

# Workday Reporting & Analytics

## Meeting Minutes

Date: 2/23/2021  
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	
Elizabeth Schwartz	X	Kay Schubert	X	Kem Morgan	
Kelli Holt	X	Martha Alexander	X	Debra Cortinas	X
Laura Quirino	X	Keisha Lamb		Lloyd Butler	
Brad Blair					

Additional attendees: Meagan Kuitu, Amy Suter, David Gutierrez, Nancy Hamilton, DeAnna White, James Ross, Meredith Fox, Ranil Gunasekara, Randy Guillot, Kami Xiong, Rachel Habiger, Wally Wellborn, Sri Kamarthi,

### 2. Action Item Review

- a. People Analytics update
  - i. Implemented pilot group changes yesterday (2/22). Excluding Grad Assistants and adding new Is Leader criteria.
  - ii. Not able to get stories on the company level per collaboration with Workday.
  - iii. Email will be sent to the broader pilot group.

### 3. New Items

- a. Historic Records for Prism
  - i. Note: Prism is a separate data set created independently of Workday data. In order to achieve historic data, we need to load (add) that data to Prism.
  - ii. Input requested: Do you need historic data prior to August 2020? i.e. do you want to have prompts available to see back in time prior to August?
    1. No feedback at this time; please reach out to Candice with further thoughts.
- b. Executive Dashboard
  - i. Communication Plan
    1. Per executive sponsor (Mark Schulz), we will target communications to HROs and CFOs only for initial release
    2. Soft launch this week (2/25-2/26); please send any remaining feedback. HR, Compensation, and Benefits Partners and View Only roles will have access at this time.
    3. Announcement on 3/2/21 or 3/3/21 to HROs and CFOs, including instructions for access. Will need to discuss security roles for CFOs to gain access and include in this communication.

4. Official launch announcement will be mid-March, including video and additional webinars.
  5. Input requested: would personal follow-up with CFOs be helpful?
    - a. Elizabeth Schwartz: Yes, Jennifer Hobbs: Yes. AgriLife CFOs could be one group, Martha Alexander: Yes I think offer it, Kay: CFO meeting March 3- maybe Mark could introduce.
  6. Elizabeth Schwartz: Actually I think that would be good to include each company's main security contact (including Authorized Security Requesters in communication to HRO/CFOs)
  7. Elizabeth Schwartz: If there are data folks who aren't on this group, could they see it also? Talking about the people who use data frequently who CFOs tend to rely on. Could be helpful for Elizabeth to forward to key people to keep them in the loop (e.g. Wes Wynn).
  8. Candice: we want you to always feel free to forward communications to people who need to be in the mix. They are welcome in these webinars and it's helpful to not manage the list centrally. Working Group will be included on all communications regardless of membership in HRO/CFO group.
- ii. Gather Feedback on Executive Dashboard
1. Input requested: Should we keep or cut:
    - a. Workforce tab | Worker Status (bottom right corner)
      - i. Keep: III Cut: I
      - ii. Martha, Kay: Working Retire we need some times for random things. Breakdown between full time /part time/ temp casual and WR would be helpful for us
      - iii. Elizabeth Schwartz: I think this is useful for quick reference
      - iv. DawnAnn: workforce employee category type would be used quite a bit by Tarleton
      - v. **Decision** to re-do as employee type breakdown
    - b. Positions tab | Position Annual Work Period Months for Filled Positions (bottom right corner)
      - i. Keep: II Cut:
      - ii. Elizabeth: helps for a variety of reasons; Candice to follow-up with Elizabeth, primary use is related to benefits. Further discussion needed per representation of each position independently.
      - iii. DawnAnn: we actually want to see them separated
      - iv. **Decision** to leave as-is
  2. Employee Type prompt set has default filter for faculty and staff (budgeted only), keep?
    - a. **Decision:** Elizabeth, Kelli, Martha, Jennifer, Kay, Tina, DawnAnn – keep it pre-filtered with ability to expand to other non-budgeted groups as needed.
  3. Charts that include salary

- a. Currently doing average annual budgeted salary
- b. Kay/Kami: these salaries do not currently include allowances. It would be helpful to have the county allowances added to fully analyze salary for county agents. Would like the ability to exclude/include specific allowances using a filter. Cell allowances are helpful for analysis sometimes too. Would want the base salary to stand alone and see allowances separately in a report.
- c. Jennifer Hobbs: But is that easier than running the allowance report?
- d. Jennifer Hobbs: I think " budgeted salary skews the data because we're comparing 12 mo to fewer than 12.
  - i. If we're trying to compare 9 months vs 12, we feel it may be confusing for analysis.
  - ii. Debra Cortinas: salaries should be FTE Annual. Recommends building another tab to focus on budget perspective.
  - iii. Laura Q: separate would be better
  - iv. Wally: what would a President or CFO what to see? FTE or budgeted? They are the target.
  - v. Debra: CFOs will want to focus on budget perspective, but I agree with Wally; can we consider future dashboards in this conversation?
  - vi. Martha: budget and FTE count are the big things for CFO
  - vii. Kay: as you click on the detail, you can still see both FTE and Annual Budgeted.
  - viii. Debra Cortinas: My 2 cents: Annual 12 month FTE. Maybe 9 month FTE for faculty.
  - ix. Kay: Annual Budgeted Salary is more meaningful for CFOs.
  - x. Elizabeth/Kay: I am thinking an annualized FTE salary may mean the most in terms of compensation. This is coming from an HR person. Kay is right though about CFOs wanting to see budgeted and not "inflated" FTE totals
  - xi. Keep both: Kelli, Elizabeth, Tina, Kay
  - xii. **Decision:** find a way to display two salaries: Annual Budgeted Salary and Annualized FTE Salary (adjusted salaries as though everyone were 12 month 100% effort).
    - 1. We will research options on how to achieve the "both" in a given chart.
    - 2. To clarify...the FTE annual salary to be added will be the FTE annualized base salary with no allowances. So, calculates the equivalent at 12 months and 100% effort.
- e. Kami: question about what qualifies as base pay

- i. Elizabeth: And on our campus, they are moving toward breaking out salaries from department head and administrative allowances
          - ii. Elizabeth: Could allowances like department head or administrative be included as a column in the detail? Maybe interim
          - iii. Martha: Communication pay (is good for analysis); we definitely do not want it lumped in with base pay and kept separate
          - iv. Debra Cortinas: I don't think allowances should be included in base pay. Maybe an exception for special members.
          - v. Elizabeth: considering faculty salary and administrative appointments. Could be significant for their overall pay.
  - 4. Access for: HR, Compensation, Benefits, and Payroll Partners and View Onlys
    - a. Elizabeth: Absence Partner can just have a department scope. Does this allow them to see past that?
    - b. No- Wally will work on this
    - c. Debra- add job profile to Workforce tab to all detail reports.
    - d. Martha: Candice, I still would like to be able to provide to this level some information regarding retirement succession - who is within a year up to maybe 5 years....
  - iii. Discuss use of Executive View Only role
    - 1. Keep it: Jennifer, Kay, Elizabeth, Debra, Tina, Martha
      - a. Jennifer Hobbs: I do think we should move forward with this for those who don't work inbox items as a partner role.
    - 2. **Decision** to move forward with the role.
    - 3. Constrained vs unconstrained
      - a. Note: will include access to age, service, ethnicity, comp, degree, EEO, MSO, etc. In Prism specifically, not the workday employee record.
      - b. Constrain: Jennifer, Martha, Elizabeth, Debra
      - c. Elizabeth: We struggle at A&M with some of the overlap with some shared employees that are technically in other companies
      - d. **Decision** to constrain on the company for Prism. Can revisit access to displayed attributes in the future via Wally.
  - iv. Discuss adding dashboard worklet to Home Page
    - 1. Talking about making it show up automatically on someone's home page based-on their role. For those who don't get into Workday a lot, this would circumvent the process of executives having to add it to the home page.
    - 2. Yes: Jennifer, Elizabeth, Kay, Martha, Kristen
    - 3. **Decision** to move forward with this.
4. Next meeting: 3/29 11-12; Tina will send a delegate

### 5. Decisions

- a. Re-do Workforce tab | Worker Status report as employee type breakdown. This will come in a future phase, we will not have it vetting in time for the soft launch.
- b. Keep Positions tab | Position Annual Work Period Months for Filled Positions as is
- c. Keep Employee Type prompt set defaulted to faculty and staff on each tab
- d. Find a way to display two salaries: Annual Budgeted Salary and Annualized FTE Salary (adjusted salaries as though everyone were 12 month 100% effort).
  - i. We will research options on how to achieve the “both” in a given chart.
  - ii. For clarity, the FTE annual salary will be the FTE annualized base salary with no allowances. So, calculates the equivalent at 12 months and 100% effort.
- e. Move forward with use of Executive View Only role
  - i. Only have access to the Prism data sources to start with – expands as needs arise in the future
  - ii. Constrained on the Company. Multiple companies can be assigned for individuals who need to see across more than 1 company.
- f. Automatically add the HCM Executive Dashboard worklet to Workday Home Page only for those with Executive View Only assignment

### 6. Questions/Comments

- a. The comments around including allowances to display as part of base pay are very interesting. The WD Reporting Team would like to a step back and take our time to discuss this change holistically with Workday Services HR and Comp. We will start with the System Members who have “3<sup>rd</sup> party allowances”:
  - i. AgriLife with County Funding
  - ii. WTAMU with AmeriCorps participation