

Workday Reporting & Analytics

Meeting Minutes

Date: 8/12/2020
 Time: 1:00 pm
 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	
Kelli Holt		Martha Alexander	X	Debra Cortinas	X
Laura Quirino		Keisha Lamb	X	Lloyd Butler	
Brad Blair	X				

Additional attendees: David Gutierrez, (Carey Hutchison), Meagan Kuitu, Kami Xiong, Rachel Habiger, James Ross, Nancy Hamilton, Ranil Gunasekara, Julie Burnham, Randy Guillot

2. Action Item Review (Candice)

- a. Trended Worker and Scorecard Update (Kami Xiong)
 - i. (Note – Kami is a Business Analyst in EDW with a primary focus on Workday Reporting)
 - ii. Last subcommittee meeting- sent out list of delivered reports for feedback on whether/how we should customize or hide them. Kami has consolidated feedback.
 - iii. Temporarily put the task on-hold for implementation of Prism and PPLA, and will do gap analysis to see what is missing between these two tools and look into meeting the need with Trended Worker.
 - iv. Planning to start to evaluate scorecards next.
 - v. Elizabeth: in May, there were a couple of meetings to help tie these things together. Recommends a meeting where this group can see the feedback and a direct comparison. **Candice will add to agenda for next meeting.**
- b. Prism Dashboard and People Analytics Update
 - i. Use Cases
 1. Pre-Payroll Validation – goal is to become more proactive in payroll data cleansing/preparation, rather than reactive.
 - a. Working with A&M to blend work study award data into Prism.
 - b. Internal meeting with payroll and operations team today to review dashboard and get feedback.
 - c. Blending-in Pay Cycle Command Center.
 - d. Next step (ETA early next week) is to release dashboard for this group’s review. Production release is 8/27, security access 9/3.
 2. Events Dashboard – focused on business processes and optimizing efficiency
 - a. Development ETA is EOM August

- b. Elizabeth: will PPLA View Only role be able to see all the dashboards?
 - i. Candice: we will use existing roles to drive security on the dashboards.
 - ii. E.g. Payroll Validation will be heavily driven by payroll roles, but additional roles will also become more involved in the payroll data. Aiming for broader collaboration across roles and achieve a holistic approach.
 - 3. Candice: Is the group willing to review and vet the dashboard for us? Yes (from Debra, Elizabeth, Martha, Tina, Jennifer (will try)). We may **set-up a Webex meeting with a brief demo**; (Jennifer and Elizabeth – that would be helpful)
 - 4. Dave: steps in the right direction
 - c. Training and Communication Plan Update
 - i. We want to make sure that the skills to navigate the dashboards and use them well are established.
 - ii. Video ETA is EOM August
 - iii. Training and education will occur in Workday Production environment. We want exposure for this group to the dashboards in production (ETA 9/3)
 - iv. Webinars:
 - 1. Workday Prism and People Analytics (kick-off, discussing framework and vocabulary) – 8/18/20
 - 2. Event Analysis Dashboard – 9/8/20
 - 3. Pre-Payroll Dashboard – 9/15/20
 - 4. People Analytics Dashboard 9/22
 - v. Invitations: Payroll, HR, Compensation, Recruiting Partner-level roles, and HROs and CFOs.
 - vi. Recommendation from Keisha to add Payroll View Only roles. Per Candice and Brad, **bring-in the view-only version of the roles we included**.
 - vii. Dave: what time are the workshops? 1:30-2:30
 - viii. Rene Quiroz will send-out the information for webinars 2-4 after the kick-off on Tuesday.
 - ix. It will be possible to proxy in TAMUS2 as each role, and we will provide a list of roles and people for reference.
 - d. **Next Meeting: 10/14 11-12** (confirmed by Elizabeth, Debra, Jennifer, Keisha, Martha, DawnAnn)
3. New Items
 - a. People Analytics Pilot
 - i. Per meeting yesterday, decision to delay fully opening/advertising PPLA, expanding pilot group in September (to include SOBA representatives and any other recommended members from this group), confirmed by Reporting Leadership committee.
 - ii. Workday is actively investing in this; we want to invest more too before rolling-out this functionality to executives
 - iii. Current ETA is Spring, maybe March alongside feature release

- iv. People Analytics View Only role was added to Workday SOR, but is being removed. Planning to use the SOR for the extended pilot group, asking it to be written-in on the form.
- v. Elizabeth: how free are we to add people?
 - 1. Candice: we leave it to you to determine who should be included. Asking it to be people who they feel will be open to partnering with us on the continued development without expecting polished product.
 - 2. No current limit in mind on our end. Feel free to submit whatever group is most appropriate. 8/14/20 Update: We have determined that a limit of 3 individuals per System Member, not including any working group members in that total.
- 4. Decisions
 - a. Only expand People Analytics pilot instead of broad release on September 3rd: affirmative
 - b. Availability/willingness to vet the new dashboards and provide feedback: affirmative
- 5. Questions/Comments
 - a. Debra: what assistance could we get in the benefit area? This is an area with a lot of corrections and it is difficult to keep up.
 - i. Candice: we are looking at another round of engagement with Workday on additional use cases. Reporting leadership team is considering benefits and time off as future use cases.
 - ii. Elizabeth: Yes, would love to see help with Benefits issues. Even stats on benefit events by type, counts of various tasks etc. benefits dashboard would likely be really informative
 - iii. DawnAnn: I support Debra's comment. We have a lot of reports to handle/work on insurance and retirement. Not having to run all of the reports separately or schedule them would be nice.
 - iv. Martha: Yes, benefits is a definite needed area
 - v. Candice: seeing 11-minute average runtime on benefits reports
 - vi. Keisha: Benefits, definitely, pleasee :)
 - b. Candice: Thoughts on Time Off (and Time Sheets)?
 - i. Issues with security in allowing payroll to see time sheet data.
 - ii. Kristen: Oh yes!!
 - iii. Would a more informative Time Off dashboard be helpful? E.g. LeaveTraQ with future accruals
 - iv. Elizabeth: Yes, would like to see leave and timekeeping stats without running separate reports. Like overtime hours, comp time etc. Glad this is being talked about.
 - v. DawnAnn: Leave dashboard where we can drill down would be really nice
 - vi. Keisha: anything that would include additional job info,,,so many times additional job data is missed
 - vii. Example: where are payments entered late clearing the threshold for overtime and resulting in overpayments?
 - c. Big Picture: as we develop the roadmap, we want to make sure we have your feedback in mind, even if it is a long-term future development item.
 - d. Elizabeth: would like to see development in organizing people by department.

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- i. Candice: if you have a list of reports where this would be helpful, send them to me.
- ii. Debra: I agree with Elizabeth. Need to pull data by dept and division, executive
- e. Debra: I guess if I had another wish/desire - it would be compensation.
- f. Keisha: I probably missed it but did you say we need to let you know of others we'd like to add to the pilot group? Will y'all be doing a demo for them as well?
 - i. Please send an SOR for pilot group additional people, with People Analytics View Only role written-in.
 - ii. Keisha, RE providing video recorded demos, recordings will help all of us so we can re-visit them if needed
 - iii. Considering recording an initial webinar for extended pilot group. Working-out the details offline.
 - iv. Access is not required, but is encouraged, for participation in the webinar.
- g. Do we want another demo for People Analytics?
 - i. Jennifer: I could probably use some remedial training to get back into it.
 - ii. Martha: I think so we can discuss more about the details that pull and so forth and how to use the filters and such
 - iii. Elizabeth: yes, that would be good. Getting started was the slowest part...a webex to show it would be very helpful for feedback
 - iv. We will do another PPLA Pilot Deep Dive, ETA Early-Mid September

8/14/20 Update: Official Plan for Expanded PPLA Pilot Group:

Activity	Activity Owner	Date
Collect up to 3 participants per member and send to Candice	Working Group	EOD August 27 th
Official welcome email and walkthrough meeting link will go to expanded pilot members.	Candice	August 28th
Send in <u>SoRs</u> for expanded pilot members with write in for "People Analytics View Only" role	Working Group / Expanded Pilot	EOD August 31 st
People Analytics View Only granted to expanded pilot members	Workday Services	September 3rd
Online walkthrough meeting for People Analytics	All	September 10th
Collect feedback, review configuration changes, give feedback to Workday Product team	All	Ongoing through Spring 2021

- **Limited participation:** In order to keep the pilot group to a manageable number, we'd like to limit participation to 3 people per System Member not counting any working group members. This will add up to 66 members in addition to our 15 working group members for a total of 81. Please communicate with the members you represent to gather the names (if any) of those who will participate and send the list to me by EOD August 27th.

- **Expanded Pilot welcome and walkthrough** – On September 28th, we will send an official welcome email and include a meeting link to an online meeting that will take place on September 10th. The walkthrough will introduce the dashboard, review the mappings in place, and cover the feedback we would like to collect and how to submit that feedback.
- **Security permissions** – We need to grant the new members the role “People Analytics View Only”. Please submit a Workday SoR with the role manually written into the form and send through the normal Workday support email by *EOD August 31st*. We will accumulate the forms and grant permissions on September 3rd (the original PPLA go-live turned expanded pilot ☺).
- **Feedback Consolidation** – We would like for you, our working group members, to be a funnel for feedback consolidation back to us. Since you all have a little more exposure and background on this feature, we feel it would be more efficient for you to be involved in initial questions that may arise and reducing duplication of feedback we already have. I have attached a document of all the feedback I have compiled from you all and us internally thus far. Going forward, we all will meet periodically as a People Analytics committee to review feedback, discuss changes, etc.