Finance and Facilities: Workday Project Update
August 25, 2025

Program Accomplishments and Status

- Completed the Planning/Data Conversion milestone

- Foundation tenant build complete for Finance/HCM

- Functional architecture sessions are complete

- Kicked off Change Management workstream

- Filled critical project and testing roles

- Completed analysis of Student implementation options

- Project status is Green and on schedule

Current Priorities

- Complete configuration of Finance/HCM/Payroll
- Conduct unit testing of functionality, processes, and configurations
- Configure integrations with third-party system partners
- Execute on change management plan and communications
- Prepare for next round of data conversion and import
- Finalizing recommendation for Student implementation
- Addressing all risks and issues flagged by workstreams

Issues/Risks

- Team continues to be stretched thin with multiple demands on functional leads and workstream leads through configuration and unit testing

- Need stronger planning to address capacity and timing issues related to data conversion prior to the End-to-End Tenant build

- Significant complexity exists in areas such as payroll configuration/ testing, integrations with Colleague and third-party systems

- There will be significant changes in processes and procedures in Workday that also will require changes in how work is allocated between functions and departments

- The internal team has limited experience with Workday, and it poses a steep learning curve

Student Implementation Pre-Planning

Preliminary Recommendation for Implementation Methodology

Background

- Both VTSU and CCV will share a single instance of Workday
- Workday offered two approaches for implementing the Student module to handle multiple institutions in a single tenant
  - Single-Entity (SE) – Institutions would be treated as distinct academic units within a single entity, but students would have a single academic record
  - Multi-Entity (ME) – Institutions would be setup as unique institutions that would share many configurations but have more flexibility to address unique student needs
- While feasible to implement in an SE environment, it would require us to use a third-party system to manage and process Financial Aid
- Once we begin implementation, changing would carry significant costs and risks

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Operational and Academic Alignment Assessment

- Workday consultants led the discovery and analysis process

- Focus was on areas of alignment and unique requirements by institution and impact of SE/ME decision

- Generated a list of pros and cons for each area

- Demonstrated key functionality in both

Evaluation Criteria:

1. Student Experience

2. Deployment Complexity

3. Maintenance Considerations

4. Security

5. Scalability

6. Reporting

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Recruiting and Admission

- Both institutions use Slate for recruiting and admissions
- The decision between SE and ME would have a limited impact
- Key consideration is the complexity of integrating a third-party for Fin Aid

	Single Entity	Multi Entity
Pros	Less complex transfer from CCV to VTSU (fewer configurations)	Single system for integration No third-party FA system required
Cons	Harder to show distinction between CCV and VTSU. Need to integrate with third-party FA system.	Configurations needed to enable pathways and cross-enrollment.

Student Records (Core and Academic Foundation)

- An SE environment would mimic what we have today
- Significant configurations would be needed either way to support students attending both institutions (pathways and cross-enrollment)

	Single Entity	Multi Entity
Pros	Ease of configuring to match our current policies and practices	Greater clarity to students about their pathway and what credits had been taken where. Seamless reporting environment with standard reports and processes.
Cons	Lack of flexibility in configuring for different student needs OPEID reporting would require custom reports and processes. This kind of configuration has not been done before in Workday.	Process for moving from a single academic record to an ME environment is not yet well understood from a data conversion perspective.

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Curriculum and Advising

- Significant configurations would be needed either way to support the student experience for cross-enrollment and pathways students
- SE, like our current system, offers greater ease in moving from one institution to the other but offers less clarity about what is being offered where and where credits are earned

	Single Entity	Multi Entity
Pros	Ease of cross-registration and transfer as part of student's academic plan.	Greater clarity and transparency of course plan and history based on institution.
Cons	Lack of transparency about registration for shared courses	Lack of visibility of in-progress courses at sister institution Complexity of integrating with SSE Connect

Financial Aid

- Moving ahead with SE would require us to implement and integrate a third-party system for FA, adding significant complexity and cost
- Workday offers a superior product for FA processing and in ME the integration with the other modules would be seamless

	Single Entity	Multi Entity
Pros	None.	FA would be implemented within the Workday system, providing numerous improvements to process automation and a better student experience.
Cons	Need to implement and integrate two instances of a third-party FA system, adding significant cost and complexity.	There are some FA features that may not be available within Workday at time of implementation. (FISAP, NCAA reporting will require reporting configuration)

Student Accounts

- Workday recommended ME as the best approach regarding Student Accounts
- If we went SE, we would be the only customers to go that direction and it would require significant custom configurations and reporting

	Single Entity	Multi Entity
Pros	None.	Standard Workday processes and procedures supported.
Cons	Complexity to configure student accounts and would be only customer to do this.	Custom process needed for balance transfers for shared students.

Core and Cross-Functional Elements

- Virtually all core elements like user profiles, demographic designations, and identification codes remain the same regardless of implementation approach.

	Single Entity	Multi Entity
Pros	N/A	N/A
Cons	N/A	N/A

Other Strategic Considerations

- Vision for the VSCS is to expand transfer from CCV to VTSU through program pathways and provide opportunities for cross enrollment.

- The expectation is that we will continue to look for opportunities to consolidate administrative functions and manage common processes through shared services.

- Need to ensure strong collaboration and governance to foster greater alignment across institutions while addressing unique needs of students and the institutions.
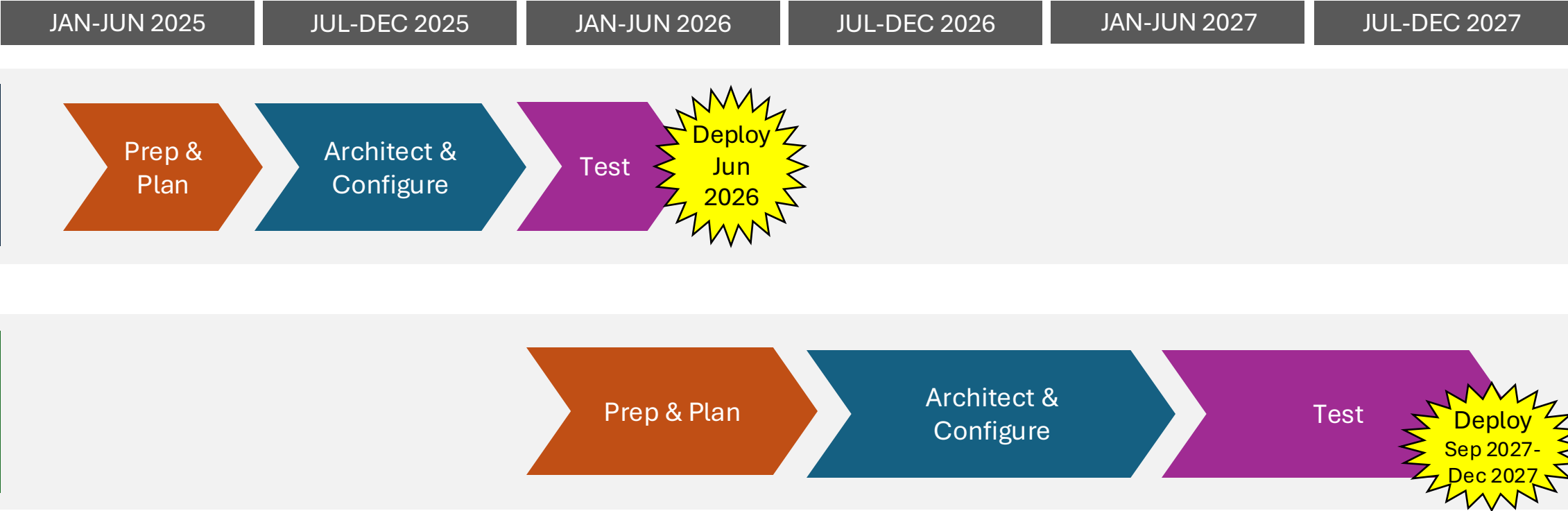
Preliminary Recommendation – Multi-Entity

- Aligns with guiding principles for the Workday implementation

- Offers the best mix of features, processes, and experiences for students, faculty, and staff across the system and institutions.

- Enables consistent student experiences and maintains transparency, while preserving institutional identities.

- Minimizes technical, financial, and operational risks

- Risk in being the only multi-institution, single-entity customer

- Workday's technical roadmap is oriented around ME

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Next Steps

- Confirm the feasibility of several configurations proposed
- Work with Workday to detail cost and scope implication to be captured in a required change order
- Final recommendation and draft change order will be presented at the November Finance and Facilities and Full Board Meetings for approval

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Backup Slides

Timeline

| | JAN-JUN 2025 | JUL-DEC 2025 | JAN-JUN 2026 | JUL-DEC 2026 | JAN-JUN 2027 | JUL-DEC 2027 |

Finance /HCM
- Prep & Plan
- Architect & Configure
- Test
- Deploy Jun 2026

Student
- Prep & Plan
- Architect & Configure
- Test
- Deploy Sep 2027- Dec 2027

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