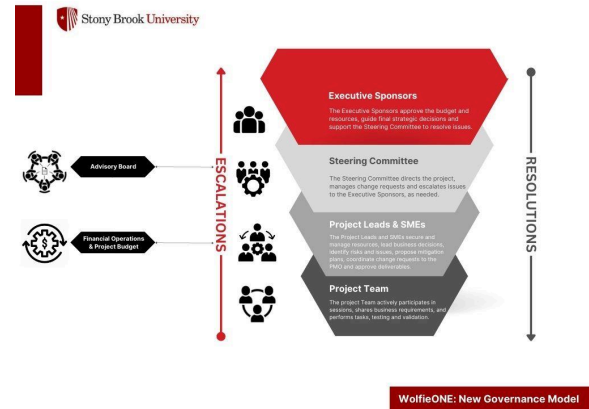
The Office of Change Management, in collaboration with Deloitte, conducted two Leadership Labs during November with the WolfieONE Executive Sponsors and members of the Steering Committee. Collectively, the group engaged in several meaningful activities designed to fine-tune the ERP project's vision, guiding principles and governance structure.

Please click on any of the graphics below to enlarge, or download the files.

Vision and Guiding Principles:



Governance Structure:



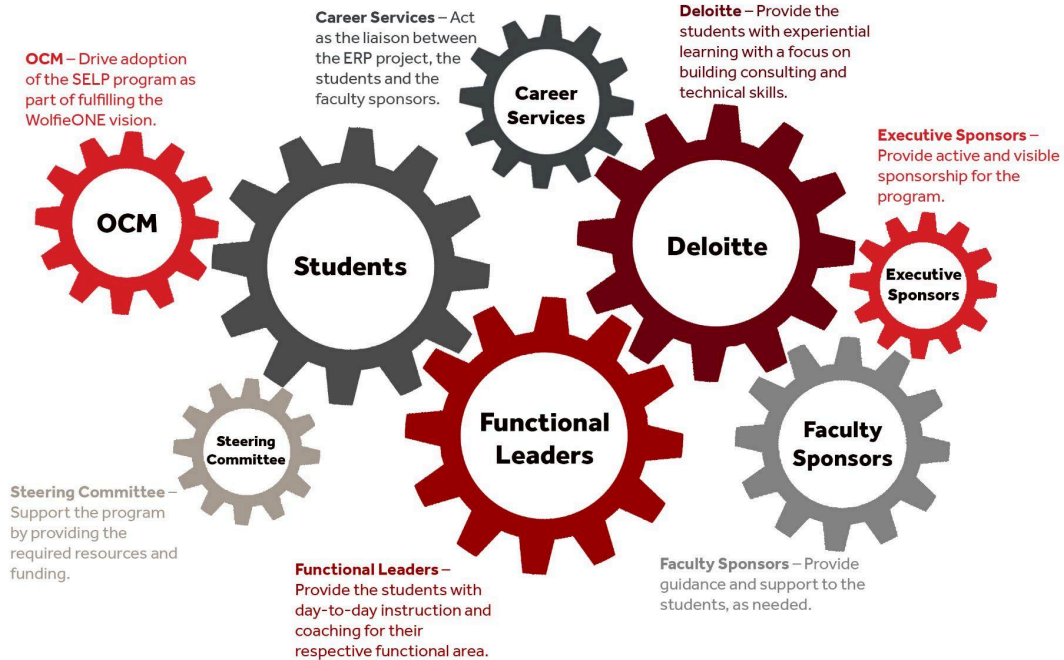
SELP

"Experiential learning is the process whereby knowledge is created through the transformation of experience." - David Kolb

Stony Brook is excited to announce our partnership with Deloitte to offer a Student Experiential Learning Program (SELP) to SBU students. The students who are selected will gain valuable hands-on experience implementing an ERP, and will be a part of this large, transformational effort at Stony Brook.

The Partners (click to enlarge):

THE PARTNERS ENABLING SELP AND ENSURING SMOOTH MOTION



An informational session for students was conducted on November 15th and interested students applied to the program. The team has selected 6 students that will partner with their respective workstream leads on the project. The program will kick off in the Spring of 2024. Shoutout to our liaisons, Marianna Savoca (Career Services) and Kevin Moriarty (Faculty Sponsor).

Learn more on the [OCM website](#).

Important Links

[WolfieONE Website](#)

[Feedback Form](#)