

**Lauren Candela, Senior Communications Manager for Finance & Administration, Stony Brook University**

**University:** Let's go ahead and get started. Thank you all, first and foremost, for being with us today and taking the time out of your very busy schedules to come to the WolfieONE Workstream Team Virtual Kickoff. I am glad that you are here. My name is Lauren Candela. I am the Senior Communications Manager in Finance & Administration at Stony Brook University. And I am going to be acting as our emcee for the next 90 min, and just wanted to start by thanking everybody. So we have a nice full agenda today. While you're sort of taking a look at what's to come in the next 90 min or so, I'm just going to go over a couple of housekeeping items, and then we'll kick everything off.

So if you have not already, if I could ask you to just put yourself on mute, so we don't have any side distraction or any noises. We will be recording this session today and posting the video recording to the WolfieONE website later this week. And we'll also post the deck that we're going to review today to that same website later in the week. So keep an eye out for that and for anyone that's not able to attend today, that's where they can go and get all of the information. As questions come up during the presentation, please feel free to drop them in the chat. A couple of my colleagues and I are going to be monitoring the chat and getting answers for any of the questions that do come up. We'll also have a period of questions and answers towards the end of the presentation. So if you want to save your questions and ask them at that time, that's okay, too.

I also want to thank everyone who helped plan and prepare for this kickoff. A great deal of work went into making today's session possible. So thank you to everyone who contributed both big and small. It takes a village, and certainly a village was involved in putting this presentation together. So thank you. And I also want to thank the project's executive sponsors. The folks that you see here listed on this slide have been incredibly instrumental in bringing us to this point in time today. Their leadership and their support of this critically important initiative is much much appreciated. So I want to just take a moment and thank these 6 individuals for their leadership, their time, their efforts, and for bringing us to this really important point in the project.

I also want to give a special thanks to all of our speakers today, so we will start with one of our WolfieONE Executive Sponsors who's listed on this slide, Jed Shivers. He's going to kick us off and give a high level overview of the project. And then we'll hear updates from each one of our workstream leads. They'll be talking about things like how their particular workstream will be getting started, how their area will be engaging with campus stakeholders, they'll share updates on progress that's been made so far in their particular workstream, what to expect, and so on.

And then, of course, change management is a really important topic in this conversation, so my colleague Hina will share information from the Office of Change Management. And then we'll turn it over to Ted from Deloitte, who will talk about the timeline and what to expect in the months ahead, and then we'll finish by addressing any questions and sharing a list of resources that are here to support each of your efforts throughout this project. So that's sort of a roadmap of where we're going over the next 90 minutes, and with that I will turn it over to our Senior Vice President for Finance & Administration, and

one of our WolfieONE Executive Sponsors, Jed Shivers, who will kick us off. Jed I will hand the mic over to you, so to speak.

**Jed Shivers, Senior Vice President for Finance & Administration, Stony Brook University:** Okay, thanks, Lauren. So you know I'm Jed Shivers, and maybe most of you know me, but after this you'll either know me and curse me or be okay with me. Hopefully, it'll work out well.

So I just want to say again, echoing Lauren's thanks. I really appreciate everyone who's participating in this meeting. I think it really does take a village to get these things together. And you can see a quote which I actually, I think I wrote this, or maybe Lauren and I wrote it together, but I really do mean it. So the most important thing to recognize is that we really are all in this together. This is a Stony Brook Project, not an IT or a business project. And we're looking forward to working together with our University community. So why do we say something like that? Well, I've actually been involved in many of these kinds of projects, and so often, you know, when they run into trouble it's, 'Oh, it's an IT project', you know, because you're usually bringing in a new product, or a piece of functionality is like, 'Oh, it's all IT's fault'. Or, 'It's those business people, they're voicing things, they don't understand us, and they're just putting something out there to get something done, click it off on their resume.' You know I'm sort of being cynical here, a little bit on purpose, but, in fact from decades of experience I think that's actually, you know, kind of the way this works.

In fact, really, what we're trying to do here is take systems which are really not doing as well as they could to serve us. And when I mean us, I don't just mean the business folks or the IT folks, but the entire community. Anyone who interacts with these systems now, whether it's HR people or finance people or accounting people, or you know you name it, and really try to create something that will work better for the whole University community, and in doing so make this a better place to work and make it make the information more accessible to all levels of the University. So it's a small ambition, but one which we hold dear. And we're really, you know, shooting for this fairly transformational change.

So you know, this really is a strategic transformation. And as we know here, it's an initiative that's going to design and implement an enterprise resource planning ecosystem at Stony Brook University. And, in fact, that's the name, right, WolfeONE. ONE is Our Networked Enterprise, which I think really speaks volumes to the way that we look at this, that we're really coming together. This is a means of bringing us together, supported by Oracle, to better support our financial, budget, HR and business operations. I think one of the key concepts here is we have a lot of software systems that are what we call on premises, or on-prem for short. They're in servers and that is not the way the world is going. The world is going in the opposite direction. It's really moving towards software as a service, and so this is something that we're not doing just to keep up with the Jones', but this really is where the industry is going and all businesses. And we need to jump on this boat. So part of this is really fundamentally moving into a cloud based system. But really, I think from our perspective, more importantly, it's a chance to really do things better.

So I want to give you a sense of how we got here. So I actually started in July of 2022, and you can see that this is something that predated me. You know there was a crisis, and a lot of times, you know the need to implement new systems is discovered when people are faced with difficult times ... they need information, help to make decisions, and the information is not as readily available as we would like. So what are we gonna do about it, right? So I think this started, you know, in the Covid period. Financial information was not easily obtained. Data was extracted from numerous disparate systems and spreadsheets and a lot of manual work was completed which is always prone to, no matter what heroic efforts, and I really mean that you know, people undertook, difficult to do. But one of the results was a mapping of the University's finance system, data flows and processes. And as a result of that, you know, we start to see these needs coming to the forefront, which I alluded to.

So in the spring of 2022 leadership identified the need for a new ERP, and Oracle was selected. I will go into this later, but just to give you an idea, we spent a long time really talking to other campuses around the country, people who are either going through or who have just been through this process with these products. We really learned a lot, and hopefully, some of the things that we learned and have internalized will help create a greater probability of success here at Stony Brook. So you know everything from the need to do Change Management, hence Hina and her Office coming into being a new thing for Stony Brook, to really, I have like a little mantra, you know, no functionality should be left behind, right? Because I've seen over and over again, where people rely on a certain kind of incentive information and it's gone. We wanna try to avoid that when possible.

We also went through a very significant RFP process, and we ended up with Deloitte, which is one of the leaders in implementing the software, and a company that actually had done work with the majority of the universities that we talked to, so really happy about that partnership. You'll meet folks from Deloitte in the course of this presentation. So back to the long time, both all of the fact finding that we did, which started when I got here in July, I mean, there was some of the before, obviously, and all the way up through you know, September. So for me, you're talking about 15 months. We finally kicked off the project in September that led us through the whole RFP process to pick an implementation partner, figure out what we're gonna be implementing and we started working on the chart of accounts which, as you'll hear, is sort of the foundational element of these systems; how we record all financial activity.

There, we kind of realized a couple of things. One was, and hopefully, this won't be a surprise to anybody, we have a lot of customized legacy systems here. They don't necessarily speak to each other, and one can argue they're not really meeting the needs or what we need, either now or certainly in the future. Sharing data is tough. Not a piece of cake. I don't know that'll become ultra easy in the future, but it certainly should become easier and more routine. We lack modern robust reporting systems. People really have to, again you'll hear me say this over and over, people exercise a degree of heroism to keep stuff up, and also to generate data which is of high quality and has data integrity. And kudos to everybody who does that, but it's a lot of work, and we would like to get to a place where we're spending less time trying to derive the information and more time analyzing and understanding information. So we recognize the need to establish consistency in our accounting and financial structures and practice. When you get customized systems there's a lot of disparate stuff that goes on which you

start to wanna try and routinize, and of course, that leads to simplified standardized business processes. We'll see this over and over again, like now, when you wish that things would happen, say, for example, when you're initiating a human resources transaction hopefully, you'll see through what we call journeys, that will become a fairly routine process, you'll know what to expect, you'll know where something is in the process. There won't be a lot of rework, because there'll be a workflow that will assist you, sort of painting the potential for the future.

When you think about it, what do we have to do? Well, we have to migrate the enterprise data from all these legacy systems into a single cloud based software application. That's a lot of work. We have to continue to support the transition to an all funds budget model. So one of the things that was really important and championed by our Budget, Financial Planning & Analysis group, in conjunction with the executive leadership team, was the need to really recognize all the funds that we have at our disposal, and that creates a much more logical and complete framework for budgeting. We must continue to move that forward and make sure that our system supports that. We've got to adopt a new start to categorize all financial transactions, to provide better financial controls, interoperability, transparency, and meaningful reporting. You know, one of my things that I actually had in my prior institution, was an audited financial statement at our university, and you may or may not know that does not exist here at Stony Brook. I want to get to the point where we have an audited financial statement, even though it's not formally audited, because I wanna make sure that you know, people like me, executive leadership, and really, anyone in the university community that says, 'Hey, from an accounting perspective what does University look like? And how did it change from one year to the next?' And that's something we really need to get into to make sure we're really understanding what's going on. We want to enable more accurate analysis of financial positioning, predictive modeling, and forecasting. If you're spending all your time just getting to the data, we really wanna make that easier. And of course, as I noted, identify inconsistent, non-standardized processes.

I think one of the outcomes, when you really kind of look at what we're shooting for here is we're gonna have better access to quality real time data. These systems actually do tend to work in real time like you make a change and it's populated very rapidly. They're seamlessly shared across the institution. We get a comprehensive overview of all functional areas that will live in one place. We'll have much more transparency for the entire University community, greater standardization and enhanced planning and forecasting efforts. So I think that's really an important concept. We'll have, as we noted, robust reporting. So modern, robust recording tools that will better support analytics. And we'll be able to spend even more time doing the analytics and really sort of saying, 'Okay, based on what we're seeing, what strategy does this suggest to recommend to the executive leadership of the University?'

In the past, we've had too much customization when implementing new systems; you're just trying to make the thing fit, but that leads to problems with supporting it in the long run which my IT friends can talk about. But probably more importantly, it's very difficult to then readapt it as conditions change. If we do all this right, I think what we're gonna see and what we're hoping for is like 80% out of the box and maybe 20% customization of the ERP as a whole. So that's kinda like a fundamental goal that makes

it much easier to maintain, but more importantly, it creates the transparency and the standardization that I've alluded to earlier.

I think what we've learned, as we work through our own history of all this customization, is really why we're bringing in as much of the built in configurations of work as possible. We want to make sure that what we get supports the fundamental nature, both from the individual user experience all the way up to the executive level, who are the sort of end consumers of the global, corporate (so to speak) information.

Next is a listing of the modules other folks will get into. I will just add one last thing before turning this over to our wonderful Control Cassie and that is, I think, one of the hallmarks of what we're trying to do here is really build a system which enables us to manage Stony Brook. That's the fundamental goal. That's something that we've talked about from the very beginning, but at the same time we must generate the required products that SUNY needs from us. So that's the thing that we're really going to be working towards is really creating that sort of duality of purpose. And that's something that I would argue strongly we've never quite had here. So if there's like a single big change taking place, I think that's it. So having said that, let me turn over to Cassie, who's really going to talk about the chart of accounts.

**Cassandra Amadio, Assistant Vice President for Accounting & University Controller, Stony Brook**

**University:** Thank you. As Jed mentioned, I'm Cassie Amadio, the University Controller here at Stony Brook. I started in May of last year, so I'm still learning on some aspects, but I'm currently the team lead for the chart of accounts, portion of the WolfieONE project, in addition to the ERP Finance module which we'll talk about on a later slide.

I probably put a little bit more on chart than maybe what was needed, but I think when some individuals hear 'chart of accounts', that may not always resonate with everybody. So I wanted to take just a minute and explain what a chart of accounts is. Jed sort of touched on it a little bit, and it's that keyword of foundation, right? It's the foundation, kind of the underpinning, the infrastructure, of all the transactions that are going to be flowing through Oracle as a system.

So the chart is a predefined segment, or set of predefined segments, that repeat every time in a transaction. So if we have 9 segments or fields, as part of the chart of accounts, those 9 fields would repeat in every transaction throughout the WolfieONE system. This is where your data, reporting and financial reporting, all the information that flows through, really becomes critical. Because you can build hierarchy, you can build different attributes if you need, and this is where your system really becomes powerful for what it extracts, and what you can use on the back end.

In terms of some terminology, I just wanted to mention that supports the chart of accounts, so first is governing principles. As we engaged in the chart of accounts portion of this project, we've actually been working on this since September of last year, and at this point the chart of accounts portion of the project is roughly 95% complete. We do have a model that we've developed, but as part of our process in working through that chart of accounts and coming up with the new chart of accounts, we've started

with these governing principles. And again this ties right back into what Jed had mentioned in terms of the overall project goals, and getting to that point where the chart of accounts is useful and gives us more efficiency and more transparency into the data.

So we focused on usage, obviously eliminating redundancy where we could. And we did find quite a few situations where we were able to do this, and that makes sense. You know, Peoplesoft was a system that we've used for over 20 years. So just over the decades we've created some areas where we were able to eliminate redundancy. Build for future growth: this was the portion that we really focused on to facilitate the external financial reporting that Jed had talked about in terms of auditable financial statements, accrued financial statements, so that was definitely a key tenant as part of our chart of accounts process. Hierarchies: being able to utilize those to the fullest extent, because that gives you flexibility within the chart and the data elements that you have. So, as part of our new chart, we definitely utilize those to the greatest extent. The chart of accounts does not necessarily answer all questions, and that can be a little painful for accountants and data users in general, but that is really an important concept; the chart is designed for functionality, and maybe some additional functionality, but there's always going to be situations where things might be tracked outside of the system, because it just doesn't make sense or it doesn't fit within the overall framework, right? Or we don't want to create redundancies elsewhere. So that was a key principle that we kept in our mind.

For me, that bottom sentence was really really key, a simplified chart really does create greater future flexibility. So we tried to keep all these things in mind as we created our new draft set of chart of accounts. As I mentioned, we're 95% of the way through the chart of accounts piece of the project. It's not technically a separate module. It wasn't listed on the modules before, because it's just sort of the foundation for the system. But we started in September and we are now working through the final stages of our straw model and answering a few final questions.

We've gathered multiple documents. We've met with a lot of you on this call. We've documented the current state, how it was used in PeopleSoft so we could use that to translate to the future state. We consulted with various stakeholder groups, discussed leading practices which we're still doing in terms of some follow-up workshops on governance with Deloitte, and designed a new chart of account structure, with defined segments and purposes for each statement and as we start to really finalize the new chart, we will be posting updates on the website as well. Lauren's been great with helping us put things out there as we have them available. So we will be able to share that as well. Then at this point we will now begin to create and map the segment values. Mapping from the old chart of accounts to the new chart of accounts, and again continue to test and make sure that our new model is viable, and will work in the way that we want it to.

So thank you. That's all I had on the chart. I think this next slide is our EDM module, which is Enterprise Data Management. I'm going to pass that over to Korak on the Deloitte side to cover that one.

**Korak Ganguly, Manager, Deloitte Consulting:** Thanks, Cassie. Hi everyone. For those I haven't had the pleasure of meeting, my name is Korak Ganguly. I am going to be leading the finance implementation

from Deloitte, working closely with Cassie and the rest of the team. I'm here to talk about EDM at a very, very high level. So Cassie talked about the progress we've made with the chart of accounts redesign right? And we are at the point where we're talking about the new values that will be developed as well as the mappings.

One of the components as we're working through the values is really defining the notion of the standards of each of those values. What are some of those values going to look like? What are the hierarchies they're going to follow? What are some of the smart numberings and logic that's going to govern the value development themselves? Not just that, but also the value maintenance moving forward. And that's where EDM really comes into place. It's to make sure that the institution has full control over the governance of the chart of accounts that values themselves. And there's workflow built into the processes, so that there's a single point of intake for value requests as far as chart of accounts growth is concerned, but also an auditable process for the institution to follow, to make sure that chart of account standards are adhered to not just now, but moving into the future. So this is really a tool for charge of accounts, governance and charge of accounts maintenance. So this is one of those key sort of early modules that we think about as far as the implementation is concerned, but I'm going to hand it back over to Cassie to talk about a lot of the meat of the core ERP system. So Cassie, back over to you.

**Cassandra Amadio, Assistant Vice President for Accounting & University Controller, Stony Brook**

**University:** Thank you Korak. Just one more comment on EDM. This is a module that doesn't exist in this form today in PeopleSoft. So this is one I'm really excited about. I think it's functionality that we're doing and we have, but it's in a different format, a lot of this. We might be tracking just separately outside of the system, and we don't have that auditable trail that Korak had mentioned. So I think this one will be a real benefit to us from a governance perspective. So EDM is sort of new from PeopleSoft today.

The next slide that we wanted to cover was an overview of the ERP module that we will be implementing in Oracle, which Korak and I are also the leads on the ERP/Finance side. The ERP stands for Enterprise Resource Planning. We typically just call it the Finance module, because that's really where a lot of this falls, in finance or accounting. Either way you want to look at it. This looks and feels much more like what we have in PeopleSoft today. For the most part, there are some modules that we aren't using today in PeopleSoft that we will be using in Oracle and will be turning on that functionality.

So for ERP, this is going to be the module where financial transactions occur and those transactions will roll up to our general ledger within Oracle, and specifically the sub modules within Finance. We have fixed assets, cash management, financial dashboards, and reporting general ledger, which is where journal entries would lie, like any kind of manual entry that you'd wanna make from a finance perspective, account reconciliation, and then close, like any kind of period in close that we would be performing financially. This also has the accounting hub which we can mention. Budgetary control, accounts receivable and accounts payable/expenses. So all of the primary financial transactional information is going to live within the ERP/Finance module, which again, as I mentioned, is pretty similar to what we have today in PeopleSoft, with a few nuances, one of those being fixed assets. Fixed assets is not a module that we use today in PeopleSoft, but we have that capability in Oracle. So we're going to

utilize that one. Cash management is a lot of bank reconciliation work, which again, we're utilizing that today in PeopleSoft. And you know, managing your bank accounts, banking information, things like that.

Your general ledger again sort of sits on top. That's where consolidation and reporting can happen. And that's where a lot of the transactions feed and blend into that general ledger. Accounting hub and budgetary control. Those are kind of nuanced to Oracle, and I won't get into the details, because it's kind of the back end connections that we're going to be making but accounts receivable, accounts payable, again, kind of your traditional AR and AP sort of functionality which today we don't necessarily utilize in PeopleSoft. We do some elements of both of these, but not necessarily to the fullest extent. So we are looking to really fully turn on all this functionality within Oracle to the way that we need it at Stony Brook. So that may mean that we don't necessarily use all the functionality, but for our processes we want to utilize and put as much of that through the Oracle system as we can.

In terms of key changes and benefits again, right back to what Jed had mentioned, you know, for our project goals. We're really trying to eliminate redundancy. We're looking at our work processes as part of the implementation of these modules. And I think there's going to be a lot of opportunities to streamline hopefully, tweak a few things and make it easier for the end user as well. That's really a major component of what we're looking at in terms of these transactions because the better data coming in, the easier the data is to come in, that makes the data better overall, right? Better data integrity. So that's really what we're working towards in terms of using some of these modules again, that we're not necessarily using today in PeopleSoft.

So work done so far for the ERP/Finance module. We've done a lot of planning work. We've done the chart of accounts which again has to be completed before we can really start the finance piece. And significant amounts of planning pre-work, data gathering, understanding current processes, things of that nature, and at the end of this month, we are starting the design stage, which I think Ted will probably talk about later. We're starting the design stage of finance which is really working through each one of these modules and imagining, coming up with what we need as far as functionality within each one. So that's sort of our next step on the Finance side. It's sort of a post phase of the chart of accounts. We have to get through the chart first, but we've been able to work really closely on the finance side as well, and use some of that work to our benefit on both sides.

In terms of when we will be engaging next, we're hoping to start to bring folks in as we work through the design phases, because I think we're going to have a lot of questions on potential changes. We'll want to make sure we understand how that will impact certain groups. So I think, as we move into this next phase of really imagining what the new processes will be, we'll start to bring in more of the groups. And again, even a lot of folks on this call will be involved. Thank you.

**Lauren Candela, Senior Communications Manager for Finance & Administration, Stony Brook**

**University:** Thank you Cassie and Korak. I appreciate all of the information that you guys shared with everybody. I'm going to turn it over now to my colleague Nick who is going to talk about EPM, so Nick I'll hand the proverbial mic over to you.

**Nicholas Candela, Director for Budget Systems and Decision Support Reporting, Stony Brook**

**University:** Thanks, Lauren. My name is Nick Candela. I'm the Director of Budget Systems in the BFP&A Office, and I'm the lead for EPM.

So EPM, or Enterprise Performance Management, will be our new centralized application for our all-funds planning functions, i.e. budgeting, forecasting, and our long range planning, moving away from CBM and some of the various shadow systems to this new cloud-based platform.

So some of the key changes that you'll notice again, is moving away from some of these disparate systems that we're housing some of the planning data. The system will provide seamless integrations of data with Finance and HR; that's ERP and HCM respectively. Along with those better integrations will come more powerful analytics and reporting, and going back to what Jed said earlier, more real time, reporting with less manual effort. Sometimes it is quite involved to get to the data, so we'll be focusing on how we can get quality data pretty quickly for leadership to make important decisions.

Continuing on with some of the benefits here, EPM will house driver-based modeling for revenues, what-if scenario analysis and predictive planning. That's not something that we currently have in CBM today. So you know, that's some of the new technology that's available through the system.

And one of the items I really want to focus on is the Smartview tool. That is basically a Microsoft-enabled application that connects to Excel, or Microsoft Word that allows you to quickly retrieve data, and build recurring reporting. So it's really a nice tool that will come out of this, along with many other tools, from a reporting perspective.

Touching on some of the work we've done so far, we've gone through scoping, talking through what our planning requirements are from the BFP&A perspective and really mapping the current state by identifying the current integrations with our planning system and the various reporting that goes along with it. We're also beginning to document what some of our future state needs are, and then, continuing our involvement in the chart of accounts. Again, this is a base, for both finance and the planning perspective. So making sure we're aligned to create that seamless reporting across the university.

And last, but not least, we've come up with a preliminary list of our design sessions needed, which leads me into what's next for the EPM team. The design sessions will start a little later on than Finance and HR, and that's done specifically for a couple of reasons. One, the chart account needs to be solidified for us to move forward, but also there's a lot of processes that sit within HR and finance that we are dependent upon, and that we will be part of those discussions. Adding our input for those decisions to be made about what's needed from a BFP&A perspective.

So that's EPM overall. For the involvement from some of the folks that haven't been involved to this point, you can expect during the design sessions that we will probably be reaching out to folks that are consumers of the data. So some of the budget officers in the various areas. Some of the folks we work

with in Finance & Administration along with various other areas. We'll be reaching out to be involved in some of those design sessions and really get input from our end users to make sure we're thinking through all that's needed from both our perspective and our users' perspective.

So that's all I had. Lauren, I'll pass it back to you.

**Lauren Candela, Senior Communications Manager for Finance & Administration, Stony Brook**

**University:** Okay great, thank you Nick. I am going to ask Tracey if she wouldn't mind talking for a little bit about the HCM module that we will be implementing as part of WolfieONE.

**Tracey McEachern, AVP for HR Operations, Stony Brook University:** Great! Thank you, Lauren. Hi, everyone. My name is Tracy McEachern. I am the AVP for HR Operations, and the functional leader for HCM. First of all, I want to let you know that I am extremely excited about the opportunity that we have as a university to implement a new ERP and the technology investment our university is embarking upon.

I know you guys have been hearing a lot about WolfieONE and not really understanding it, but WolfieONE, and HCM, are part of the entire ERP system that will provide all of us, all of our subject matter experts, will be involved at some point like you've heard everybody say, but it gives us an opportunity to not only streamline our processes but also reimagine our approach to the way we do business today as we begin to design the system.

So what is the system going to do for us? What are some of the things we are looking for? Of course we are trying to leverage reporting capabilities to provide improved decision making with analytics and reporting capabilities. We're trying to reduce errors by adding more automated processes within the centralized database. We are implementing employee self-service and expanding our manager self services. Getting rid of paper forms where we can. Minimizing double data entry and reducing HR's administrative load as we empower our employees with information at their fingertips for a great employee experience.

This ERP also offers us an opportunity to be integrated with our other functional partners. We have budget, finance, payroll and accounting. We'll all be sharing information seamlessly across these functional areas.

For talent management, the ERP tool enhances functionality for talent acquisition specialists, succession strategies, performance evaluations, and we'll be able to leverage the rich data and utilities provided within a cloud framework.

Then there is scalability for us. As our institution grows, HR needs will evolve. So the ERP can be scalable to accommodate more employees, new business units, departments, divisions, and any additional requirements without the need for a major upgrade.

What has been done so far is we've really been talking about the current state, and we are about to begin our design sessions which will involve all of you subject matter experts to help us achieve the goals that we have set for our university. Our teams will include East campus and West campus along with our Veterans home, because we want to be fully transparent, and we want to leave no stone unturned, so collaboration will be key for all of us.

So lastly, I want to say that the ERP implementation will be a transformative tool not only for HR, but for all you subject matter experts and we'll need you all to participate and collaborate. Careful planning transparency will gain stakeholder buy-in, and ongoing training to ensure that our system meets the intended objectives for everyone.

I'm gonna turn it back over to you, Lauren. I think I'm done.

**Lauren Candela, Senior Communications Manager for Finance & Administration, Stony Brook**

**University:** I agree, this will be so transformative at Stony Brook. I think we've got it road ahead, but it's a good road, and it'll get us to a really good place. Thank you. I'm gonna pass over to Jim now to talk about some of the technical and IT elements associated with this implementation. So, Jim, take it away.

**Jim Gonzales, Assistant Vice President, Enterprise Applications and Integrations, Stony Brook**

**University:** Thanks, Lauren. Hi, everyone! Jim Gonzales. I'm the AVP for enterprise applications and integrations within DoIT. On this project I represent the team lead for the technology workstream. Unlike the other areas that we've heard from so far, this workstream isn't tied to a specific module. We don't have a technology module, so to speak, but we are threaded throughout all of the other workstreams that have already gone forward in that we work with them closely to do a lot of the analysis, the assessment, the configuration, and then, of course, any development efforts that need to take place.

So you know, as this is a SaaS-based solution the technical workstream for this project is less about customizing the application functionality itself and more about facilitating data conversions between the current enterprise systems and the new Oracle cloud application suite, as well as building integrations between the new system and all of the various systems, both within the University and the external partners like SUNY, commercial service providers, and other non-Stony Brook entities. Beyond that, we'll be working closely with the functional teams to configure the system where functionality can be done so, to assess needs that can't be met by the delivered solution and develop external applications as necessary to meet requirements.

Additionally, we'll be involved in the development of the various reports that the new system will be providing. The benefits of moving to the Oracle cloud suite include reducing the need for on-premise infrastructure that has been historically difficult and expensive to keep secure, current, and up-to-date. Furthermore, by relying on Oracle's cloud-based infrastructure, we'll be able to leverage their hardened systems, continuous update cycles and support resources for better security, maintenance, redundancy and service level agreements to handle any issues that may arise.

To date, on this project, we've been involved with gathering information on our current state of integrations and customizations, and working closely with our partners on the functional side, to assess all of that. Now, really, we'll continue to work with our functional partners as we start the work to design our future state. So that pretty much covers it from a high level. Like I said, we're intertwined with our functional areas as they work on the various modules that they're involved in. So we'll be kind of involved with this from start to end throughout the entire project, with all of the different phases involved. And you know, we also partner with the IT team from the hospital side, and they may have a perspective on this that I'm not privy to. So I'm just gonna give John Hennessey, my counterpart on the hospital side, a chance to weigh in here and provide any input from his perspective that he may like to add.

**John Hennessey, Chief Application Officer, Stony Brook University Hospital:** My name is John Hennessey. I'm the Chief Application Officer for Stony Brook Medicine. The WolfieONE project for Stony Brook Medicine has brought some opportunities to look at.

What is Stony Brook Medicine doing from an HR perspective from a system-wide application portfolio. We've done a lot with putting together strategies around a number of our applications and consolidating applications across the health system so that we have common solutions, common interfaces for our customers, our patients, and our employees. So the WolfieONE project has brought us to the point of saying, 'Gee, we should really participate with the University and see what opportunities this application could bring for not just Stony Brook University Hospital, but the actual health system across Eastern Long Island, Southampton, administrative services, and the other organizations. So we've contracted with Deloitte to actually do any analysis of where we're at, what our strategy is today, what we're running and put together some recommendations about what the future looks like for Stony Brook Medicine with the HR applications.

Then, we will work with our partners, Jim and others, to figure out how that really works with the WolfieONE project, and how it integrates so that we can hopefully all get to a point of a common platform. Thank you very much.

**Lauren Candela, Senior Communications Manager for Finance & Administration, Stony Brook University:** Thanks Jim and John for your leadership on this project. It is very much appreciated. So as we talked about the beginning, change management, I think, is one of the things that will be most critical to the overall success of this project. So I'm actually gonna turn it over to my colleague Hina now who's going to walk us through some of the Office of Change Management structures, and what we can expect from OCM throughout this project. So Hina, take it away.

**Hina Kausar, Director of Change Management, Stony Brook University:** Thank you, Lauren. Good afternoon, everyone. Today is a milestone day for us. As Lauren mentioned, there have been a lot of people from the project team working on this initiative ever since we kicked it off at the end of September last year, and we're very excited to onboard all of you today, because you know that completes our project team. And as Lauren mentioned, my name is Hina Kausar. I'm the Director of

Change Management. This is a new role at Stony Brook, and it came about because it is a critical element in making sure a transformation such as WolfieONE, which is a new ERP system, and so much change becomes successful with adoption from the people that it is intended for, and that is the whole reason why obviously change management is here. So I, along with my counterpart from Deloitte, Kariley Famer will walk you through some of the activities that OCM has been engaged in.

So if you think about it, everything that you heard so far in terms of the business reason for this initiative, all the new changes that will be implemented in terms of the new system, the new solution, if we were to build the best solution in the world, yet the people that will actually be responsible for adopting it and using that new system, if that doesn't happen, then we are not going to realize the business benefits that Jed and the rest of my colleagues have spoken about. So Change Management's role is to make sure that we adopt the solution, and people can reap the benefits, Stony Brook can reap the benefits. So what we've been doing since September is we've been working with our leadership team, which includes our six sponsors that Lauren shared in the beginning, and our steering committee, which is composed of functional leaders from the different work streams, and we conducted a workshop. We've been laying the foundation from an OCM perspective around, why are we doing this, what is the vision, where are we trying to go?

And I'm not going to read the statement, but, you know, feel free to go through this as this encapsulates some of the sentiments of the leaders, the people at Stony Brook, as to where we are and where we want to be. So that's our vision. And that's where we are looking to go. But it's not going to be an easy path to get there. And there are different teams working together. At times they are going to be different competing priorities, different competing requirements. So how are we going to work together as a team?

In order to put that in place, we put together some guiding principles. And this is going to become especially important as we now enter the design phase, because that's when we will start having discussions around what are our requirements, and how do we go from the current state to the future state?

Let's say, Finance has a requirement, and there's a competing requirement from Human Resources. At the end of the day we all have to come together and think about these guiding principles and make trade offs where we are making sure that, regardless of our functional area requirements or benefits, that we are putting Stony Brook first. Because that's why we are doing this entire thing. So these are the guiding principles. There's not going to be a test on it, but I would love it if everyone could memorize this and imbibe these, because, as you go through these design sessions, you need to be asking yourself these questions over and over again. Am I being transparent? Am I being inclusive? Is there someone else I need to include in this discussion?

From what we have seen so far with the chart of account's team, including stakeholders and people from areas outside of the chart of accounts team making sure that their input is taken, understood, and incorporated to the extent possible. So we are collaborating and not just building these things in silos.

Making sure we are working towards a single source of truth, making sure this is a transformative change, and not just replicating our current processes into the new system. So this is not just a cultural shift but also a mindset shift. So as we make the changes and think about the future state, we really need to pause and say, is this something that's going to be better than where we are today, and in the best interest of Stony Brook.

So those guiding principles ... I would urge everyone, take a look at them, read through them, and as you participate in design sessions, make sure you are holding yourself and your team members accountable to these.

There are going to be instances when decisions will have to be made. Risks will come up in the project. There will be, as I mentioned, trade offs, decisions, and so anything that does not get resolved by the project team will get escalated down this path to your project leads and subject matter experts. So a lot of you may be pulled in, and your expert advice will be sought as to what is the best possible path or solution that we should be working towards.

If we need to further escalate an issue, we have a Steering Committee that is composed of leaders from all the different functional areas, and we'll take it there, and then the Steering Committee will evaluate, and we'll come out with the best decision. There could be a further escalation where we might need to go to our Executive Sponsors, and this will probably be very rare, but just in case, we have to plan ahead. Because, if we are encountered with such a situation, we don't want to be sitting there and making the decision at the time. That's the reason why this workshop was held with the leaders a couple of months back. This is the structure. So hopefully things will get escalated, and we will have resolutions. That will flow down to the team.

We also have an Advisory Board that is also available, and we have been meeting with them periodically. We also have functional operations and the project budget team that always keeps us in check making sure we're adhering to the budget and the resources and the time commitments that we have made.

Okay, so we've laid the foundation. And as I mentioned, we are now moving into the design phase. So I'm gonna turn it over to my colleague, Ker, from Deloitte, who's my counterpart, and she's going to walk us through what's coming next for OCM.

**Kariley Famer, Senior Consultant, Deloitte:** Thank you Hina. Hi, everyone I'm Ker. I'm here to help you along this process. Hina and I have been supporting the other workstreams wherever we're needed, wherever we can help. So a good example of that, and what we've been doing between September of last year and now, is supporting the chart of accounts team through outreach to various stakeholder groups to help everyone map the current state.

So there's a number of things that we've done between September and now, to make sure that the various workstreams sound like an orchestra where we're trying to help the instrument players in various

parts of an orchestra playing the same piece of music sound like an orchestra, and to make sure that when we go out to campus to other divisions and units and departments, we're saying the same message across the board, across workstreams and across everyone that's on this call right now. So that's why we've gone through these exercises.

You'll have the list of OCM deliverables that came out of all the work that we've done in the prepare phase, so that you can reference those and read those and become more familiar with the work that we've done so far. If you want to dig into the details or send us questions, we're an open book, 100% transparency there. What we're doing right now is we're going to be capturing change impacts, and then we're going to be helping educate the campus, first on the chart of accounts, and a little bit on scoping as well, because it's important for everyone to know what's in scope and out of scope for this project, and that's something that we do know right now that we did maybe didn't know as well a month or two ago.

And the turf accounts, that's the next piece, and there's a natural progression to information that becomes solid enough for us to start talking about learning, so that no one has to be worried about learning every aspect, or every facet of the project in one go, that's absolutely not necessary. We'll go in stages. We'll get used to the CoA, and then Hina and I will come to you with information about HCM, and then ERP, and then EPM, and so forth in small chunks of information, so that nobody has to take everything in one go.

This is just a list that Hina and I put on here for you to see what's been done so far, and for you to access the deliverables from our workstream.

**Hina Kausar, Director of Change Management, Stony Brook University:** These are links to actual deliverables that we have been working on since September. Typically when people think of building a system and then going live with it, when they think of people is when it's time to train them. Change management is so much more than that. There's nothing wrong with that approach, but you're missing out on the opportunity to make sure that you are communicating with the stakeholders and letting them know what this is, why we are doing it and bringing them along. Because changes in an emotion. It's not just 'I'm going to train you and you're going to be able to sit in front of a system and be able to perform your job in the future.'

If you are interested in taking a look at what our strategy is, what did we get out of the leadership labs that we did, how are we going to be engaging our stakeholders, these are the links to those documents. We just started a road show where we are going to all different VP areas, and we're going to be talking about this initiative. That's going to help us build buy-in for this solution and make people feel they're included. We've started accumulating feedback. We're asking for your questions right here. This is to understand what's on your mind and be able to answer them. So when you actually get down to training, you will have a lot of context around what you're doing and how you're supposed to be doing it.

**Kariley Famer, Senior Consultant, Deloitte:** So now we're starting to capture change impacts as we go into the design phase, so Deloitte will naturally know quite a bit about the future state, and we're going to rely on you Stony Brook experts to tell us more about the current state, so that Hina and I can track the delta between the current state and future state. There will be some obvious ones primarily, in that technology category that bottom lane that you see now on the screen. That'll be the more obvious ones for us to identify and track, but we will need a lot of help from you. And sometimes we'll email you directly, and sometimes you'll come to us and say, you know, I've noticed this about the future state, whether it's now or in testing all the way down the line, you can tell us at any given point throughout the project what are the changes that you think are significantly going to impact training or end user experience, or any of these 3 categories. We will make sure that we document that so that we can continue to support people in these changes.

**Lauren Candela, Senior Communications Manager for Finance & Administration, Stony Brook University:** Thank you Hina and Ker, I appreciate that very much. I'm going to turn it over to Ted from Deloitte now to give us a little bit of a rundown of what to expect in the months ahead, and for 2024. So, Ted, I'll hand it over to you.

**Ted Simpson, Managing Director, Deloitte:** Great, thank you, Lauren. I appreciate it. For those of you who I've not yet met, my name is Ted Simpson. I'm with Deloitte. I'm the overall engagement leader for this implementation. So thank you for giving me a couple of minutes today. So as you've heard from many of the leaders so far, our focus throughout the fall of 2023 has been on planning. We certainly have a couple of more odds and ends to take care of, but by and large we've got the bulk of what we needed to accomplish, accomplished in the fall. And our focus, starting in 2024, is moving into design sessions. So Cassie, Nick, Tracey, Jim, and Hina, I'll reference the design sessions that will be starting here in a few weeks.

Jed mentioned early on in the meeting today, we are aiming for the proverbial 80/20 goal, which means, 80% of delivered functionality will meet Stony Brook's needs. And roughly, 20% will be something that is uniquely Stony Brook. And we'll have to figure out ways to accommodate that. So we go into design sessions thinking that way. We also take business practices that we see for leading practices from other universities and start those design sessions by saying, 'Why will this business process not work for Stony Brook and tell us why', rather than starting with a blank slate and building from the ground up as part of our methodology. It's a much more agile approach to implementing systems.

All of those design sessions will then inform the technical work that needs to happen. As Jim mentioned, conversion planning happens in these sessions, and then the technical team will take those decisions and make the technical game plan for doing conversions and building integrations to other systems, etc.

And then throughout all of the design sessions, and the whole design phase, Ker and Hina and team will be embedded into these conversations and what they will be looking for, and we'll talk about this a little bit more in a bit, but they will be looking for change impacts. That was where Ker just left off on the last slide. And what that means is really having an understanding of if we're changing the way that Sony

Brook does something, and if you listen to what Jed and Cassie and others said, quite a bit will be changing for the better, we'll want to be paying attention to how big of a change that will be for the user community who will be impacted by that, and making sure that we have a game plan to get out to all of those stakeholders, making sure they understand what that change is going to be, how their sort of day to day work will change and hopefully improve. And we'll go from there. So it's a really integrated approach to designing a new system.

You can see the timeline, and you'll see where we are here in January of 2024, and you'll see designs are in the context of the rest of the project. When I suggest that everybody do is focus not on the specific dates, or the specific duration of any one thing, but instead focus on what activities happen when and which activities follow other activities. So you can see that there's a lot happening all at once, particularly as we get later in the project. And you know, for example, as Nick mentioned, the planning and budgeting design sessions are a little bit staggered. So different parts of the project will be working on different types of things, but I promise you at the end of it all, it all does come together.

So you'll see that there's kind of a logical flow of activities. And without getting into too much terminology or methodology or consultant speak, basically, what we're doing is we're planning in a system. We're designing it. We're configuring it. We're building any kind of technical work around it. Testing it thoroughly and then deploying it. And then we have to train and communicate and do all those things.

And as both Tracey and Jim alluded to, the thing about these cloud systems is this kind of work doesn't really stop at the end of this, because there's always improvements and new releases and new functionality coming out from Oracle. So part of the work that Stony Brook will be doing during this project is building the internal capability to absorb this kind of change, to do some analysis on something new. Will it work for Stony Brook? How will it work? How do we test it and deploy it and roll it out? So We're at the early stages of the project right now. So some may think we're not up to that task right now, and you don't have to be, but I promise you, by the end of this Stony Brook will be well on their way to deploying new functionality on their own.

The other thing I will mention around the timeline is that the cut over date is a really important date. And it isn't really something that can move around a lot. You have to really make some decisions around when you're going to cut over because there are significant dependencies and impacts on that decision making. So Hina walked through the governance process. So as we move into the next phase of this project, we will start to really enforce that governance structure and make sure that we're making decisions based on facts and information and really deliberating well as a team to make sure that any changes we make to the timeline are really going through a rigorous process.

This is just a view of some of the things we talked about. Already, the technical functional areas, change management, and the project management office; this is just kind of how our teams are organized. I will give kudos to the Stony Brook team. The workstream leads from the Stony Brook team and the Deloitte team really spent this past fall becoming a really well-integrated team. And that isn't always the case. So

my appreciation to all of our colleagues for working really hard to develop solid working relationships over the fall. So with that, Lauren, I'll turn it back over to you.

**Lauren Candela, Senior Communications Manager for Finance & Administration, Stony Brook University:**

All right. Thank you, Ted, for your partnership on this project as well. We are sincerely grateful. Leading into this meeting today we had asked for anyone who had questions to submit them. These are a couple of questions that came through. So we're gonna work to answer those now and then I'll ask if anyone has additional questions if you want to drop them in the chat. After we've gone through these 3, feel free to come off mute and ask questions at that point. But we'll start with the first question that came through which was, 'How will Stony Brook engage with SUNY Central during this initiative?' and I'm actually going to pass this over to my colleague Lyle to answer. Lyle, if you wouldn't mind talking a little bit about the work that's been done so far to engage SUNY?

**Lyle Gomes, Vice President for Finance, Stony Brook University:** Hi folks. Lyle Gomes, Vice President for Finance. My role with the project is to support overall program and project management for this important project. It is a really important question. So, thanks to whoever asked that. Engaging SUNY and RF is a top priority of our project from start to finish. Including our partners from SUNY and RF is critical to our success. Our goals related to engaging SUNY and RF are multi dimensional. On the one hand, obviously, we need to ensure that all the required interfaces and integrations work well. Without those, employees wouldn't get paid and vendors wouldn't get paid, so we certainly need to make sure that those integrations are working well. But in addition to the integrations I certainly see, and I think my colleagues see, lots of opportunities that we'd like to bring forth to our partners in SUNY and RF that certainly will benefit Stony Brook, but could also benefit our partners sitting up in Albany at SUNY and RF and possibly other campuses as well. So I see this as a real benefit to all those that are involved.

And you know, including reps from SUNY and RF, we have them on our advisory committees. We've been providing regular updates and progress reports. We've been scheduling specific meetings with our SUNY and RF partners to let them know what's going on, and just as importantly to get their input and their perspective as to the approach that we're taking, and possibly any of the impacts that some of the things that we're recommending may have both on on their systems and their environment plus ours. So I think it's a really important thing. It's a great question.

In my role, one of my key responsibilities is to ensure that we are connecting and engaging with our partners from SUNY and RF at all times, especially when there are certain specific requirements in which we need their cooperation to help us get through and meet these challenges.

**Lauren Candela, Senior Communications Manager for Finance & Administration, Stony Brook University:**

That's great. Thank you. Lyle. The second question that came through was asking if we could list other academic institutions that have successfully implemented ERPs similar to what we're sort of starting out here at Stony Brook, and what have been some of the valuable insights that we can glean from those other implementations. I'm going to ask Jed maybe to take the first part of this question. I know Jed has done a tremendous amount of work at interviewing other institutions that have gone

through this process. So, Jed, if you could speak to that, and then, Ted, if you could chime in at the end. I've got some of the institutions listed here and I'm sure there are more that Oracle and Deloitte have worked together to implement ERPs at. So if you guys wouldn't mind sort of tag teaming this question and providing us with an answer that would be great.

**Jed Shivers, Senior Vice President for Finance & Administration, Stony Brook University:** Yeah, thanks. Alright. So this really is a good question. When I got here we were really trying to understand Oracle and its place in higher education, and I would say we probably spent a good 9 months really talking with other universities, and the way that we came up with that list in our own peculiar way was, I think Shaneen, Lauren and I went shopping on the web, and we looked up all the places that we could find that adopted Oracle.

And so we talked to places like Brice University, which is a big private university in Texas. We talked to the University of Wyoming. In fact, we spent quite a bit of time with them. They were kind of like the first people that we really learned about, and they were really wonderful. And then, we kind of realized that virtually the entire University of California system was flipping over into Oracle. And so we spent a lot of time in particular with UC San Diego and UC Davis and it was just tremendously interesting. The key, to be honest, was to find places that are kind of like our size or bigger; at least our complexity, if not more so. And most of the places on this list are that. They all have medical schools, they have hospitals, most of them, and they're very similar in the fundamental structure, although obviously some are private and some are state.

So then, in terms of the specific insights from my perspective, I thought one of the most interesting things was what we learned when we talked with the University of California, San Diego. So there are 2 things. One was, it's what I would call a super research, intensive institution. And one of the most interesting things that happened, which is not really directly possible here because of the research foundation, is that they had a whole bunch of functionality that they developed during the course of several years that gave principal investigators, and this is a place that has a huge portfolio of research, they gave principal investigators monthly accounting on where they were, where they were going, what they were doing, and when they implemented their system they inadvertently erase the functionality. And that is not so good when you're in a research intensive place.

So one of the mantras that we adopted is to the extent possible, leave no basic functionality behind. And now I guess that I've been both a perpetrator and a victim of the implementation of these systems. And so I can tell you first hand how aggravating it is once something that you count on goes away, and it's not replaced by another method. Now, there may be other methods to do this. We may have to learn new methods of doing it, but the point is, if there's something really required you want to make sure that we can generate the information. So I would say, that's one item.

Another one is the need for change management. So when we talked with UCSD, what they said to us over and over was, you have to have a change management program. You've got to be able to help people understand what's going on; what the context is, what's the framework, etc. So when this stuff

starts to happen and people get called in and asked for their help testing out a piece of functionality, someone's not going, 'Why am I doing this, what's going on.' So one of the purposes of this meeting that we're having right now is to help everybody sort of get into the framework and understand the context of what's going on.

The other thing is that by and large these implementations have been fairly successful. In other words, when all is said and done, and when people emerge from the other side, they basically have gotten much of what they were looking for. You know, it's difficult, it can be annoying, frustrating, etc., but fundamentally what their goals were, that they were shooting for, which are similar to ours would up basically intact. And they pretty much got what they were looking for. So the chances of success, if we do all this correctly and we really pay attention, are good.

I guess my only mantra that I want to leave behind is, I do have an informal rule, and that is no festering. So what that means is, and this is something I've learned in my own experience is, if people have a thing that they're concerned about, they need to speak about it. And the organization, we right, we need to hear it and we need to address it. You got to get these things resolved, and you can't allow issues to fester. And I think that's one of the things we're really trying to keep in mind. So with all that, let me turn it over to Ted.

**Ted Simpson, Managing Director, Deloitte:** Thank you Jed; a lot of similarities with what Jed said. When I think about some of the projects we've done and are doing, and some of the insights that we can glean, I would say that Stony Brook is in a good spot because you're not first, you're not the last, you have a number of institutions who have gone through this, or are going through this, and just looking at this board here as an example, UC Davis just went live. UCLA is kinda just getting going. Santa Barbara is kind of right in the middle. Rutgers and Pittsburgh were early early adopters, so they learned a lot and share a lot with the community.

I think that 3 of the things that I would pick up on, 2 of them Jed mentioned, so I won't harp on them, but one is around decision making. These projects, as they go, the tempo of decision making starts to pick up and the volume of decision making starts to pick up. One of the things that you're probably all familiar with is sometimes decisions in a university setting don't always stick. We have to be very, very cautious and thoughtful about our decision making so that when we make especially significant decisions, they stick. I appreciate Jed's rule, no festering, and I think that's a really great way to address some of the decisions that we're going to have to make.

I'll give kudos to one of the very first big set of decisions that we all had to collectively make, around the chart of accounts. I've done a number of these chart of accounts redesigns over the years, and this was probably the most orderly one I've seen, so kudos to Cassie and the whole team for that. If we continue in that vein I think we won't have any major problems here.

One of the things we haven't talked much about, and we won't see for quite some time in the project (but I wanted to call it out), when we get into testing, everyone talked about how Stony Brook is moving

from a set of disparate systems into a more centralized system. Cassie talked about some of the things that we haven't done before that we're going to start doing now. It's a difficult thing to test a future state that looks different from the current state, and is bigger and slightly different. So when we get into testing, it's going to be really important that we are doing thorough and thoughtful testing and not just checking boxes because we're going to want to pay attention to data quality as we're converting data from all these different systems into a new chart of account structure. Testing is a lot of work, but it's something that if it's not done well, you're asking for problems when you move into production.

The last thing I'll reiterate is what Jed said. Change management is a huge thing on these projects, in particular in a university setting. I know it's shocking to all of us, but not everybody reads all of their emails. So we have to make sure that we're coming up with various strategies to get the word out to the user community, especially when things are going to change. As I mentioned before, and kudos to Hina for really establishing a strong foundation through which we're going to be doing that. Lauren back to you.

**Lauren Candela, Senior Communications Manager for Finance & Administration, Stony Brook University:**

Thank you, I will actually pass it right back to Hina, so kudos! The next question that came through was, what are 2 or 3 of the hardest issues to tackle with a project like this? I know we've done a lot of talking offline about what those challenges could be. So Hina, if you could summarize for everybody, I think it would be good to sort of acknowledge them and talk about how we're going to work through them now.

**Hina Kausar, Director of Change Management, Stony Brook University:** Absolutely. Thank you so much, Ted. I appreciate that word of confidence. You know, we're just trying to establish this function here of change management, and I really hope personally, that through the WolfieONE project we are able to do at least a good job of making sure you know what change management is and how it can be beneficial. There's a lot of data out there that shows that if we do change management right, the chances of success increase so much more, and in terms of the hardest issues there could be so many. Some we know, some we don't know just yet. So in terms of the ones that are kind of known at this point in time I would say that as I mentioned earlier, we have different functional areas, and everybody has their own requirements, and I think Cassie shared her slides, and they have their own guiding principles which makes sense for their particular area, and then Tracey may have her own guiding principles. However, when it comes to Stony Brook as a whole, it's making sure that we are thinking of Stony Brook first, and we are balancing out what's best for the organization as a whole. So that's going to be challenging. It sounds simple, but when we actually now get into these design decisions we will have the opportunity to reevaluate and make sure we are going in the right direction and balancing out what's the best between different areas.

So that's one thing as well, keeping a mindset of making improvements from our current business processes to the future state. So please, when we are making these decisions, don't just take something because we are used to doing it today in a certain way and we think that's the best way. Take a moment to really evaluate whether that's the best way to do something just because we've been doing it like

that. So this is a great opportunity for business process improvement. The second thing to keep in mind, as Ted shared the timeline, is we don't want to scare people, but as the team that will be helping build the solution, design it, test it and eventually roll it out, you do need to understand the different activities and sequence of activities that need to happen. As you must have noticed, we're in this for the long run. This is not a short duration project, so think of it as a marathon, not a sprint.

Even though we'll be working in sprints for design, we have a long way to go. People are going to get tired. People are going to get frustrated. People are going to lose their patience and you're going to see so much of Ker and me. We started our road shows, and we've told everybody that we might be seeing you 2, 3, or 4 times, but I would rather you see more of us than you don't hear from us, because as Jed said, festering. We want to hear what's on your mind, we want to hear your concerns. If we don't hear it, we won't be able to address it. So please do that.

And then, when it comes to the unknowns, there are going to be so many things that believe it or not, that none of us thought about. So we need to make sure that we are accounting for those unknowns and things that we don't know yet, and we'll go ahead and take care of it.

I want to make sure that we covered a couple of questions that came in through the chat. The first one was related to the chart of accounts. Cassie, if you could unmute yourself, and the question was, do we have any feature in the CoA that helps to eliminate the duplicate entries. I know you answered it in the chat, but for everyone's sake, if you wouldn't mind speaking to it.

**Cassandra Amadio, Assistant Vice President for Accounting & University Controller, Stony Brook University:** Yeah, absolutely Hina. This is a great one because I think this kind of goes back to a little bit of what Korak was talking about on the EDM module. In terms of duplicate entries, we're going to look at rules and any kind of internal controls that we can build organically within the transactional system that would avoid any of that. We'll certainly have some checks and balances in place that would mitigate and prevent any sort of duplicate entry from a transaction perspective.

**Hina Kausar, Director of Change Management, Stony Brook University:** I'm gonna move on to Dominic's question. And Tracey, if you don't mind taking that.

**Tracey McEachern, AVP for HR Operations, Stony Brook University:** Sure, Hina. First of all, I think we would be remiss if we didn't say 2 things. The first thing is thank you to our people for the 20 years worth of work that they have put into PeopleSoft to make it work for this university. So I think Jim, Simeon, and Jed all would agree with me that our PeopleSoft support has been great through the years, and we just want to take an opportunity to say thank you to them.

And, Dominic, your question is great. What Deloitte has told us is that we are not losing any functionality that we currently have in place in PeopleSoft. So with that said, the data that we're using to build on Kronos, that what we put in Peoplesoft will have flex fields in Oracle, WolfieONE. So the answer to that

question is, yes, we will be able to address the things that we're building now for Kronos in WolfieONE to respond.

**Caleb Pingelton, Senior Manager, Deloitte:** I will add to the second part of the question with terms of experience, absolutely. Oracle, If we're not typically doing time and labor, Kronos is probably one of the higher, like vendors that we integrate with. Deloitte also has a very deep look back in terms of our project experience implementing between Oracle HCM and timekeeping systems such as Kronos or with Kronos. So we've got that experience to draw from as well. So we definitely have it covered on both fronts. To Tracy's point, we have been very involved with the updates of what's happening. As we go into our design sessions, we will look specifically at those integration points between UKG and where we need to hand off to WolfieONE. It's certainly a big consideration that we've taken into account, and we are addressing. We're all covered.

**Hina Kausar, Director of Change Management, Stony Brook University:** I'm going to end with a couple of resources. We have this recording as well as the deck that Lauren will be sharing out after this meeting, and she's done a great job putting together this WolfieONE website. The site has a lot of current, but also a lot of historical information which is very important for people to understand. How did we get here? I would strongly encourage everybody that has joined us today, and is new on this project to go through this website.

We also have a Sharepoint project site, where we have been maintaining all our project documents and Heather McLaughlin, who is from our EPMO is not on the call today, but she has, I think, granted access to everyone on the Tier I team that joined us today. So please, when you get a chance click on this. If you need access, you can reach out to her.

There's also the EPMO site that has the project status. So feel free to take a look at that.

Also I want to mention that you can sign up for free Oracle training. We'll be sharing more information about this when we come to each of your VP areas.

And the WolfieONE feedback form. So this is something that's been out there, and I just dropped it into the chat. This is where you can send us your questions, your comments, your concerns, and we promise that we will circle back and make sure we provide you with a response. So with that, we're right on time, I'm going to turn it back over to Lauren. Thank you so much. Have a great day.

**Lauren Candela, Senior Communications Manager for Finance & Administration, Stony Brook University:** Thank you, Hina. Alright. We did it. We made it 90 minutes. Hopefully it didn't feel like 90 minutes, but I thank you all again for attending. Your time is precious and valuable to us. So thank you for making the time today and thank you to everyone who worked to make this possible and spoke with us today. If you have questions like we said, drop them on that form, and we'll get back to you. And here's to an exciting journey and road ahead. Thank you. Everybody have a good rest of the day. Stay safe in the snow. Take care.