Pre-Payroll Dashboard User Guide

This user guide is intended to be a resource to help you get the most out of the analytics provided.

Introduction

The layout of this document is structured to help you understand the purpose of each tab and each analytic within it, including how to take action.

- Prompt Set: The prompt set is parameters located at the top of each tab that will filter every report on that tab according to the values chosen.
- Purpose: The business case or intent of the analytic
- Metric Guidance: Details about the metrics and dimensions being used in addition to any filters to the record set.
- Data Source: Workday Delivered or Prism. Prism data sources are different from Workday delivered in a few ways:
  - Ability to report on the FAMIS organization (Department, Div/College, and Executive Level)
  - In some cases, will return data more quickly
  - Are refreshed daily so changes made today will not be reflected until tomorrow
  - May return more records because the security is more flexible to ensure you see records for your organizations even if a worker has transitioned out of your organization
- Share Permission: Indicates which Workday roles will have access to each report. Security constraints vary depending on the data source of Workday delivered vs Prism.

Understanding the Pre-Payroll Dashboard

Dashboards are visual representations of data intended to quickly share information. In Workday, these consist of multiple reports intended to allow the user to see high-level summary data but also drill into the details of this data. See the "Workday Dashboard" video available on the Workday Help site via Education | User Guides | Video Help to see all the features available in Workday dashboard that turns one analytic into many.

When viewing the Pre-Payroll Dashboard, the user will see these components:

- Tabs: Organize and group tables and visualizations on separate pages based on a commonality of function.
- Analytics (vizes): Display the data in a visual format so the user can quickly identify trends, compare volumes, quickly see highest/lowest values, etc. Tables are often included and organize the data in an easy-to-read format and provide links to drill into the detail.
- Menu links: A list of links to related reports, tasks, and other resources outside of the dashboard.

With these components, the user is able to do the following:

1. View high-level summary data in a table and/or a chart
2. View details by clicking on the links in the charts and tables
3. Export report output to Excel or PDF
4. Summarize and slice and dice data in different ways by changing the criteria using the "View By" feature
5. Sort and filter results based on details
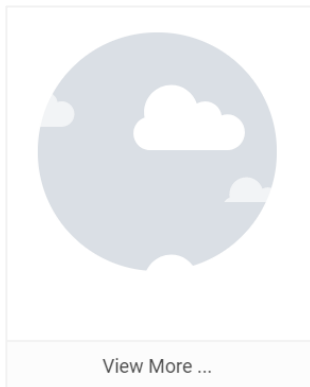
If the report used in a worklet doesn't have enough data to populate values in a table or chart, the worklet will show the image of clouds in a gray circle.

If this occurs, select the "View More…" link under the image to run the report outside of the dashboard and, if included, access additional parameters beyond the prompt set.

NOTE: In the period of time between payroll calculations, the reports on the In Progress tab will usually show no data until the next payroll calculation is initiated.

Reference

Data Review Tab – Review worker and positon data that will ensure the success of payroll. The prompt set for this tab includes Company and defaults to the Company of the user's primary position.

- *Missing Costing Allocation*
  - Purpose: Highlights positions without current costing allocations in an effort to proactively make position changes needed to avoid payroll cost transfers (PCTs). Actionable steps include assigning costing allocations to the positions returned in the report.
  - Metric Guidance: This worklet includes all filled positions missing all costing allocations or just worker position costing allocations. The employee population considered includes faculty, staff, graduate assistants, student workers, and temporary/casual staff.
  - Data Source: Workday Delivered

- o Share Permission:
    1. Compensation Partner
    2. Compensation View Only
    3. Department Head
    4. Faculty Partner
    5. Graduate Studies Partner
    6. HR Contact
    7. HR Partner
    8. HR View Only
    9. Manager
    10. Payroll Partner
    11. Payroll View Only
    12. Research Partner
    13. Sponsored Research Services

- *Position Attribute Mismatch*
  - o Purpose: Returns workers whose pay group is mismatched on pay rate, compensation plan frequency, and/or organization. Actionable steps include reviewing the mismatched data and making corrections to the workers' pay rate, compensation plan frequency, organization, etc. if applicable.
  - o Metric Guidance: This worklet includes filled positions for faculty, staff, graduate assistants, student workers, and temporary/casual staff.
    1. Pay Group Pay Company Mismatch: shows a flag for workers whose company and pay group company do not match.
    2. Pay Group Pay Rate Type Mismatch: shows a flag for workers whose pay group is incompatible with the pay rate type.
    3. Pay Group Compensation Plan Frequency Mismatch: shows a flag for workers whose pay group is incompatible with the compensation plan frequency.
    4. Compensation Plan Frequency Pay Rate Type Mismatch: shows a flag for workers whose compensation plan frequency is incompatible with the pay rate type.
  - o Data Source: Prism
  - o Share Permission:
    1. Compensation Partner
    2. Compensation View Only
    3. HR Contact
    4. HR Partner
    5. HR View Only
    6. Payroll Partner
    7. Payroll View Only

Impacting Events Tab – Monitor in progress and completed events that impact payroll at times when there is not an In Progress pay calculation. Work toward successful completion of pending events. The prompt set for this tab includes Company and Effective Date range.

- *Impacting Terminations*
  - o Purpose: Returns termination or end additional job events within the prompted effective date range.
  - o Metric Guidance: This worklet is not related to in-progress payroll calculations. Any terminations in the prompted date range are returned.
  - o Data Source: Prism
  - o Share Permission:
    1. Benefits Partner
    2. Benefits View Only
    3. HR Contact
    4. HR Partner
    5. HR View Only
    6. Payroll Partner
    7. Payroll View Only
- *Impacting Compensation Changes*
  - o Purpose: Returns compensation change events in the prompted effective date range.
  - o Metric Guidance: This worklet is not related to in-progress payroll calculations. Any compensation changes in the prompted date range are returned.
  - o Data Source: Prism
  - o Share Permission:
    1. Compensation Partner
    2. Compensation View Only
    3. HR Contact
    4. HR Partner
    5. HR View Only
    6. Payroll Partner
    7. Payroll View Only
- *Events Awaiting Actions*
  - o Purpose: Returns events awaiting action in the prompted effective date range.
  - o Metric Guidance: This worklet is not related to in-progress payroll calculations. Any events awaiting actions in the prompted date range are returned.
  - o Data Source: Prism
  - o Share Permission:
    1. Benefits Partner
    2. Benefits View Only
    3. Compensation Partner
    4. Compensation View Only
    5. HR Contact
    6. HR Partner
    7. HR View Only
    8. Payroll Partner
    9. Payroll View Only

Verify In-Progress Tab – Review the in progress payroll. The prompt set for this tab includes Company and Periods.

- *Terminations*
  - Purpose: Returns termination or end additional job events that impact in progress payroll. Actionable steps include verifying that these records have a sub period that appropriately prorates a partial work period to avoid overpayment to the employee.
  - Metric Guidance: This worklet does not include payroll calculations with the status complete or complete with exceptions.
  - Data Source: Prism
  - Share Permission:
    1. Benefits Partner
    2. Benefits View Only
    3. HR Contact
    4. HR Partner
    5. HR View Only
    6. Payroll Partner
    7. Payroll View Only
- *Job Changes*
  - Purpose: Returns job change events that impact in progress payroll. Actionable steps include determining payment amount changes based on job changes returned in the report.
  - Metric Guidance: This worklet includes the business process types change job, demote, promote, and transfer. It does not include payroll calculations with the status complete or complete with exceptions.
  - Data Source: Prism
  - Share Permission:
    1. Benefits Partner
    2. Benefits View Only
    3. HR Contact
    4. HR Partner
    5. HR View Only
    6. Payroll Partner
    7. Payroll View Only
- *Compensation Changes*
  - Purpose: Returns compensation change events that impact in progress payroll. Actionable steps include determining payment amount changes based on compensation changes returned in the report.
  - Metric Guidance: This worklet includes the business process propose compensation change and request compensation change. It does not include payroll calculations with the status complete or complete with exceptions.
  - Data Source: Prism
  - Share Permission:
    1. Compensation Partner
    2. Compensation View Only
    3. HR Contact
    4. HR Partner
    5. HR View Only
    6. Payroll Partner
    7. Payroll View Only
- *Pay Group Changes Impacting Benefits*

- o Purpose: Returns job changes from biweekly to monthly, or monthly to biweekly in the current period. Actionable steps include validating the benefit deductions on in progress payroll to avoid double deduction.
- o Metric Guidance: This worklet includes the business process types change job, demote, promote, and transfer. It does not include payroll calculations with the status complete or complete with exceptions.
- o Data Source: Prism
- o Share Permission:
    1. Benefits Partner
    2. Benefits View Only
    3. HR Contact
    4. HR Partner
    5. HR View Only
    6. Payroll Partner
    7. Payroll View Only