

Workday Reporting & Analytics

Meeting Minutes

Date: 12/7/2020
 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		Dr. David A Giles	X
Elizabeth Schwartz	X	Kay Schubert		Kem Morgan	
Kelli Holt	X	Martha Alexander	X	Debra Cortinas	X
Laura Quirino	X	Keisha Lamb		Lloyd Butler	
Brad Blair	X				

Additional attendees: Kami Xiong, Meagan Kuitu, Nancy Hamilton, Sri Kamarthi, Ranil Gunasekara, Tammi Thompson (TAMUC), Danielle Trevino (TAMUC), James Ross, Wally Wellborn, Edward Romero (TAMUC), Randy Guillot, Meredith Fox, DeAnna White, Amy Suter, David Gutierrez, Carey Hutchison, Debbie Morrison

2. Action Item Review

- a. Trended Worker / Scorecard – recommended solution is to load to Prism and create reports from those data sources.
 - i. Allows for break down by FAMIS orgs and more than 3 years of data for trending analysis
 - ii. Next steps:
 1. Load trended worker data to Prism
 2. Include 3 high priority reports to Executive Dashboard
 - a. Headcount and FTE by Month
 - b. Quarterly Turnover Rates
 - c. Employee Movement
 3. Deliver medium priority reports in Spring 2021
 4. Subcommittee met and found that we would have to customize every report anyway, so we will bring the data set into Prism before re-writing the reports
- b. Prism Dashboard and People Analytics update
 - i. Prism Task Update
 1. On-track to complete before Christmas; Kami to demo new features at the monthly users meeting
 2. Completed Changes:
 - a. We now have data in the Pre-Payroll Dashboard even when a pay calc is not in progress; see Pre-Payroll Impacting Events tab
 - b. Enhanced work study reporting (for TAMU; would like to open this to other institutions after TAMU is stabilized as pilot)

- c. Bug fixes and preliminary work for Exec Dashboard
 - 3. Pending Changes:
 - a. Payroll Preview reports (Monthly Payroll, BVD, P2P)
 - i. E.g. someone was on leave without pay, had a costing change in the works. Goal is to reduce corrections after payroll.
 - ii. Because of the FAMIS org structure, we can do this at the exec/div/col/dept levels.
 - b. Business Process Milestones
 - i. Challenging to break-up some of the more extensive business processes; hoping to get info out to the group within the next two weeks
 - c. HR Contact (departmental) access for work study reports
 - ii. People Analytics
 - 1. People Analytics pilot group is separate from this group, and has much broader participation. This is an official governance group; kept small to efficiently inform decisions and direct priorities.
 - 2. Workday contacted us (TAMUS) about an issue in the data going into PPLA resulting in an error. It was previously State, now Region, which includes non-US "states". Impacts data regarding Qatar, etc.
 - 3. Next meeting for PPLA working group is next week.
- 3. New Items
 - a. Dashboard User Guide Feedback
 - i. Seeking feedback from this group about the user guide on the Workday Help site for each dashboard, per Rene Quiroz. E.g. is it a job aid? Resource?
 - ii. Intention behind this is to give users insight into using the document and dashboard, and also how the data inside the dashboard is built, and then specifics on each report in the dashboard.
 - iii. Document Purpose: analytic info, or general dashboard navigation?
 - 1. Debra – I think the guidebooks have very useful information and are extremely well-done. I haven't opened/used it a lot, but I think it is useful and good to have.
 - 2. DawnAnn - For me the dive into the metrics is important so that I can confirm I am pulling the info I think I'm pulling
 - 3. Kelli - More information is better than less information...need all of the above.
 - 4. Elizabeth - I like having both the instructions and the analytic info
 - 5. Martha, Jennifer, Tina - We find the information useful.
 - 6. Tammi - It helps us plan where we should train!
 - iv. Security Roles (Rene has received feedback generally that people don't want to go to different places to get info) – Is it helpful to see security info in this document? Can we link to the report inventory to save some maintenance work?

1. Jennifer - if we know which report to search for, it isn't a problem
2. Tammi, Laura, Tina, Elizabeth, Martha – keep it in the guide
3. Debra - I like it here. You could still add the link
- v. Elizabeth - Candice, where can these be found again? The report inventory
 1. Candice – there is a link on each dashboard for “user guide”
 2. Elizabeth - Great! thank you. I see them in both places now
- b. Executive Dashboard Requests
 - i. Development starting January 2021, Gathering specs today
 - ii. Has been requested to OIT leadership, and highlighted during the Reporting Assessment for EDW. Goal is to develop resources to target the executive persona as well as others.
 - iii. Looking for what reports, analytics, and KPIs our executives want to see, to help them drive business decisions and take action
 - iv. Demo of HR Analytics by Danielle Trevino, Research and Reporting Analyst at Texas A&M University – Commerce
 1. Met with President Reuben to find out what he'd like to see. Goal to help executives see the composition of our university and inform decisions based-on data.
 2. Used Tableau, which allows visuals to be interactive to the user and also to other visuals.
 3. Was asked to add functional areas to this for cross-departmental analysis.
 4. Executives gave feedback that they also like to see what they're familiar with: spreadsheets. Danielle met this via crosstabs.
 5. Elizabeth, Martha, Tina, Kelli, Randy – great work, Danielle!
 6. Debra - This is fantastic and many execs would be thrilled to be able to view and use.
 7. Danielle - If you have any questions, please feel free to email myself and Dr. Dave Giles at HR.Reporting@tamuc.edu
 - v. Demo of BusinessObjects Interactive Reports
 1. BusinessObjects Public Folders > TAMUS Publications > Interactive Reports
 - vi. We also have Trended Worker waiting for development, per committee (Headcount and FTE by Month, Quarterly Turnover Rates, Employee Movement)
 - vii. Feedback from group:
 1. Martha – has been getting questions about succession planning, looking at how many people are eligible to retire. Seeing a trend of people approaching that status but hesitant to share about that in time for a replacement to be fully trained.
 2. Elizabeth - We are also getting a lot of questions about retirement data. Both recent historical and predicting upcoming.
 3. Debra, Elizabeth - I would like to see data similar to what commerce had: headcounts by various categories, ethnicity, gender, turnover, average pay.
 4. Tammi – that would be very useful for us.

5. DawnAnn - Megan built a fabulous BO report for Tarleton! It's very complex and captures most everything. **Action Item:** Meagan will publish BusinessObjects report for general use.
6. David – what KPIs would people want to see?
 - a. Danielle - David, how about information about employees who teach as a non-primary role? We have a lot of staff who teach as adjuncts. Maybe # of employees who teach as a non-primary job, along with their compensation for that role?
 - b. Kelli - I'll review past reports and see if anything sticks out, but this data looks comprehensive!
 - c. Martha - We also get request for Time to Fill and how many days positions are posted for
4. Decisions
 - a. Dashboard User Guide Feedback
 - i. Keep document focused on the analytics and providing insight to the reports
 1. The generic dashboard nav is fine to include also
 - ii. Keep the security roles listed in the doc for convenience
 - b. Next meeting 2/16/21 11:00 – 12:00
 - i. No scheduling conflicts reported
5. Questions/Comments
 - a. David Gutierrez to Danielle Trevino: How does Commerce publish their Tableau dashboards? Planning to embed on website; TAMUK was able to do this without a server license, through desktop authoring licenses. Danielle will send David their Tableau contact. Miao @ TAMUK would be a good contact. Could consider something like a shared service in the future