

# Workday Reporting & Analytics

## Meeting Minutes

Date: 6/23/2020  
Time: 2:30 pm  
Location: WebEx

### 1. Welcome & Roll Call

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

Additional attendees: David Gutierrez, Carey Hutchison, Meagan Kuitu, Kami Xiong, Rachel Habiger

### 2. Action Item Review (Candice)

- a. Discovery Boards for All Feedback – still a need for more feedback on:
  - i. Whether we should move forward
  - ii. What the timeline should look like
  - iii. Who will need to have access and training
  - iv. Curious on whether, with the steep learning curve on Workday objects, the tool would be helpful to partner personas, or just people like BO users.
    1. *Keisha: I do think it will be the people that currently use business objects initially. Once everyone learns it, it might expand the user base some.*
    2. *Elizabeth: Yes, I think the main users should probably be those who use Data Warehouse regularly, but sometimes it is helpful to be able to run things ourselves. I need to devote some time and get back to you.*
  - v. Note: discovery board is not currently part of the communication and training plan
  - vi. *Input from Debra: hasn't gone into the tool yet, but found yesterday's demo on PPLA helpful. It's difficult to keep it all straight. Which tools can get down to the system member level of granularity?*
    1. *Candice: Discovery boards are a tool into many of the same data sources we use for Workday reporting. In this tool, you're essentially writing reports from scratch, allowing analysts to build reports a bit more interactively.*
  - vii. *Kelli: I started it, but didn't get that far...was working from home and internet was intermittent.*
  - viii. *Elizabeth: The demo yesterday was incredibly helpful.*
  - ix. *DawnAnn: (Re: discovery boards having limited access to benefits data) benefits is important too 😊*
  - x. *Kay Schubert: It did seem like an overwhelming amount of data, somewhat intuitive, but uncertain on what her role allows her to have*

access to. Tried to filter for company, but had trouble with drilling through a lot of data. Could we do some kind of canned filters?

1. Candice: (demo dashboard that Rachel Habiger created) see sheet filter vs. viz filter. Sheet applies it to everything on the tab; viz is specific to the visualization. Note the learning curve to identify which company/org fields to choose. We (and discovery board users themselves) can define dashboards with view access for sharing with executives, to eliminate some of the confusion with so many objects. Would like to explore excluding some extraneous data sources (e.g. student, credit card) – asked Workday (with the support of Lisa Canty) to develop this functionality
2. Kay: This is helpful.
3. Debra: That's a cool feature.
4. Keisha: Would be great to reduce options to only what would produce actual results
5. David: Your comment about this being helpful primarily to BO users- what drives this opinion? Does it seem less intuitive?
  - a. Elizabeth: I guess I rely on those folks to know exactly how to give me what data I need---and figured this might be the same. However, in the way back machine, I used to write queries using the SQL database, so I think with time I could become more familiar
  - b. Debra: Our HR folks are the BusinessObjects people; my team could probably jump-in on this.
  - c. Keisha: The business objects users are the ones that have gravitated towards report writing responsibilities. I don't think we know enough about it yet to know if it's intuitive enough quite yet.
  - d. Elizabeth: What I don't want is to be the main one in my division who knows how to do it. If I have time constraints, I need to be able to delegate the research and data research.
- xi. Candice: Curious what kind of training would be most helpful to shorten the learning curve, get better adoption rate.
  1. Keisha: I like the idea of some video instruction so we can go back to it or pause sections if needed.
- xii. See email regarding expected issues on a couple of the Workday use cases on this.
- b. Executive View Only Role Follow-Up
  - i. We do want to use this role, but we had discussion around how it should be configured (constrained vs unconstrained) across members.
  - ii. Working Group not comfortable making the decision until they know what data sets and fields they can access.
  - iii. Proposal to delay config until we know what tools will be available to the role. (support from Elizabeth, Debra, Tina, Martha, DawnAnn to table this decision)

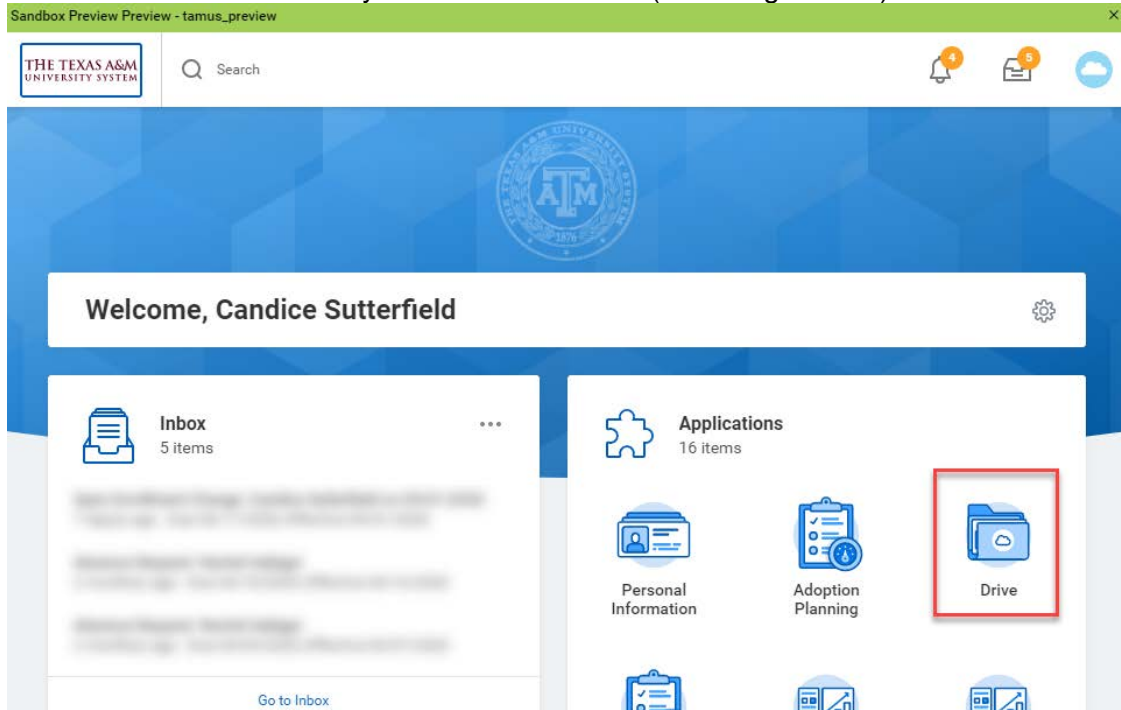
### 3. New Items

- a. Prism Communication and Training Plan (Brad Blair)

- i. (Workday Reporting Implementations graphic)
  1. *Dave: This visual is instructive*
  2. *DawnAnn: When adopted, are discovery boards always via the drive?*
    - a. *Candice: yes- it is only accessible through Drive, and we have no expectation at this time that it will move from that location.*
    - b. *DawnAnn: I anticipate it would be HR, Finance and only the highest super users who will use it if it's not available readily from a worklet. While that might seem silly, out of sight out of mind.*
    - c. *Candice: would it be helpful to have in drive and worklet, or just one?*
      - i. *DawnAnn: to be honest, I need to play around and understand more*
      - ii. *Kay: I like the idea of both- so you could have your favorite discovery boards*
      - iii. *Debra: Candice - I have no idea. Need to study.*
      - iv. *Brad: Would be good for favorite/canned boards*
      - v. *Elizabeth: Yes, I was a bit unsure where to go when I first logged into the test environment to look at Trended Worker reports. That is just a user familiarity issue*
    - d. *Brad: key feedback will be how much knowledge will people who are going to be using this truly need.*
  3. *Note: discovery boards will have prism data sources and a subset of Workday-delivered data sources in the future. Expecting prism data sources to be similar and user-friendly like the universes in BusinessObjects. This could be an advantage to the object learning curve. Candice's background in Data Warehousing will drive this.*
    - a. *Kelli, Lloyd, Martha: That makes sense*
    - b. *Kay: That's helpful*
  4. *Elizabeth: This visual is extremely helpful*
- b. Communication and Training Plan (Brad)
  - i. *This plan is focused on 3 items (Pre-Payroll validation dashboard, event and process dashboard, and people analytics dashboard)*
  - ii. *Communication (high-level) went out in June to stakeholders; will communication about the specific deliverables at the end of the month*
  - iii. *Candice partnered with WDS education team to develop glossary, help content, videos. Planning to create video with more general navigation on how to use dashboards.*
  - iv. *Kick-off (overview, intro, glossary, navigation video) on 8/18 plus 3 webinars during September geared-toward effective utilization of dashboards. They may not be completely polished, but we want you to have a chance to be comfortable with them.*
  - v. *Planning for dev to be complete by end of August, dashboards available September 3rd*

- vi. Note: utilization/uptake will be important. We expect this to be highly beneficial, for example payroll dashboard combines 20+ reports.
  - vii. We know it's a busy time, so we are targeting the sessions to try to help maximize participation
    - 1. *Candice: we are asking this group to generate excitement, communicate the value to people, to garner good uptake/acceptance of the tools.*
    - 2. *Elizabeth: Yes, partnerships would be good for the rollout*
  - viii. *Keisha: Is September 8th a webinar during or instead of the users meeting?*
    - 1. *Brad: TBD- we do expect larger group than the users meeting.*
    - 2. *Keisha: There's a payroll settlement on the 9th so that's getting a little tight in the schedule for payroll*
    - 3. *Candice: we will take another look at that date- thanks for the feedback.*
  - ix. *Elizabeth: Sounds good. When we will have to determine who we recommend for access, or will that already be determined based on security roles at that time?*
    - 1. *Candice: we are defining roles and will work with this group to confirm that. Everyone who already has the roles will automatically get the tools.*
4. Decisions
- a. Table configuration for the Executive View Only Role: affirmative
5. Questions/Comments
- a. *Dave: Looking forward to today's slide deck! This is exciting -- get the "Mental WD-40" out*
  - b. *Kelli: Y'all are doing great work!*
  - c. *Lloyd: Thank you for the awesome work!!*
  - d. Candice added a suggestion to the Discovery Boards For All (DB4A) Early Adopter group to provide the ability to add a worklet icon for shared discovery boards.

- e. There is a Drive worklet that can be added to the home page to make accessing the Discovery Boards more visible (see image below).



### 6. Next Steps

- a. Next Meeting: Wednesday August 12<sup>th</sup>, 1:00 – 2:30?
  - i. Expecting to have a more solid version of the dashboards for a review before going-live in September.
  - ii. Availability Poll:
    1. Yes, I'm free: Keisha, Tina, Kay, Martha, Lloyd, Elizabeth, Dave, Debra
    2. No, I can't make it: None from meeting
    3. Maybe: DawnAnn (checking on new faculty orientation), Kelli (checking schedule)