



DELOITTE HIGHER EDUCATION

Client Success Story

Student Information System (SIS) implementation
at a leading private research institution

Student Information System (SIS) implementation at one of the world's leading private research institutions

Updating and replacing the university's primary student administration system which supports the processes associated with a student's progression from admission through graduation; including, student records, registration, course rosters, grading, advising, and transcripts.



Background

This Workday Student Implementation Project deployed Workday Student at one of the world's leading private research institutions and replaced the university's 30+ year-old core academic information system.



Process

As this institution was an inaugural member of the Workday Student Design Partnership program, Deloitte coached project stakeholders during their interactions with the Workday product development team to expand the product's functionality and expand application scalability.

During the Workday Student Design Partner Program, Deloitte and the client collaborated on needs and vision. The project team followed Deloitte's proprietary Student implementation pre-planning phase, called Elevate, during this early initiation period.

As the product matured and evolved, Deloitte and the client collaborated through a series of prototyping sessions for each major Workday release included configuring and testing complex business processes to capture configuration elements for the

Foundation build, exposed needs for business process or policy change, and highlighted gaps in functionality that needed future problem solving. As a result, we led periodic fit-gap review and mitigation workshops to track product progress, inform vendor product architects and brainstorm mitigation strategies.

Additional outcomes of Elevate pre-planning included: Program Governance procedures, guiding principles for success, current state assessment, operating model impacts, a change management strategy, and future state process alignment.

The Elevate phase was followed closely by a Planning phase where we established a project staffing structure, project workplan, tech strategy for integrations, and conversions and leadership alignment cadence to monitor and control program activities.

During the 30-month implementation, we engaged administrators, faculty, students, alumni, and other key stakeholders to establish a Vision and Guiding principles for the new system. We conducted university-wide workshops to identify and mitigate divergent practices and prepare for business process transformation. Deloitte led the conversion of thousands of rows of student data. We leveraged firm-wide expertise in student information systems and our proprietary conversion tools (Hoover and Rover) to streamline this effort.

The functional teams – including Academic Foundation, Student Admissions, Student Records, Academic Advising, Student Financials, and Financial Aid – leveraged Agile-Scrum practices to build a requirement backlog, configure plans, testing scripts, and integrated communications so each area tracked and managed the work and key decisions over time.

This institution made history as the first R1 institution to go live on Workday Student in December 2019. This was part one of three phased go lives and included Academic Foundation and Curriculum Management. Subsequently, the university went live with integrations to Admissions, and Financial Aid systems, Student Records, and Academic Advising deployed in February 2020. The institution began successfully registering students in Workday Student in April 2020.

During Deployment and Support, the team leveraged “Zoom” office hours, daily standup conference calls, a student registration helpdesk, and other technology tools to streamline the operational ticketing and support process.



Focus Areas

Academic Foundation

Pinnacle to a successful SIS implementation is getting the Academic Foundation right to support all downstream processing in all functional areas, in addition to integrations, conversions and reporting. UR created an academic unit structure and corresponding policies to cover all of the universities teaching units, including supporting the registration and transcripts for the School of Medicine & Dentistry (SMD). The new Workday Student system allowed for streamlining of disparate processes when creating new programs of study, grading schemes, and most importantly, academic calendars. Each configuration decision was made with close collaboration between UR stakeholders, Deloitte and Workday to ensure maximum flexibility for future growth and uptake of new Workday features.

Scope of Work

Scope included a phased, full platform implementation for over 12,000 students with 13 distinct conversion data sources.



Academic Foundation

- Academic Unit / Level Configuration
- Academic Calendar
- Student Cohorts
- Programs of Study



Curriculum Management

- Course Catalog
- Class Schedule
- Pre and Co-requisites
- Instructor Eligibility



Student Records

- Academic Policies and Rulesets
- Student Status
- Program Completion/Graduation
- Transcripts



Academic Advising

- Eligibility Rules
- Academic Requirements
- Advisor Assignments
- Student Cohorts



Student Finance

- Student Charge Items
- Student Payment Plans
- Student Waiver Payments
- Student Refunds
- Student Billing



Curriculum Management

The institution required a curriculum management foundation that could adapt to and support new student learning methods. The new Workday Student system was configured to accommodate unique elements of curriculum management such as flexible learning delivery models, course cross-listings, and co-requisites. The implementation of Workday Student allowed the university to update outdated modes of delivering the course catalog to students, as well as eliminating possibilities of having duplicate or redundant data in multiple places that used curriculum and class schedule data. (e.g., classroom attributes were being stored in multiple data sources).

Student Records

Workday Student Records provided the institution with a flexible framework to bring curriculum management, academic records, and enrollment functions up-to-date. With the new Workday Student System, the university was able to configure business processes for grade submissions and design transcript layouts to report on grades, academic standing, competencies, cumulative GPA, and much more. Instructor Eligibility was woven seamlessly with the legacy HR system, and the overall implementation of Workday Student allowed for the decommissioning of several, disparate systems through the university that were all performing similar functions for different schools or departments.

The university's faculty are not only able to view customized dashboards to access information such as course rosters or grade assignments, but they can also manage tenure through academic appointments. The institution launched registration in Workday Student for the first time remotely. This was not only a huge success for our project team and for the Workday Student product, but also for the institution itself as their leaders said they did not think it would have been possible to manage remote registration in their legacy system.

Academic Advising

With Workday Student Academic Advising, the university is now able to leverage student data to provide intelligent, real-time alerts, and notifications. The new Student System functionality allows the university to manage academic requirements associated with a student's educational objective, including verifying the number of units, courses, grades, GPA, competencies, and other attributes.

Workday Student also provides a central location for advisors to document and view conversations with students in addition to custom dashboards to track advisee information. In addition, the university's administrative staff can view all student profile data within a single system guided by robust security rules, eliminating the need to access separate systems, pages, or tools for a student's history, grades, academic plan, or financial and other information.

Student Finance

Prior to the implementation of Student Finance, the institution was operating on a 30-year-old "home grown" legacy system. This university blazed the path for identifying revenue streams that needed to be captured at the course level instead of the student's academic unit level. This requirement provided input and guided Workday to deliver new functionality that will continue to be implemented at other institutions in future implementations. The myriad number of calculations used for Student Charge Items and Waivers, coupled with the granular level of configuration in Workday, gave this institution the flexibility which was missing in their legacy system. Having the ability to offer their students the option to view their account, sign up for a payment plan, and pay their bill from the convenience of a cell phone placed the university lightyears ahead of other institutions. The project team set a goal to focus not only on the student experience being user-friendly, but the administrative experience as well. Looking back... mission accomplished!



Impact

Collaboratively, Deloitte and this university brought **more than 12,000 students** onto Workday Student, which resulted in:

- making history as **the first R1 institution to go live** on Workday Student
- nearly **900 students** registering for courses on Workday Student **within the first five minutes** of the system being opened
- **12,000+ student registrations** using Workday Student for the 2020-2021 academic year
- **450,000 converted student registrations** for terms prior to 2020
- **23,000+ courses** and **95,000+ course sections converted** from legacy to Workday Student with active courses and sections published to UR's online course catalog system
- **Automated 14,000+ students transfer credit articulations**
- Integrations with Technolutions Slate for Admissions, PowerFAIDs for Financial Aid and Blackboard LMS.
- **130,000+ converted historical student records**

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[**highereducation@deloitte.com**](mailto:highereducation@deloitte.com)



[**deloitte.com/highereducation**](https://deloitte.com/highereducation)



[**@DeloitteEdu**](https://twitter.com/DeloitteEdu)

For more information, please contact us.

Kathy Karich

Principal

Deloitte Consulting LLP

kkarich@deloitte.com

+1 917 741 2140

Ted Montemayor

Managing Director

Deloitte Consulting LLP

tmontemayor@deloitte.com

+1 214 840 1600

Keith Costello

Senior Manager

Deloitte Consulting LLP

keicostello@deloitte.com

+1 410 800 8828

Authors

Cecilia Daizovi Weiland

Roy Mathew

Ted Montemayor

Keith Costello

Edwin Roe

Mary Grutta

Ray Lozanes



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