Records & Registration SIG

September 2018

Agenda

▶	What does it take to build a Workday tenant?
▶	Upcoming Functionality Releases
▶	Workday Cutover Framework

What does it take to build a Workday tenant?

- Building a Workday tenant is an iterative process
    1. Requesting the tenant
    2. Performing tenant setup activities
    3. Loading end user security configuration
    4. Loading foundational configuration
    5. Executing course conversion
    6. Post-course conversion configuration
    7. Loading additional data conversions
    8. Loading remaining configuration based conversions
    9. Migrating integrations and reports

- These tasks and activities can take a number of weeks to complete – understanding timing, interdependencies and duration is critical in planning how we go live

Workday Release Information

- Workday is delivering critical functionality for UR in December

  - Student Records & Academic Advising
    - Ability to override course edits individually
    - Transcript comments for active and historical students
    - Tenantable enrollment status reason codes
    - Ability for an administrator to request a change of status for a student

  - Student Financials
    - Correct company on operational journals
    - Adjustments to charges/payments from external systems

Working Cutover Framework

- The timeframe to be able to execute and complete testing, as well as when we need to begin pulling data to adequately prepare for production conversion defines at what point we can no longer accept new features from Workday and still meet our July go live.
  - Changes that impact conversions and integrations need to be available to the team by the end of the year
  - Changes that are limited to the user interface could be accepted in March

- We will use this framework to build our Day in the Life Tenant to confirm that the sequence of steps that we plan, and the conversion processes, can result in a UR Student system that can meet our needs.

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Working Cutover Framework

- The UR Student Working Cutover Framework is a 'living document'
- It will define many aspects of how we plan to introduce UR student into the university, including:
  - Key events in the academic calendar
  - Technical components of building the tenant
  - Periods of time where we need to freeze data entry or require dual entry
  - Communications to Faculty, Staff and Students
  - Training strategies
  - Understanding when key features will be used in UR Student for the first time
  - Understanding when key integrations will execute for the first time
  - Understanding when other campus systems need to be ready to interact with UR Student

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Working Cutover Framework

- **High Level Assumptions**
  - UR Student will go live on July 7th, 2019
  - Final extract of registration activity will not occur until the end of the first week of Summer B
  - In order to close out and reconcile the 2018-2019 Aid Year, Summer registration activity will have to be dual entered in both ISIS and UR Student after that cutover date
    - Revenue posting for Summer will occur out of ISIS
    - Revenue posting for Fall will occur in UR Student
  - The Bursar's Office will keep the student account balance in synch between ISIS and Workday Student from that point forward
  - NSC Reporting for Summer will occur out of ISIS

  - This approach will help us meet Federal Aid compliance requirements

Review of Cutover Framework Diagram

Please launch file to review the UR Student Cutover Framework DRAFT document

Microsoft Excel
Worksheet

Next Steps

- Meeting survey will be sent to request your feedback and thoughts on the current state of the Working Framework

- We will schedule another session in November to review the Working Framework again with your feedback incorporated

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