



# HR Data Mart User Guide

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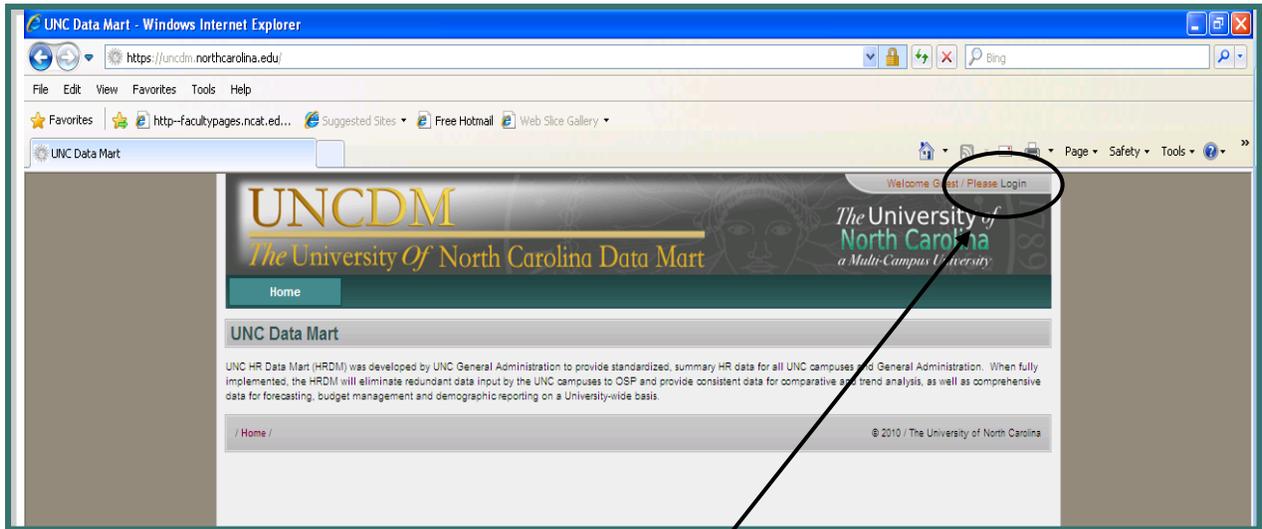
Author: Michelle Rainey

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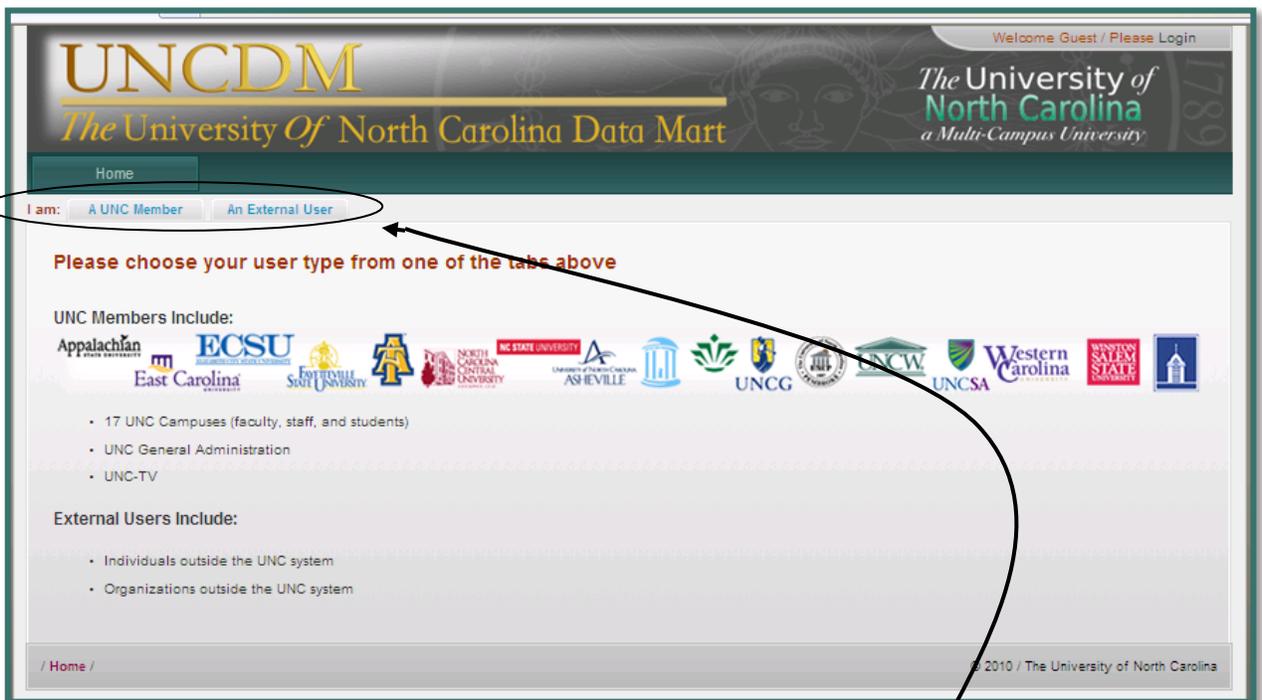
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# Logging On

To access Data Mart go to <https://uncdm.northcarolina.edu/>

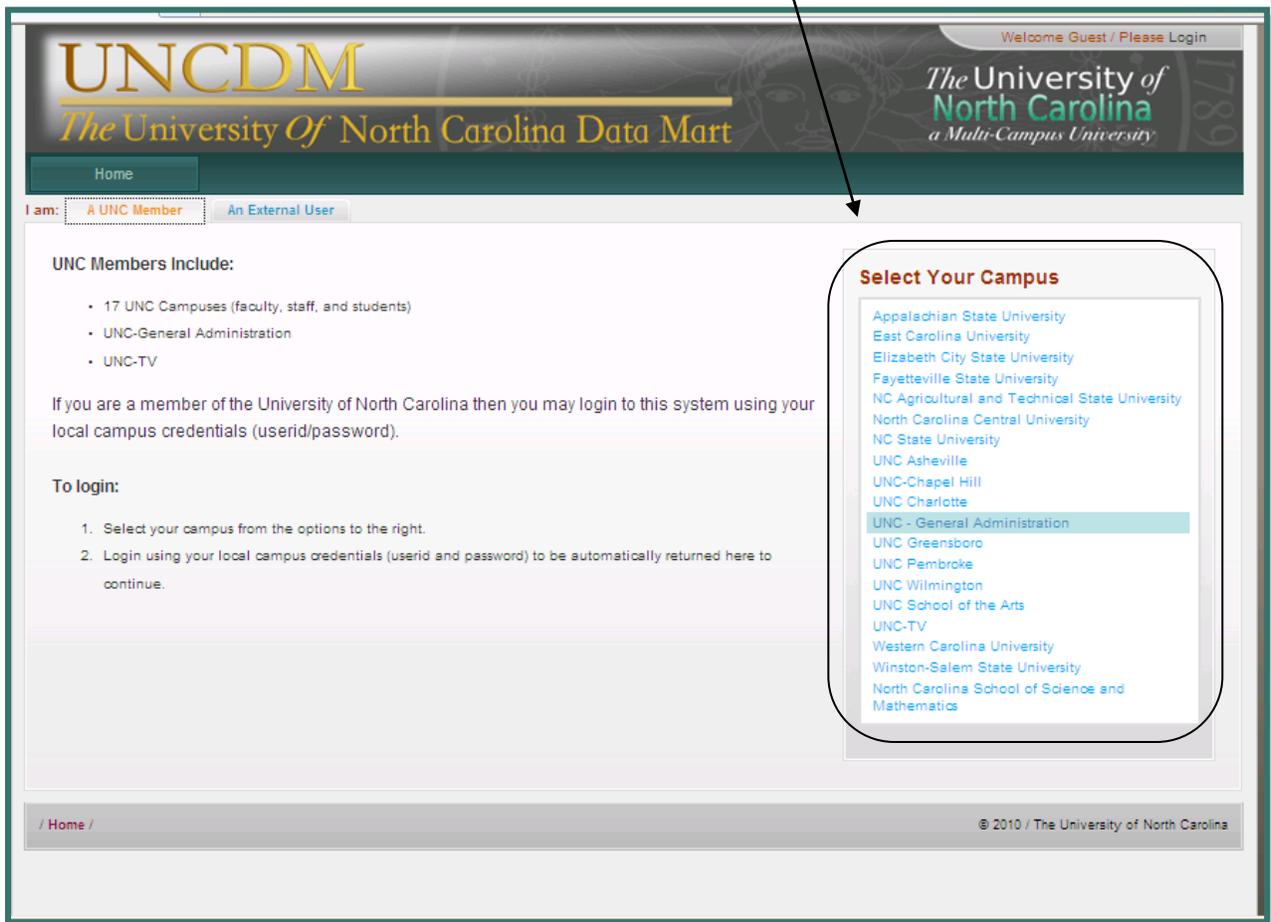


Select Login in the right top corner of the webpage.



Select either 'A UNC Member' or 'An External User'

Select your campus by clicking on the name of your campus



The screenshot shows the UNCDM (The University of North Carolina Data Mart) login interface. At the top, there is a header with the UNCDM logo and the University of North Carolina logo. Below the header, there is a navigation bar with a 'Home' button. The main content area is divided into two columns. The left column contains information about UNC members and login instructions. The right column contains a 'Select Your Campus' list. An arrow from the text above points to the 'Select Your Campus' list.

UNCDM  
The University Of North Carolina Data Mart

Welcome Guest / Please Login

The University of North Carolina  
a Multi-Campus University

Home

I am: [A UNC Member](#) [An External User](#)

**UNC Members Include:**

- 17 UNC Campuses (faculty, staff, and students)
- UNC-General Administration
- UNC-TV

If you are a member of the University of North Carolina then you may login to this system using your local campus credentials (userid/password).

**To login:**

1. Select your campus from the options to the right.
2. Login using your local campus credentials (userid and password) to be automatically returned here to continue.

**Select Your Campus**

- [Appalachian State University](#)
- [East Carolina University](#)
- [Elizabeth City State University](#)
- [Fayetteville State University](#)
- [NC Agricultural and Technical State University](#)
- [North Carolina Central University](#)
- [NC State University](#)
- [UNC Asheville](#)
- [UNC-Chapel Hill](#)
- [UNC Charlotte](#)
- [UNC - General Administration](#)
- [UNC Greensboro](#)
- [UNC Pembroke](#)
- [UNC Wilmington](#)
- [UNC School of the Arts](#)
- [UNC-TV](#)
- [Western Carolina University](#)
- [Winston-Salem State University](#)
- [North Carolina School of Science and Mathematics](#)

/ Home /

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Enter your User ID and Password. Click Sign In.

The UNIVERSITY of NORTH CAROLINA | a Multi-Campus University

UserID: (e.g. email and workstation login name and password)

Password:

Sign In

[Forgot Your Password? Unable to Login? Click Here for assistance.](#)

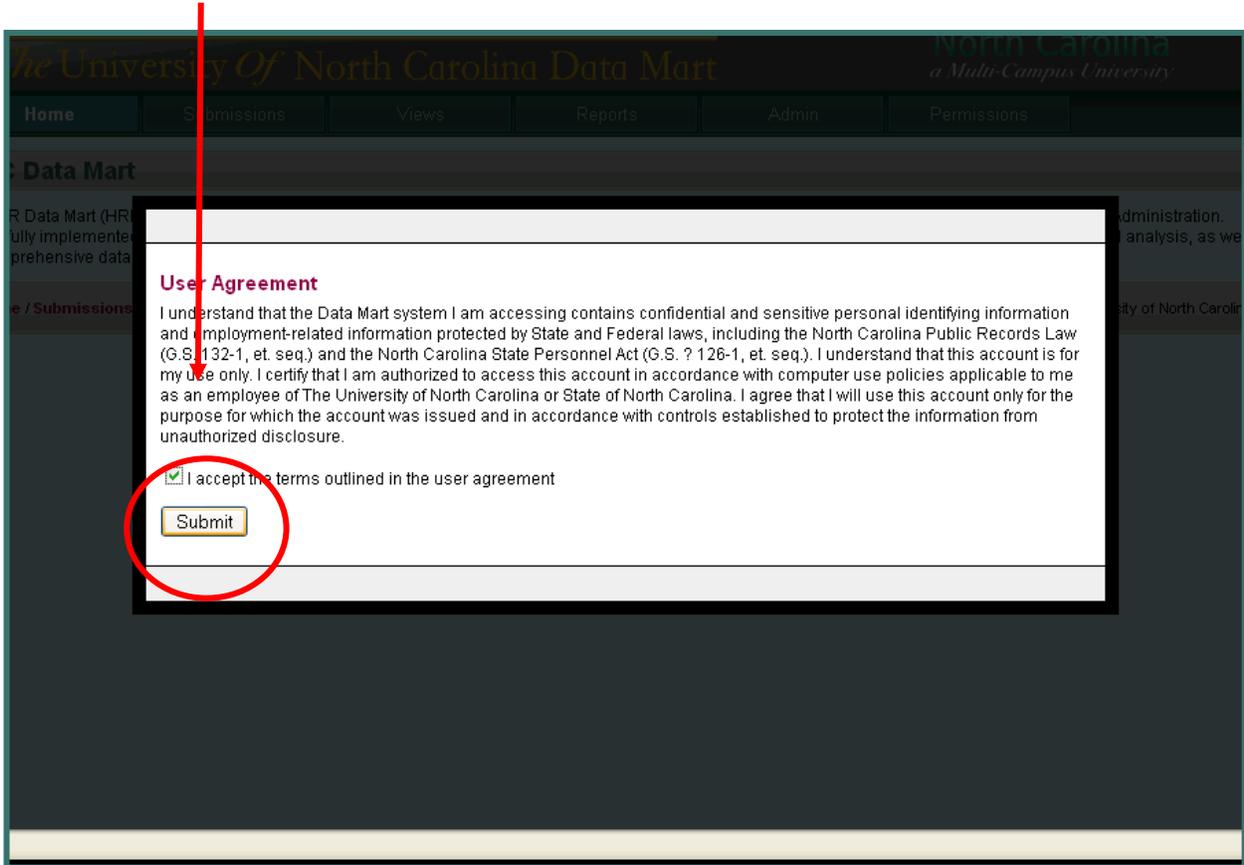
[Verify this page is hosted by General Administration.](#)

If this is the first time you are logging in to the HR Data Mart, you will need to submit your information to UNC General Administration and contact Keith Dupuis at [kedupuis@northcarolina.edu](mailto:kedupuis@northcarolina.edu).

Once your account has been set up and you sign in for the first time, you will need to complete a pop up security certification.

Once you have read the User Agreement, check the box beside of the statement:

“I accept the terms outlined in the user agreement.” Click the submit button when complete



The screenshot shows a web browser window displaying the 'The University of North Carolina Data Mart' interface. A modal window titled 'User Agreement' is overlaid on the page. The modal contains the following text:

**User Agreement**

I understand that the Data Mart system I am accessing contains confidential and sensitive personal identifying information and employment-related information protected by State and Federal laws, including the North Carolina Public Records Law (G.S. § 132-1, et. seq.) and the North Carolina State Personnel Act (G.S. § 126-1, et. seq.). I understand that this account is for my use only. I certify that I am authorized to access this account in accordance with computer use policies applicable to me as an employee of The University of North Carolina or State of North Carolina. I agree that I will use this account only for the purpose for which the account was issued and in accordance with controls established to protect the information from unauthorized disclosure.

I accept the terms outlined in the user agreement

Submit

A red circle highlights the 'Submit' button, and a red arrow points to the top of the modal window.

# Home

---

## Data Mart Overview

Welcome michelle / Logout

# UNCDM

*The University of North Carolina Data Mart*

*The University of North Carolina*  
a Multi-Campus University

1789

[Home](#) [Submissions](#) [Views](#) [Reports](#) [Permissions](#)

### UNC Data Mart

UNC HR Data Mart (HRDM) was developed by UNC General Administration to provide standardized, summary HR data for all UNC campuses and General Administration. When fully implemented, the HRDM will eliminate redundant data input by the UNC campuses to OSP and provide consistent data for comparative and trend analysis, as well as comprehensive data for forecasting, budget management and demographic reporting on a University-wide basis.

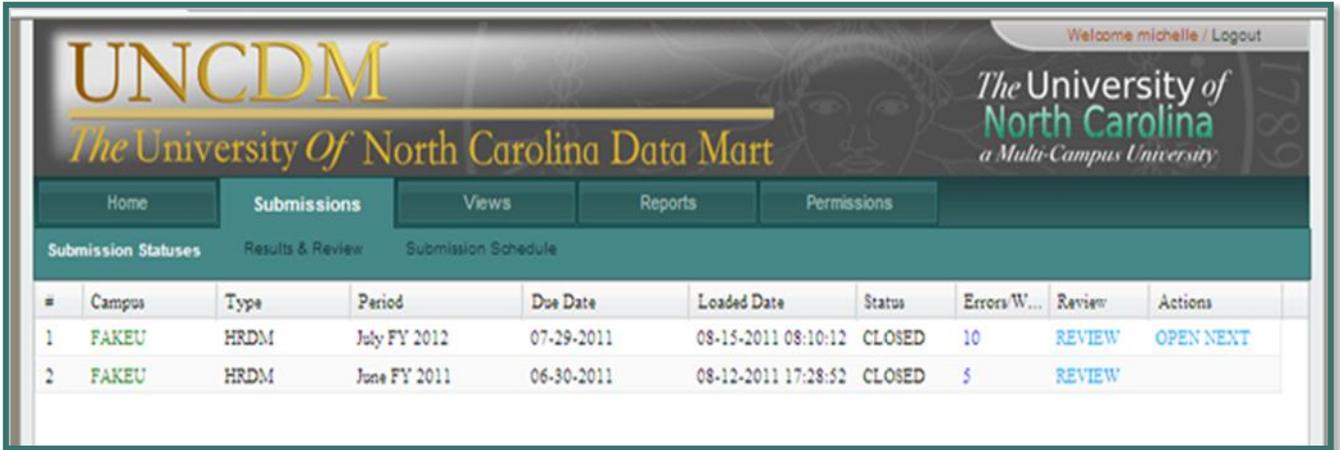
[/ Home / Submissions / Views / Reports / Permissions /](#)

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# Submissions

## Submission Statuses:

Under the Submissions tab there are three links, the first of which is Submission Statuses.



The screenshot shows the UNCDM (The University of North Carolina Data Mart) interface. The top navigation bar includes 'Home', 'Submissions', 'Views', 'Reports', and 'Permissions'. The 'Submissions' tab is active, showing a sub-menu with 'Submission Statuses', 'Results & Review', and 'Submission Schedule'. The 'Submission Statuses' link is selected, displaying a table with the following data:

#	Campus	Type	Period	Due Date	Loaded Date	Status	Errors/W...	Review	Actions
1	FAKEU	HRDM	July FY 2012	07-29-2011	08-15-2011 08:10:12	CLOSED	10	REVIEW	OPEN NEXT
2	FAKEU	HRDM	June FY 2011	06-30-2011	08-12-2011 17:28:52	CLOSED	5	REVIEW	

1. **Campus-** Name of campus that submitted the data
2. **Type-** Currently, we only have an HR Data Mart (HRDM) system, but in the future we might see versions tailored to other areas, such as Benefits or Finance. The “TYPE” column refers to the specific type of Data Mart.
3. **Period-** Period of current submission
4. **Due Date-** Date the submission for that period is due
5. **Loaded Data-** Date the data was last loaded
6. **Status-** Current status of the submission
7. **Errors/Warnings-** Number of errors or warnings within the particular submission. A red number indicates critical errors that must be resolved prior to the monthly deadline. A blue number indicates warnings that we recommend you review prior to the deadline, but which will not prevent an official submission.
8. **Review-** Allows the user to review the submission

9. **Action-** Actions permitted by the campus. Depending on the state of the submission or the time of the month, possible Actions might be to OPEN NEXT (to open the next month's data early) or CLOSE (to manually close the monthly submission after errors have been resolved during the deadline grace period).

## Other Features

The Submission Statuses section allows you to sort and filter what information you wish to view. You may select any of the columns to sort into ascending or descending order.

The screenshot shows the UNCDM interface with the 'Submission Statuses' section active. The table contains two rows of data:

#	Campus	Type	Period	Due Date	Loaded Date	Status	Errors/W...	Review	Actions
1	FAKEU	HRDM		07-29-2011	08-15-2011 08:10:12	CLOSED	10	REVIEW	OPEN NEXT
2	FAKEU	HRDM		06-30-2011	08-12-2011 17:28:52	CLOSED	5	REVIEW	

You may also filter what information about the submissions you wish to view. You may do this by clicking on a column, selecting columns, and un-checking the boxes beside the columns you do not wish to view.

The screenshot shows the UNCDM interface with the 'Submission Statuses' section active. The table contains two rows of data:

#	Campus	Period	Loaded Date	Status	Errors/W...	Review	Actions
1	FAKEU	July FY 2012	10:12	CLOSED	10	REVIEW	OPEN NEXT
2	FAKEU	June FY 2011	28:52	CLOSED	5	REVIEW	

The 'Columns' dropdown menu is open, showing the following columns with their selection status:

- #
- Campus
- Type
- Period
- Due Date
- Loaded Date
- Status
- Errors/Warnings
- Review
- Actions

## Errors



Welcome michelle / Logout

**UNCDM**  
The University Of North Carolina Data Mart

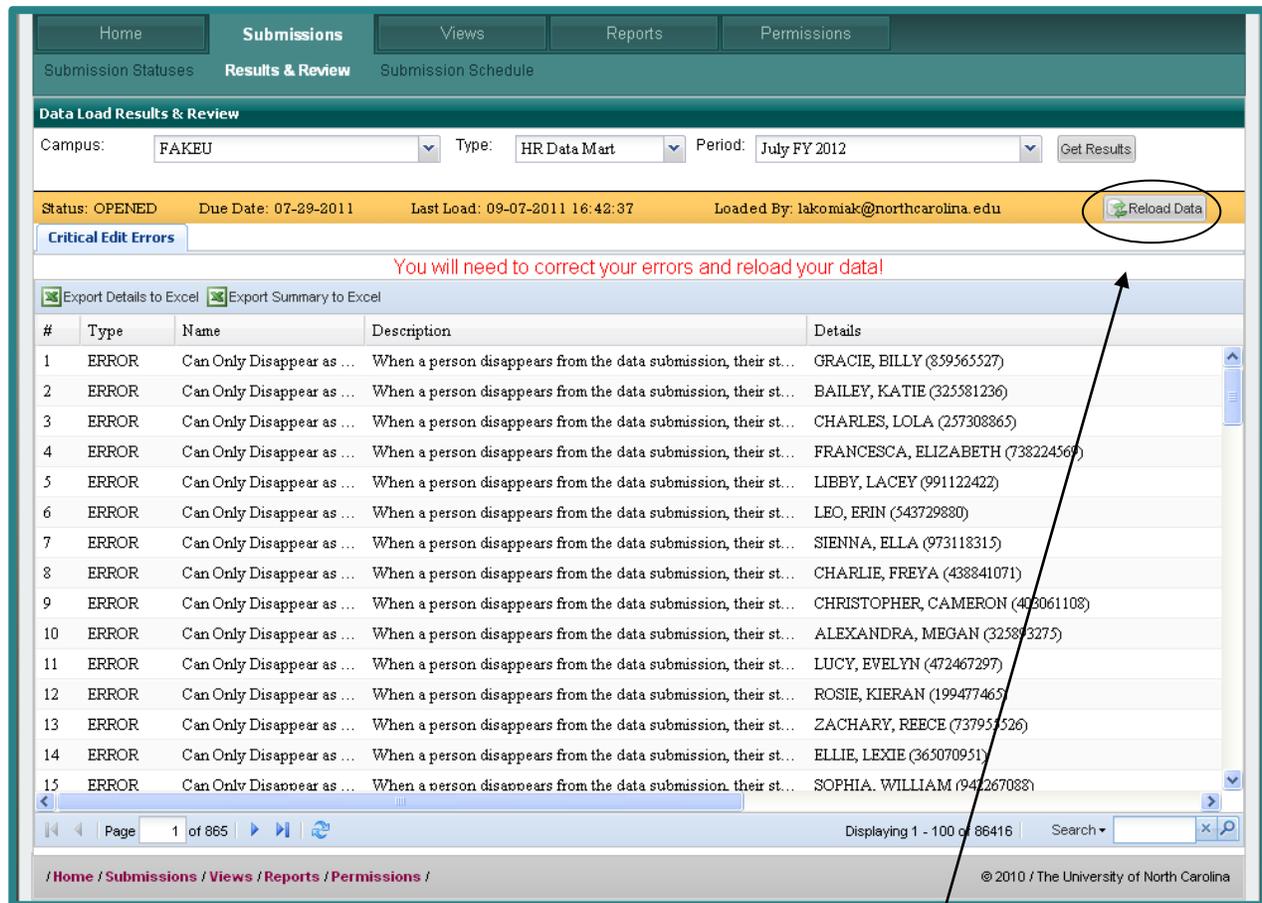
The University of North Carolina  
a Multi-Campus University

Home Submissions Views Reports Permissions

Submission Statuses Results & Review Submission Schedule

#	Campus	Type	Period	Due Date	Loaded Date	Status	Errors/...	Review	Actions
1	FAKEU	HRDM	July FY 2012	07-29-2011	08-15-2011 08:10:12	OPENED	86416	REVIEW	
2	FAKEU	HRDM	June FY 2011	06-30-2011	08-12-2011 17:28:52	CLOSED	5	REVIEW	

There may be times when you will receive errors in your submission, indicated by a red number. Simply select 'Review' on the line with the errors.



Home Submissions Views Reports Permissions

Submission Statuses Results & Review Submission Schedule

Data Load Results & Review

Campus: FAKEU Type: HR Data Mart Period: July FY 2012 Get Results

Status: OPENED Due Date: 07-29-2011 Last Load: 09-07-2011 16:42:37 Loaded By: lakomiak@northcarolina.edu **Reload Data**

Critical Edit Errors

You will need to correct your errors and reload your data!

Export Details to Excel Export Summary to Excel

#	Type	Name	Description	Details
1	ERROR	Can Only Disappear as ...	When a person disappears from the data submission, their st...	GRACIE, BILLY (839565527)
2	ERROR	Can Only Disappear as ...	When a person disappears from the data submission, their st...	BAILEY, KATIE (325581236)
3	ERROR	Can Only Disappear as ...	When a person disappears from the data submission, their st...	CHARLES, LOLA (257308865)
4	ERROR	Can Only Disappear as ...	When a person disappears from the data submission, their st...	FRANCESCA, ELIZABETH (73822456)
5	ERROR	Can Only Disappear as ...	When a person disappears from the data submission, their st...	LIBBY, LACEY (991122422)
6	ERROR	Can Only Disappear as ...	When a person disappears from the data submission, their st...	LEO, ERIN (543729880)
7	ERROR	Can Only Disappear as ...	When a person disappears from the data submission, their st...	SIENNA, ELLA (973118315)
8	ERROR	Can Only Disappear as ...	When a person disappears from the data submission, their st...	CHARLIE, FREYA (438841071)
9	ERROR	Can Only Disappear as ...	When a person disappears from the data submission, their st...	CHRISTOPHER, CAMERON (403061108)
10	ERROR	Can Only Disappear as ...	When a person disappears from the data submission, their st...	ALEXANDRA, MEGAN (32583275)
11	ERROR	Can Only Disappear as ...	When a person disappears from the data submission, their st...	LUCY, EVELYN (472467297)
12	ERROR	Can Only Disappear as ...	When a person disappears from the data submission, their st...	ROSIE, KIERAN (199477465)
13	ERROR	Can Only Disappear as ...	When a person disappears from the data submission, their st...	ZACHARY, REECE (73795526)
14	ERROR	Can Only Disappear as ...	When a person disappears from the data submission, their st...	ELLIE, LEXIE (365070951)
15	ERROR	Can Only Disappear as ...	When a person disappears from the data submission, their st...	SOPHIA, WILLIAM (942267088)

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/ Home / Submissions / Views / Reports / Permissions / © 2010 / The University of North Carolina

Review and correct your errors. Once complete, select "Reload Data."

**Note: Only select users on each campus have the ability to access this button to reload the data.**

Once you select “Reload Data” you will be prompted with this message:



Select ‘Yes’ to reload your data. Continue to correct and reload your data until nothing but warnings remain for your campus’s submission.

The Campus’s ability to reload the data will be available through the third day of the grace period after the submission date.

If you are reloading data within the three day grace period you will need to manually close the month.

## Results & Review

The second link under the submissions tab is “Results and Review”, which provides details about each successful submission. Data Mart will not return results from any campus that did not have a successful submission for that month.

The screenshot shows the UNCDM interface. At the top, it says 'UNCDM The University Of North Carolina Data Mart' and 'The University of North Carolina a Multi-Campus University'. There is a navigation bar with 'Home', 'Submissions', 'Views', 'Reports', and 'Permissions'. Under 'Submissions', there are links for 'Submission Statuses', 'Results & Review', and 'Submission Schedule'. The main content area is titled 'Data Load Results & Review'. It has three dropdown menus: 'Campus' (FAKEU), 'Type' (HR Data Mart), and 'Period' (open to a list of months from September FY 2012 to January FY 2010). A 'Get Results' button is circled in red, and an arrow points from it to the text below.

Select the appropriate Campus, Type, and Period and then press

‘Get Results’.

Please note: Data Mart will list the earliest period that information became available from any campus in the UNC system. Any attempt to pull data from a time period earlier than your first HRDM submission will trigger a “No data was found for the filters chosen” error message.

The screenshot displays the UNCDM (The University of North Carolina Data Mart) interface. At the top, it shows the UNCDM logo and the University of North Carolina logo. The user is logged in as 'michelle'. The main navigation menu includes Home, Submissions, Views, Reports, and Permissions. The current view is 'Results & Review' under 'Submission Statuses'. The 'Data Load Results & Review' section shows a submission for 'FAKEU' (HR Data Mart) for 'July FY 2012'. The submission status is 'CLOSED', due date is '07-29-2011', and last load was on '08-07-2011 16:42:37'. The 'Validation Warnings' tab is selected, showing a list of 10 warnings. A red circle highlights the 'Validation Warnings' tab, and an arrow points to the 'Type' column of the first row in the table.

#	Type	Name	Description	Details
1	WARNING	Incongruent Competenc...	When a person's competency increases (progression) within th...	BROOKE, BILLY (258229657)
2	WARNING	Incongruent Competenc...	When a person's competency increases (progression) within th...	ISABELLE, ROSIE (457587091)
3	WARNING	Incongruent Competenc...	When a person's competency decreases (regression) within the...	JOEL, MICHAEL (556284033)
4	WARNING	Can Only Disappear as...	When a person disappears from the data submission, their statu...	MUHAMMAD, EVE (862325780)
5	WARNING	Can Only Disappear as...	When a person disappears from the data submission, their statu...	MUHAMMAD, CHRISTOPHER (928557062)
6	WARNING	Position over Capacity	The sum of the employee_position FTE is greater than positio...	Position Number 00046697
7	WARNING	Position over Capacity	The sum of the employee_position FTE is greater than positio...	Position Number 00050107
8	WARNING	Position over Capacity	The sum of the employee_position FTE is greater than positio...	Position Number 00043053
9	WARNING	Position over Capacity	The sum of the employee_position FTE is greater than positio...	Position Number 00044416
10	WARNING	Position over Capacity	The sum of the employee_position FTE is greater than positio...	Position Number 00040752

## Validation Errors and Warnings

Displays a list of warnings and errors with the current submission. Please note that the errors/warning data can be exported into an Excel spreadsheet by clicking “Export Data to Excel”.

# Employees

	CID	SSN	Last Name	First Name	Middle Name	Suffix	Birth Date	Employee Eff...	Employ
1	835405401	6670	ALICIA	RYAN	Allison		08-18-1962	07-25-2011	SPA
2	155844995	5820	ANNA	ESME	A		07-07-1985	07-25-2011	SPA
3	596704572	2770	CHARLES	MORGAN	Camaione		08-27-1952	07-11-2011	SPA

After clicking on the EMPLOYEES tab, click on one of the four tabs beneath it to access information on:

## New Employee Data

Lists all new employees compared to previous month's submission

## Deleted Employee Data

Displays employees that do not show up on this file, but were on previous month's file.

## Modified Employee Data

Displays employees who have had modifications to at least one data element in his/her record.

*Tip! Hovering your mouse over a highlighted field shows previous month's value.*

## All Employee Data

Displays complete details of all employees in submission.

To quickly view additional position information of a specific employee, simply click the '+' icon beside the number of the employee. By clicking on it, you will be able to access deeper layers of data.

# Positions

#	Position Nbr	Working Title	Position Type	Appointment Typ	Appointment Sub	Appointment Peri	Position Effective	Position Establish	Position Reclass
1	00101366	Purchasing Speci	SPA	Time-Limited	None		06-30-2011	10-01-2009	10-01-2009
2	00102149	Human Resource:	SPA	Permanent	None		07-01-2011	07-01-2011	07-01-2011
3	00102212	Nurse Director	SPA	Time-Limited	None		07-01-2011	07-01-2011	07-01-2011

After clicking on the POSITIONS tab, click on one of the four tabs beneath it to access information on:

### New Position Data

Lists all new positions compared to previous month's submission

### Deleted Position Data

Displays positions that do not show up on this file, but were on previous month's file.

### Modified Position Data

Displays positions that have had modifications to at least one data element in the record.  
*Tip! Hovering your mouse over a highlighted field shows previous month's value.*

### All Position Data

Displays complete details of all positions in submission.

To quickly view additional employee information of a specific position, simply click the '+' icon beside the number of the employee. By clicking on it, you will be able to access deeper layers of data.

## Jobs

Shows all of the jobs submitted, which are grouped by employee.

The screenshot displays the 'Jobs' view in the HR Data Mart application. The interface includes a navigation bar with tabs for 'HOME', 'SUBMISSIONS', 'VIEWS', 'REPORTS', and 'PERMISSIONS'. Below this, there are sub-tabs for 'Submission Statuses', 'Results & Review', and 'Submission Schedule'. The 'Data Load Results & Review' section shows filters for 'Campus: FAKEU', 'Type: HR Data Mart', and 'Period: July FY 2012'. A status bar indicates 'Status: CLOSED', 'Due Date: 07-28-2011', 'Last Load: 08-07-2011 16:42:37', and 'Loaded By: lakomiak@northcarolina.edu'. The 'Jobs' tab is active, showing a table with the following columns: Action, Campus Identif..., Position Number, Working Title, Employee Posi..., Is Primary Pos..., Position FTE, Position Annual Base Sal..., and Name. The table lists several job entries for employee AARON, all with an action of 'NO CHANGE'. A 'Hide No Change?' button is circled in the bottom right corner of the table.

Action	Campus Identif...	Position Number	Working Title	Employee Posi...	Is Primary Pos...	Position FTE	Position Annual Base Sal...	Name
Name: AARON, AMBER(492277336) FTE=1 (1 Entry)								
NO CHANGE	492277336	00050267	Student Service...	1	Y	1	\$82,406	AARON, AMBE
Name: AARON, BAILEY(507463387) FTE=1 (1 Entry)								
NO CHANGE	507463387	00046802	Bus and Tech...	1	Y	1	\$49,121	AARON, BAILI
Name: AARON, DAVID(912028155) FTE=1 (1 Entry)								
NO CHANGE	912028155	00062443	Professional N...	1	Y	1	\$39,000	AARON, DAVI
Name: AARON, FLORENCE(648151049) FTE=1 (1 Entry)								
NO CHANGE	648151049	00043417	Research Oper...	1	Y	1	\$23,500	AARON, FLOR
Name: AARON, GEORGIA(862384340) FTE=1 (1 Entry)								
NO CHANGE	862384340	00063023	Medical Diagn...	1	Y	1	\$34,000	AARON, GEOR
Name: AARON, GRACIE(499951414) FTE=1 (1 Entry)								
NO CHANGE	499951414	00041309	Business Servic...	1	Y	1	\$52,500	AARON, GRAC
Name: AARON, JACOB(348862734) FTE=1 (1 Entry)								
NO CHANGE	348862734	00102139	Business Servic...	1	Y	1	\$35,000	AARON, JACOB
Name: AARON, KAI(194191496) FTE=1 (1 Entry)								

Each Job is categorized as "No Change", "New", "Modified", or "Deleted" which are computed based on previous month's submission. For your convenience, all categories except for "No Change" are color-coded.

Green=New

Yellow=Modified

Purple= Deleted

Use the "Hide No Change?" button in the lower right corner to see only the changes since previous month's submission.

## Budgets

Shows all of the budget data submitted, which are grouped by position

Action	Budget Effecti...	Budget FTE	Budget Annual Base Salary	Funding Source	NCAS Company	NCAS Budget...	NCAS Fund Code	NCAS Account...
Position: 00001740(Human Resources Specialist) FTE=1 (1 Entry)								
NO CHANGE	2010-07-01 0...	1	\$52,046	1	16010	1132		
Position: 00002751(Technology Support Technician) FTE=1 (1 Entry)								
NO CHANGE	2010-10-01 0...	1	\$40,000	1	16010	1122		
Position: 00007101(Vehicle/Equipment Repair Tech) FTE=1 (2 Entries)								
NO CHANGE	2010-07-01 0...	.36	\$27,312	1	16010	1132		
NO CHANGE	2010-07-01 0...	.64	\$48,628	1	16010	1122		
Position: 00008215(Research Technician-Nonexempt) FTE=1 (1 Entry)								
NO CHANGE	2010-08-01 0...	1	\$30,000	3	16010	0507		
Position: 00040002(Print/Document Service Super) FTE=1 (1 Entry)								
NO CHANGE	2010-07-01 0...	1	\$22,350	3	16010	0221		
Position: 00040004(Research Technician-Nonexempt) FTE=1 (1 Entry)								
NO CHANGE	2010-07-01 0...	1	\$61,632	1	16010	1170		
Position: 00040005(Electronics Supervisor) FTE=1 (1 Entry)								
NO CHANGE	2011-03-21 0...	1	\$29,967	1	16010	1180		

Each budget record is categorized by "No Change", "New", "Modified" or "Deleted" which are computed based on previous month's submission.

Any fields that are highlighted indicate a modification from the previous submission.

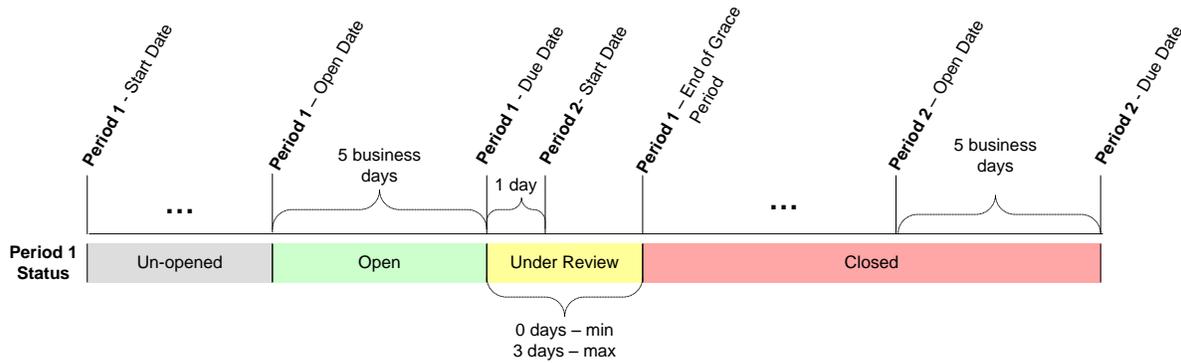
Use the "Hide No Change?" button in the lower right corner to see only the changes since previous month's submission.

# Submission Schedule

Displays when each period opens and is due.

#	Period	Opens	Due Date
1	September FY 2012	09-23-2011	09-30-2011
2	October FY 2012	10-24-2011	10-31-2011
3	November FY 2012	11-21-2011	11-30-2011
4	December FY 2012	12-20-2011	12-29-2011

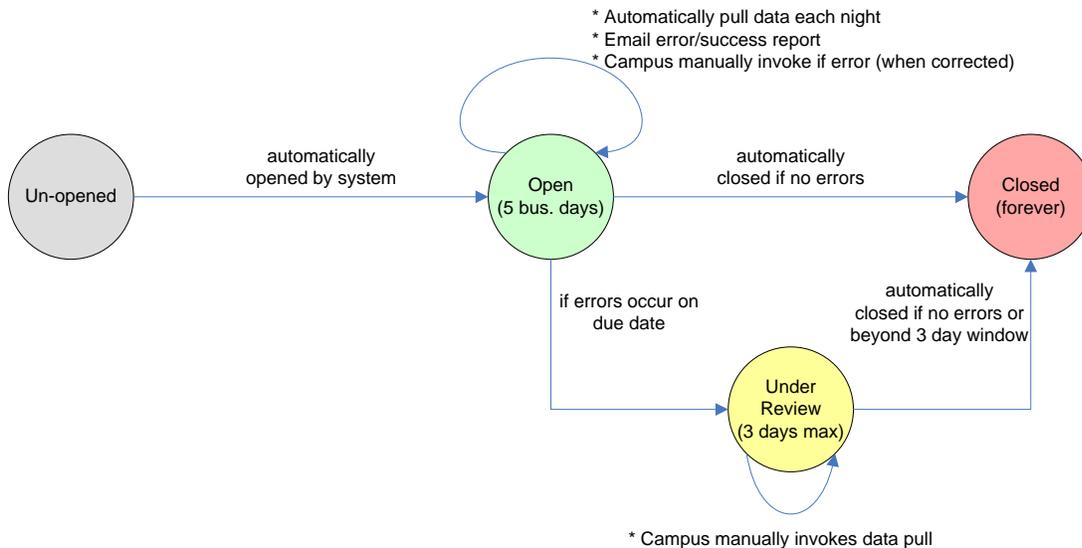
## Extract/ Submission Process Explanation



- **Period Start Date** – The official beginning of the period. For example, if the period is monthly, then it will most likely be the 1<sup>st</sup> of the month. However, precisely, it will be exactly 1 day after the due date of the previous period.
- **Period Due Date** – Defined as the last business day (as identified in the closing schedule) of the period and marks the date at which the official snapshot for the period will be taken. The next period will start immediately after this date has passed.
- **Period Open Date** – The open period for campus data submissions. The period open date is calculated as 5 business days before the end of the period.

- **Period End of Grace Period** – If errors occur on the due date of submission, the campus and GA will have 3 business days to correct the issue and take a snapshot that can still count in the prior period.

The following diagram illustrates the possible statuses of a submission and how these statuses are updated:

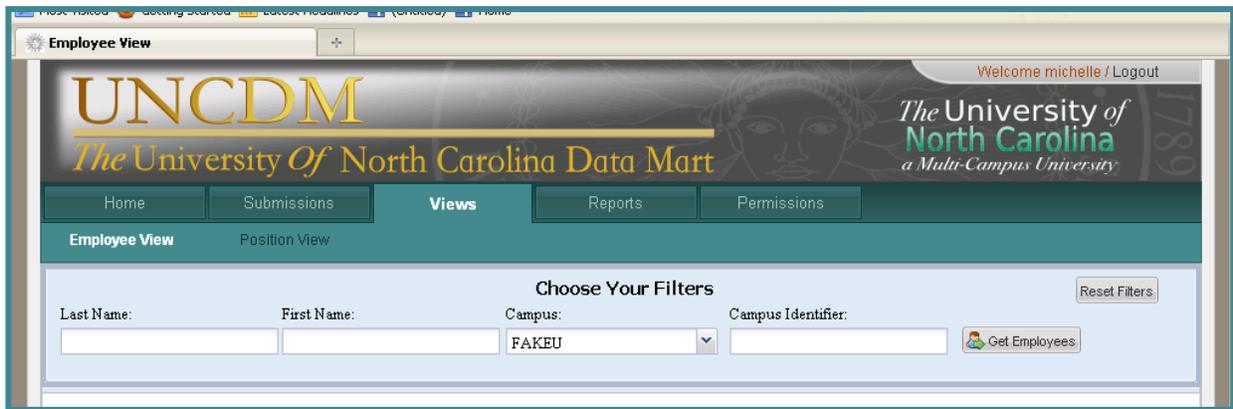


1. **Un-opened:** All periods are pre-defined within the system and will remain in an un- opened state until ready for use:
  - a. **Auto-open:** Once the day of the year is within the 5 business days halo of the end of the period, the system will automatically open the period.
2. **Open:** Once opened, the system will automatically execute the following steps ***each day at 7am through the period due date***. Each subsequent day's invocation of the data pull overrides the previous day's submission.
  - a. **Extract campus data:** The web services architecture will pull the data contained in the 4 views enumerated above. This process will be automated and NOT require manual campus intervention.
  - b. **Load data:** The extracted data will be processed and loaded into a temporary table space with the data warehouse.
  - c. **Error check:** The temporarily loaded data will be evaluated against the data definition to determine if it meets the definition.

- d. **Email status:** Campus administrators will be emailed a report on a daily basis concerning the status of the data load. Specifically, it will relay if the data load was successful or not, and what errors, if any, it encountered.
  - e. **Manual Invocation:** If there were errors in the data load, the campus staff will need to investigate and correct as necessary. They will be able to login to the warehouse (using their local campus credentials via UNC's federated identity) and manually invoke the data submission on demand.
3. **Under Review:** If we did not get a "clean" data load (no errors) on the due date, then the period will be marked as "Under Review" and will be characterized by the following:
- a. **Email notification:** The campus administrators and the GA administrators will be notified via email once the due date passes and a clean data load was not encountered.
  - b. **Manual Invocation:** The automated nightly extraction process will be cancelled. Instead, the campus administrator will need to correct the issue leading to the errors encountered during the data load and login to the warehouse to manually invoke the submission.
  - c. **Manual Close:** Once the campus administrator has corrected the issues and is satisfied with the correctness of the submission, they will be able to manually close the period via the web interface.
  - d. **Auto Close:** If the campus administrator is unable to submit a "clean" data set within the three day grace-period, the period will be automatically closed for that campus, and it will have to wait until the next period to submit.
4. **Closed:** Once closed, no period can be re-opened for subsequent submission. The campus will have to wait for the next period to make data corrections.

# Views

The Data Mart project relies on four Oracle views, which collect HR data in four distinct areas: Employee Information, Position Information, Employee-Position Information, and Budget-Position Information. You have the option to choose from employee and position view.

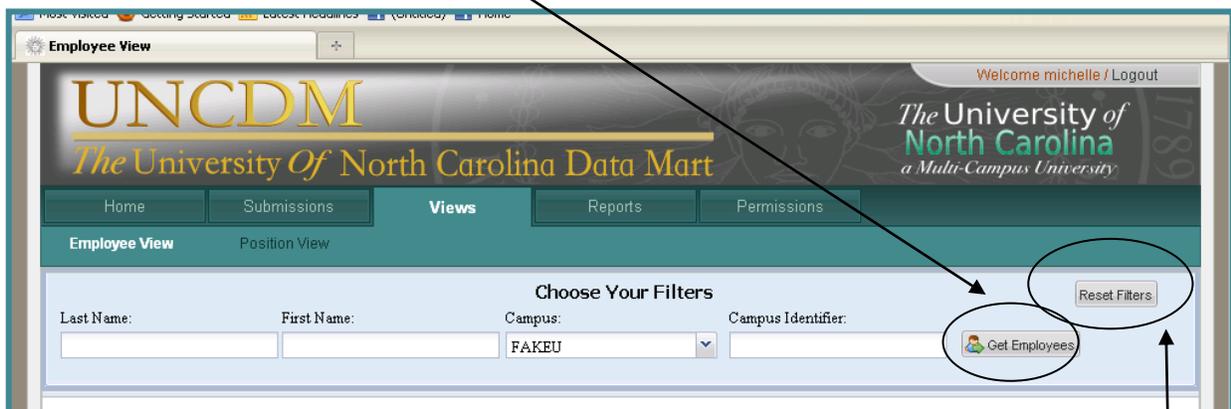


## Employee View

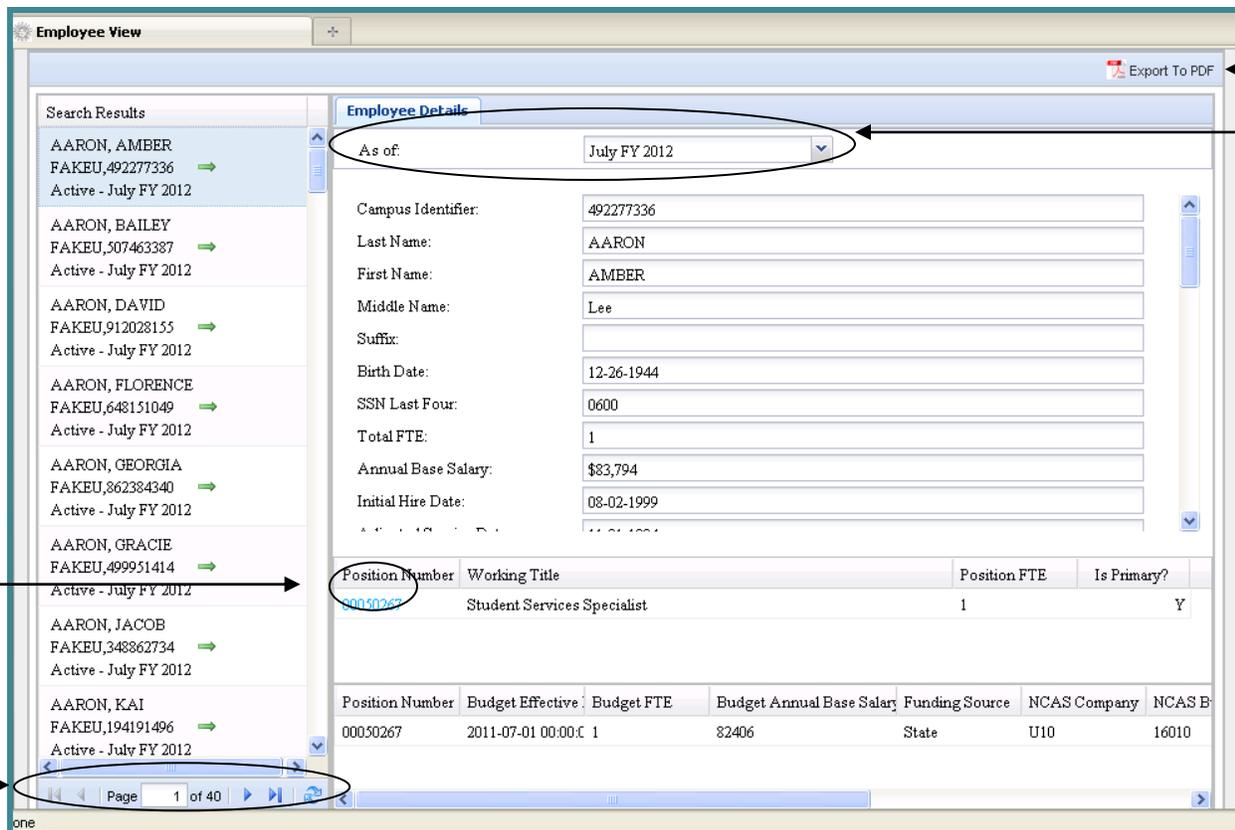
### Choosing Your Filters

Search for a particular employee by name and campus or if you wish to view every employee, simply select your campus. Once you have selected your filters, click the “Get Employees” Icon.

*Note: Only Users with cross campus access will be able to select another campus other than their own.*



“Reset Filters” button erases any filters previously selected



Clicking on the employee’s name on the left will show details on the right side of the screen.

You can review an employee’s data by a certain time frame by selecting which period you wish to view.

*You can use the paging buttons at the bottom of the screen to page through search results.*

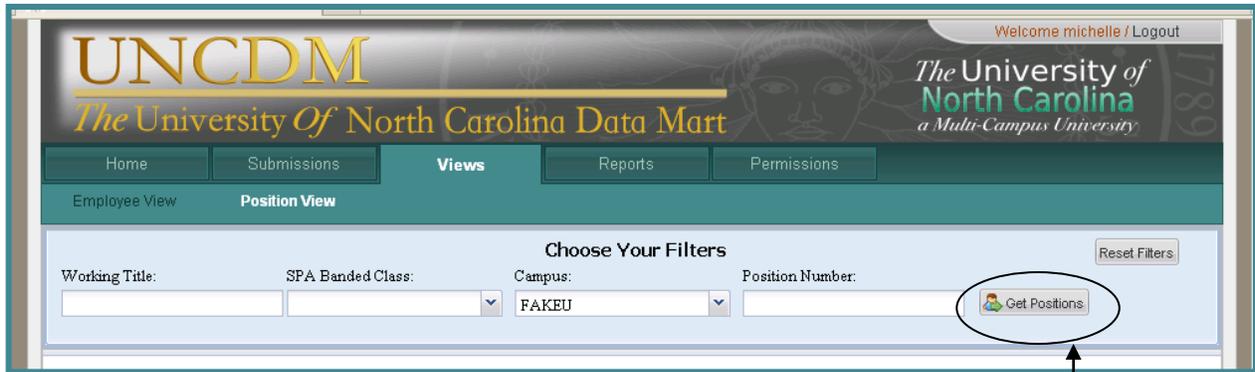
Any positions an employee may have are located at the bottom of the employee details panel and can be clicked to see the corresponding position record.

You can export this information to a PDF file by selecting “Export To PDF”

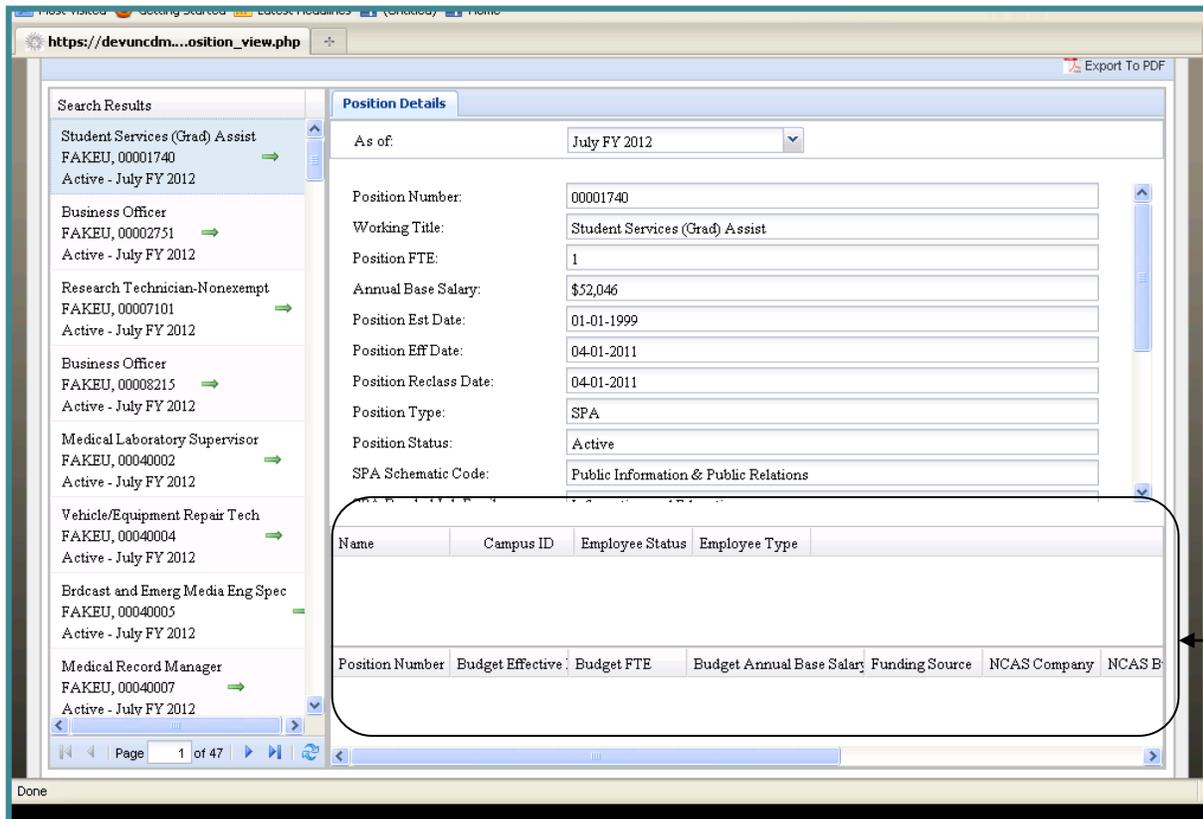
# Position View

## Choosing Your Filters

Filters allow you to search for positions based on the Working Title, SPA Banded Class, Campus, or Position Number.



Once you have selected your filters, click the “Get Positions” Icon



Clicking on the position listed on the left will show details on the right side of the screen.

Employees associated with this position are located at the bottom of the details record and can be clicked to see the corresponding employee record. *This particular position is empty and therefore no employee details are displayed.*

# Reports

## Stock Reports

Stock Reports are pre-created reports for which you can specify a few parameters via a drop down menu to see the customized results.

The screenshot displays the UNCDM (The University of North Carolina Data Mart) interface. The top navigation bar includes 'Home', 'Submissions', 'Views', 'Reports', and 'Permissions'. Below this, a secondary navigation bar lists 'Stock Reports', 'Adhoc Reports', 'Custom Reports', 'Validation Reports', 'Dataset Information', and 'Report Inventory'. The 'Report Inventory' link is circled in red. The main content area is divided into two sections: '1. Select Report:' and '2. Specify Parameters:'. Under '1. Select Report:', a list of reports is shown, with 'Advancement Change By Gender EPA Report' highlighted in yellow. Under '2. Specify Parameters:', three dropdown menus are visible: 'CAMPUS' set to 'FAKEU', 'PERIOD' set to 'Any', and 'EPA\_ADVANCEMENT\_CHANGE' set to 'None'. A 'Run Report' button is circled in red. The footer of the interface shows the breadcrumb path '/ Home / Submissions / Views / Reports / Permissions /' and the copyright notice '© 2010 / The University of North Carolina'.

### Step 1: Select Report

Select the type of report you want to see.

*Note: I've selected: Advancement Change By Gender EPA Report*

Descriptions of all the stock reports can be found under the Report Inventory link.

### Step 2. Specify Parameters

Specify the relevant filters for how the report should be constructed.

*Click "Run Report" to see results*

Other examples of possible parameters:

### Hire/Separation by Gender Report

The screenshot shows the '2. Specify Parameters:' section of the 'Hire/Separation By Gender Report' configuration. The parameters are:

- CAMPUS: equals FAKEU
- PERIOD: equals Any
- NEW\_HIRE\_SEPARATION: equals SEPARATION

The 'NEW\_HIRE\_SEPARATION' dropdown menu is open, showing options: Any, INITIAL LOAD, NEW HIRE, SEPARATION (highlighted), and None. A 'Run Report' button is visible on the right.

### Salary Change Report

The screenshot shows the '2. Specify Parameters:' section of the 'Salary Change Report' configuration. The parameters are:

- CAMPUS: equals Any
- PERIOD: equals February FY 2012

The 'PERIOD' dropdown menu is open, showing a list of fiscal years from June FY 2011 to March FY 2012, with 'February FY 2012' highlighted. A 'Run Report' button is visible on the right.

	AMERICAN IND OR ALASKA NAT FEMALE	AMERICAN IND OR ALASKA NAT MALE	ASIAN FEMALE	ASIAN MALE	BLACK OR AI
FAKEU	8	14	145	90	
Total	8	14	145	90	

Results are then displayed below the filtered criteria in a flat table. From here you can:

1. Expand all the data by selecting Expand All or '+'
2. Collapse all the data by selecting Collapse All or '-'
3. Export the data to an excel spreadsheet, PDF, or Text File
4. Select the Advanced Tab to view report parameters.
5. Select Charts to view graphical representation of the data

*Note: Changing parameters and saving the report does not affect the stock report, it creates a 'copy' of the report under your id.*

# ADHOC Reports

ADHOC Reports are reporting mechanisms that allow you to manipulate datasets to perform highly customized queries.

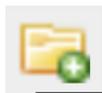
## My Reports

My Reports allows you to create and save your own customized reports



In the picture above, the arrows on the left have been clicked to expand the campus root folder (UNC-GA) and the subsequent personal sub-directory (KEDUPIUS).

### 1. The icons:



- a. The “ADD FOLDER” icon allows you to create new folders within your own sub-directory.



- b. The “ADD REPORT” icon allows you to create your own reports. If the ADD REPORT button is selected while you are in your personal folders, the report will be created within your own directory, visible only you. If you were to click the ADD REPORT button while in your campus folder (example being “UNC-GA” folder), the newly created report would be accessible to all other users on your campus.



- c. The “DELETE ITEM” icon allows you to delete reports that you have created. You cannot delete another user’s reports. (Red X’s will not appear next to reports created by other users)



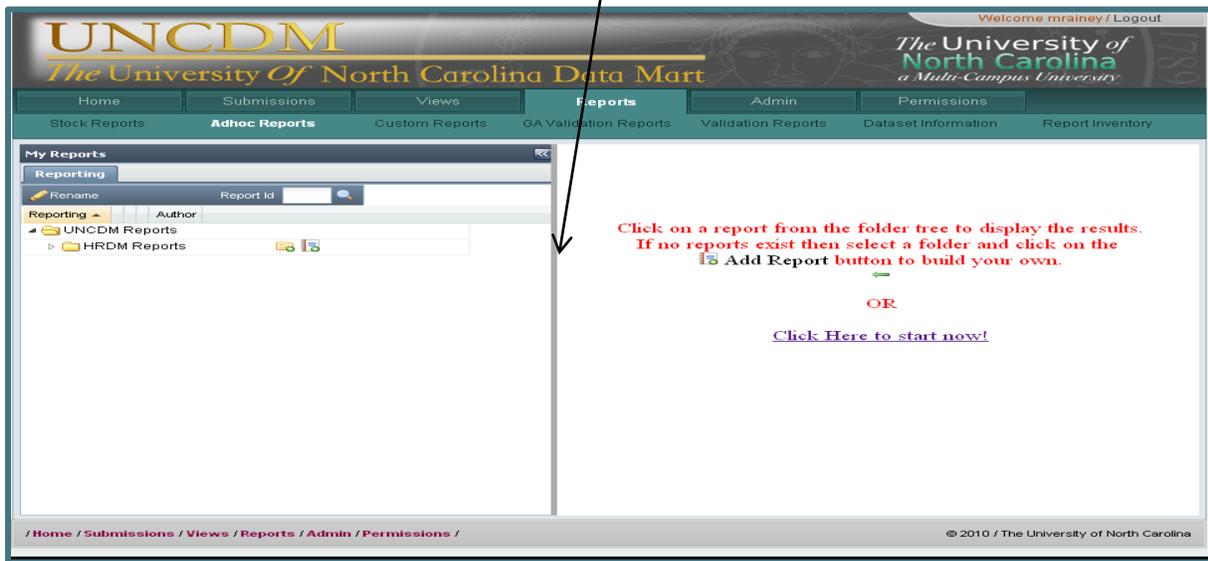
- d. To the right of the icons is the email address of the individual who created the report.

[Click Here to start now!](#)

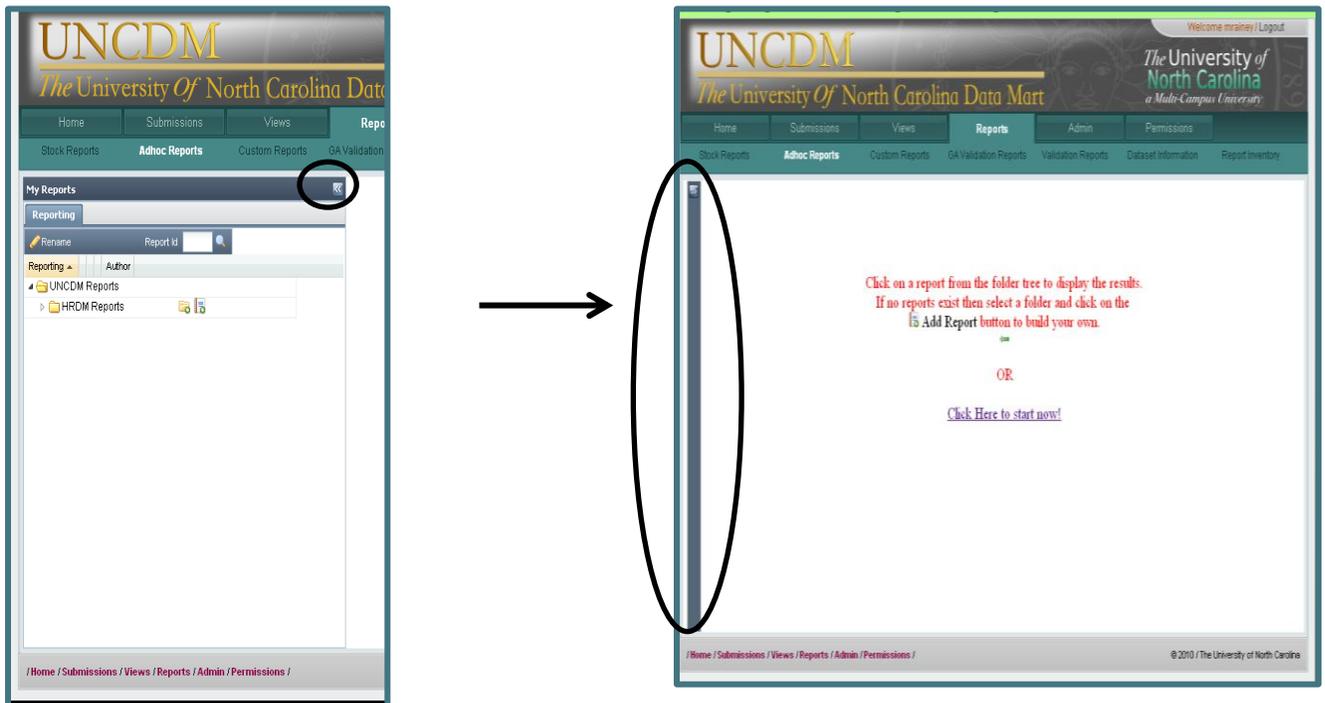
- e. This icon allows you begin creating your personal report without diving down within the folders. Reports saved from here will be located in your personal sub-directory.

- 2.** This indented list is an example of private reports visible only to a particular user. This personal sub-directory is where any personal reports you create and save will be located. As you can see, there are 6 unique reports under the “KEDUPUIS” directory, which is not visible to anyone except the user KEDUPUIS.
- 3.** The non-indented list shows examples of reports under the root directory – in this case, UNC-GA. There are 8 shared reports currently available to all UNC-GA users.

The Reporting frame size may be increased or decreased. Hover your mouse over the right edge of the frame, adjacent to the scroll bar, until the mouse shows as cross hairs. Left click your mouse and resize the Reporting frame.

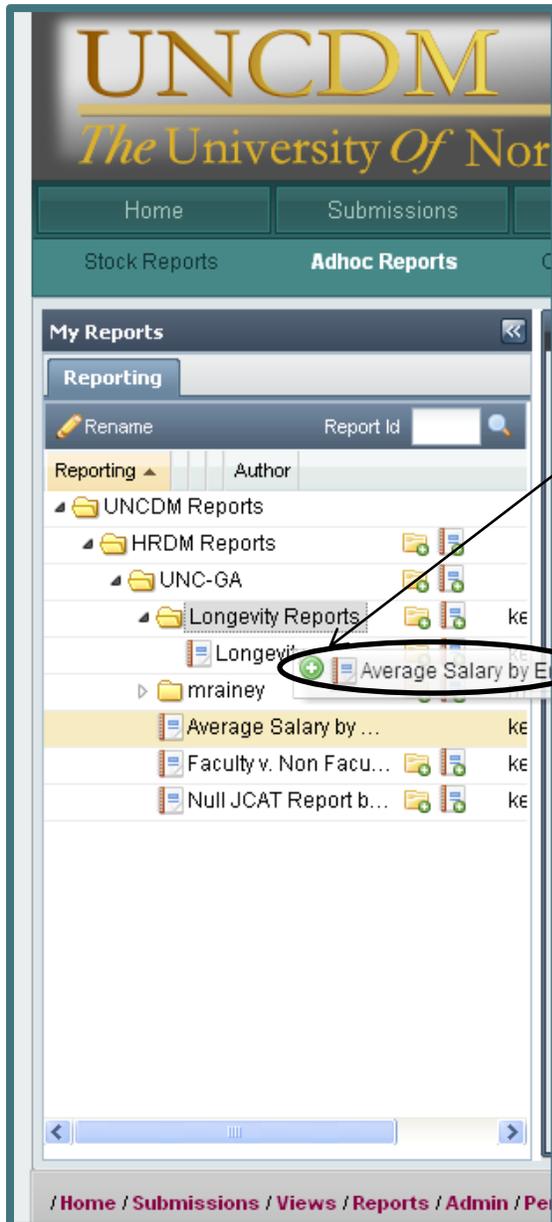


The reporting frame can also be hidden by clicking the left facing double arrow icon in the top right corner of the frame. The frame can be brought back by clicking the double facing right arrow in the upper left section of the frame.



## Drag and Drop Functionality

You have the ability to copy reports within your personal folders and share them through the shared folders on your campus.



To move a personal report into a shared folder:

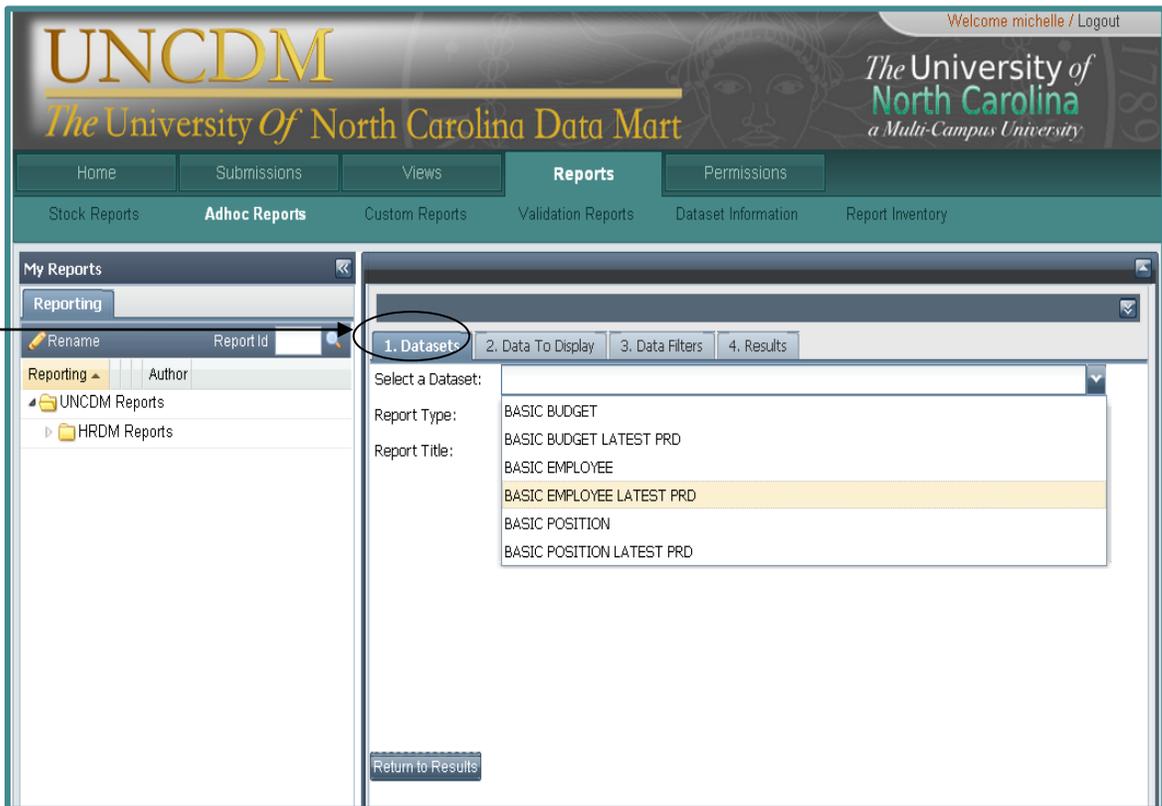
Select the report you wish to share within your personal directory by left clicking on the report, holding the left mouse button down, and dragging the name of the report upwards towards the shared folder you wish to place it into. Look for the green plus icon, indicating it will be added, before releasing your mouse.

*Note: You will have the ability to delete that now shared report by selecting the red X displayed to the right of the report you shared.*

Once you are ready to begin creating your report, select Advanced

## Datasets

**Select a Dataset.** Contains a list of all the datasets for which the your account has access. *You can hover over the dataset to get a longer description if desired.*



**BASIC BUDGET-** This view contains data from ALL PERIODS for the position's and budget records information.

**BASIC BUDGET LATEST PRD-** This view contains data from the LATEST PERIOD for the position's and budget records information.

**BASIC EMPLOYEE-** This view contains data from ALL PERIODS for the employee's records and position information of their primary job. One record per employee per campus per reporting period.

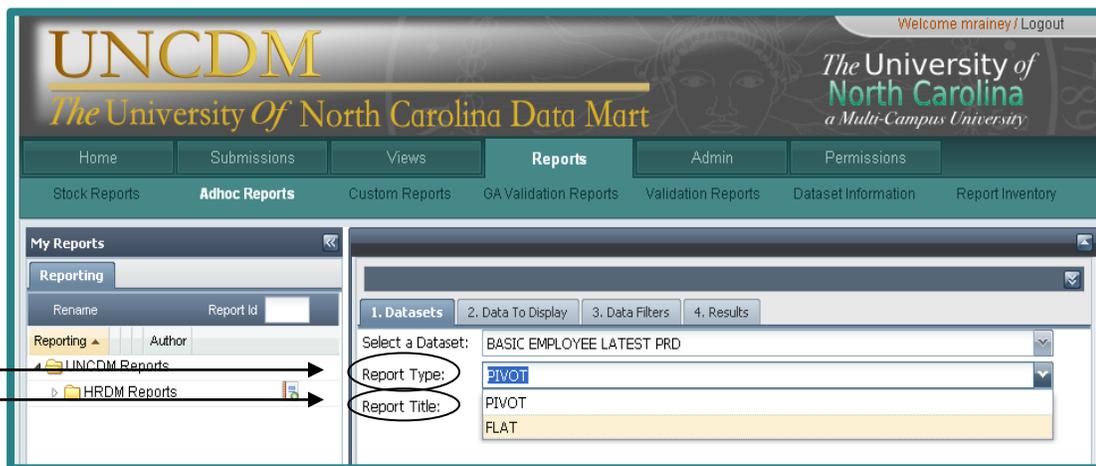
**BASIC EMPLOYEE LATEST PRD-** This view contains data from the LATEST PERIOD for the employee's records and position information of their primary job. One record per employee per campus per reporting period.

**BASIC POSITION-** This view contains data from the position records for ALL PERIODS

**BASIC POSTION LATEST PRD-** This view contains data from the position records for the LATEST PERIOD.

## Report Type

- **Flat reports** allow you to sort, count, total or give the average of data using only columns and rows, without the ability to drill down
- **Pivot tables** allow you to automatically sort, count, total or give the average of data in one table or spreadsheet. It also allows you to drill down into information based on specific variables. For those with data containing a lot of information, you may find it difficult to get summarized information. A pivot table can quickly help summarize the data and highlight the desired information.



**Report Title.** Not specifically required, but helpful if you want to name a report for future use. **A title header will not print on any exported results unless you enter a Report Title here. It will not print the name you assign a custom report that you save in your directory or the campus directory.**

## Data to Display- Flat

If Report Type 'Flat' is chosen, the screen below will be displayed.

The screenshot displays the UNCDM (The University of North Carolina Data Mart) Reports interface. The top navigation bar includes 'Home', 'Submissions', 'Views', 'Reports', and 'Permissions'. Below this, there are sub-navigation options: 'Stock Reports', 'Adhoc Reports', 'Custom Reports', 'Validation Reports', 'Dataset Information', and 'Report Inventory'. The main interface is divided into two panes. The left pane, titled 'My Reports', shows a 'Reporting' section with a 'Rename' button and a 'Report Id' field. Below this, there are folders for 'UNCDM Reports' and 'HRDM Reports'. The right pane, titled 'Data To Display', contains a list of fields on the left and a list of columns on the right. The fields list includes: DISABLED VETERAN?, EDUCATION ATTAINMENT LEVEL, EMPLOYEE ANNUAL BASE SALARY, EMPLOYEE APPOINTMENT PERIOD, EMPLOYEE APPOINTMENT TYPE, EMPLOYEE CAMPUS IDENTIFIER, EMPLOYEE COMPETENCY LEVEL (SPA), EMPLOYEE DATE ON EMPLOYEE REC, EMPLOYEE FTE AMT CHANGE, EMPLOYEE FTE CHANGE, EMPLOYEE FTE PCT CHANGE, EMPLOYEE PERFORMANCE RATING, EMPLOYEE RAW SAL AMT CHANGE, EMPLOYEE SAL/FTE RATIO PCT CHG, and EMPLOYEE SALARY PCT CHANGE. The columns list includes: CAMPUS, AGE RANGE, EEO RACE/GENDER, and EMPLOYEE SALARY AMT CHANGE. An arrow points from the 'EMPLOYEE ANNUAL BASE SALARY' field to the 'EMPLOYEE SALARY AMT CHANGE' column. Another arrow points to a set of arrow buttons (left and right arrows) located between the fields and columns lists, indicating the mechanism for moving fields to the columns box.

**Fields Column:** Contains a list of all the fields in the selected dataset.

**Columns:** Controls the breakdown of information and which fields you want displayed on each row and column.

*Drag and drop or click on the arrow buttons to move selected fields to the columns box.*

## Sorting and Aggregation (2b) (Flat Only)

Field Name:	Sort:	Aggregation:	Use for Total:	Sort Order:
CAMPUS	Ascending		<input type="checkbox"/>	0
AGE RANGE	Ascending		<input type="checkbox"/>	1
EEO RACE/GENDER	Ascending		<input type="checkbox"/>	2
EMPLOYEE SALARY AMT CHANGE	Ascending	AVG	<input type="checkbox"/>	3

Records Per Page: 25  Show Grand Totals

Note that the data I selected in the previous tab is now displayed here

**Sort-** Whether or not it is an ascending (A-Z) or descending (Z-A) sort.

**Aggregation-** If you want to apply an aggregation operation to this field, otherwise leave blank. *Example: AVG over SALARY*

**Use for Total-** If checked, the chosen aggregation will be added to any other checked field to create a row total. *Example: Base Salary + Other Salary could be added for a combined total; or, alternately, you could leave Other Salary unchecked so that only Base Salary goes toward the row total.*

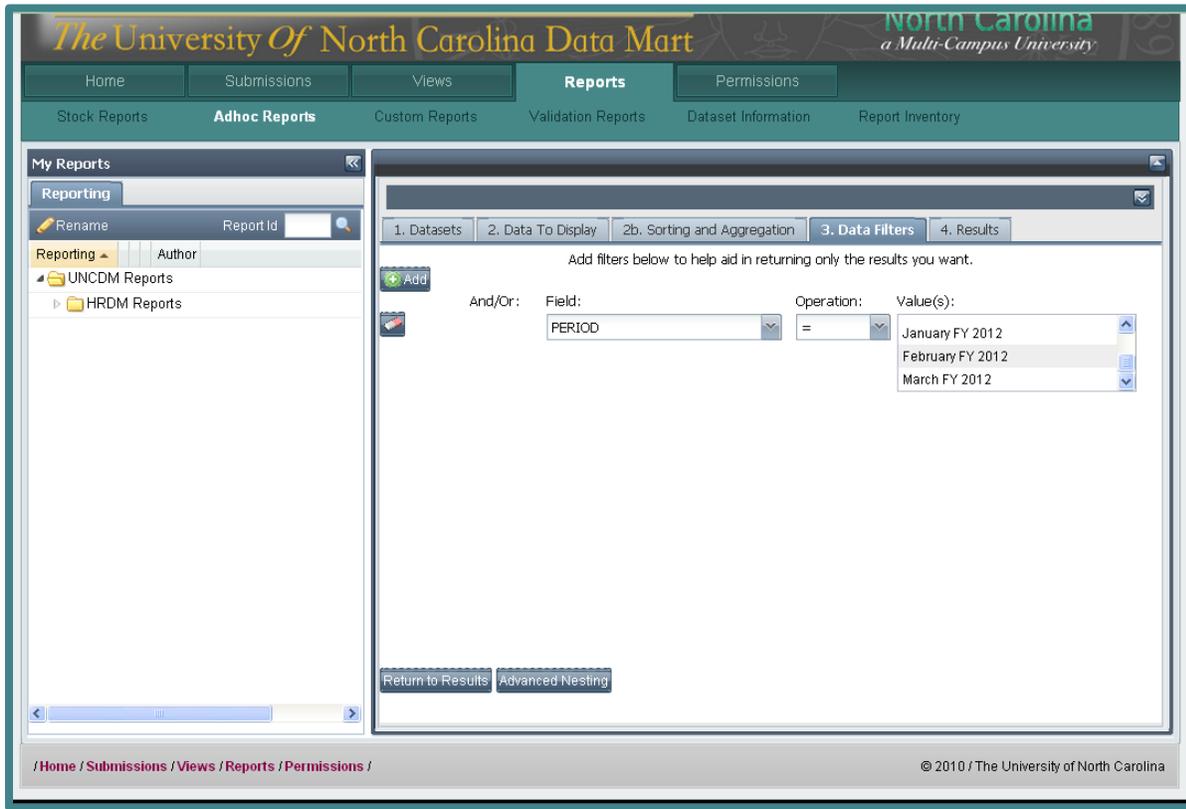
**Records Per Page-** Controls the size of the pagination within the web browser. Defaults to 25 and can be extended, but will slow down processing.

**Sort Order-** A numeric value that controls the order of the sort. *It will DEFAULT to the order of the fields in the "2. Data to Display" tab. Therefore, you can drag/drop the sort order on that tab as well.*

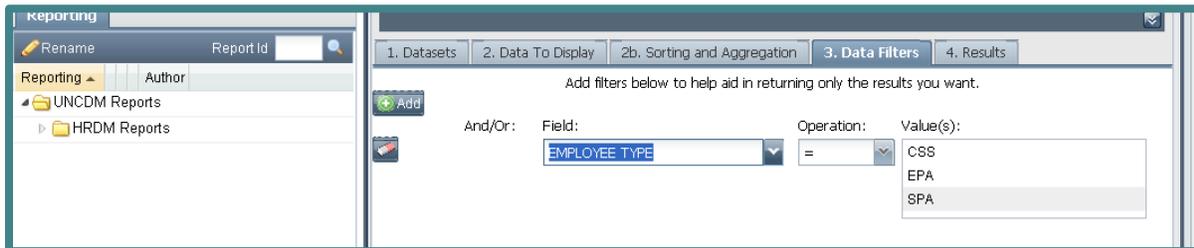
**Show Grand Totals-** If checked, then it will sum all of the total columns for each row into one master total row

# Data Filters

Allows you to control/filter the subset of data used to populate the query.



## Other examples of Data Filters



**NOTE:**

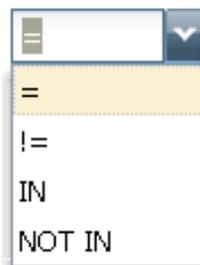
*If you want to select multi-values from a dropdown, then you need to use the "IN" operation instead of the "=" operator.*

*Select multiple values by holding down the 'CTRL' key and simultaneously clicking on the values you desire.*

**Field Dropdown-** You can select the field from the list for which you want to add a filter criteria.

**Operation-** Depending on the underlying data type of the field you select, you will have options governing what operations are valid.

Possible Operations and their meanings



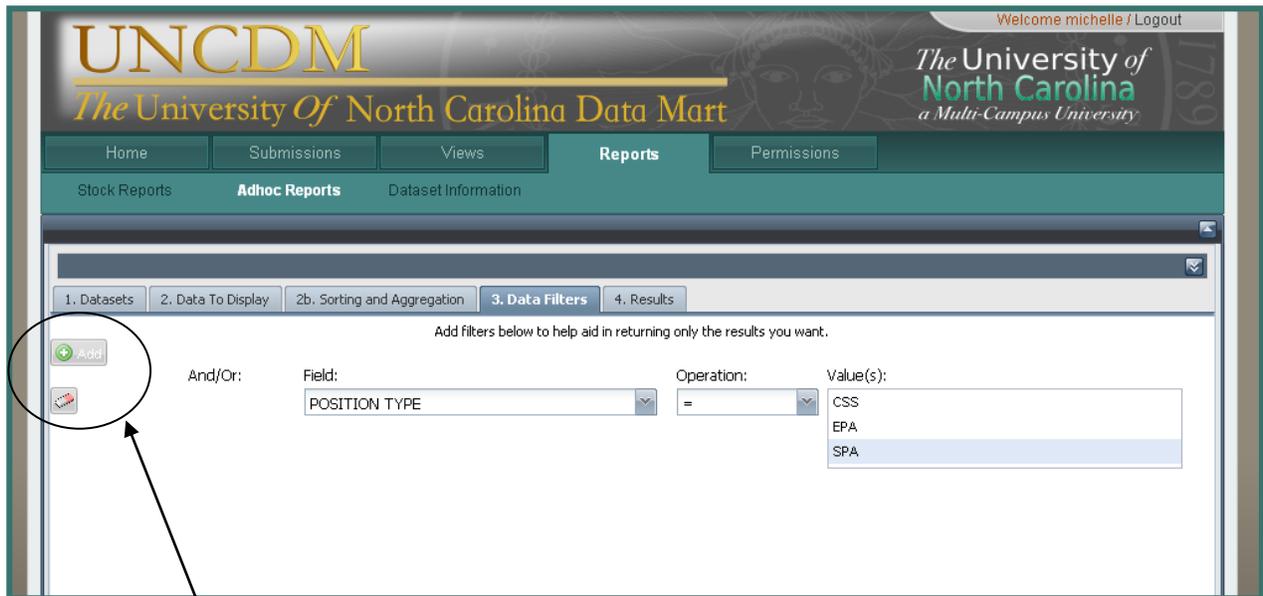
*= The field selected will equal the value(s) you select*

*!= The field selected will not be equal to the value(s) selected*

*In= The field selected will be included in the value(s) you select*

*NOT IN- The field selected will be excluded from the value(s) you select.*

**Value-** Depending on the underlying data type of the field, you will either manually enter a value, select a date, or click on a list of items in a dropdown to specify the exact details you want.



**Add Filter-** You can click the "Add" button to add additional criteria.

**Erase Filters-** You can click the eraser icon to erase any filters you have currently selected.

# Results

Welcome michelle / Logout

## UNCDM

The University Of North Carolina Data Mart

The University of North Carolina  
a Multi-Campus University

Home Submissions Views **Reports** Permissions

Stock Reports Adhoc Reports Custom Reports Validation Reports Dataset Information Report Inventory

My Reports

Reporting

Rename Report Id

Reporting Author

- UNCDM Reports
  - HRDM Reports

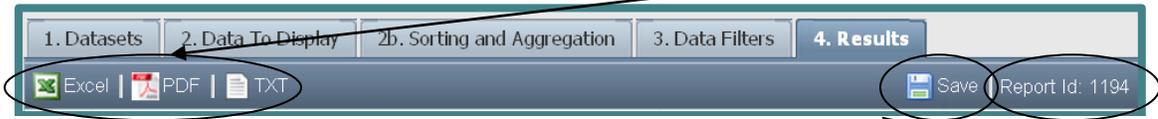
1. Datasets 2. Data To Display 2b. Sorting and Aggregation 3. Data Filters 4. Results

Excel PDF TXT Save Report Id: 1194

	CAMPUS	AGE RANGE	EEO RACE/GENDER	EMPLOYEE SA
1	FAKEU	20-29	American Ind or Alaska Na...	
2	FAKEU	20-29	American Ind or Alaska Na...	
3	FAKEU	20-29	Asian Female	
4	FAKEU	20-29	Asian Male	
5	FAKEU	20-29	Black or African American ...	
6	FAKEU	20-29	Black or African American ...	
7	FAKEU	20-29	Hispanic Female	
8	FAKEU	20-29	Hispanic Male	
9	FAKEU	20-29	Unknown Female	
10	FAKEU	20-29	Unknown Male	
11	FAKEU	20-29	White Female	
12	FAKEU	20-29	White Male	
13	FAKEU	30-39	American Ind or Alaska Na...	
14	FAKEU	30-39	American Ind or Alaska Na...	
15	FAKEU	30-39	Asian Female	

Page 1 of 4 | Displaying 1 - 25 of 83

**Export to Excel, PDF, TEXT-** Generate an Excel, PFT, Text file with the information in the report by selecting the corresponding icon.



**Save:** Save your report by selecting this icon  
You will then be prompted to name your report which will be saved to your personal subdirectory



**Report ID:** Is the number specifically associated with this report. This number allows you to quickly generate a specific report without having to reenter the different parameters and filters. It is also a method for sharing reports among users.

To generate a previously processed report, enter the report id in the 'Report ID' field on the Reporting tab and click on the search icon. Your report will display in the results pane.

*Note: If you change the selection criteria for a report, a new report id will be generated.*

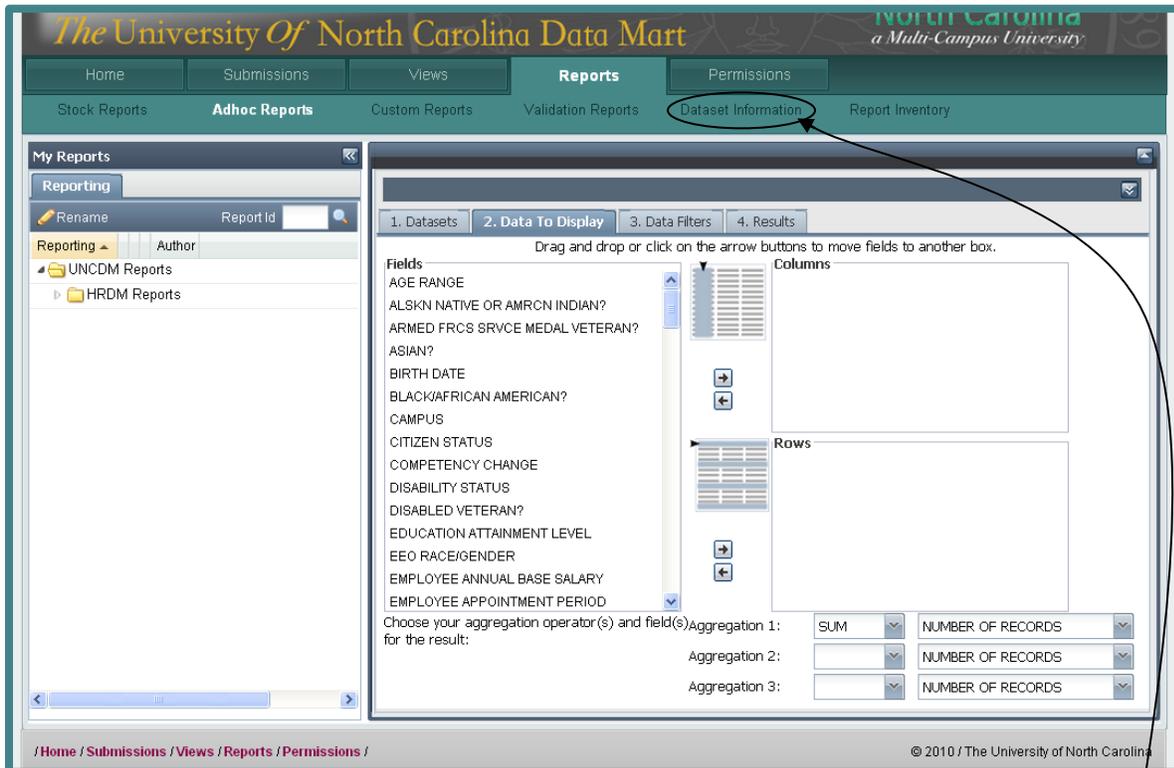
	CAMPUS	AGE RANGE	EEO RACE/GENDER	EMPLOYEE SALARY AMT CHANGE
1	FAKEU	20-29	American Ind or Alaska Nat ...	.00
2	FAKEU	20-29	American Ind or Alaska Nat ...	.00
3	FAKEU	20-29	Asian Female	37,784.00
4	FAKEU	20-29	Asian Male	59,412.00
5	FAKEU	20-29	Black or African American ...	38,637.00
6	FAKEU	20-29	Black or African American ...	37,252.00
7	FAKEU	20-29	Hispanic Female	19,889.00
8	FAKEU	20-29	Hispanic Male	36,531.00
9	FAKEU	20-29	Unknown Female	35,372.00
10	FAKEU	20-29	Unknown Male	32,301.00
11	FAKEU	20-29	White Female	44,602.00
12	FAKEU	20-29	White Male	42,634.00
13	FAKEU	30-39	American Ind or Alaska Nat ...	73,996.00
14	FAKEU	30-39	American Ind or Alaska Nat ...	.00
15	FAKEU	30-39	Asian Female	28,733.00
16	FAKEU	30-39	Asian Male	4,311.00
17	FAKEU	30-39	Black or African American	34,956.00



**Pagination-** You can use the arrows at the bottom of the window to scroll through the pages of results if they exceed one page or refresh the report

## Data to Display- Pivot

If Report Type 'Pivot' is chosen, the screen below will be displayed.



**Fields Column:** Contains a list of all the available datasets.

Definitions of fields can be found under the link 'Dataset Information'

*(See page 53 for more information on the Dataset Information tab)*

*Drag and drop or click on the arrow buttons to move selected fields to or from the columns and rows boxes.*

**Columns/Rows:** Controls the breakdown of information and which fields you want displayed on each column and row. *A maximum of three columns is allowed.*

*\*Note: Adhoc Pivot Repots need both columns and rows to work correctly\**

The University of North Carolina Data Mart

North Carolina  
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Home Submissions Views **Reports** Permissions

Stock Reports Adhoc Reports Custom Reports Validation Reports Dataset Information Report Inventory

My Reports

Reporting

Rename Report Id

Reporting Author

UNCDM Reports

HRDM Reports

1. Datasets 2. Data To Display 3. Data Filters 4. Results Charts

Drag and drop or click on the arrow buttons to move fields to another box.

Fields

AGE RANGE

ALSKN NATIVE OR AMRCN INDIAN?

ARMED FRCS SRVCE MEDAL VETERAN?

ASIAN?

BIRTH DATE

BLACK/AFRICAN AMERICAN?

CAMPUS

CITIZEN STATUS

COMPETENCY CHANGE

DISABILITY STATUS

DISABLED VETERAN?

EMPLOYEE ANNUAL BASE SALARY

EMPLOYEE APPOINTMENT PERIOD

EMPLOYEE APPOINTMENT TYPE

EMPLOYEE CAMPUS IDENTIFIER

Columns

EMPLOYEE TYPE

NUMBER OF RECORDS

EMPLOYEE ANNUAL BASE SALARY

EMPLOYEE APPOINTMENT PERI...

EMPLOYEE FTE AMT CHANGE

EMPLOYEE FTE PCT CHANGE

EMPLOYEE RAW SAL AMT CHA...

EMPLOYEE SAL/FTE RATIO PCT...

EMPLOYEE SALARY AMT CHANGE

EMPLOYEE SALARY PCT CHANGE

Rows

EDUCATION ATTAINME

EMPLOYEE TOTAL FTE

PRIMARY JOB FTE

PRMRY POS BDGT ANNUAL BAS...

PRMRY POSITION APPT PERIOD

PRMRY POSITION TOTAL FTE

PRMRY SPA BANDED MAX SALA...

Choose your aggregation operator(s) and field(s) for the result:

Aggregation 1: AVG NUMBER OF RECORDS

Aggregation 2: NUMBER OF RECORDS

Aggregation 3: NUMBER OF RECORDS

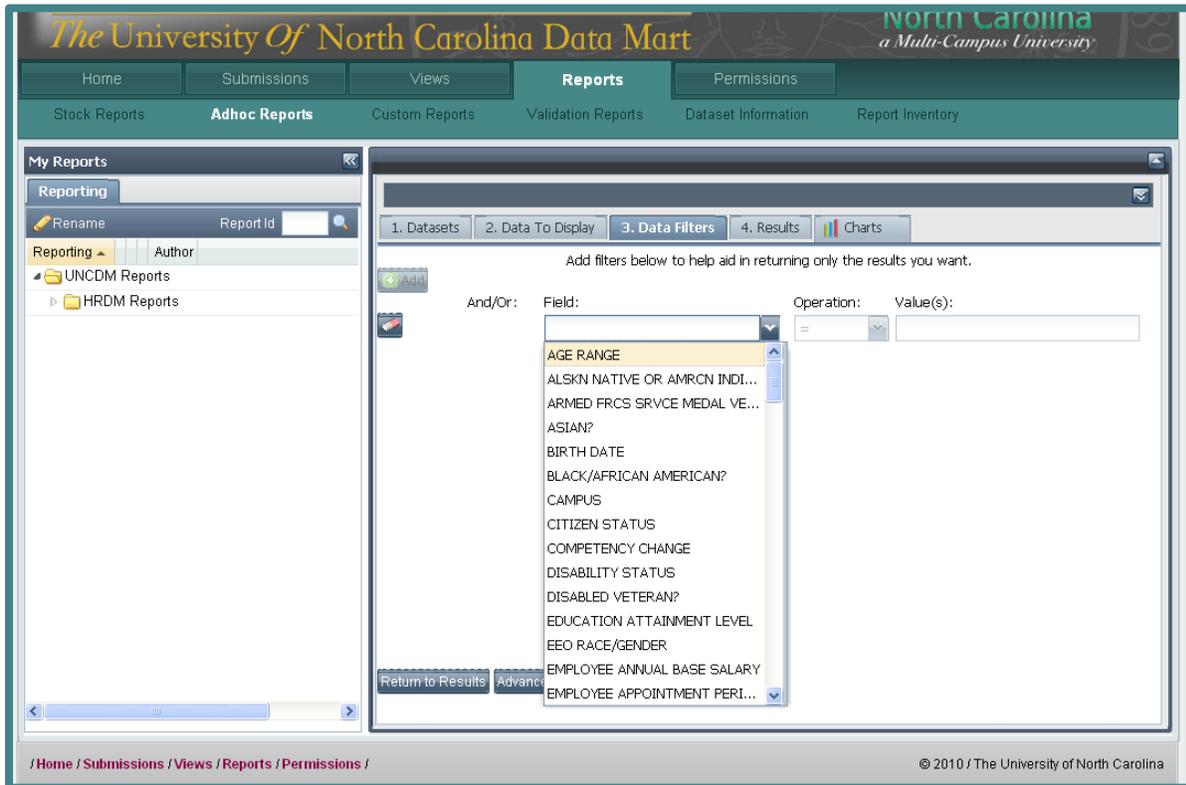
/ Home / Submissions / Views / Reports / Permissions /

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**Aggregation Operator & Field:** Controls what operator and over which field the aggregation will occur. If left blank, it will count the number of unique records.

## Data Filters

Allows you to control/filter the data used to populate the query.

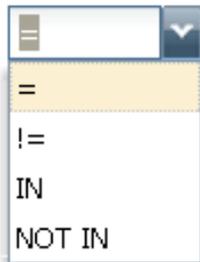


*NOTE: If you want to select multi-values from a dropdown, then you need to use the "IN" operator instead of the "=" operator.*

**Field Dropdown-** You can select the field from the list for which you want to add a filter criteria.

**Operation-** Depending on the underlying data type of the field you select, you will have options governing what operations are valid.

## Possible Operations and their meanings



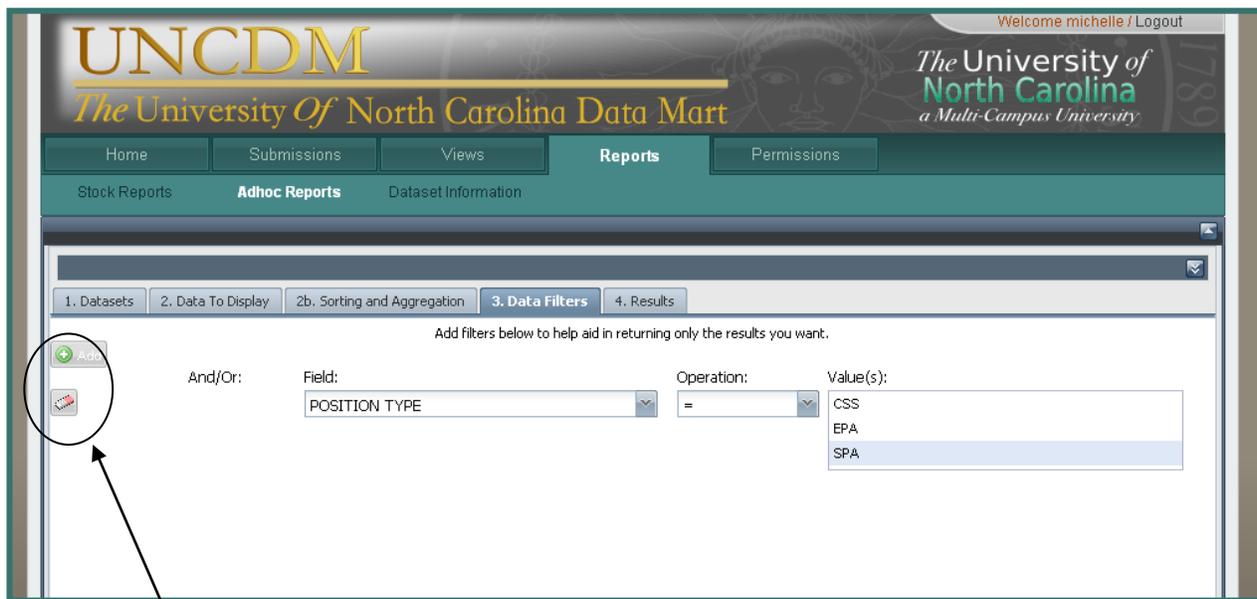
= The field selected will equal the value(s) you select

!= The field selected will not be equal to the value(s) selected

In= The field selected will be included in the value(s) you select

NOT IN- The field selected will be excluded from the value(s) you select.

**Value-** Depending on the underlying data type of the field, you will either manually enter a value, select a date, or click on a list of items in a dropdown to specify the exact details you want.



Add Filter- You can click the "Add" button to add additional criteria.

Erase Filters- You can click the eraser icon to clear your filters

## Results

The screenshot shows the 'Reports' section of the Data Mart interface. A table displays the following data:

EDUCATION ATTAINMENT LEVEL	SPA	Total
Not High School Graduate	116	116
High School Graduate	324	324
College or Associate Degree	402	402
Doctoral or Professional	12	12
Bachelor's Degree	538	538
Master's Degree	145	145
Total	1,537	1,537

The SPA values (116, 324, 402, 12, 538, 145) are highlighted in blue in the original image, with an arrow pointing from the text below to the value 116. The interface includes navigation tabs (1. Datasets, 2. Data To Display, 3. Data Filters, 4. Results, Charts), export options (Excel, PDF, TXT), and a 'Save' button. The report ID is 1236.

If you wish to view more detailed information about the numbers that were generated by your report, simply select the blue number under the category you wish to learn more about.

**Export to Excel-** Generate an Excel file with the information in the report.

This screenshot shows the bottom of the report interface. It features three export buttons: 'Excel', 'PDF', and 'TXT'. On the right side, the 'Report Id: 748' is displayed and circled in red. Arrows point from the text below to these elements.

**Export to PDF-** Generate a PDF file with the information in the report.

**Export to TXT-** Generate a text file with the information in the report.

**Report ID:** Is the number specifically associated with this report. This number allows you to quickly generate a specific report without having to reenter the different parameters and filters.

This number will change if you go back and alter the report in any way.

Welcome michelle / Logout

**UNCDM**  
The University of North Carolina Data Mart

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Home Submissions Views **Reports** Permissions

Stock Reports **Adhoc Reports** Dataset Information

1. Datasets 2. Data To Display 3. Data Filters 4. Results Charts

Expand-All Collapse-All Excel PDF TXT Report Id: 764

EDUCATION ATTAINMENT LEVEL	F	M
+ Not High School Graduate	1	1
+ High School Graduate	1	1
+ College or Associate Degree	1	1
+ Bachelor's Degree	1	1
+ Master's Degree	1	1
+ Doctoral or Professional	1	1
Total	1	1

Page 1 of 1 | Displaying 1 - 7 of 8

know the report id of a previous report produced? Enter it here  Run

/ Home / Submissions / Views / Reports / Permissions /

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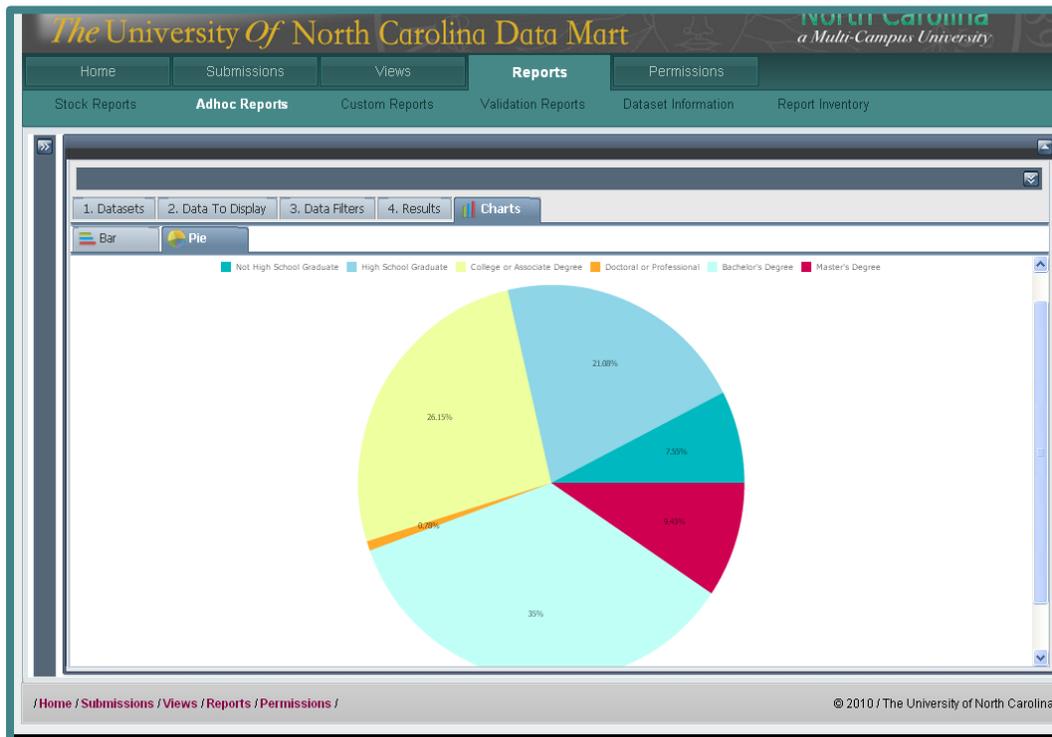
**Drill Down (pivot)-** If you have added more than 1 row in a pivot table, then you can click the "+" sign beside each row to expand the next level of data.

**Pagination-** You can use the arrows at the bottom of the window to scroll through the results if they exceed one page.

You can enter a Report ID here to generate a report used previously

## Charts

Provides a graphical representation of data in either a Bar or Pie Chart.



*Note: Although it is possible to generate charts from flat files, they are mainly derived from Pivot Tables.*

### Bar Graphs

- Only allow one column
- Only the first level of rows will be used.
- Multiple aggregations will not display.

### Pie Charts

- Only allow one column
- Only the first level of rows will be used.
  - These will become the legend
- The percentages will be based off of the total number
- The use of filters is vital in order to create relevant pie charts.

It is important to know that if a report does not contain the values necessary to create a readable bar graph or pie chart, the tab displaying Charts will not be available.

# Custom Reports

The custom report link on the Reports tab is a new reporting interface for special, standardized reports that require programming to achieve. For example, our first custom report is a staffing report requested by OSP that has OAC categories broken down by race, ethnicity and gender categories that is designed to match the exact format of an existing report in Beacon.

**UNCDM**  
*The University Of North Carolina Data Mart*

The University of North Carolina  
*a Multi-Campus University*

Home Submissions Views **Reports** Admin Permissions

Stock Reports Adhoc Reports **Custom Reports** GA Validation Reports Validation Reports Dataset Information Report Inventory

**Choose Your Filters**

Reports: Staffing Activity Report  
Staffing Activity Report

Campus: ASU  
ECU  
ECSU  
FSU

Start Period: July FY 2012

End Period: July FY 2012

Output: PDF

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# Validation Reports

Validation reports help you get a quick overview of key data elements, so you can spot issues that might not trigger as actual ERRORS, but still indicate a possible issue with data integrity.

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Home Submissions Views Reports Permissions

Stock Reports Adhoc Reports Custom Reports Validation Reports Dataset Information Report Inventory

1. Select Report:

Broad Banded Employees  
County Distribution

2. Specify Parameters:

COUNTY equals Any

Any  
Avery  
Buncombe  
Cabarrus  
Carteret  
Columbus  
Durham  
Forsyth  
Guilford  
Halifax  
Henderson  
Jackson  
Jones  
Madison  
Mecklenburg  
New Hanover  
Orange  
Outside Of North Carolina

Run Report

/ Home / Submissions / Views / Reports / Permissions /

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Step 1: Select Report- User can select one of the stock reports

Step 2: Specify Parameters

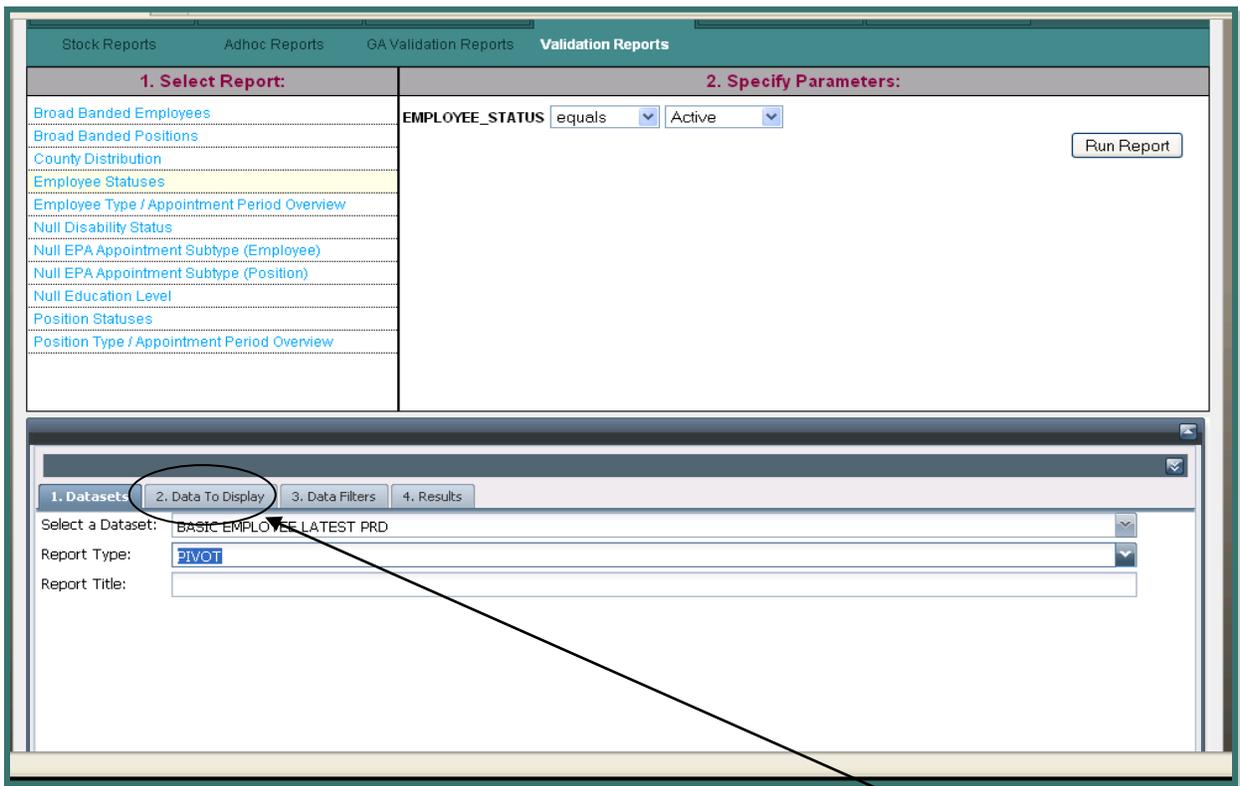
Step 3: Click “Run Report”

COUNTY	SPA NON-FACULTY	Total
Buncombe	<a href="#">10</a>	3
Cabarrus	<a href="#">16</a>	6
Carteret	<a href="#">1</a>	1
Guilford	<a href="#">10</a>	2
Henderson	<a href="#">16</a>	16
Rockingham	<a href="#">1</a>	1
Tyrrell	<a href="#">4</a>	4
Wake	<a href="#">4,378</a>	4,378
Washington	<a href="#">4</a>	4
Total	4,415	4,415

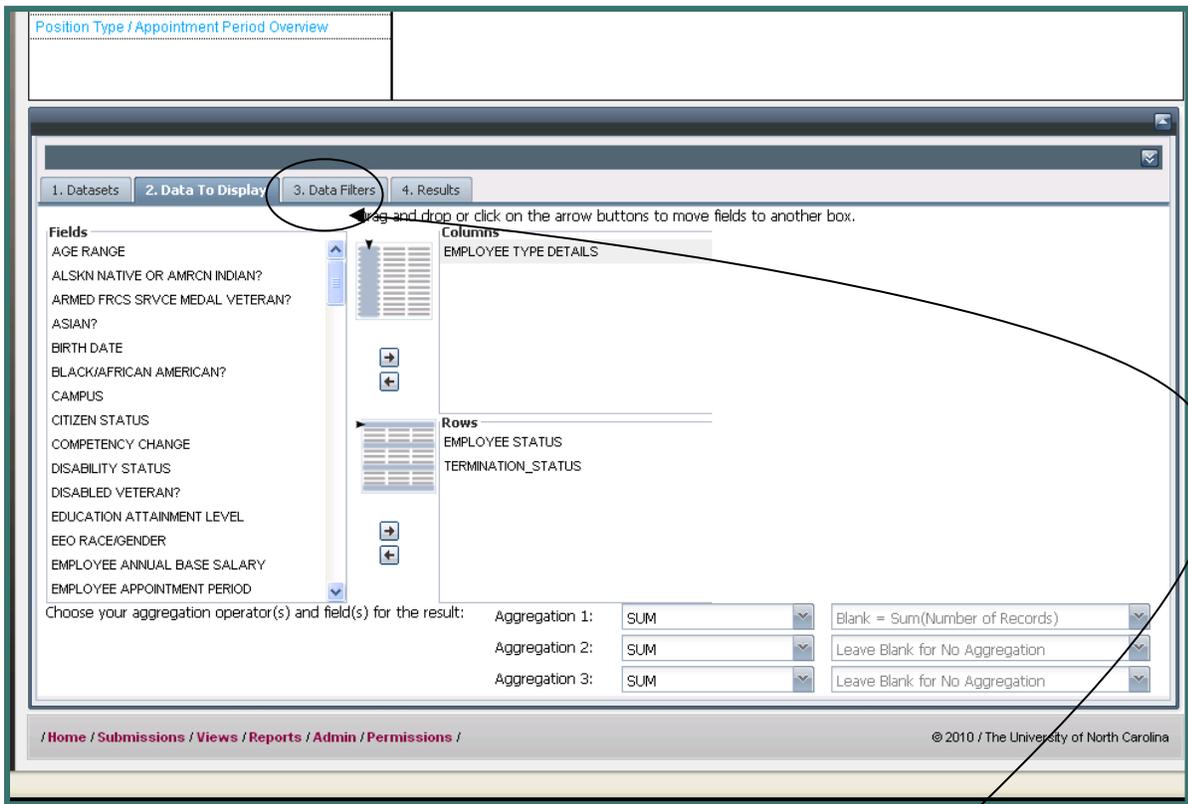
A quick review of the report is usually enough to determine if there are obvious errors with the data. (For instance, if you are reporting null values; or if you are reporting no new hires in a month where you know a new hire was made).

You also have the option to look deeper into the data. Clicking on the numbers in blue will allow you to investigate any of the generated numbers.

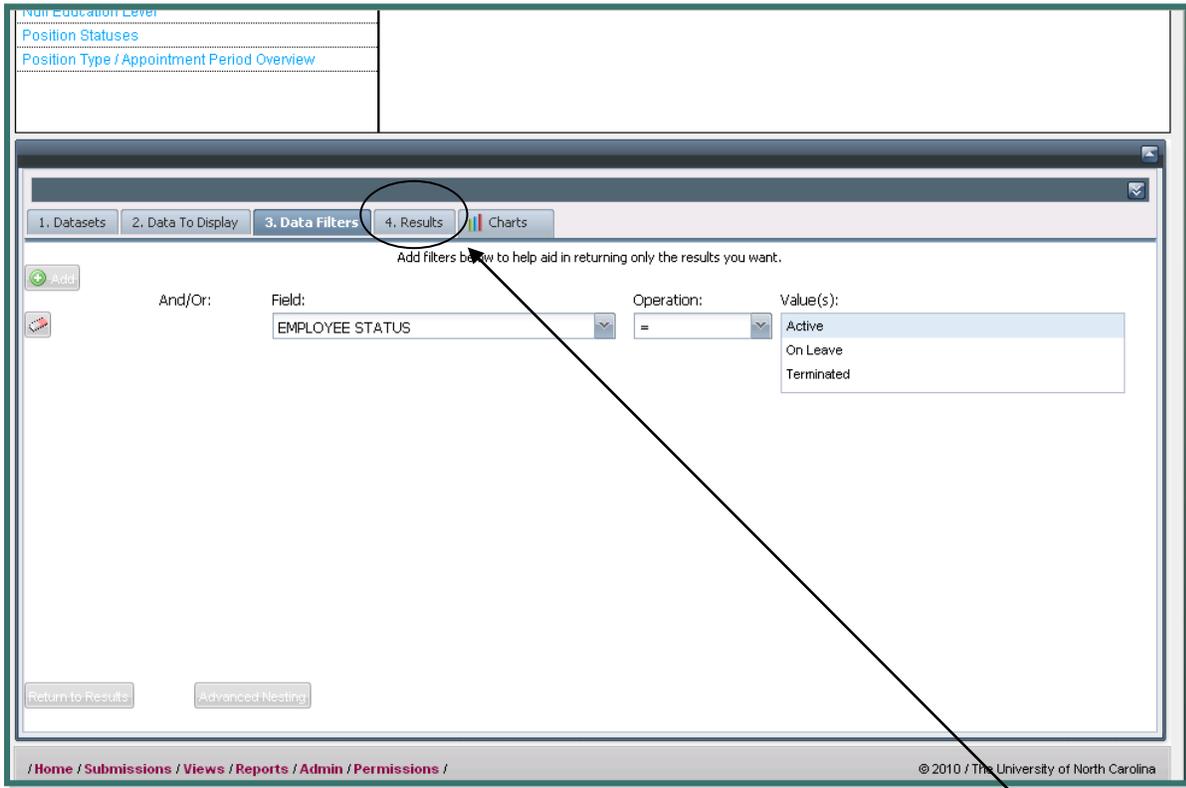
Selecting “Advanced” allows you to reconfigure or filter the data further, just as you could in the previous tabs.



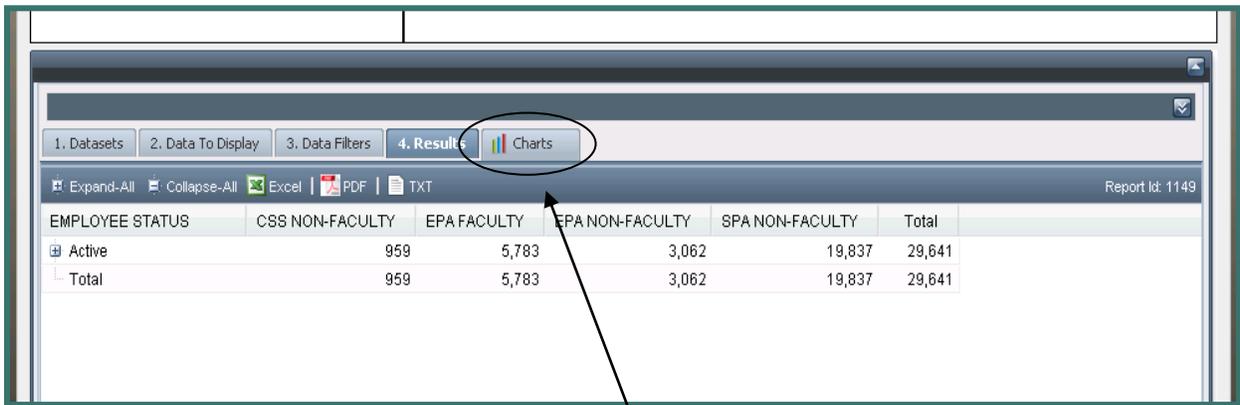
Selecting “Data to Display” allows you to see the way the table is set up



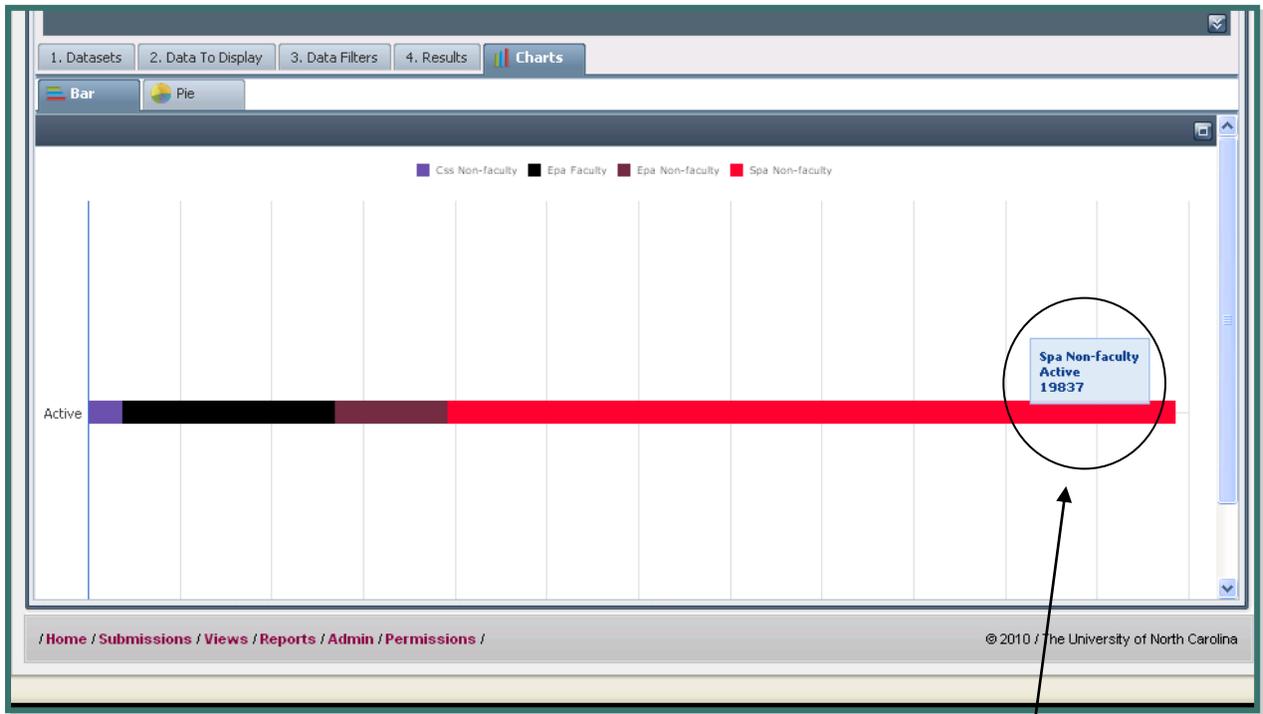
Selecting “Data Filters” allows you to view the filters applied.



Selecting “Results” will bring you back to the original results generated.



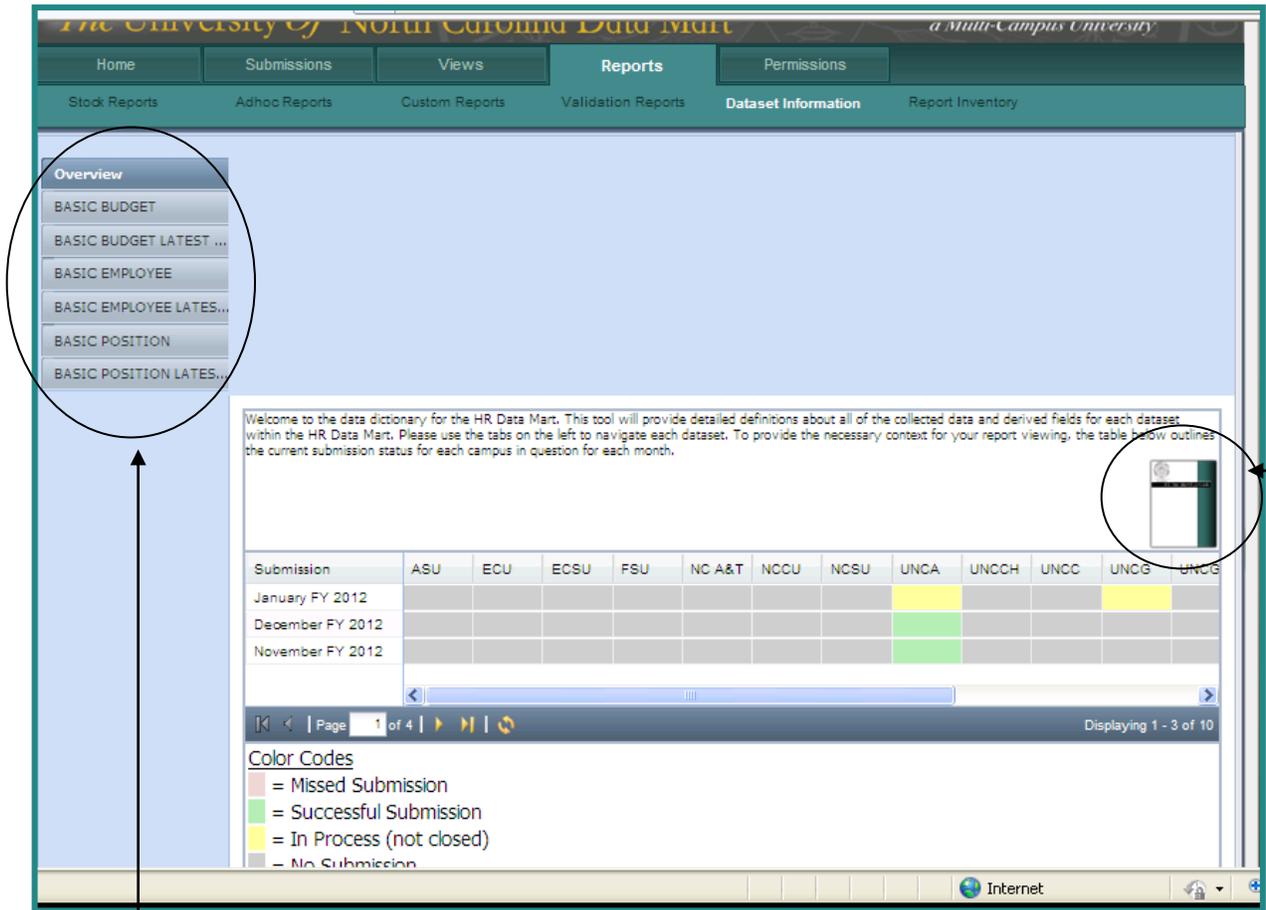
Selecting “Charts” allows you to view a graphical representation of the data



You can hover your mouse over the different parts of the chart to receive more information.

# Dataset Information

Provides detailed definitions about all of the collected data elements and derived fields for each dataset within HR Data Mart.



Use the tabs on the left to navigate the dataset for each main View:

Basic (budget/employee/position): Takes all available periods into consideration

Basic Latest (budget/employee/position): Takes only the latest successfully-closed period into consideration.

*This table outlines the current submission status for each campus in question for each month.*

You have the option to view the Data Mart User Guide by selecting this icon

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Home Submissions Views **Reports** Permissions

Stock Reports Adhoc Reports Custom Reports Validation Reports **Dataset Information** Report Inventory

Overview  
BASIC BUDGET  
BASIC BUDGET LATEST ...  
**BASIC EMPLOYEE**  
BASIC EMPLOYEE LATES...  
BASIC POSITION  
BASIC POSITION LATES...

Description: This view contains data from ALL PERIODS for the employee's records and position information of their primary job. One record per employee per campus per reporting period.

Printer Friendly | Search

Field Name	Definition	Type	Example Data	Notes
AGE RANGE	A derived field based on an individual's birth date, which will categorize them into ten year age ranges.	<a href="#">VARCHAR2</a>	40-49	
ALSKN NATIVE OR AMRCN INDIAN?	A boolean value (Y=Yes, N=No) indicating whether the employee self-identified themselves as being an Alaskan Native or American Indian.	<a href="#">VARCHAR2</a>	Y	
ARMED FRCS SRVCE MEDAL VETERAN?	A boolean value (Y=Yes, N=No) indicating whether the employee self-identified	<a href="#">VARCHAR2</a>	Y	Same definition as required for

Internet

The Dataset Information is arranged into a table

Field Name: Displays the field name

Definition: Provides a description of the field

Type: Displays the format of the information the field is looking for (*for some fields, this is a live link that can be clicked on*)

Example Data: Provides an example of what the data would look like for that particular field

Notes: Displays any notes that pertain to that particular field

# Report Inventory

Lists every stock report along with its related data elements

The screenshot displays the 'Report Inventory' page of the UNCDM (The University of North Carolina Data Mart). The page features a header with the UNCDM logo and navigation tabs for Home, Submissions, Views, Reports, and Permissions. Under the 'Reports' tab, there are sub-tabs for Stock Reports, Adhoc Reports, Custom Reports, Validation Reports, Dataset Information, and Report Inventory. The main content area shows a table of reports with the following data:

Report id	Report Type	Title	Description	Filters	Data Elements	Aggregations
103	PIVOT	Advancement Change By Gender EPA Report	Advancement Change By Gender EPA Report	CAMPUS, PERIOD, EPA_ADVANCEMENT_C...	EPA_ADVANCEMENT_CHANGE, GENDER, CAMPUS, PERIOD	SUM(COUNT OF RECORD
102	PIVOT	Advancement Change By Gender SPA Report	Advancement Change By Gender SPA Report	CAMPUS, PERIOD, SPA_ADVANCEMENT_C...	SPA_ADVANCEMENT_CHANGE, GENDER, CAMPUS, PERIOD	SUM(COUNT OF RECORD
86	FLAT	Advancement Change EPA Report	Advancement Change EPA Report	CAMPUS, PERIOD, EPA_ADVANCEMENT_C...	CAMPUS, PERIOD, FULL_NAME, EPA_ADVANCEMENT_CHANGE, RACE_N, VETERAN_FORCES_SVC_MEDAL, RACE_A, BIRTH_DATE, RACE_B, CITIZEN_STATUS, COMPETENCY_CHANGE, DISABILITY_STATUS, VETERAN_DISABLED, EDUCATION_LEVEL, EEO_RACE_GENDER, EMPLOYEE_ANNUAL_BASE_SALARY, APPOINTMENT_PERIOD, APPOINTMENT_TYPE, CID, EMPLOYEE_COMP_LEVEL, EMPLOYEE_EFFECTIVE_DATE, PERFORMANCE_RATING, EMPLOYEE_SALARY_AMT_CHANGE, EMPLOYEE_SALARY_CHANGE, EMPLOYEE_SALARY_PCT_CHANGE, EMPLOYEE_STATUS, TOTAL_FTE, EMPLOYEE_TYPE, EMPLOYEE_POSITION_FTE, EPA_ACADEMIC_RANKING, EPA_TENURE_STATUS, CENSUS_ETHNICITY, FIRST_NAME, GENDER, INITIAL_HIRE_DATE, IPEDS_RACE, IS_EPA_APPOINTMENT_CHANGE, IS_NAME_CHANGE, IS_NEWHIRE_AND_SEPARATION, IS_SPA_APPOINTMENT_CHANGE, IS_SSN_CHANGE, IS_TITLE_CHANGE, LAST_NAME, MIDDLE_NAME, SUFFIX, NEW_HIRE_SEPARATION, VETERAN_OTHER_PROTECT, RACE_O, RACE_P, PERIOD_EFFECTIVE_DATE, POSITION APPOINTMENT SUBTYPE.	

# Permissions

Displays the permissions granted to each user of your campus. During the first phases of the Data Mart project, UNC-GA will establish admin privileges for campuses. At some point, we expect to turn the admin privileges over to campuses along with recommendations for access protocol.

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Home Submissions Views Reports **Permissions**

Last Name: First Name: Institution: FAKEU Permission: Search

	Name	Campus	DataMart Type	Can View Results	Can Upload Data	Gets Emails	Can Grant Access
1	Hopper, Steven	FAKEU	HRDM	Y	N	N	N
2	Rainey, Michele	FAKEU	HRDM	Y	N	Y	N

Page 1 of 1 Displaying 1 - 2 of 2

/ Home / Submissions / Views / Reports / Permissions / © 2010 / The University of North Carolina

## Permissions:

**Can View Results:** User is allowed to view data and create reports within HRDM

**Can Upload Data:** User is allowed to Upload/ Reload Data for the campus for campus submission

**Gets Emails:** Receives emails from HRDM

**Can Grant Access:** Can grant other users on the campus access to HRDM (currently disabled for campuses)

# Data Mart FAQ

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To view the most up to date FAQ click the link below:

<http://collab.northcarolina.edu/public/index.php/projects/288/files/17162>

## Background

1. [What was the impetus to develop the HR Data Mart \(“Data Mart”\)?](#)
2. [Who designed the Data Mart?](#)

## Procedural Issues

3. [How much time will we have to fix errors before each month’s Data Mart “snapshot”?](#)
4. [What is the difference between a Warning and an Error?](#)
5. [Does Data Mart coordinate with existing payroll cycles?](#)
6. [Will the Data Mart replace the Personnel Data Files \(PDF\)?](#)
7. [Will the Data Mart still be a relevant project if S575 passes?](#)
8. [Who are the Project Managers on each campus?](#)

## Security Issues

9. [Why are we using social security numbers and birth dates?](#)
10. [What measures has the General Administration taken to protect the information supplied to Data Mart, specifically the Social Security Number of each employee?](#)
11. [What data elements can individual users access?](#)
12. [How do we handle locked Job Records in Banner?](#)

## Data Element Issues

13. [Will the Data Mart accept alpha-numeric data types in place of numeric data types?](#)
14. [What is Effective Date on a position?](#)
15. [What is our system recognizes more than the required 5 termination codes?](#)
16. [Does the Data Mart “Veteran Status” comply with Federal guidelines?](#)
17. [What if we have EPA or miscellaneous employees not in positions?](#)
18. [Is a primary position required?](#)
19. [Should ‘funding source’ be attached to a job or position?](#)
20. [Is the Data Mart tracking position vacancies?](#)
21. [Is highest education level required?](#)
22. [Will we lose access to historical PMIS data?](#)
23. [Can we export Data Mart data into an Excel chart?](#)
24. [Who can I contact with further questions?](#)
25. [What do we do about employees moving from SPA to EPA or TEMP status?](#)
26. [What do we do about non-resident aliens that we assign a temporary SSN placeholder?](#)
27. [Is Data Mart looking for the county the employee is working in or where the job is based?](#)
28. [What do we do with employees who are in between job assignments and hence are not active, on leave, or terminated? Can their status be NULL?](#)
29. [Are employees who are terminated but still due leave payout still considered active?](#)
30. [What value should we use for Last Day Worked?](#)
31. [Should we be entering pooled positions?](#)
32. [What are the differences between Appropriation, Receipts, and Other funding types in the HR Data Mart and how do I determine each?](#)

33. [Do we need to include positions that exist only as a way to categorize salary reserves?](#)
34. [For rehires, do we use their original hire date or their rehire date for the “Initial Hire Date” data element?](#)
35. [We’re seeing NCAS budget codes showing up on error reports. Is there a list of codes that are acceptable?](#)
36. [For employees with multiple jobs, are we only required to use the salary of the primary job to calculate annual base salary?](#)

### **Code Issues (WCU CODE)**

37. [What is GORIROL and how does it play into the Data Mart?](#)
38. [Why use GTVSDAX for crosswalked data instead of hard coding things within the Data Mart scripts?](#)
39. [In what order do we apply the scripts and views to aid in creating the process?](#)

### **Post-Production Questions**

40. [We were told that we weren’t reporting our Faculty. What does that mean?](#)
41. [Is Appointment Type a required field?](#)
42. [What happens after a successful submission?](#)
43. [Can we look at our monthly data before the last 5 days of the month?](#)
44. [Does opening data early affect our 5-day window?](#)
45. [What info is OSP looking at?](#)
46. [Can we extract data from views into Excel?](#)
47. [We’ve had warning issues regarding an employee’s FTE being more than the FTE of a position.](#)
48. [What happens if our grace period spills over into the following month? Won’t our snapshot include data from that new month?](#)
49. [Do we have a glossary of terms or data elements?](#)
50. [Will temporary workers trigger an error report?](#)
51. [What do we do if we have an error for a valid CUPA code?](#)
52. [What are the most common errors with JCAT codes?](#)
53. [Do we have the ability to add campus users ourselves?](#)
54. [Can you save or re-run ad hoc reports?](#)
55. [Why am I getting an error on a NULL value for a data element that accepts NULL values?](#)
56. [When will we need to provide disability and education level data elements?](#)
57. [What are validation reports?](#)
58. [What should we do if our validation reports indicate we have no SPA time-limited employees?](#)
59. [How do we request additional Data Mart users?](#)
60. [Can we request a GA Override on an error we can’t solve?](#)
61. [When does the 3-day grace period start?](#)
62. [How do we close out our monthly submission during the grace period?](#)

## **1. What was the impetus to develop the HR Data Mart?**

In June 2009, a University-Wide HR Reporting Task Force was formed. This committee was charged with developing a proposal for the University reporting of required statewide HR information, to replace PMIS. Pursuant to this effort, campuses were asked to recommend changes that would make existing policies and practices more efficient and effective. The resulting inquiry revealed that duplicate data entry into the PMIS was identified as an area that strongly required efficiency review. In April 2010 a proposal was presented to the Office of State Personnel for UNC General Administration to present consolidated reporting of HR data on behalf of all campuses by providing regular snapshots of SPA personnel data.

## **2. Who designed the Data Mart?**

The HR Data Mart was designed and vetted by a steering committee composed of UNCGA, OSP, OSBM and campus representation. This group collectively defined the following objectives:

- Eliminate the need to enter duplicate data into PMIS
- Provide consistent, timely and accurate HR information to campuses, GA, OSP, OSBM and the General Assembly
- Increase our ability to catch and correct inaccurate HR data as it is recorded (and consequently prevent the costly and exhaustive revisions that result from a single, yearly snapshot)

## **3. How much time will we have to fix errors before each month's Data Mart "snapshot?"**

Campuses will be able to use a web-based application to test their data during a 5 day window before the monthly snapshot is taken on the last business day of the month. That snapshot

may generate Error or Warning reports. In the absence of any Errors, the snapshot will be closed for the month. If there are Errors, they must be resolved within a 3 business day grace period, at the end of which the Snapshot closes for the month.

## **4. What is the difference between a Warning and an Error?**

The Error Report flags data issues that must be fixed prior to the monthly snapshot being finalized. Examples of Errors include missing required fields or incorrect data formats. Warnings are potential data issues that the campus may want to review prior to the monthly snapshot, but will not prevent the monthly snapshot from being finalized. Campuses are more than welcome to request the inclusion of Warnings that benefit their own data process.

## **5. Is Data Mart being coordinated with existing payroll cycles?**

No. We suggest that you pull monthly Data Mart information after payroll is submitted, but the exact timing within the established timeframes is a campus decision.

## **6. Will Data Mart replace the Personnel Data File (PDF)?**

This has not been determined, but it is one of the long-term goals for Data Mart.

**7. Will Data Mart still be a relevant project if S575 passes?**

Data Mart will become even *more* relevant if the BOG is given personnel authority. Reports that the OSP are currently required to prepare for the General Assembly will then be required of the BOG. The BOG must have a system in place to collect and present this data.

**8. Who are the Project Managers on each campus?**

Appalachian State University	Richard Shook
East Carolina University	Rhonda Updyke Gavin
Elizabeth City State University	Tanisha Brumsley
Fayetteville State University,	James Campbell
North Carolina A&T University,	Maurice Warren
North Carolina Central University	John N Smith
North Carolina State University	Brian Simet
University of North Carolina at Asheville	Lisa Honeycutt
UNC at Chapel Hill	Dave Turner/Rich Arnold
University of North Carolina at Charlotte	Jared Waugh
University of North Carolina at Greensboro	Joella Anderson
University of North Carolina at Pembroke	George Guthrie
University of North Carolina at Wilmington,	Andrea Powell
University of North Carolina School of the Arts,	Susan Porter
Western Carolina University	Diana Catley
Winston-Salem State University	Janine McDuffie
UNC - General Administration	Keith Dupuis

**9. Why are we using social security numbers and birth dates?**

PMIS currently tracks social security numbers and birthdates; this is not a new data element. OSP uses this information to track the movement of employees, since campus PID numbers have no consistent value across different state agencies and campuses.

**10. What measures has General Administration taken to protect the information supplied to the Data Mart, specifically the Social Security Number of each employee?**

General Administration takes securing the information in the Data Mart extremely seriously. While we do not want to divulge specific details that could assist a hacker trying to penetrate our defenses, we can say that the following general steps are taken to protect this information:

- **Encrypted Transmission** - The web services architecture uses public key infrastructure to encrypt the data 3 times between the campus and General Administration. This triple encryption ensures authenticity of the following: 1) when GA requests the data from the campus and 2) when the campus responds with the actual data feed. In short, each campus is assured that it is GA making the request and that only GA can read its response.

- **De-identification** - As soon as General Administration receives the SSN, we immediately de-identify the data by separating the SSN from the remainder of the biographical information and replacing it with a meaningless identifier. The full SSN will never be displayed to the user via the web interface and will never be used to find employees in the system. Only the last 4 digits of the SSN is visible to authorized users of the system.
- **Encrypted Storage** - Once the SSN has been stripped from the employees record, it is encrypted twice and stored in a vault that can only be accessed by a limited set of database administrators. Access to this vault is logged and monitored.

### ***11. What data elements can individual users access?***

Security permissions are being established for both the standard reports (which are based on reports currently available to the OSP and OBM), as well as individual data elements that can be compiled into ad hoc reports. As an added security measure, all users will be required to read and sign a user agreement that is currently being developed by GA Legal.

### ***12. How do we handle locked Job Records in Banner?***

While we understand that Job Records in Banner are locked during the active payroll cycle, which at times could delay any changes to that Job Record, we believe the windows of time given in the monthly submission process will prevent any significant problems. If it becomes a recurring issue on campuses, we will absolutely reconsider the process deadlines.

### ***13. What if Data Mart requires a numeric entry and our data field is alpha-numeric?***

That won't be a problem; our IT folk can edit those requirements as necessary. Once identified, please pass along any specific instances to Steven Hopper, Director, GA Online Services ([hoppers@northcarolina.edu](mailto:hoppers@northcarolina.edu)).

### ***14. What is Effective Date on Position?***

In Banner, use Last Activity Date.

### ***15. What if our system recognizes more than 5 termination codes?***

We will provide a translation table. We understand that several data elements may require translation tables during the initial stages of the program. Unfortunately, this is a necessary effort in order to achieve standardized values that make sense across all campuses.

### ***16. Does the Data Mart "Veteran Status" comply with Federal guidelines?***

The Data Mart values are compliant with current VETS 100 and 100a reporting.

**17. What if we have EPA or miscellaneous employees not in positions?**

All EPA employees must be in positions; it's a requirement of the PDF process. Miscellaneous employees that are currently not in designated positions will be handled during Phase 3.

**18. Is a “Primary Position” required?**

All employees *must* have a primary position.

**19. Should “Funding Source” be attached to job or position?**

For phase 1, we will only be attaching funding sources to positions. Based on campus feedback, we are currently readdressing this question for future phases

**20. Is Data Mart tracking position vacancies?**

Data Mart will *not* replace the current campus vacancy reporting process. The closest data elements that Data Mart tracks with regards to potential vacancies are positions that are active, frozen or eliminated.

**21. Is Highest Education level required?**

The state does track Highest Education level. However, we understand that it's not being tracked consistently across campuses. As mentioned above, once we review the campus error reports, we'll re-evaluate its inclusion in Phase 1.

**22. Will we lose access to historical PMIS data?**

Historical PMIS Data through 12/31/2011 is available in BEACON BI. In late 2011, each campus designated between two and three super-trainers who learned how to access this historical data. Please contact your Data Mart PMO or Keith Dupuis ([kedupuis@northcarolina.edu](mailto:kedupuis@northcarolina.edu)) with any questions about your campus super-trainers.

**23. Can we export Data Mart data into an Excel chart?**

Yes. Data Mart will include two main reporting tools: standard reports, and ad hoc reports. In addition to campus-specific information, Data Mart will—in planned enhancements—also provide aggregate-level data from across all campuses (for instance, the prevalence of a specific JCAT code across all campuses.)

**24. Who can I contact with further questions?**

You can contact Gwen Canady (Project Management Officer, [gcanady@northcarolina.edu](mailto:gcanady@northcarolina.edu)) or Ann Lemmon (Associate VP for HR, [awlemmon@northcarolina.edu](mailto:awlemmon@northcarolina.edu)) with general questions, or Steven Hopper (Director of Online Services, [hoppers@northcarolina.edu](mailto:hoppers@northcarolina.edu)) with technical questions.

**25. What do we do about employees moving from SPA to EPA or TEMP status?**

The current procedure involves terminating the employee and rehiring them under a new Employee Type. There is a possibility for confusion when the snapshot is taken between those two transactions. (IE, employees could show as terminated one month and as a new hire the next.) We do not expect this to be a common occurrence, however, and can handle it as the situation arises.

**26. What do we do about non-resident aliens that we assign a temporary SSN placeholder?**

We've based our policy on current IRS rules (<http://www.ssa.gov/employer/hiring.htm>), which allows employers to use 000-00-0000 as a placeholder SSN until a unique identifier is issued. Data Mart will not flag this as an error unless the all-zero placeholder appears for more than two consecutive snapshots.

**27. Is Data Mart looking for the county that the employee is working in, or the county where the job is based?**

Data Mart is looking for the North Carolina county of the site where the employee does their principle work. Telework positions should report the county where their home department is located, not the county where the work is being done. In cases where that information is not maintained in Banner, you can code the data element to default to the campus county, with the understanding that corrections will be made prior to Data Mart's Phase 2 in late 2011.

**28. What do we do with employees who are in between job assignments and hence are not active, on leave, or terminated? Can their status be NULL?**

Permanent employees must be either Active, On Leave, or Terminated.

**29. Are employees who are terminated but are still due a leave payout still considered "active"?**

No.

**30. What value should we use for Last Day Worked?**

Based on campus feedback, we will be updating this data element. You should use the last date an employee is paid their standard salary (not including severance or benefit continuation).

**31. Should we be entering pooled positions?**

Yes.

**32. What are the differences between Appropriation, Receipts, and Other funding types in the HR Data Mart and how do I determine each?**

For the purposes of the HR Data Mart we have established the following definitions for each category.

- **Appropriation** – Any payment from the General Fund except payments from fully receipt supported purposes within the General Fund.
- **Receipts** – Any payment from a fully receipt supported purpose within the General Fund. Generally this will only apply to payments funded from Purpose 1102 – Summer Term Instruction and Purpose 1103 – Non-Credit and Receipts-Supported Instruction.
- **Other** – Any payment not from the General Fund.

**33. Do we need to include positions that exist only as a way to categorize salary reserves?**

If you have positions that were established solely for the purpose of salary reserves or premium pay (or other similar conventions used to simplify the accounting process in Banner), you do not need to include them. Please note that these are separate from pooled positions, which must be included.

**34. For rehires, do we use their original hire date or their rehire date for the “Initial Hire Date” data element?**

Use their rehire date.

**35. We’re seeing NCAS budget codes showing up on error reports. Is there a list of codes that are acceptable?**

Yes, and it’s been posted on the Collab Site. We only recently began working from a standard set of NCAS budget codes, which explains why some campuses are seeing new errors. Please review the list of acceptable NCAS budget codes and either crosswalk your campus-specific codes to the campus-wide codes, or contact us with a justification for adding new codes to our list.

**36. For employees with multiple jobs, are we only required to use the salary of the primary job to calculate annual base salary?**

No; any jobs that form a piece of the employee’s overall FTE must be figured into annual base salary. Please note that this does not include supplemental pay, such as pay for increased course load.

**37. What is GORIROL and how does it play into the Data Mart?**

GORIROL is a baseline Banner Identity Role process that works with GORRSQL to interpret Banner Data and associates a role with the ID. For example, once a person is associated with PEAEMPL they are identified in Banner as an Employee; once in SGASTDN, they are identified as a Student; once in APACONS, they are identified as an Alumni, etc. More

information on the GORIROL process can be found in the Banner Bookshelf / Banner General Technical Reference Manual / Chapters 7 and 11 reference this process.

***38. Why use GTVSDAX for crosswalked data instead of hard coding things within the Data Mart scripts?***

GTVSDAX allows a user maintainable reference for the Data Mart mapping and data extraction process that allows for future growth to the Standard Model Rules and Validations. These initial crosswalk values identify Employee Classes used solely for Data Mart processing (thereby eliminating non-reportable classifications), retirement information pertinent to employee participation and enrollment types, termination and job change reason codes {UNCHRDM\_ECLS, UNCHRDM\_RET, UNCHRDM\_JCRE, UNCHRDM\_TREA}.

***39. In what order do we apply the scripts and views to aid in creating the process?***

The readme.txt file (posted on active collab as “README.TXT-FAQ Question 50” explains the steps to creating the Data Mart Schema and applying the scripts as needed for the process to be successful (attached below for easy reference).

***40. We were told that we weren’t reporting our Faculty. What does that mean?***

We found that while EPA workers were being reported, some campuses were submitting a null value for the data element titled “EPA Faculty v Non-Faculty.” EPA workers are not able to submit a null value in that category without triggering an error check.

***41. Is Appointment Type a required field?***

Starting in October, it will be a required field, which may be an issue for some of our earlier campuses. The Appointment Type data element provided information on SPA and EPA workers, such as whether they are permanent, time-limited, or temporary (for SPA), or continuing, fixed-term, temporary or grad students (for EPA).

***42. What happens after a successful submission?***

The monthly submission is scheduled for the last business day of each month, though our schedule does take into account holidays. The complete schedule can be found on the “Submission Schedule” link on the Submissions page. Five (5) business days before the deadline, the system will automatically pull your data and send an email to designated users with results. You have those 5 days to review and fix critical errors; and each morning, the data will be freshly pulled. On day 5, if there are no problems, the monthly snapshot will be taken. If there are still critical errors, you will get a three (3) business day grace period to fix the errors and then manually close the snapshot for the month.

**43. Can we look at our monthly data before the last 5 days of the month?**

Yes, on the Submissions Statuses page, you'll have the option to "OPEN NEXT" once you officially close the prior month's data.

**44. Does opening data early affect our 5-day window?**

No, it just gives you access to the data early. You can hit the reload button as often as you want during that time frame.

**45. What info is OSP looking at?**

OSP will have access to all types of information that they currently have access to through PMIS.

**46. Can we extract data from views into Excel**

Not in the Views, but you can export standard and ad hoc reports to Excel -- so you could always take basic employee View data and put into a flat report. If there's a need from campuses to create an export from Views, we'll examine it. Right now, you should also be able to get Views data from your IT department.

**47. We've had warning issues regarding an employee's FTE being more than the FTE of a position.**

We're going to change the warning logic of that, so that it only applies to permanent instead of time limited and temp positions. We'll also revisit this during the phase when we start including temporaries. Please keep in mind that warnings will not prevent a successful data submission, either.

**48. What happens if our grace period spills over into the following month? Won't our snapshot include data from that new month?**

We don't expect that to be a problem. Ultimately, the Data Mart system is just meant to provide a general snapshot in time.

**49. Do we have a glossary of terms and data elements?**

Yes; there is a DATASET link on the REPORTS tab that will give you a list of all data elements (and their definition and variables) for the employee, position and budget views.

**50. Will temporary workers trigger an error report?**

Yes; if you have workers who are coded as temporaries under appointment type, it will cause an error. All non-permanent workers should be pulled from the Data Mart submission. We will be addressing their addition during the next phase of Data Mart.

**51. What do we do if we have an error for a valid CUPA code?**

Please contact Keith Dupuis, who will research the CUPA code and update the Data Mart validation table as necessary.

***52. What are the most common errors with JCAT codes?***

The 6-digit JCAT code is composed of three parts: a 3-digit JCAT code, a 1-digit special descriptor, and a 2-digit subcategory code. The general default for the special descriptor, if no other code applies, is currently “X”. We see a lot of problems when campuses submit JCAT codes that are not 6-digits, or use “o” (zero) as the special descriptor default, which is not a valid option. A NULL value is acceptable for positions that have no corresponding JCAT number. As we approach Phase II of the Data Mart project, we expect to adapt the JCAT structure so that it is more in line with the traditional PDF requirements, based on feedback from campuses. We’ll update you on that change as it develops.

***53. Do we have the ability to add campus users ourselves?***

For the moment, GA is processing admin privileges for all university users. We expect to hand that role over to campuses within the next several months, along with some suggestions for campus access protocols.

***54. Can you save or re-run ad hoc reports?***

Yes, ad hoc reports can be reproduced if you make a note of the REPORT ID (which prints on every report you download as an Excel spreadsheet as well as on the reporting tab itself after a table is generated). You can also create and name custom reports that can be saved in either a personal directory or a shared campus-wide directory. Please see the user manual for instructions.

***55. Why am I getting an error on a NULL value for a data element that accepts NULL values?***

Most often, we find that the data isn’t being submitted as a true null value (ie, the complete absence of any data, even a space key).

***56. When will we need to provide disability and education level data elements?***

GA gave campuses an extended period of time to collect this information given that most campuses did not routinely track it in Banner. We expect that all campuses will have supplied information for these data elements by the end of the calendar year. Following that, missing data elements will trigger error reports.

***57. What are validation reports?***

Validation reports, accessed under the Reports tab, indicate potential data integrity issues. GA routinely reviews them to identify potential errors that, while not causing an Error, suggest a need for deeper review. For example, we may find a campus is reporting no SPA time-limited positions, no terminated employees, and no work counties other than the county of the main campus. That information should prompt you to ask the obvious questions: do we have any SPA time-limited positions, and if we do, why aren’t they being recorded? Did we have any terms this month? Do we have any business units based off the main campus?

**58. What should we do if our validation reports indicate we have no SPA time-limited employees?**

An SPA time-limited employee is comparable to an EPA fixed-term employee. Not every campus will necessarily have time-limited employees. We suggest you review areas that focus on research, especially research projects run by funds with an end date.

**59. How do we request additional Data Mart users?**

- For each person you want to have access, ask them to login to the Data Mart production site (<https://uncdm.northcarolina.edu/index.htm>) using his/her credentials. This will create the basic account in our system. They will not be able to see anything at this point, which is normal.
- Once everybody has logged in, please contact Keith Dupuis and supply the name and access level (essentially whether the employee can VIEW DATA and/or RELOAD DATA. We suggest you limit the amount of people who can RELOAD DATA.)
- We will add the necessary permissions as you specify and notify you once it is complete.
- You will then be able to login to see the submission tab.

**60. Can we request a GA Override on an error we can't solve?**

The GA override button was designed to excuse errors that we know can't be solved given a set of justified, extenuating circumstances. If you feel an override is warranted, please contact Keith Dupuis and Steven Hopper with your justification

**61. When does the 3-day grace period start?**

If you have any errors on the day that your monthly submission is scheduled (see the submission schedule on the Data Mart submissions tab), you will enter a 3-day grace period beginning that morning. For instance, if the monthly submission is scheduled Monday, you will have until start of business Thursday to manually correct and close your monthly submission. Please note that automatic submission generally occur in the early hours of morning, shortly after midnight.

**62. How do we close out our monthly submission during the grace period?**

Once you reach zero errors, the Data Mart submission status page will show a "CLOSE" link in the column labeled "Actions." Click on it. The available action should change from "CLOSE" to "OPEN NEXT".