



DELOITTE HIGHER EDUCATION

# Client Success Story

Implementing an enterprise-reporting platform leveraging Workday Finance and HCM data

# Implementing an enterprise-reporting platform leveraging Workday Finance and HCM data



## Background

A private R1 University on the east coast implemented Workday Financials and Human Capital Management (HCM) that prompted a reassessment of their reporting strategy and platform to create a foundation for the long-term vision for sustainable operations and decision making.

The transition from the legacy reporting platforms to a data warehouse posed a challenge unique to Higher Education institutions. The change associated with the introduction of a new ERP system was a significant source of anxiety. The legacy reporting platform provided significant value to the user community and the disruption needed to be carefully managed.

The University engaged the Entigence analytics team (acquired by Deloitte Consulting in August 2021) to develop a roadmap for an enterprise reporting strategy and subsequently design and deploy an enterprise reporting platform. The objective was to build a strong foundation that would enable next generation reporting platform to further enhance their decision making and reporting capabilities.

feedback from the Provost, Chief Operating Officer, Chief Financial Officer, and other stakeholders on their vision for enterprise reporting related to their financial, human capital, student, learning management, and sponsored research data analytical needs.

Given the extent of disruption that stakeholders were already dealing with, the team needed to be prescriptive yet flexible when defining requirements. Proven change management strategies were deployed from start to finish to bring stakeholders along for the journey. The team, leveraging information from the survey and leading practices from other implementations, developed a roadmap for the design and implementation of a modern enterprise reporting platform. The team also developed a reporting strategy that laid the foundation for how the University should incrementally develop a vision to support university and executive reporting needs. The team methodically analyzed the legacy platform, developed a foundation for the data platform, and mapped the models to the Workday core foundation. The development process involved the creation and adoption of bridge tables to crosswalk historical and emerging data, thereby creating advanced analytics that allowed users to conduct historical as well as longitudinal analysis.



## Process

The consulting team conducted an enterprise survey that included soliciting



## Impact

These services enabled the University to overcome significant challenges



## Impact *(cont'd)*

related to extraction of data from object-oriented data structures into performance optimized datasets that users could understand, explore, analyze, and act upon.

Highlights of other outcomes include:

- Delivered over 30 critical reports and dashboards that contained large volumes of cross-era and cross-ERP data
- Built a reporting platform for Ad Hoc reporting needs
- Developed a holistic reporting strategy that served as a foundation for the University to improve decision-making insights
- Navigated and influenced the transformation with key stakeholders that had strong inclinations to the current reporting platform and capabilities
- Identified reports that were performance-intensive and created dimensional models that significantly improved performance, which enhanced the end user experience
- Mapped legacy reporting requirements to Workday constructs
- Consolidated various reporting needs to create a single source that provided compliance reporting, managerial, and analytical reports
- Distributed valuable information from Workday in a secure manner to reporting users
- Allowed users to slice and dice data in ways they needed to manage their operational processes
- Leveraged the technical foundation to continue enhancing the analytical platform

For more information,  
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