

Workday Reporting & Analytics

Meeting Minutes

Date: 10/14/2020
 Time: 11:00 am
 Location: WebEx

1. Welcome & Roll Call

Name		Name		Name	
Candice Sutterfield	x	Jennifer Hobbs	x	DawnAnn Wilson	
Tina Flores-Nevarez (Debbie Morrison)	x	Kristen Suehs		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				

Additional attendees: David Gutierrez, Kami Xiong, Carey Hutchison, Meagan Kuitu, James Ross, Nancy Hamilton, Guillot, Meredith Fox, Wally Wellborn, Amy Suter, Debbie Morrison, DeAnna White, Sri Kamarthi

2. Action Item Review

- a. Trended Worker / Scorecard – committee feedback and gap analysis
 - i. Collected feedback on 26 Trended Worker reports
 - ii. Feedback from 6 people (4 committee members, 2 Workday Services)
 - iii. Gap analysis – if functionality is duplicated in PPLA dashboard, will let functionality stay in PPLA
 - iv. Customizations:
 1. All reports reviewed required a customization
 2. (see slide 5 for specifics)
 3. One customization requested (breakdown by FAMIS org) requires Prism
 - v. Data Issues
 1. Questions on transfer in/out counts
 2. FTE report – not to be reconciled with BusinessObjects FTE Quarterly report
 3. Will resolve all possible issues
 - vi. Gap analysis
 1. (see slides 7-8 for specific reports)
 2. Planning to deliver high priority reports as stage 1
 - a. Headcount and FTE by Month
 - b. Quarterly Turnover Rates
 - c. Employee Movement
 3. Planning to deliver medium priority reports as stage 2
 4. Delivery of low priority reports will be re-evaluated after stage 2

- vii. Follow-up Questions – seeking feedback from group
 - 1. FAMIS Org Breakdown: 2 votes via chat for must-have (Elizabeth Schwartz and Jennifer Hobbs)
 - 2. (See poll results)
- b. Prism Dashboard and People Analytics update
 - i. Prism Dashboards
 - 1. Two dashboards are live right now: Pre-Payroll and Event Analysis
 - 2. Trainings are complete with recordings and decks available
 - 3. Feedback is positive so far
 - 4. Keisha – any updates on work study on the pre-payroll dashboard?
 - a. Candice – working with A&M to get the file automated; following-up with them on Banner feed changes from student employment office
 - b. Looking at opening functionality to HR Contact
 - ii. People Analytics
 - 1. 62 pilot group members currently
 - 2. Recording from pilot orientation on 9/10 is available; next meeting 10/15
- 3. New Items
 - a. Prism – Updated plan for next project
 - i. Has been talking with Workday and Reporting Leadership Team (David Gutierrez, Candice Sutterfield, Mark Schulz, Brad Blair)
 - ii. Benefits, Timesheets, Time Off are on hold waiting for Prism functionality.
 - 1. Specifically: Tables scheduled for March 2021, which allows us to re-load data in Prism similarly to how we do it in EDW. Right now, re-loads require us to delete and reload the entire history month-by-month.
 - iii. Next project: Executive Dashboard
 - 1. E.g. generic headcounts and positions
 - 2. Action item for working group members: bring ideas and be prepared to discuss in more detail at December meeting
 - 3. Note from Meagan: Candice mentioned BusinessObjects reports that these will be similar to. Those are in TAMUS Publications > Interactive Reports.
 - 4. Debra Cortinas – sounds like a good plan
 - 5. Elizabeth Schwartz – looking forward to discussing executive security role
 - b. Review outstanding Prism tasks
 - i. (See spreadsheet from Candice sent via email, Establish Prism and Future tabs)
 - ii. Looking for feedback on priority, additional future tasks/requests/issues
 - iii. Anticipated completion: Winter 2020
 - iv. Elizabeth Schwartz – This is all good progress and I appreciate it

- v. Dr. Giles - Thanks for outlining a stepwise product development timeline - helps to structure expectations
- vi. Elizabeth Schwartz – looking at the event dashboard task, interested in details on the sub-process level. E.g. benefits partner is one step in the middle of a process, and it's difficult to know what their response time is. If it's possible to get info on sub-processes, it would be helpful.
 - 1. Jennifer Hobbs - Agree with Elizabeth. Ability to review processing times we have control over is helpful.
 - a. When would this be needed? Per Elizabeth, currently we're tracking manually. Elizabeth volunteers to be part of the subcommittee on this, will follow-up with Jennifer on her availability for subcommittee membership. ☺ Would happily collect input from those who can't participate in subcommittees.
- vii. Debra Cortinas – it's a little annoying to go in and reset the filter for her member every time. Could we have a default?
 - 1. Kay Schubert - agree - resetting the filter is frustrating
 - 2. Elizabeth Schwartz - Yes, same comment as Debra
 - 3. Candice – has heard this from Keisha Lamb as well. The alternative is to leave it blank so you have to select data every time, so we assumed it would be more helpful to default your member. Additionally, we'd like to bring-in functionality for times when there is not an in-progress pay cycle. We don't have a "save" option for the prompt sets right now. Will continue to ask for this functionality from Workday.
 - 4. Keisha Lamb - We appreciate yall's efforts!
- viii. Action item for working group members: please review and provide any additional feedback by end of week 10/16.
- ix. Debra Cortinas – what is GLB on item 13? Global Dataset (Prism lingo) because it'll be blended with a lot of different things, e.g. FAMIS org on payroll and position data.
- x. Kay Schubert – question on two of the payroll items (monthly and biweekly for review by department) – how is department defined if we don't have FAMIS orgs?
 - 1. Candice – they will have FAMIS orgs because it's in Prism
 - 2. Kay Schubert - those are very needed reports, definitely want them
 - 3. Elizabeth Schwartz - I think this would really help our departments.
 - 4. Lloyd Butler - It WOULD help us! They use not having a good report as an excuse!
 - 5. Dr. Giles – yes definitely
 - 6. Elizabeth Schwartz - There is something that departments use right now...but it doesn't seem to make much of a difference. Then pay day comes, and the employee calls us
 - 7. Keisha Lamb – right now the data is just by rows, and nobody adds-up the full amount. Candice will follow-up with Keisha. She is currently using Pay Calc for a Pay Period report.
- xi. Action item for Candice – send finalized list to working group

4. Decisions

Poll results:

Questions	Results	Bar Graph
<input type="radio"/> A. Nice to Have	10/26 (38%)	
<input type="radio"/> B. Must Have	2/26 (8%)	
No Answer	14/26 (54%)	
2. Break down report output by FAMIS orgs (Dept, DivCollege, etc.)?		
<input type="radio"/> A. Nice to Have	3/26 (12%)	
<input type="radio"/> B. Must Have	9/26 (35%)	
No Answer	14/26 (54%)	
3. Ability to reconcile counts to event dashboard?		
<input type="radio"/> A. Nice to Have	10/26 (38%)	
<input type="radio"/> B. Must Have	2/26 (8%)	
No Answer	14/26 (54%)	
4. Include some trending reports in a dashboard?		
<input type="radio"/> A. Nice to Have	7/26 (27%)	
<input type="radio"/> B. Must Have	5/26 (19%)	
No Answer	14/26 (54%)	
5. When do you need the reports in high and medium delivered?		
<input type="radio"/> A. Short term (Within 6 months)	6/26 (23%)	
<input type="radio"/> B. Long term (More than 6 months)	5/26 (19%)	
No Answer	15/26 (58%)	

a. Next meeting 12/7 **11:00 – 12:00**, per request of Elizabeth Schwartz

5. Questions/Comments

a. Next meeting we plan to have a conversation about an executive dashboard. Eventually the Executive View Only Role discussion is expected to enter that conversation.

i. Dr. Giles - Having some examples of Executive dashboards would stimulate our thinking

ii. **Candice to follow-up with Dr. Giles on A&M Commerce's dashboard initiatives**

b. "Thank you!" – Kelli, Elizabeth, Martha, Debra, Keisha, Kem