




Bringing a risk and controls lens to a Higher Education Workday Implementation

Higher education institutions and their implementation teams expend extensive effort preparing for go-live. In providing Internal Audit services for a university, Deloitte was engaged to bring a risk and control lens to the implementation and provide recommendations and leading practices along the way. IT leadership and Deloitte Internal Audit, and Workday specialists collaborated to understand the highest risk areas for the implementation. Internal Audit was agile throughout the assessment to assist the university where needed by performing a segregation of duties and privileged access review and helping to review financial reconciliations. Internal Audit and university leadership worked together to help address risks leading up to and following go-live.

ERP implementations are critical moments in an organization's journey. When Financial, HR, and Student Information systems are overhauled, teaming with Internal Audit can help to achieve a successful and well controlled deployment.

Offering a helping hand with extensive Workday knowledge



While management and the implementation team are focused on the day-to-day details of a project, Internal Audit can take a step back and look at the highest risk areas. User access is constantly changing throughout a project as business processes are created, employees come and go, and roles are evaluated.

For this university, Internal Audit began with a user access review of the most sensitive and critical access and facilitated the review so that the users were evaluated by client management. This review provided assurance to the university over their highest risk access and freed up the already sparse client resources to focus on end user testing. Further, Internal Audit continued to dive deeper and evaluated potential segregation of duties concerns and access to critical actions. Due to resource constraints, the university was not able to complete its own segregation of duties review prior to go-live and was able to rely on Internal Audit's work.

Specialization in the final days



As the university approached the finish line, Deloitte specialists worked with the university's Finance and IT teams to assess the conversion crosswalk and identify opportunities for enhanced mapping, as well as variances requiring additional review to determine root cause and resolution. This included validating that the ledger account reconciliation reflected a sync of PeopleSoft account to Workday account balances.

Through this work, the team was also able to identify instances of inconsistent use of the WorkTags that, when addressed should provide better data quality, reporting and control.

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By involving Deloitte's Internal Audit and Workday-trained specialists, the university obtained customized recommendations and leading practices to implement along its journey.

Value in teaming with Deloitte's Internal Audit



By collaborating with Internal Audit, this university had the opportunity for a second look at critical areas including user security, integrations, data conversions, and overall project implementation practices.

One key to the university's successful implementation was its ability to learn and adjust throughout the project to follow the shared leading practices and recommendations.

Key takeaways for the future



As the university continues its multi-year implementation journey, Internal Audit was able to provide leading practices to keep in mind. By having these recommendations before planning even begins, the university can better achieve successful deployment.