

# Workday Reporting & Analytics

## Meeting Minutes

Date 4/27/2020  
 Time 11:00 am  
 Location WebEx

### 1. Welcome & Roll Call

Name		Name		Name	
Candice Sutterfield	X	Jennifer Hobbs	X	DawnAnn Wilson	X
Tina Flores-Nevarez	X	Kristen Suehs	X	Dr. David A Giles	X
Elizabeth Schwartz	X	Kay Schubert	X	Kem Morgan	X
Kelli Holt	X	Martha Alexander	X	Debra Cortinas	X
Laura Quirino	X	Keisha Lamb	X	Lloyd Butler	X
Brad Blair	X				

### 2. Action Item Review – None, initial meeting

### 3. New Items

- a. Introductions
  - i. EDW Team
  - ii. Working Group
- b. Scope of Responsibility
  - i. Review reporting initiatives and make recommendations to the HCM Advisory council.
  - ii. Submit recommendations for new reports and dashboards
    1. Some may be submitted to Workday for enhancement
  - iii. Meet monthly as a working group
    1. Participate in sub-committees as needed
  - iv. Meeting notes will be posted to Workday Help
- c. Reporting Modernization Project: Where does Workday Reporting fit in
  - i. Project kicks off 4/28/20
  - ii. Discovery Boards and People Analytics in Prism will be part of Dashboard tools assessment
  - iii. Workday Reporting team skills and responsibilities will be assessed as part of the Organizational Model
- d. Projects
  - i. Trended Worker
    1. Workday delivered data set for reporting workforce changes
      - a. Hire
      - b. Termination
      - c. Transfer In and Out
    2. Some configuration available
    3. Workday delivered reports and dashboards associated
    4. **Reports only on primary position**
  - ii. Scorecards
    1. Snapshots of important metrics for an organization and time period
    2. Customized metric sets
      - a. Organization and timeframe flexibility

- b. Subject matter flexibility – beyond workforce changes
      - c. Trended Worker data sets can be leveraged
      - d. Additional positions can be considered
    - 3. Reports designed around an analytic number to show on a “card”
    - 4. Compares analytic to prior period to show trends up/down
  - iii. Prism / Discovery Boards
    - 1. Prism
      - a. Enables creation of custom data sources with ability to blend 3<sup>rd</sup> party data
      - b. Kickoff March 30<sup>th</sup>
      - c. Pre-payroll Validation
        - i. 5 detailed design sessions so far
      - d. Staffing and Compensation Changes Dashboard
    - 2. Discovery Boards
      - a. Interactive dashboards for more “hands-on” data discovery
      - b. Analytic reporting feature of Prism
      - c. A&M System invited to join Early Adopter Program
  - iv. People Analytics
    - 1. Workday delivered workforce analytics dashboard
      - a. Uses machine learning to find and present data trends
    - 2. A Prism extension to be incorporated into Prism implementation
    - 3. Expected Kickoff May 18<sup>th</sup>
    - 4. A&M System invited to join Early Adopter Program
    - 5. **Reports only on primary position**
- 4. Questions/Comments
  - a. Candice asked if anyone on the working group has attended Workday Rising.
    - i. No one in the group answered that they had but other people in their organizations had.
  - b. Candice reviewed the Member Representation alignment. We would like for each representative, or set of representatives, to coordinate with contacts at each of the members within their member’s represented groupings.
    - i. Refer to the [Reporting & Analytics Working Group](#) page on the Workday Help site for a listing of Representatives and their respective Member Representation.
    - ii. Coordination includes collecting feedback on proposed solutions and use cases specific to them.
  - c. [Keisha Lamb] Can additional job information be included in scorecard metric sets?
- 5. Next Steps
  - a. Set up Committee meetings
    - i. Committee for trended data (Trended Worker and Scorecards)
      - 1. Elizabeth Schwartz
      - 2. Jennifer Hobbs
      - 3. Debra Cortinas
      - 4. Martha Alexander
      - 5. Tina Flores-Nevarez
      - 6. Dr. Giles
      - 7. DawnAnn Wilson

- ii. Committee for Prism employee and compensation changes use case
  - 1. Keisha Lamb
  - 2. Laura Quirino
  - 3. Kem Morgan
  - 4. Kelli Holt
  - 5. Kay Schubert
  - 6. Kristen Suehs
  - 7. Lloyd Butler
- b. Candice will give contact information to member representation as requested:
  - i. Texarkana and WTAMU to Kem, DawnAnn, and Dr. Giles
  - ii. TDEM to Keisha and Martha

Next Meeting: end of May, date TBD