

WolfieONE

Change Leader Network Training – Part 1

Nov 14, 2024

Office of Change Management

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



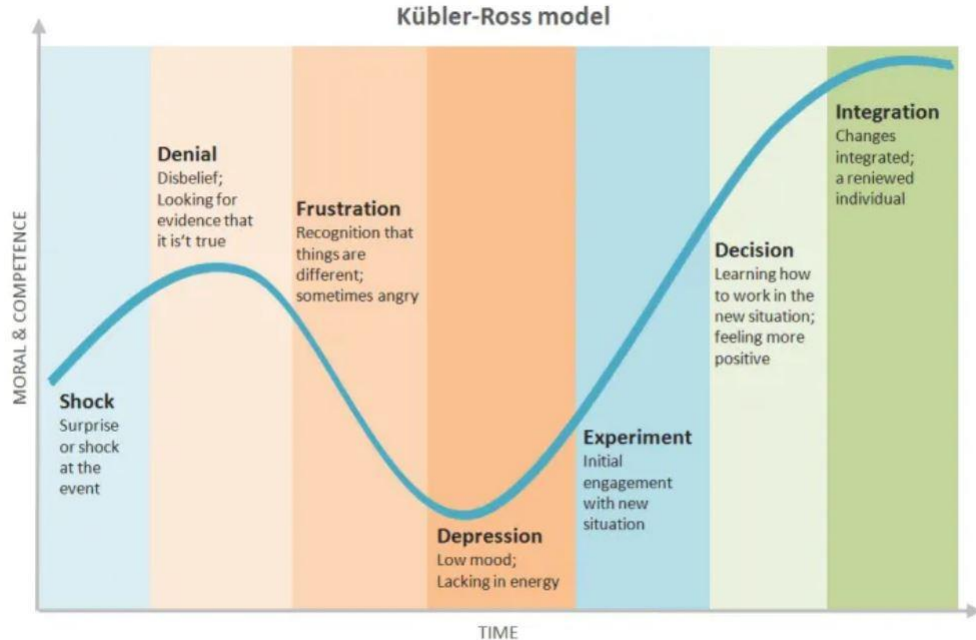
Getting Started with Change Management

The Change Curve

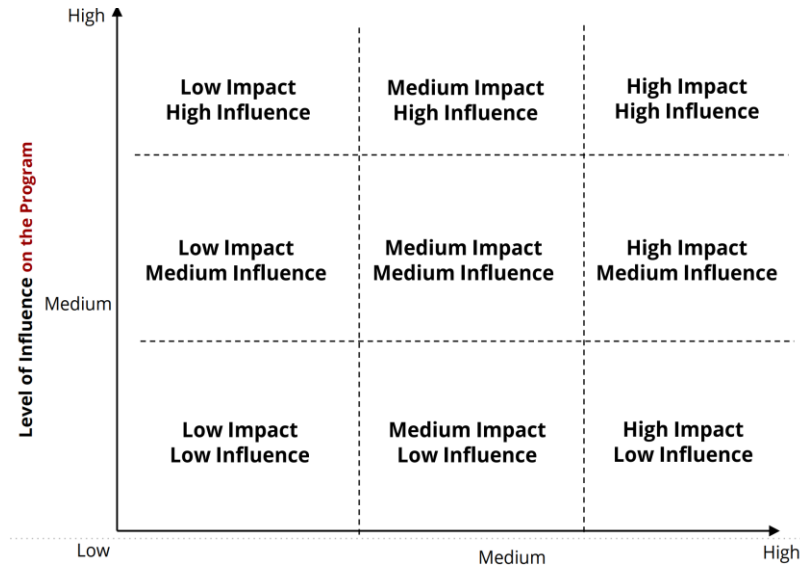
It is natural for anyone to prefer the status quo, not because they are against change, but because humans naturally gravitate towards maintaining things as they are.

WHAT	WHY	WHEN	WHERE	WHO	HOW
CM focuses on the human factor of organizational change. CM guides people to prepare, embrace and support the transformation effectively and adapt to their new environment quickly—all without resistance and repercussions to productivity.	Whenever a project's results and outcomes are dependent on individuals adopting and using a solution—it allows employees to understand and consent to the shift and work effectively during the adoption.	Whenever an organization has to change the way it works—and requires people to do their jobs differently.	Wherever 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, baseline, capacity, etc.	Enable Change Project and Change Management Teams Lead Change Sponsors, Leaders, Managers, Change Champions and Change Agents Adopt Change Impacted Users	A structured change management approach enhances the change maturity of an organization, maximizes project adoption rates, and optimizes the people side of a project.

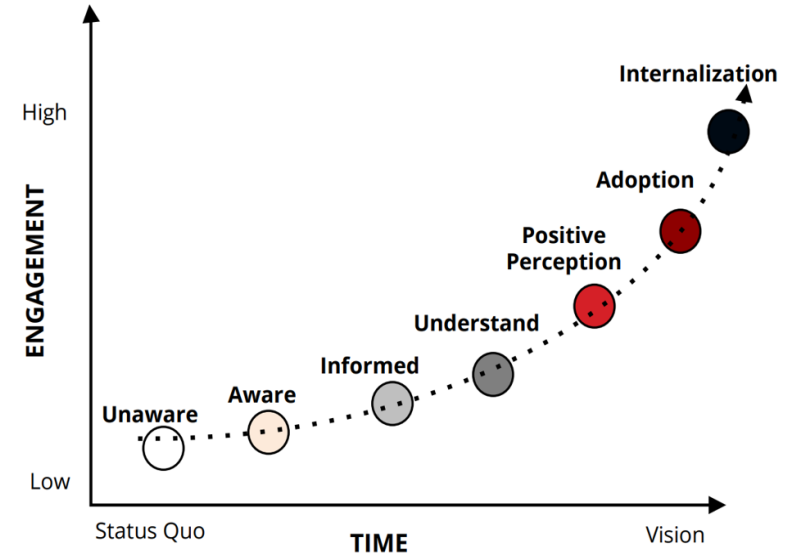
Change Management at Stony Brook



Change Management Foundations

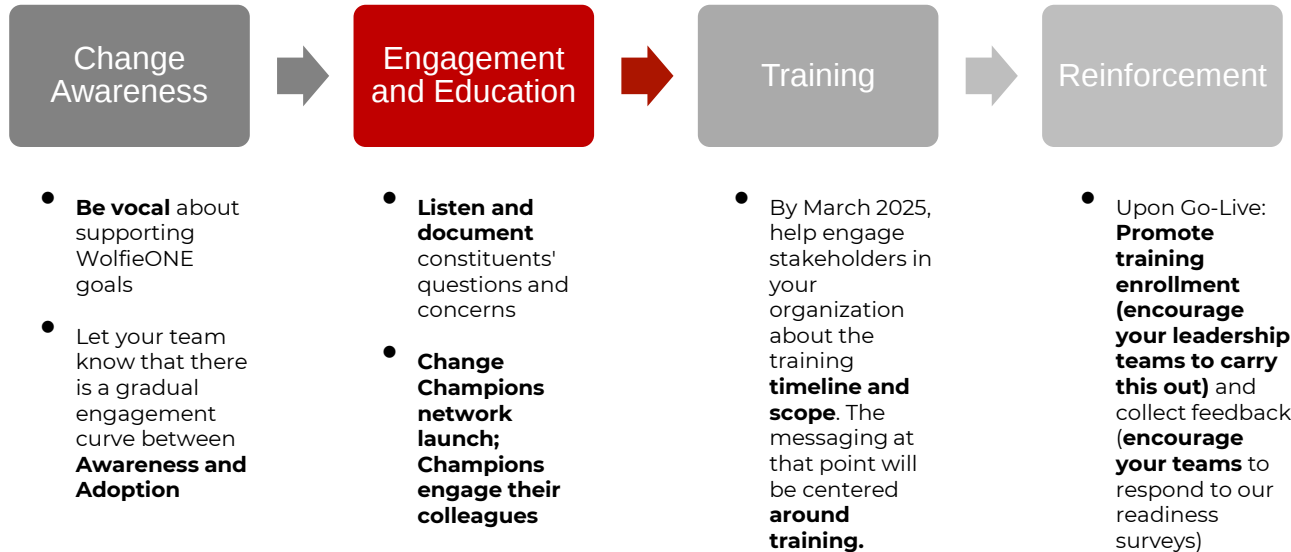


Stakeholder's Level of Impact by the Program



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/ PeopleSoft software for Finance	Enterprise Resource Planning (ERP) Cloud
Oracle/ PeopleSoft software for Human Resources	Human Capital Management (HCM) Cloud
Campus Budget Module (CBM) for Budget and Planning	Enterprise Performance Management (EPM)
SOLAR (time and attendance; employee information, NOT the student side)	Human Capital Management (HCM) for reporting time and attendance
Recruiting and onboarding in Taleo	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. Students' employee records will exist separately from their Academic record in WolfieONE.
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)

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.

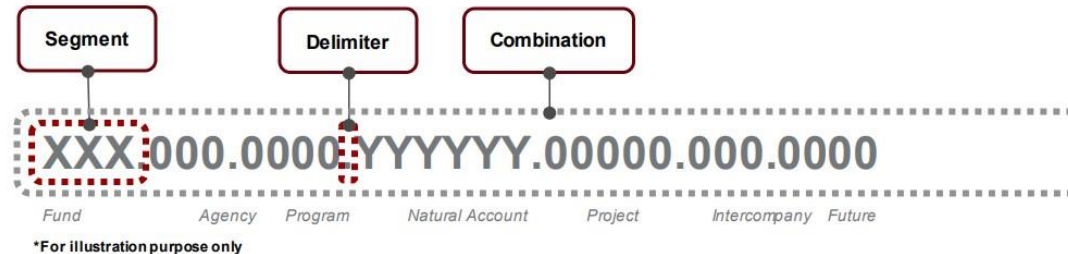
The **child** represents the lowest level in the hierarchy. The child values are the values used when entering transactions.

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:



New Chart Segments

WolfieONE

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 – A self-balancing set of accounts categorized by purpose, ownership, responsibility or restriction. Also denotes how the funds are allowed to be used: restricted or unrestricted.

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

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

Campus Commitments – Ability for units to track and manage their commitments in a systematized way.

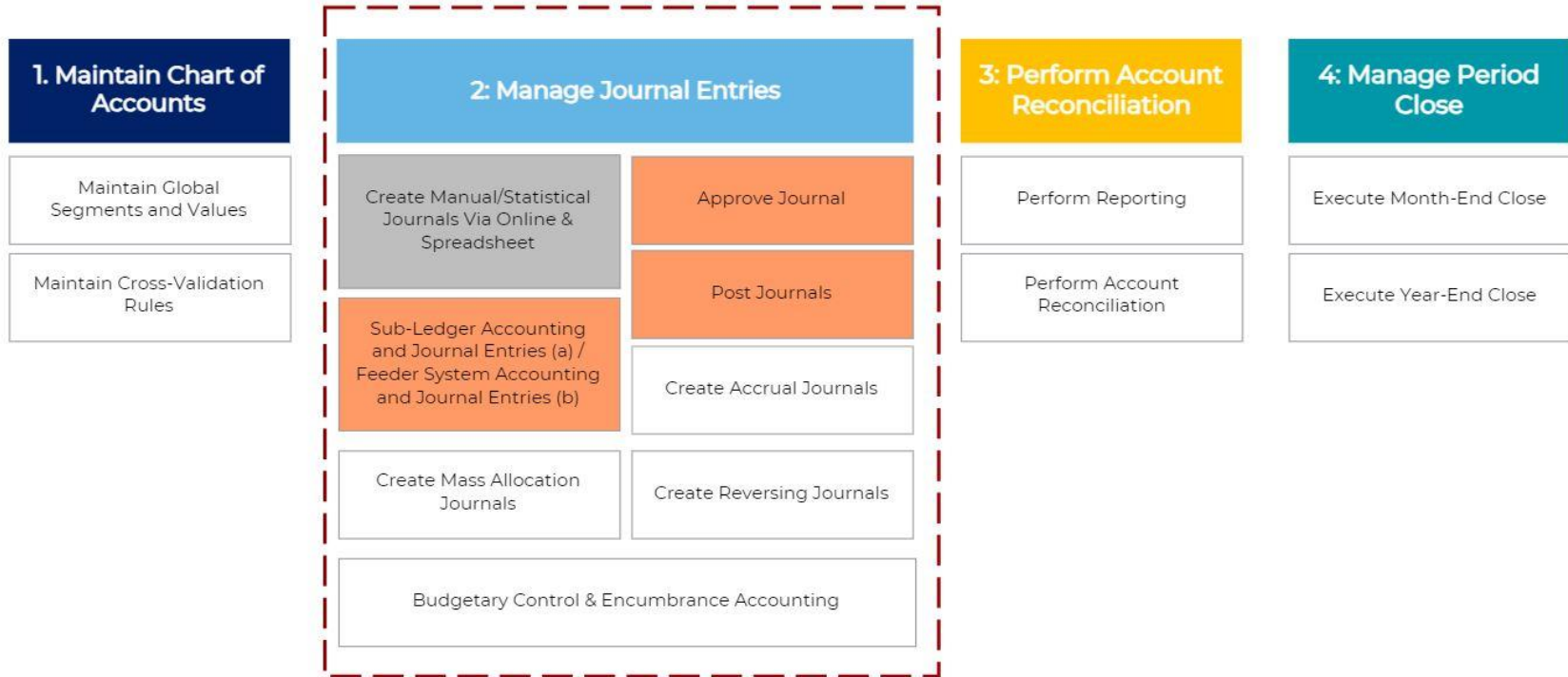
Budget Year – An identification of the budget year for prior budget spending.

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

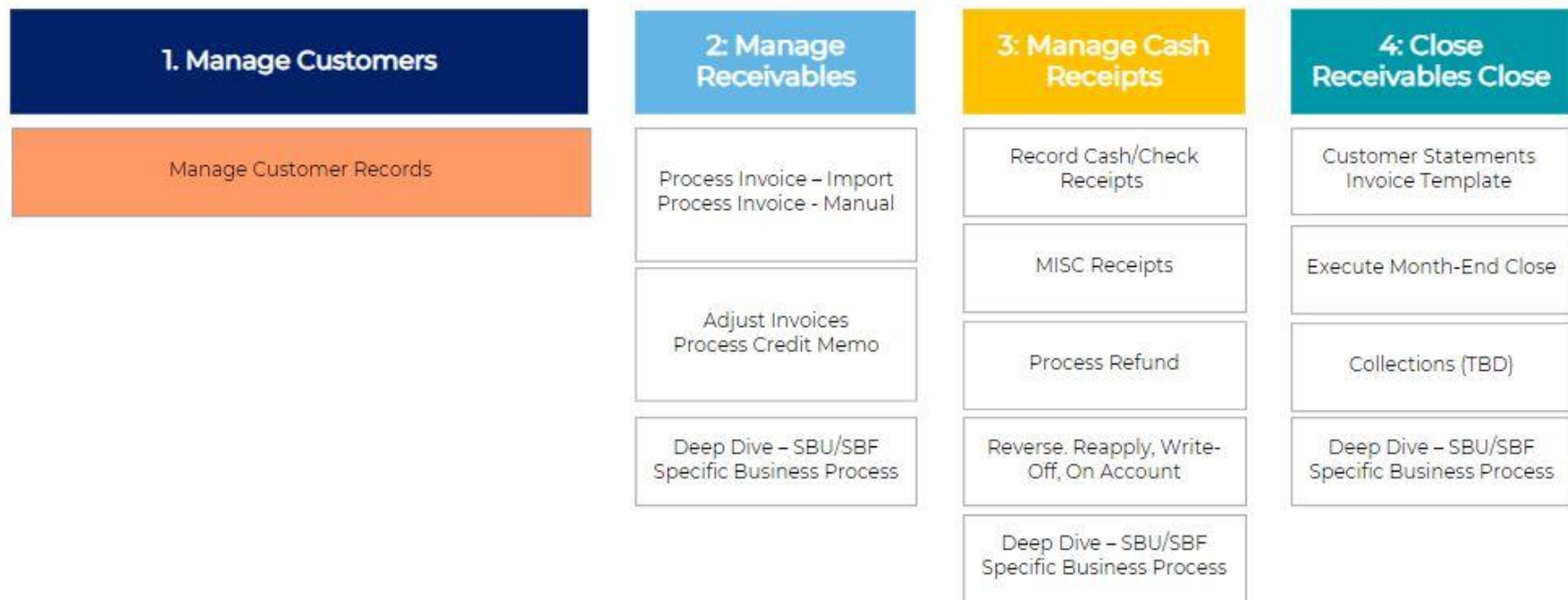


Oracle Cloud Overview

ERP General Ledger breakdown



ERP Example of Receivables breakdown



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

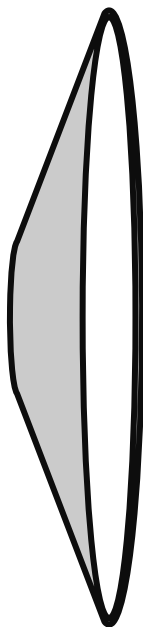
2: Manage Period Close

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

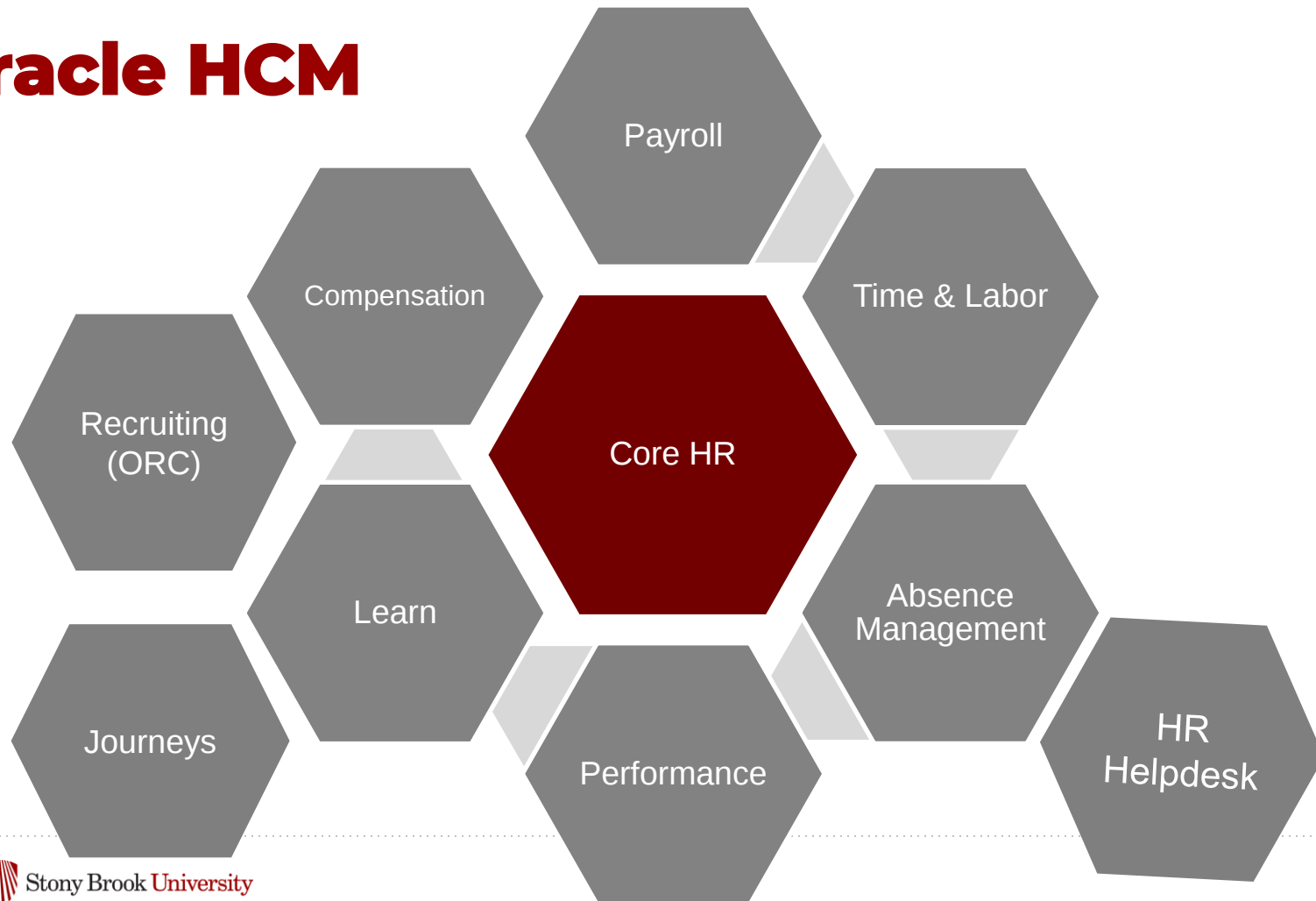
Manage Existing Positions
Manage Vacant Positions
Create New Positions
Allocations/ Costing/ Splits



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

Human Capital Management Trends

	Current state	Future state
Analytics	Multiple sources for reports.	Leveraging system functionality with the ability to consume data from a single source of truth. It allows users to create ad-hoc reports (tailored to the user's parameters) that can be shared and inherits security from the user role. Ability to leverage hundreds of “seeded” (out-of-the-box) reports, which can be delivered on a scheduled basis.
Employee Self-service	E-mail exchanges with HR Administrators. Manual entry of employee details, which has margin for errors.	Empowering employees to initiate changes to their personal record. 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 reduces risk for the institution: eliminates the errors due to manual data entry from paper / email into the system.
Learning Management System	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.	Automation of training deployment and assessments. Ability to centrally host training resources, track completion/ measurement (compliance training analytics) and view all employee training reporting in one single platform. Personalized learning recommendations based on Job Families (Example: HR or Information Technology). Flexible course structure supports various learning needs. Allowing managers to assign training to their teams. Social Learning through communities & discussions is a new capability.

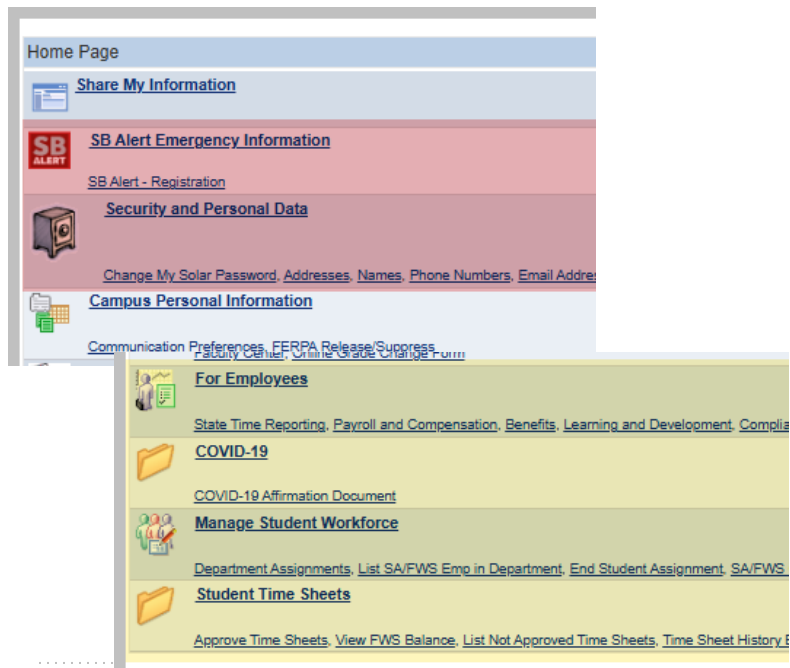
Human Capital Management Trends

	Current state	Future state
HR Helpdesk	Emails for support requests go to HR administrators through HR shared mailboxes.	Improved customer service: 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 view the status of their tickets. Employee will be able to look for policies 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.
Performance Management	Employees receive hard copies of performance documents.	Digitalization: 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 performance documents through automation (or trigger the performance program manually). AI functionality 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.
Manager Self-service	Managers reach out to HR for support.	In-system approval workflows for all HCM modules: Empowering managers to review and take actions on their direct and indirect reports. This enables effective team management, fostering autonomy and accountability.
Compensation Administration	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).	Better analysis of salary surveys at the job level enables the institution to calculate the most appropriate salary for the job market. Automation of compensation rosters to perform salary increases, such as across-the-board merit increases, within WolfieONE. Discretionary raises 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.

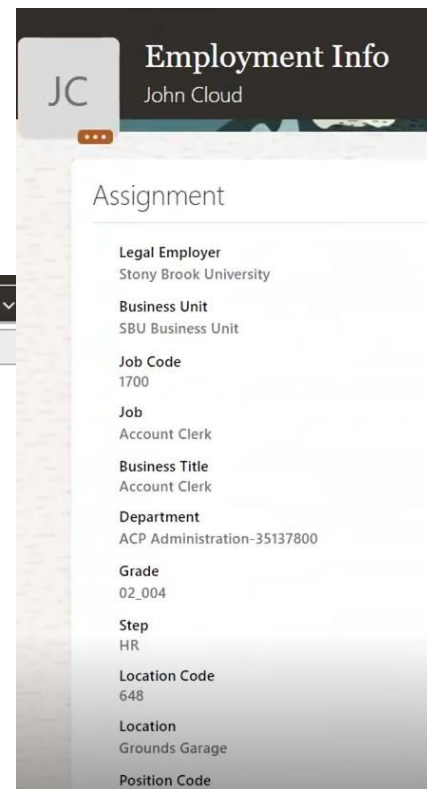
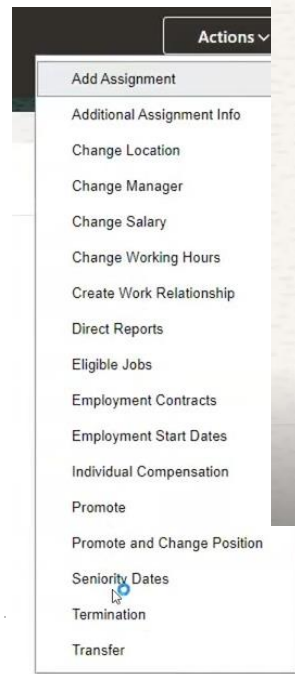
Human Capital Management Trends

	Current state	Future state
Payroll	Manual entries into PayServ, PeopleSoft HCM, and RF EBS (entry errors risk). Manual reviews and approvals. Current state nomenclature includes “earn codes” and “comp rate codes”.	Employees will enter their own bank details into WolfieONE for direct deposit. Payroll/Labor costing: splitting costs when the employee's salary is going to be funded from different sources (Different initiatives or fund sources) RF employees do not currently have labor costing in PeopleSoft , RF employees labor distribution will be integrated into WolfieONE, improving reporting capabilities. New nomenclature and processes will require training, such as “update” vs. “correct”, and “save” vs. “submit”.
Absence Management	<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.	<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 to calculate accruals. HR administrators will need training on entering leaves that were approved outside the system. Employees will need training on the absence attestation. Employees will be able to submit time off requests to their managers, and if approved will automatically be added to their timecards in Time and Labor. <i>Note: Hospital and LISVH employees</i> will enter absences in Kronos system (no change).
Time and Labor	<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. <i>Hospital and LISVH employees-</i> enter time in Kronos system.	<i>University: this module will replace paper and SOLAR time entry.</i> Review and approval will take place in the system before payroll processes. Managers will need training on approvals. All employees will require training on logging their time, including lost time due to absences. The policy around time entry for terminations will change: the last day of work will be the last day employees can log their time. Entering time promptly upon deadlines will impact other modules, Employee should submit time sheet on time or managers have to submit the timecard on behalf of teams. Additional pay components (overtime, meals, compensatory time) will be calculated automatically and sent to external payroll systems (EBS and Payserv). 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</i> will enter time in Kronos system (<u>no change</u>).

Current State: a combination of emails, attachments, paper forms, and SOLAR



Manager Self-service Future State:



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.

HCM Learn- Screenshot

The screenshot displays the WolfieONE HCM Learn interface. At the top, the navigation bar includes the WolfieONE logo, a home icon, a notification bell with a red '4', and the 'MU' logo. Below this, the 'My Learning Experiences' section features a search bar with the placeholder text 'Search learning enrollments'. To the right of the search bar are 'Actions' and 'View Transcript' buttons. Below the search bar, there are filters for 'Enrollments To do', 'Completed Date', 'Enrolled on Date', and a 'Clear (1)' button. The main content area shows '2 results' and a 'Sort By Due date' dropdown menu. Two course cards are displayed, both from Stony Brook University. The first card is for 'SC-900: Security, Compliance and Identit...' assigned by Human Resources, with a status of 'Not Started, required' and a due date of '12/18/24'. The second card is for 'Antitrust Law: Antitrust Law Compliance' assigned by Nursing Education, with a status of 'Not Started, overdue' and a due date of '10/31/24'. The bottom navigation bar contains icons for 'Browse', 'Search', and 'My Learning'.

WolfieONE

My Learning Experiences

Search learning enrollments

Enrollments To do X Completed Date Enrolled on Date Clear (1)

2 results

Sort By Due date

Stony Brook

SC-900: Security, Compliance and Identit...
Assigned by Human Resources ...

Not Started, required

Due 12/18/24

Stony Brook

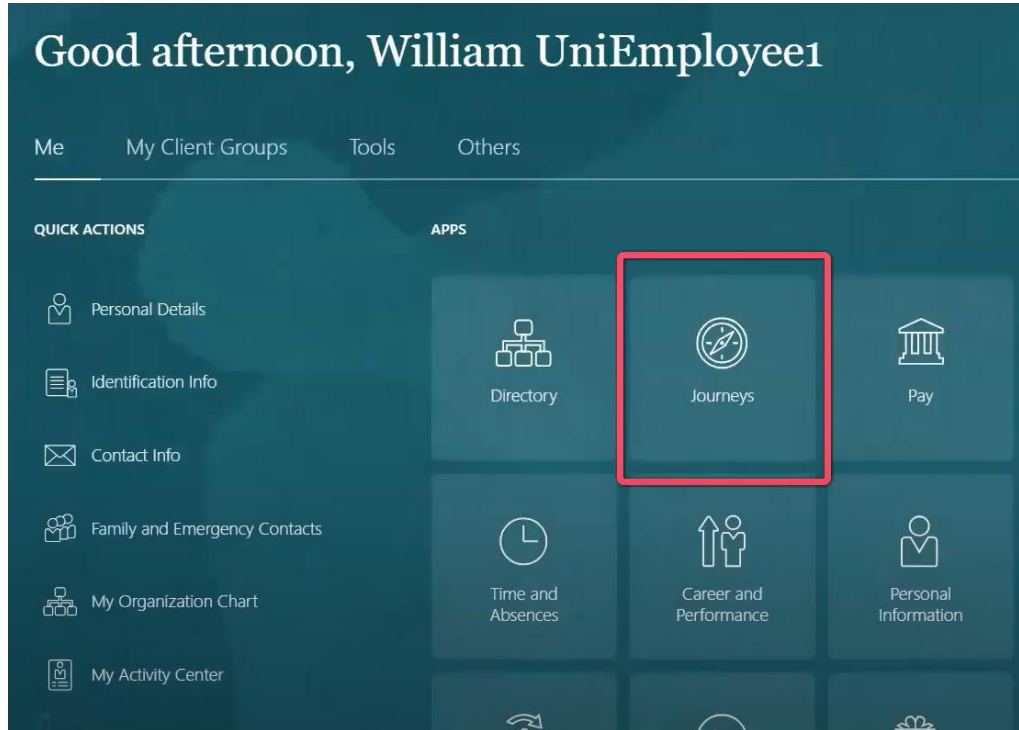
Antitrust Law: Antitrust Law Compliance
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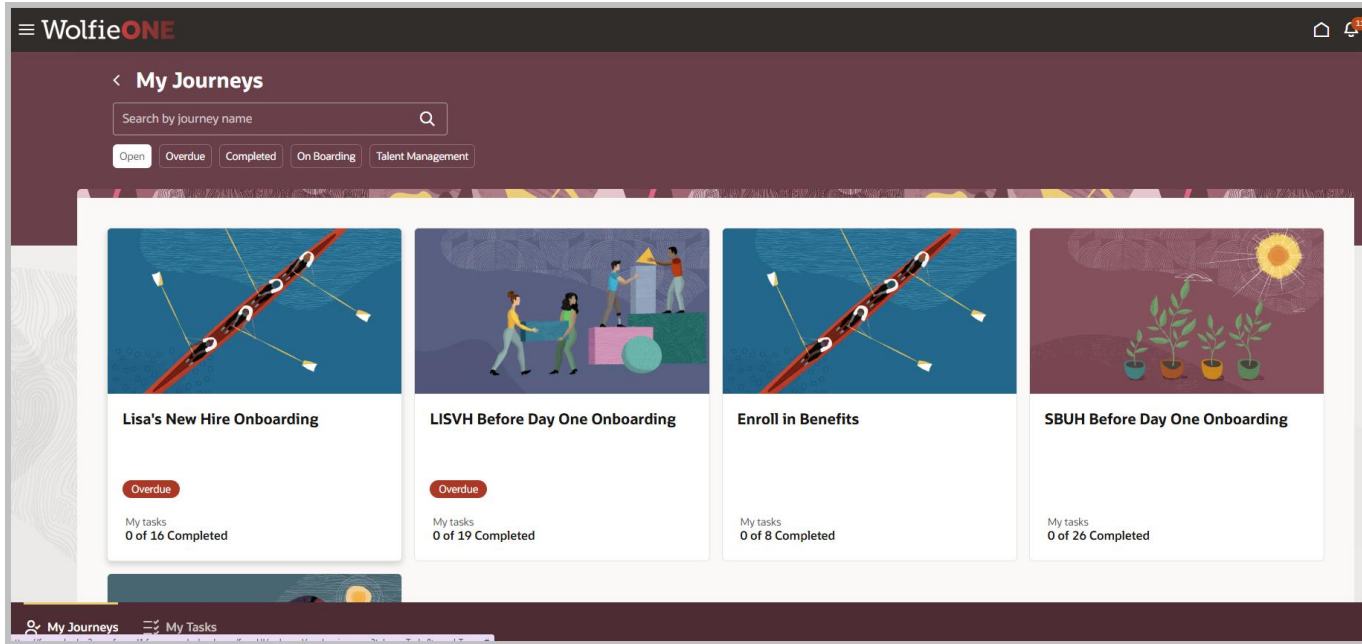
Due 10/31/24

Browse Search My Learning

Sample Journeys – Landing Page Tiles



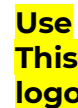
Sample Journeys- HCM Screenshot



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.

Next Steps

Change Champion Action Plan



WolfieONE

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!”



Appendix

OCM Contacts



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Julian Herrero

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

▲ Hide Segments

Alias Accounting Operating Fund ▼

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



TRANSPARE
AND INCLUS



STONY BROOK
FIRST



TRANSFORMATION



OPTIMIZED
OPERATIONS &
PROCESSES



SINGLE SOURCE
OF TRUTH



GOVERNANCE

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 \(ML\)](#).