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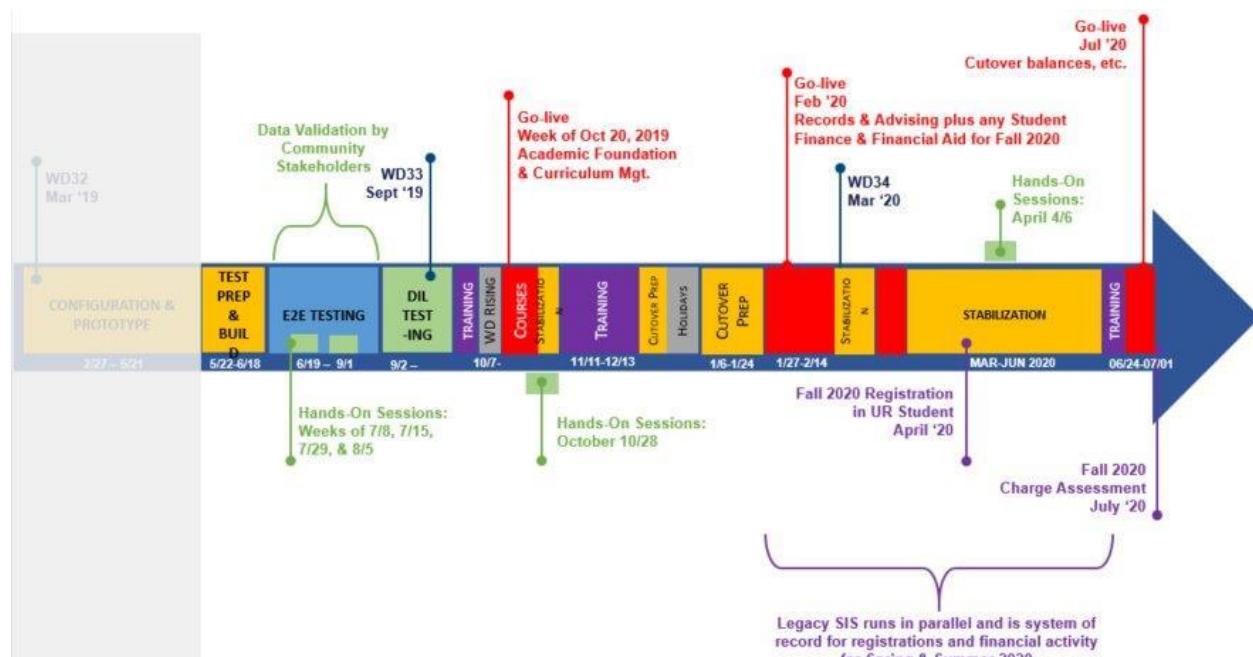
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## Project Pivot: UR Student's New Cutover Approach – The Right Activities at the Right Time

Making a fresh start in January after a readiness assessment and community feedback, the project's leadership took an official timeout for re-planning. By March, UR Student announced a revised timeline and phased cutover approach aligning with the academic calendar. This new direction allows for continued configuration and prototyping targeted school readiness and full-system testing. To keep pace with everything, check the cutover plan details and our Project Director's thoughts on its benefits. We've also included an update on some of our Change Management activities.



New UR Student project timeline as of May 2019

## Timeline & Cutover Milestones

### October, 2019 – Configure Academic Foundation and Records:

- Registrars will start maintaining course information in UR Student to support Fall 2020 registration

### February, 2020 – Configure Student Records, Advising and Student Finance Functionality:

- All financial activity related to the 2019-20 Financial-Aid year, including Summer 2020, to occur in the legacy SIS
- Fall 2020 registration (late March / April) to occur in UR Student
- Specific business functions (grading, advising, etc.) will begin at the appropriate times after this go-live date

**July, 2020 – Cutover the Student Balance:**

- All continuing Financial Aid activity (for summer) to be managed through the cutover balance for student finance activities to begin in the UR Student system
- Fall 2020 – Charge assessment to run in early July

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*“PERSEVERANCE IS NOT A LONG RACE; IT IS MANY SHORT RACES ONE AFTER ANOTHER.” (WALTER ELLIOTT)*

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**UR Student Spotlight: Project Director, Samantha Singhal**



As we continue through spring, it has been a very busy year for the UR Student project. We had an opportunity to spend some time with Samantha Singhal, the Project Director, to better understand the new approach, its benefits, and any impacts to the University community.

***Q: How would you characterize the benefits of the new phased cutover approach to those who may have concerns?***

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**Sam:** The new cutover approach has a cadence that is more naturally aligned with the academic calendar. When we pushed our go-live date we considered multiple options,

looking to minimize risk and ensure the opportunity for community engagement. We worked closely with community representatives to ensure we understood their concerns and had a plan to address them.

Together, we determined that the best approach was a phased rollout, allowing the legacy Student systems to be leveraged for the current academic year (2019-20) then fully migrating to UR Student for the new academic year (2020-21). While there are a lot of moving parts with two systems running in parallel, this approach reduces overall project risk and gives the community much-needed time to work on school readiness activities.

Our revised timeline has UR Student's Curriculum Management features going live in October 2019; this will allow course administrators to begin to manage course information in UR Student. In February 2020, a significant amount of additional functionality, including Records, Advising and Student Finance will go live to support registration for fall 2020 in UR Student.

The effort to configure the system will be completed by late May 2019, followed by the creation of a testing environment in mid-June. The project team will then begin system testing, with plans to begin Day-in-the-Life (DIL) testing in early August. The community will get a bit of a break after the testing is done as our team will continue to focus on training and change-management activities as well as preparing for cutover.

### ***What other cutover options did you consider and why did you rule them out?***

**Sam:** Ultimately, we wanted the best user experience possible. When evaluating our options, we considered what it would mean to cutover in the middle of the academic year. Specifically, we looked at cutting over in either October 2019 or December 2019.

To support a December go-live, we would have to assess charges for Spring 2020 in UR Student. Charges for Spring 2020 are typically assessed in early November, and delaying them until the end of the year would have delayed cash flow of ~\$45M for roughly two months. This is a significant financial impact.

To mitigate this impact, we considered moving up the cutover to October. Moving up the cutover date would have only given us an additional three months. It also meant going live in the middle of the fall semester. A midterm cutover would require financial transactions to begin in the legacy SIS and end in UR Student; as a result, reconciliation of the student account would be extremely problematic. We could have completely mitigated reconciliation risks by restating all those transactions in UR Student. A key concern here was that students would see those transactions come through twice. Although not financially impactful, it is clearly not a great user experience.

A phased approach, taking measured implementation steps, made immeasurable sense.

### ***Q: Now that the timeline has been reset, what will we be doing to prepare end-users for the phased cutover approach and DIL testing?***

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**Sam:** We've restarted our "roadshows" to review the revised timeline and approach with key stakeholders across the community. In addition to presentations for stakeholder groups, project team members are also convening their respective Special Interest Groups (SIGs) to provide details and answer questions.

From the project team's perspective, when the timeline was revised, we re-entered the configuration and prototype phase. During this phase, we are very focused on critical path activities: configuring the system, ensuring business processes are set up and security is ready for testing. We are making sure functionality received from Workday's update in March is prototyped, configured and meets our needs. And, last but not least, we are continuing to work through data conversions, validating accuracy and refining our conversion approach.



As we ramp up our Change Management activities at the same time, we have identified "Project Champions" from each of the schools to assist with readiness efforts. We held a kick-off meeting for this group on April 23<sup>rd</sup>. In collaboration with the Project Champions, we will work with the schools to mitigate the impact of changes coming with UR Student, develop readiness plans, and ensure the appropriate level of training and communications.

During DIL testing, the project team will be working with the community to introduce them to the system, provide a grounding in new foundational concepts that are specific to UR Student, and provide stakeholders with an opportunity to get hands-on experience testing the system. Hands-on sessions for registrars, advisors and administrators will be taking place in July and August; Faculty members will have opportunities in October. We're also targeting November to host a Community Forum with more hands-on system experiences.

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New training materials will be available to define and reinforce the key differences between the legacy system and UR Student. With training prep in mind, we'll also

provide data definitions that explain the purpose and usage of new terminology, such as Academic Periods and Cohorts. Additionally, we'll be offering Standard Operating Procedures (SOPs) customized by school and aligned with end-to-end University business processes.

***Q: Do you have any final thoughts to share with readers about how we plan to work with the university community to prepare for cutover?***

**Sam:**

It is important to the UR Student project team and to our sponsors that we partner with our stakeholders in the community to ensure that they are engaged and supported. We plan to do this in several ways.

As we get closer to go-live, the project team will ensure that community members know how they can request support from the Student Systems support team. We will work with stakeholders to ensure transparency so that it is clear how work is being prioritized and triaged. As with all our enterprise systems, we will maintain operational excellence through timely response to service requests and a focus on customer service.

When I think about where we will be after go-live, the community will have a new foundation to build on over the next 20 or 30 years. They've been on a legacy mainframe system for three decades, and now they will have a platform for the future that meets their needs. As Workday releases new functionality, and our team better understands the product, we will continue to leverage new features to enhance the UR Student user experience.

2019-20 is just the beginning.

### **Multipronged Change Management Approach**

Change Management continues to be an integral part of UR Student's phased cutover approach. We'll be expanding on the Change Management components shown below in the coming months.

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*Change Management Ecosystem*

**School readiness** activities will focus on working with each of the schools to ensure that they are identifying change impacts, developing strategies to mitigate the impact of the change, and tracking progress towards go-live. To assist in this effort, Project "Champions" are being identified within each school. These Champions will lead the change-agent network within the schools and be our primary point of contact for coordinating school-readiness activities. Visit [our website](#) over the coming months to learn more about our Champions; who they are and what they are working on.

**Community engagement** will continue to include engaging the project's executive sponsors, facilitate stakeholder discussions with Special Interest Groups, sponsor Community Forums to inform the broader University community, and involve stakeholders in Day-in-the-Life (DIL) testing activities.

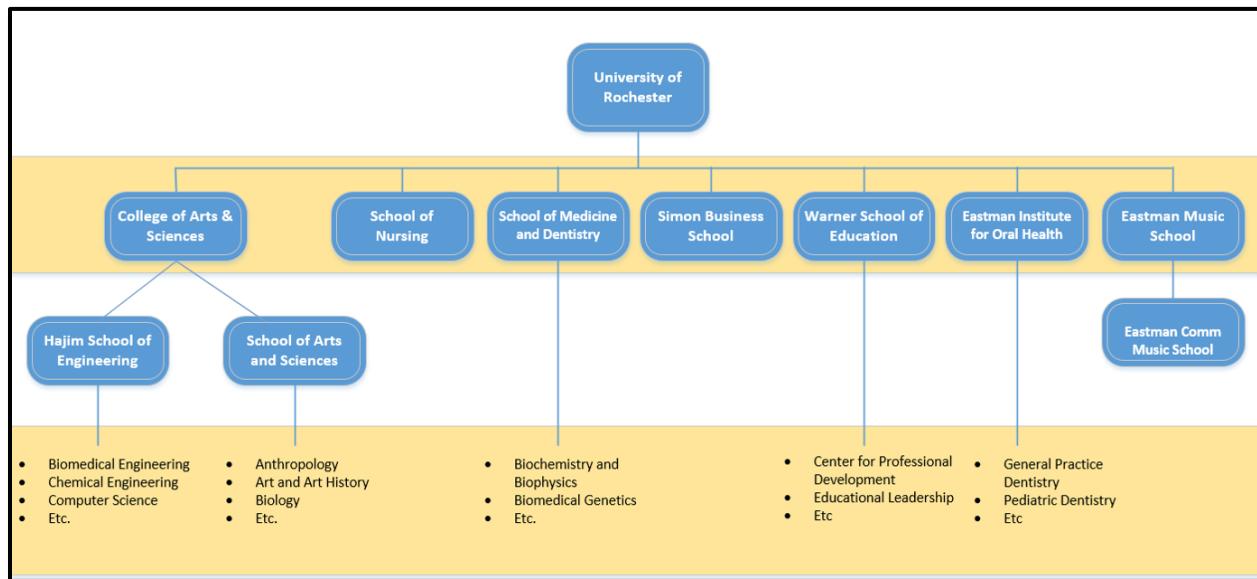
**Communications** will continue via the UR Student project website, Demo Days to showcase key aspects of system functionality, project updates via the newsletter, and presentations to stakeholder groups across the University and eventually the post go-live support model.

**Training** plans are being adjusted to accommodate the phase cutover and are being reviewed with stakeholder groups for feedback. Training will include both in-classroom training, videos, and Quick Reference guides.

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## Learning the Lexicon of UR Student

As the UR Student project moves forward, there are big changes coming regarding new terminology and data elements within key functional areas that will impact student records. Because these updates involve replacing some longstanding foundational terms, we're working on visual reference materials (infographics) to help reinforce key concepts, like Academic Unit (AU).



### UR Student Academic Units

#### Academic Unit (AU)

A Workday organization created for the purpose of representing business process approval, reporting and workflows, characterized as a **school** (college), **department**, or other **unit** within our institution.

Those with the appropriate security can use AUs to:

- Assign faculty to teach a course section
- Facilitate a system workflow and assignment of duties
- Run reports by any AU (e.g. report enrollment by school, by term, and by course)

AUs can specify which units can do the following in the UR Student system:

- Offer courses and programs of study
- Admit students
- Allow students to know all the schools they belong to at a glance

UR Student [terminology](#) will be communicated on our website as more terms are defined within the context of the project.

#### Subscribe to Stay in Touch with UR Student!

We'll give you the latest details on upcoming events, need-to-know functionality changes and other project impacts. [Go to UR Student News](#) now to subscribe to our web updates to stay in the know.

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