

# HR Reporting @ NYU

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In August of 2007, a cross-functional team representing the Human Resources Division, the Office of Academic Appointments, the Payroll Department, and ITS developed a multi-year plan with an ambitious list of technology projects. The plan's overall objectives were to introduce new systems and/or functionality that would improve efficiencies and service, provide better metrics, and ensure compliance with federal and state laws.

HR Reporting was one of the principal projects identified by the team. (See *PeopleAdmin*, p. 30, for another.) This three-year project's goals are to replace HR eReports, the legacy reporting environment whose capabilities were now limited compared with the newer reporting tools; give individual administrators and departments the ability to create their own customized ad hoc reports; and develop human resource metrics that could be used in measuring the University's progress toward achieving its strategic goals. This article highlights the process by which we accomplished Phase 1 of the project, and provides a brief look at the resulting benefits.

## Project Kick-off

The project was formally begun in September 2007. Our project team's first step was to conduct a six-month assessment of the existing reporting environment and to gather new reporting requirements. To accomplish this goal, our team created an inventory of 656 existing reports, and reviewed each of them to determine if the reports were still needed. We also ran workshops with the Schools and units, and surveyed 76 HR professionals and the staff of four central offices to determine their reporting needs. To support the new reporting requirements, we also identified the database structures

and security features that would be needed to support a fast and secure reporting environment. Finally, we determined the reporting priorities and the schedule for releasing the reports that were to be developed. Our plan was to complete the project in two phases.

The project's Phase 1 implementation kicked off in March 2008. Over the following nine months, the team learned the new reporting tool (Hyperion/Brio);<sup>1</sup> designed, built, and tested the reports; and created the "views" (loosely, the structures) needed to support ad hoc, customizable reporting.

The last two months of this time were focused on preparing for the rollout of the system to the community of HR officers and departmental administrators. An HR Reporting website, along with an HR data dictionary (an online resource which describes the reports, tables, fields, and such) and training materials, were all created during that period.

## Phase 1 Is Live!

As of January 12, 2009, HR professionals across the University have been empowered with data and flexible tools that can be used for strategic planning, analysis, and decision-making. HR officers can now run standard, pre-built reports with just a few mouse clicks, or create and save their own custom reports tailored for their specific organizational needs.

The new HR Reporting environment provides many benefits. By centralizing all HR reporting within the University's Data Warehouse, and providing standard reporting tools consistent with those used in other University administrative areas, it helps ensure consistency of analyses and metrics across units and functions. It gives HR administrators the ability to develop their own reports that

<sup>1</sup> [www.oracle.com/hyperion](http://www.oracle.com/hyperion)



The HR Reporting dashboard. Information is retrieved based on the criteria selected and the user's security profile.



The Human Resources reporting website.

address business questions specific to their units. Moreover, the data and results can be exported in a variety of formats, including Excel, for further analysis.

Training sessions — in three levels, from beginning to advanced — began in January. It is expected that in all, more than 120 people will have attended these sessions by the end of April.

### An HR-Finance Collaboration

At the same time that the HR Reporting project was underway, Business Systems Integration, Reporting and Application Development (BSIRAD — a department within the Program Services Division of the Senior Vice President for Finance and Budget) was in the process of rebuilding the Finance reports in Hyperion/Brio. Our two teams came together and decided to develop standards and deliverables that could potentially serve as a template for other groups that use the University Data Warehouse (UDW).

First, our teams collaborated on the development of a single look and feel for both the HR and Finance sets of reports. Since both the HR and Finance reporting projects were running in parallel and had a similar user base, there were

advantages in working together to produce a single reporting dashboard design.

Second, we worked together to build a single administrative reporting website that provided information and content relevant to both Finance and HR. The HR section contains links to the standard reports and ad-hoc reporting views, provides help and training schedules, and creates a one-stop shopping experience for anything related to HR reports. The website is [www.nyu.edu/reporting](http://www.nyu.edu/reporting).

Finally, the HR Reporting team was able to leverage the data dictionary that was built by BSIRAD. The data dictionary is an online repository for definitions of reports, tables, fields, and business terms. The HR section of the data dictionary is a work in progress, and we hope to encourage the people using our system to submit definitions of terms for review and subsequent publishing.

### What's Next?

Phase 2 of the HR Reporting project is currently in progress. There's more to come, just stay tuned and visit the administrative reporting website ([www.nyu.edu/reporting](http://www.nyu.edu/reporting)) for news and announcements.

### The Team

Phase 1 of the HR Reporting project could not have been completed without the volunteer project team — staff members from the Human Resources Division, the Office of Academic Appointments, the Payroll Department, ITS, and FAS Institutional Research — who worked tirelessly to learn the new reporting tool and design, build, and test the reports: Jenny Alulema, Jill Appel, Libby Berkowitz, Alfredo Braza, Dan Dunphy, David Houlihan, Annie Huang, Lisa King, Helen Likanje, Andrew Maliszewski, Mary Obermeier, Anne Mui, Tara O'Boyle, Gary Ufer, and David Vintinner. The Project Sponsor was Katie Casey, VP of Human Resources. And special thanks to Addis Crooks, Sean Ruyle and Andrew Walsh from BSIRAD for all their help. \$