HR DataMart Campus User Guide

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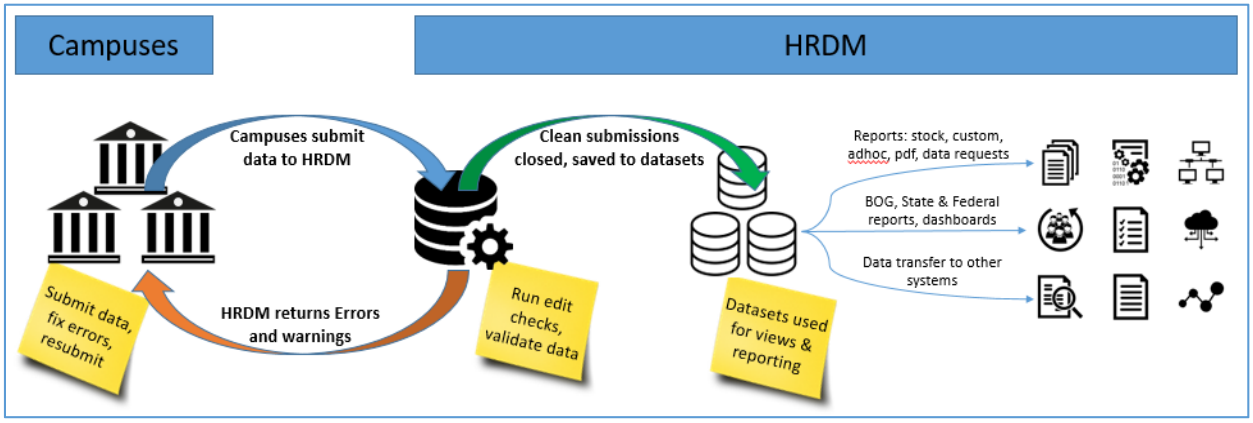
HR DataMart Overview

The UNC System Office created the HR DataMart in 2011 as a repository for HR data from the UNC campuses and the System Office. Every month, each campus submits a monthly snapshot of their HR data to the DataMart. The data undergoes validation and if there are any errors, they must be resolved. If there are no errors for the given month, the campus or system can close the submission for that month. Campuses must wait until the last payroll that will be paid for the current month has confirmed and distributed before doing a final DataMart submission, and close for the month.



The data in HR DataMart allows the System Office and campuses to run various reports for internal purposes, as well as state and federal requirements. Some data is transferred to other systems for additional reporting. HR DataMart is also a means of ensuring data quality at the campuses, and promoting data standards at the System level.

Campuses and the System Office send the following datafeeds in their monthly submissions:

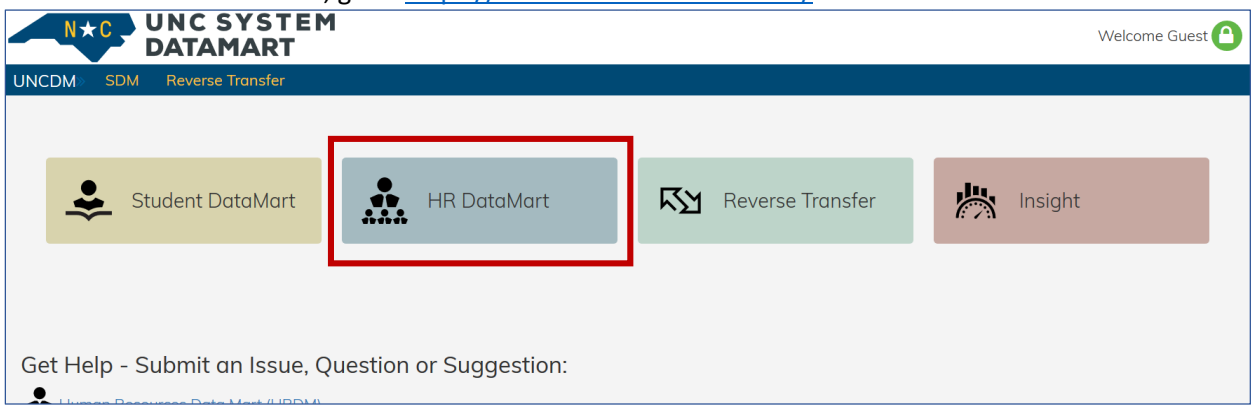
- **Benefits:** Benefit plans, payment information.
- **Compensation:** Payroll information.
- **Employees:** Information on employees.
- **Employee Position:** Job data for employees.
- **Positions:** Position information.
- **Position Budget:** Funding information for positions.
- **Performance Rating:** Annual performance rating for EHRA and SHRA employees.

For more details and the list of fields included in the HRDM Datafeeds, see the Datafeeds document on the HRDM Documents page. The Datafeeds document also includes information on which HRDM fields campuses include in their feeds to the UNC System Talent application (Cornerstone).

This user guide is for campus users who run the HR DataMart submissions, run reports, manage users and perform other campus related actions in the system. If you need help, have questions or need HRDM training, contact hrdm@northcarolina.edu.

HR DataMart Login

To access the HR DataMart, go to https://uncdm.northcarolina.edu/ and select HR DataMart tile.

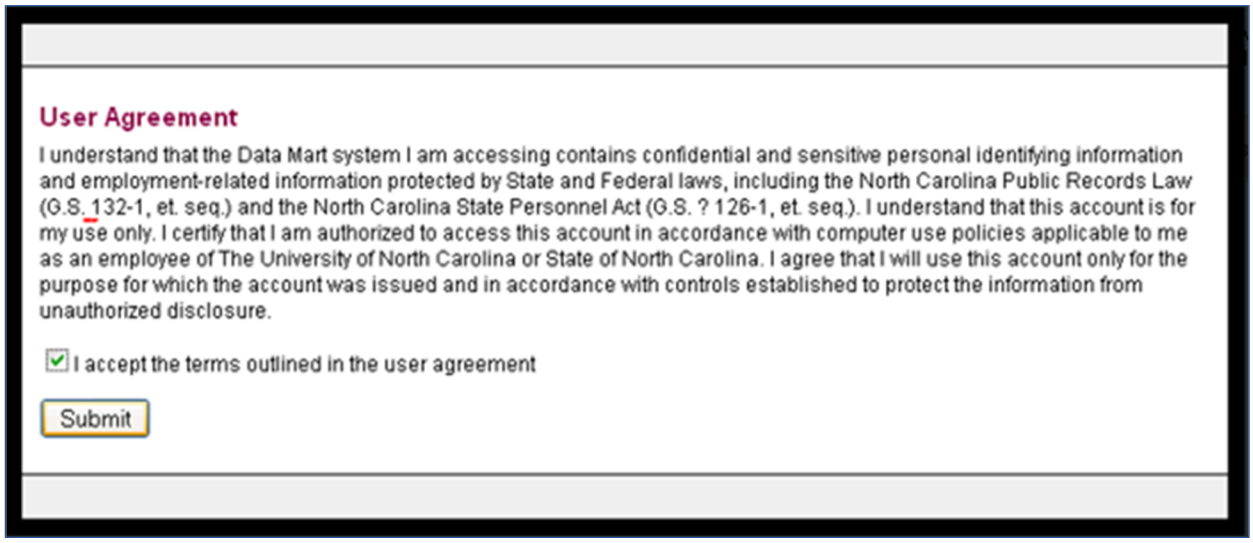


Select your campus from the list of campuses
Click '**Login through your campus**' button

The system will open your campus login screen
Enter your university network Username and Password.
Click 'Sign In'.

For new users, please contact your campus HR DataMart Administrator to request access. Your campus HR DataMart Administrator will assign your user role and access.

If you are logging into HR DataMart for the first time, read the User Agreement, check the accept checkbox and click the submit button.



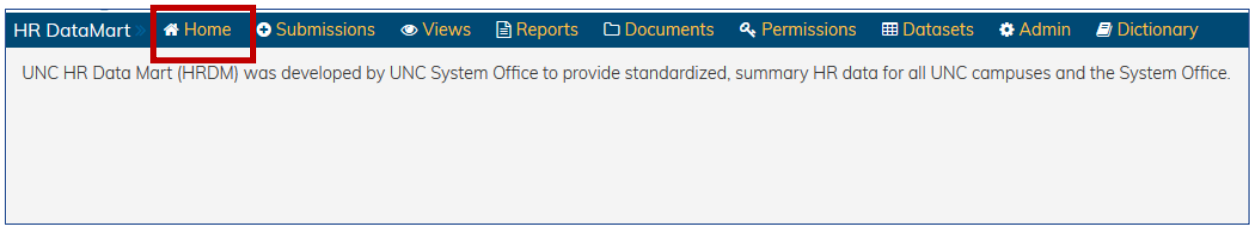
HR DataMart Tabs Overview

Most users will have the Home, Submissions, Views, Reports, Documents, Datasets and Dictionary tabs. Some users have additional tab options depending on their level of access.

Note: The Dictionary tab was added in 2019 and therefore it is not on some screenshots.

Home

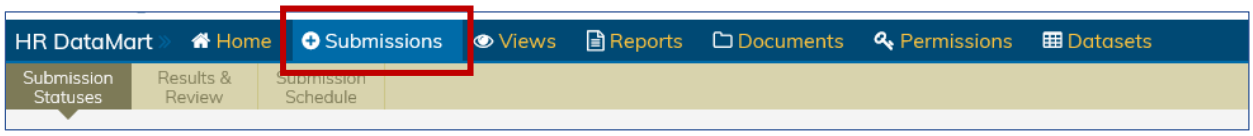
After you login to the HR DataMart, the system displays the Home tab.



Submissions

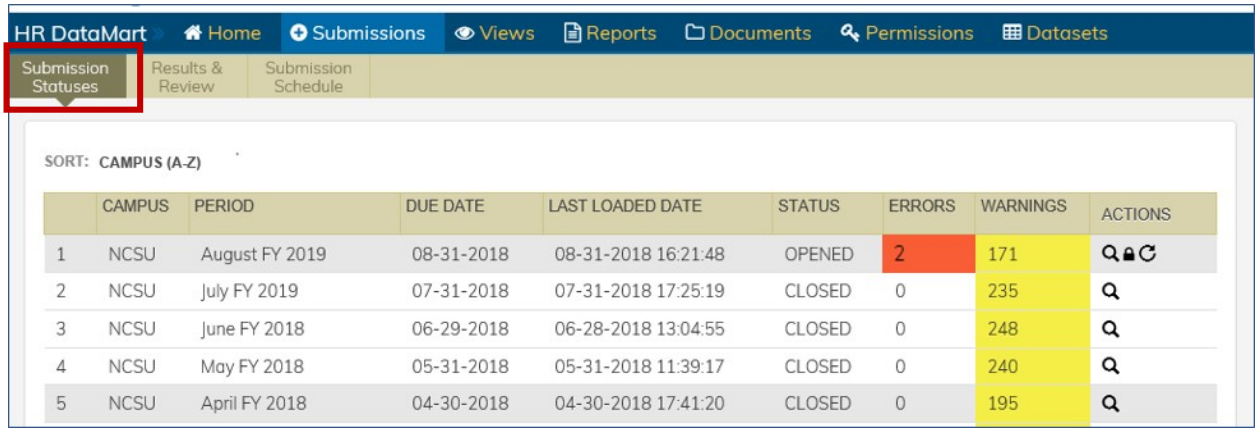
The Submissions tab shows the monthly submission information for your campus. There are three subtabs under the Submissions tab:

- Submission Statuses
- Results & Review
- Submission Schedule



Submission Statuses

The Submission Statuses show all submissions that your campus has sent to the HR DataMart.



	CAMPUS	PERIOD	DUE DATE	LAST LOADED DATE	STATUS	ERRORS	WARNINGS	ACTIONS
1	NCSU	August FY 2019	08-31-2018	08-31-2018 16:21:48	OPENED	2	171	
2	NCSU	July FY 2019	07-31-2018	07-31-2018 17:25:19	CLOSED	0	235	
3	NCSU	June FY 2018	06-29-2018	06-28-2018 13:04:55	CLOSED	0	248	
4	NCSU	May FY 2018	05-31-2018	05-31-2018 11:39:17	CLOSED	0	240	
5	NCSU	April FY 2018	04-30-2018	04-30-2018 17:41:20	CLOSED	0	195	

The Submission Status list contains the following information:

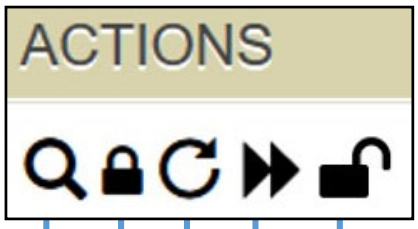
- **CAMPUS:** Name of campus that submitted the data.
- **PERIOD:** The submission period.
  The HRDM periods are based on Fiscal Year (July to June), not calendar year.
- **DUE DATE:** Date the submission for that period is due. Campuses are given a 3 business day grace period after the Due Date to close their submissions.
- **LAST LOADED DATE:** Date the data was last loaded.
- **STATUS:** Current status of the submission:
  a. **OPENED:** The submission is open for the period. Only one period is open at a time.
  b. **CLOSED:** The submission is closed for the period
  c. **RUNNING:** The submission/data load is in progress.
- **ERRORS:** Number of errors (ORANGE) for the submission. Errors must be resolved prior to the monthly deadline. You can close only if you have 0 (zero) errors.

  WARNINGS: Column showing the number of edit warnings (YELLOW) for the submission. These will not prevent closing the period, but should be reviewed and updated if necessary.

System highlights the DUE DATE and STATUS if the submission is still open and it is past the submission due date.

SORT: CAMPUS (A-Z)

	CAMPUS	PERIOD	DUE DATE	LAST LOADED DATE	STATUS	ERRORS	WARNINGS	ACTIONS
1	NCSU	August FY 2019	08-31-2019	08-31-2018 16:21:48	OPENED	0	171	



ACTIONS COLUMN: Actions applicable to the period. Depending on the state of the submission, the time of the month or your access, you will see different Actions icons.

Possible Actions icons include **Review**, **Close Submission, Reload Submission**, **Open Next**, and Reopen Submission.

Reopen Submission opens the current period after it is closed but before the period due date.

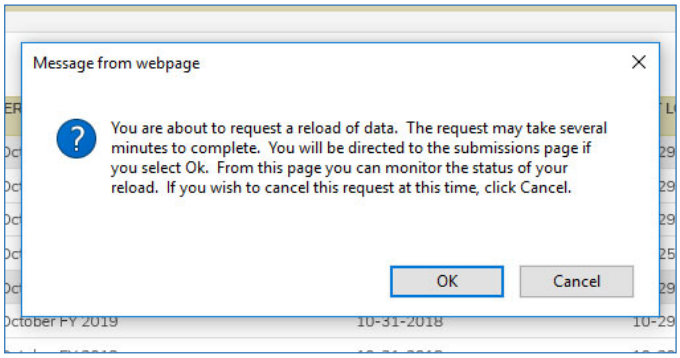
Open Next manually opens and pulls data for the next period when the current/last period is closed.

Reload Submission allows you to load your data into the HRDM while it is open.

Close Submission manually close the submission after errors have been resolved during the deadline period.

Review allows you to view detailed errors and warnings about your submission.

Note: Only campus users with upload access can load submissions.
Note: When users select "Reload Submission", the following message appears:



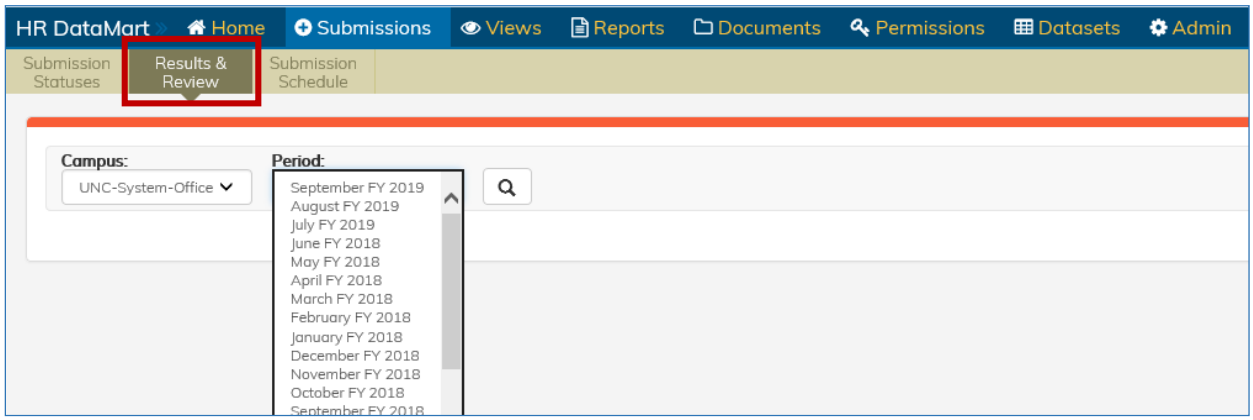
The campus can reload once the submission is open for that period.

If there are no errors on the due date, the system automatically closes the submission.

If the submission is not closed by the due date, the campus will need to manually close when all errors are resolved.

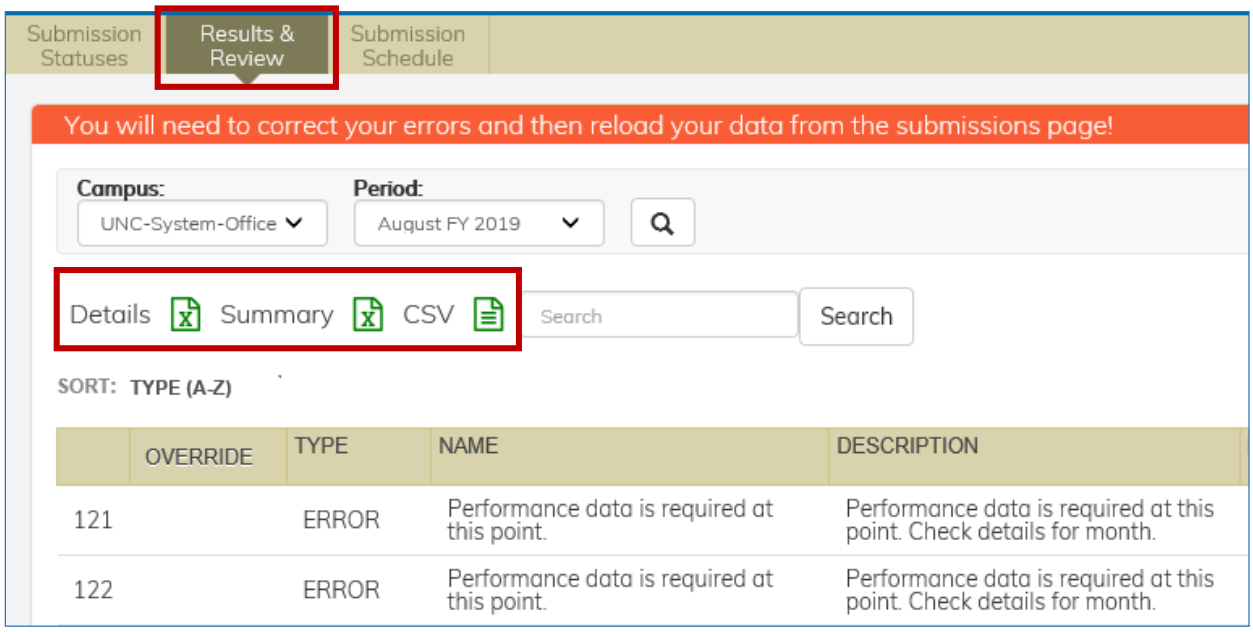
Review & Results

The Reviews & Results tab shows details about each successful submission to the Data Mart. Select a period and click the Search icon to view the results.



Validation Errors and Warnings

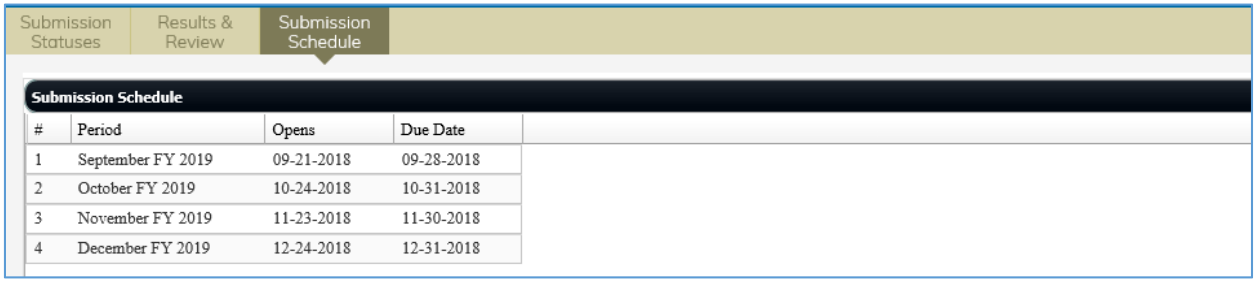
The search shows a list of errors (current period only) and warnings for the selected period. Previous periods will have only warnings since all of their errors would be resolved.



Note: Use the *e*rrors/warning Summary or Details icons to export your results to an Excel or CSV file. Use CSV for faster export when you have a large number of errors.

Submission Schedule

The Submission Schedule tab shows the period open and due dates.



#	Period	Opens	Due Date
1	September FY 2019	09-21-2018	09-28-2018
2	October FY 2019	10-24-2018	10-31-2018
3	November FY 2019	11-23-2018	11-30-2018
4	December FY 2019	12-24-2018	12-31-2018

Reviewing HRDM Period using September 2018 as an example:

- **PERIOD:** Reporting time frame, currently setup as a monthly period

- **PERIOD START DATE:** The first day of the period, usuaully the first day of the month or day after the last period closes.

- **PERIOD OPEN DATE:** Date the system automatically opens the period for all campuses. A campus can manually open before the Period Open Date. In this example, the system will automatically open all campuses that have closed for August but have not opened September.

  The period is opened for 5 business days. Once opened, every day the system will automatically load the data for that period.

- **PERIOD DUE DATE:** The due date is 5 business days after the period open date. All errors should be resolved and the campuses should close the current period. If errors are not resolved, the system remains opened. If there are no errors on the due date, the system automatically closes the period.

- **GRACE PERIOD:** Campuses are given a 3-day grace period after the due date to resolve all errors and close the period. The campus will remain open until those errors are resolved. During the grace period and beyond, the campus will have to manually load the data submission and manually close the period.

Submission Process

- **EXTRACT CAMPUS DATA:** During the open/submission period, the web services architecture (or other process defined by the campus) will pull the data from the HRDM views into the HRDM.
  a. **Load data:** The extracted data is processed and loaded into a temporary table space within the HRDM.
  b. **Error check:** The temporarily loaded data is evaluated against the data definition and edit checks to determine if it is valid, or if there are errors and warnings.
  c. **Email status:** Campus administrators receive daily email report 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.

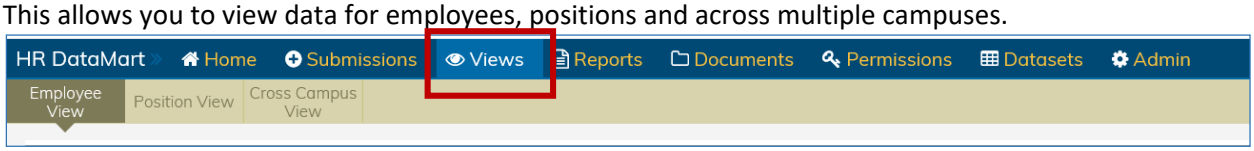
- **MANUAL LOAD:** If there were errors in the data load, the campus staff will need to investigate and correct them as necessary. They can then manually reload the data submission.

- **AUTO CLOSE:** If there are no errors on the period due date for a campus, the system automatically closes the submission for that campus.

- **CLOSED:** Once closed, a period can be reopened on or before the period due date. Once the due date is past, the period cannot be reopened. In addition, if a period is closed and a subsequent period is open, the closed period cannot be reopened. The campus will have to use the open submission to make any data corrections.

Views

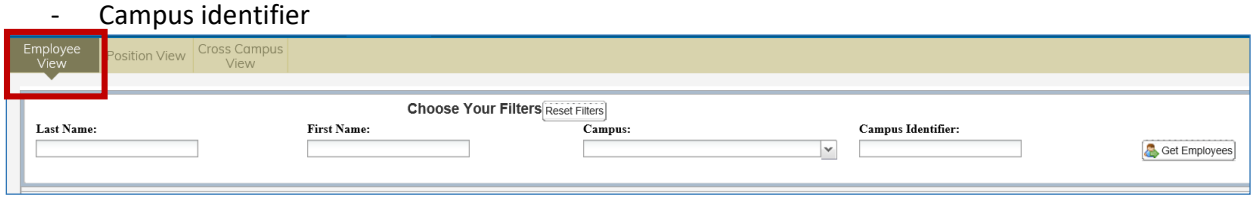
This section allows users to see data related to Employee View, Position View, and Cross Campus View. This allows you to view data for employees, positions and across multiple campuses.



Employee View

The Employee view provides information for employees and jobs using the following search criteria:

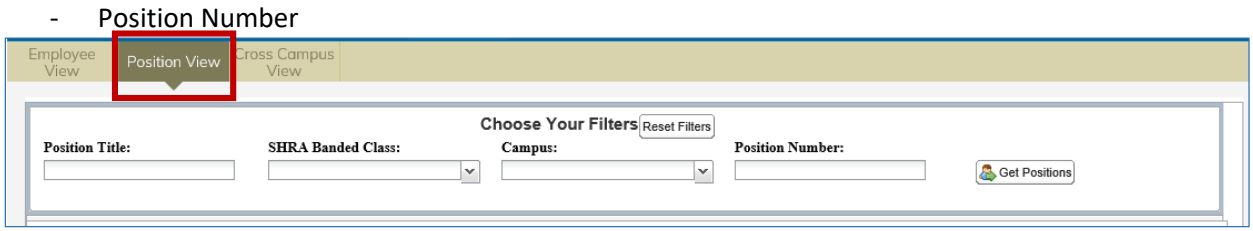
- Last Name
- First name
- Campus
- Campus identifier



Position View

The Position view provides information for positions and incumbents, using the following search criteria:

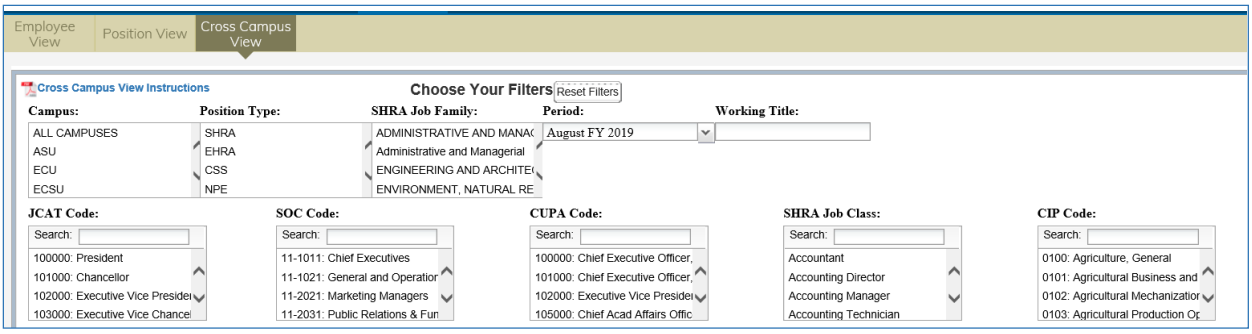
- Position Title
- SHRA Banded class
- Campus
- Position Number



Cross Campus View

The Cross Campus view provides data from the one or more campus, using the following criteria:

- Campus
- Position Type
- SHRA job family
- Period
- Primary Position Title
- JCAT code
- SOC code
- CUPA code
- SHRA Job Class
- CIP Code
- Department
- Faculty/Non-Faculty Details
- IRIT Type
- Job Working Title

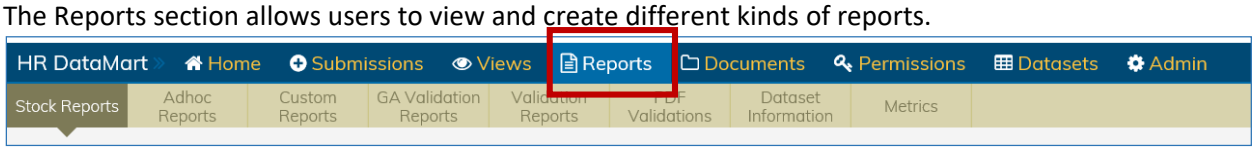


Note:

- You do not need to use every filter, the system defaults to "All".
- Selecting filters limits your results and speeds the search process.
- Select multiple items in each filter by holding down the CTRL key and selecting the items.
- Click the Reset Filters button to reset all filters.
- CSS category is specific to ECU.
- COS category is specific to NCSU.
- Periods are defined by FISCAL year; for example, December 2017 would translate to "December FY 2018" in HR DataMart.
- We are constantly looking to improve data accuracy and integrity. If you notice any issues or potential discrepancies with the data, submit a ticket to hrdm@northcarolina.edu.

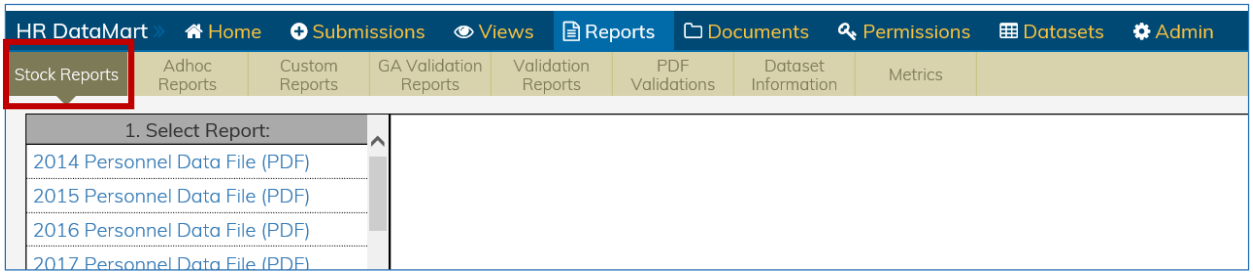
Reports

The Reports section allows users to view and create different kinds of reports.



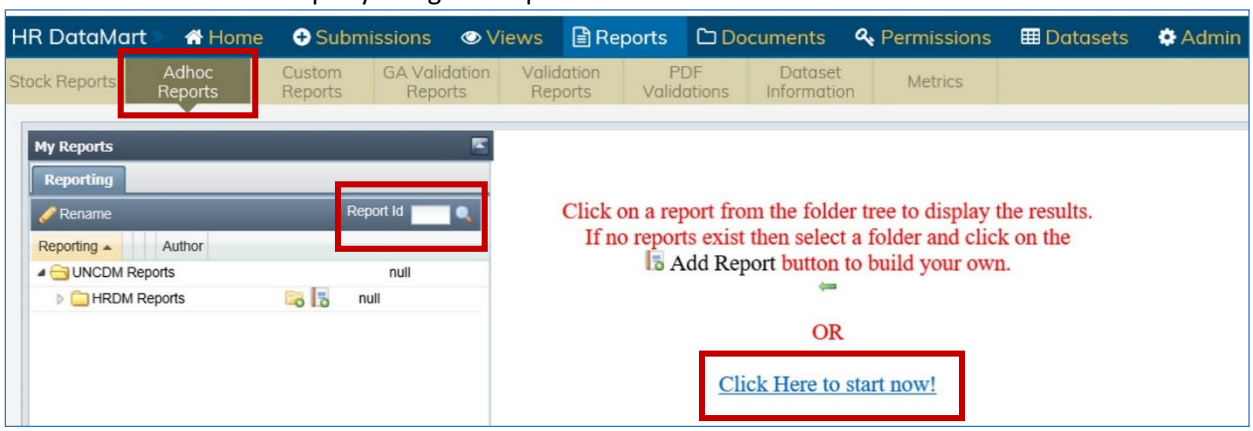
Stock Reports

Stock Reports are pre-created reports that allow users to specify parameters to view customized results.



Adhoc Reports

Adhoc Reports is the reporting mechanism you can use with the datasets to perform custom queries. You can also search for a query using the Report ID field.



To create a new query/report

- Select **'Click Here to start now!**'
- Click the **Advanced** tab

HRDM Datasets

HRDM has multiple datasets used in numerous reports, data review, as well as data transfer to other systems. Most datasets are created from the closed submissions and can combine data from multiple datafeeds. The staging datasets, available to some users, are based on the current datafeeds in the open submissions. Detailed information on the datasets are in the Dictionary. To grant access to the datasets, see the main datasets menu.

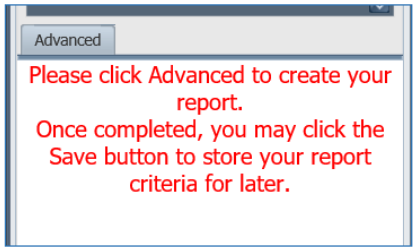
Note: Users will see a "NO DATA FOUND" message when they run a report, but do not have access to the underlying dataset. Granting the user access to the dataset should resolve this issue.

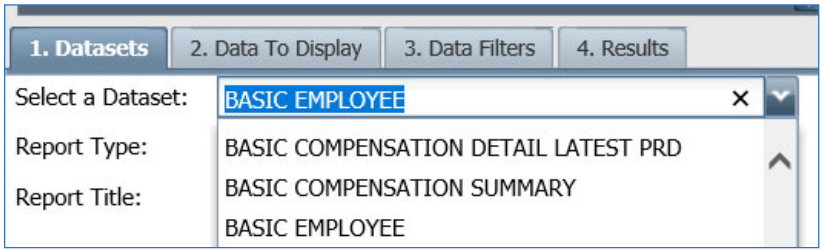
Step 1: Select a Dataset

Select a **Report Type**.
There are 2 Report Type options – **Flat and Pivot**.

Flat reports pull a full list of data and allow you to sort, count, total or give the average of data using only columns and rows, without the ability to drill down.

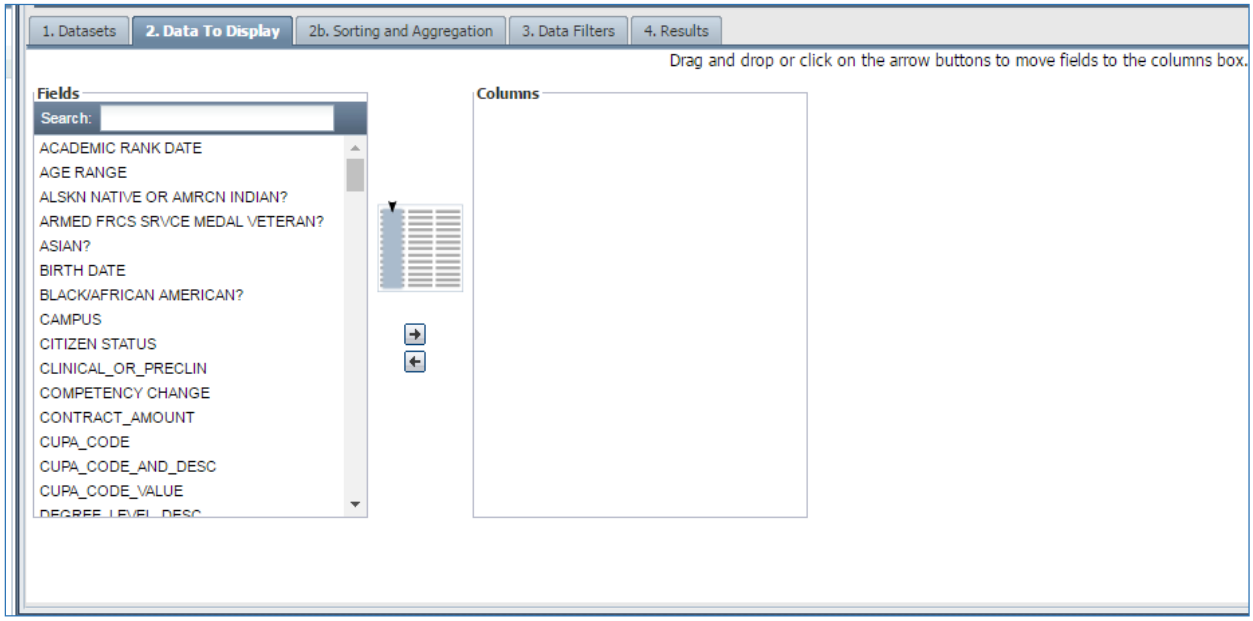
Pivot reports allow you to automatically sort, count, total or give the average of data in one table or spreadsheet. It also allows you to drill down into information based on specific variables. For those with data containing a lot of information, you may find it difficult to get summarized information. A pivot report can quickly help summarize the data and highlight the desired information.





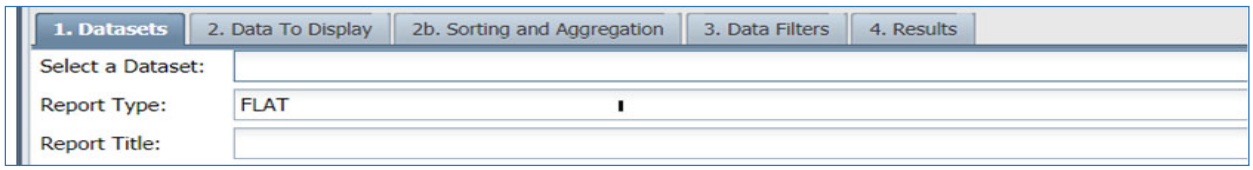
Report Title
A Report Title is not required, but helpful to re-run the same report in the future. A title header will not print on any exported results unless you enter a Report Title here.

Step 2: Select Data to Display
This is the display for Report Type 'Flat'. Drag and drop or click on the arrow buttons to move selected fields to the columns box.



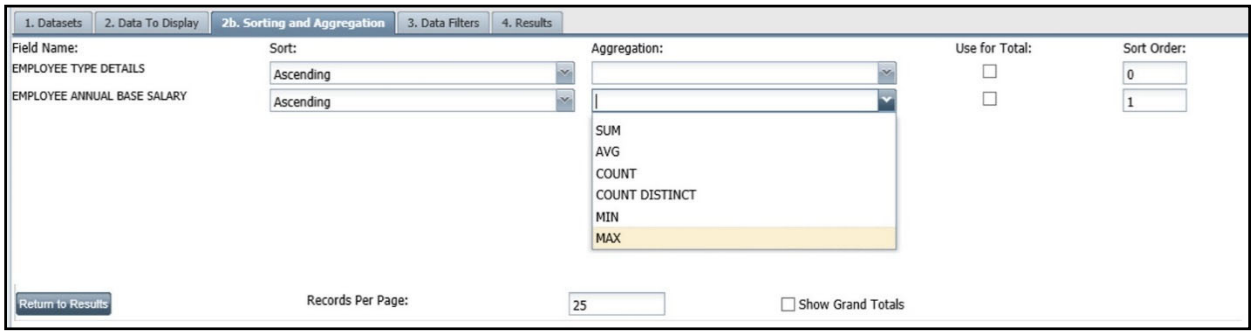
Note: The Fields list contains a list of all the available fields in the datasets. You can also search for fields.
Note: Columns allows you to select which fields you want to include in your report. Use the arrows in the middle to move fields from the field list to the columns and vice versa, or drag and drop fields between the 2 lists.

Creating a Flat report



Step 2b: Sorting and Aggregation (Optional)
Sorts output results ascending (A-Z) or descending (Z-A).

Aggregation (Optional)
Applies an aggregate operation to this field. Example: AVG on the SALARY field



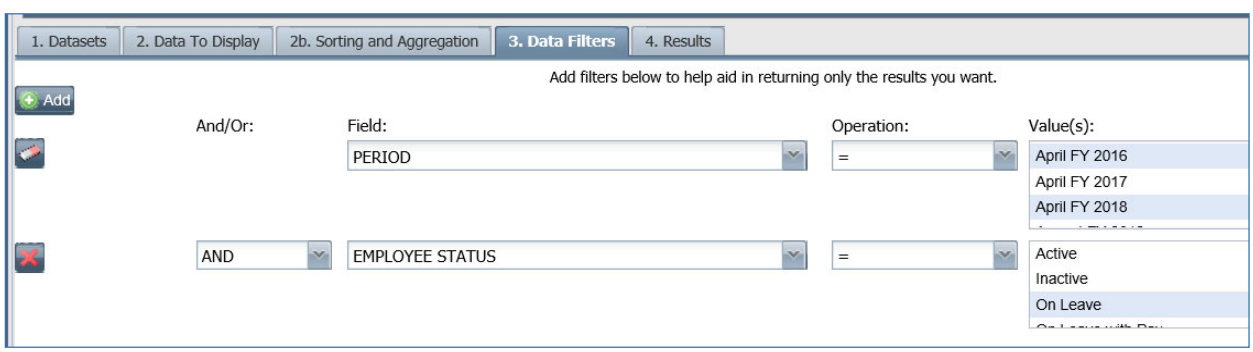
Use for Total
The chosen aggregation will be added to any other checked field to create a row total. Example: Base Salary + Other Salary could be added for a combined total; or, alternately, you could leave Other Salary unchecked so that only Base Salary goes toward the row total.

Records per Page
Controls the size of the pagination within the web browser. Default is 25, extending it can 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 selected on Data to Display tab. Therefore, you can drag/drop the sort order on that tab as well.

Show Grand Totals
Sum all of the total columns for each row into one master total row

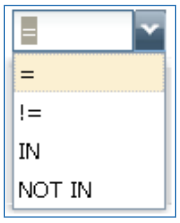
Step 3. Data Filters
Use Data Filters to control or filter the subset of data used in the query. Select multiple values by holding down the 'CTRL' key and simultaneously clicking on the values you desire.



Field: You can select the field from the list for filter criteria.

Operation: Valid governing operators depend on the underlying data type of the field you select.

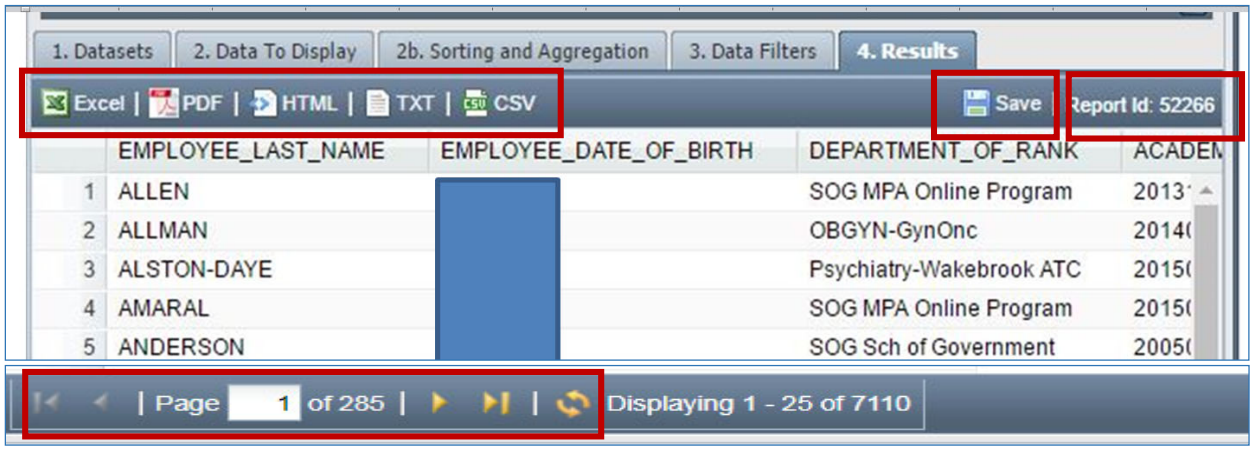
Operations and their meanings:
= : The field selected will equal the value(s) you select
!= : The field selected will not be equal to the value(s) selected
IN : the field selected will be included in the value(s) you select
NOT IN : The field selected will be excluded from the value(s) you select.



Value: Depending on the underlying data type of the field, enter a value, select a date, or click on a list of items in a dropdown to specify the details.

Erase Filters: Click the eraser icon to erase any filters.

Step 5. Results
The Results tab shows the output of your query/report selections.

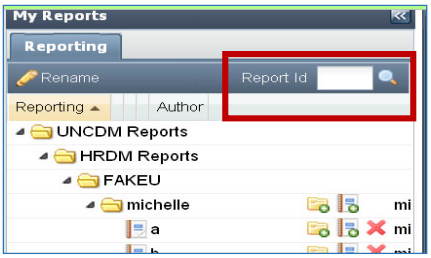


- **Export** the results to different file formats using the icons above the results.

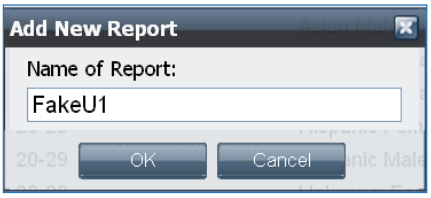
- **Save** the report by selecting SAVE. User will be prompted to name the report which will be saved to your personal subdirectory.

- **Report ID:**
  Report ID is the number specifically associated with this report. This number allows you to quickly generate a specific report without having to re-create the report. The report ID can be shared with others so they can re-run the same report or make modifications and save the new report as their own. If you modify a report and rerun it, the system creates a new report ID.

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



Users can generate a previously processed report by entering the report ID in the 'Report ID' field on the Reporting tab and clicking on the search icon.

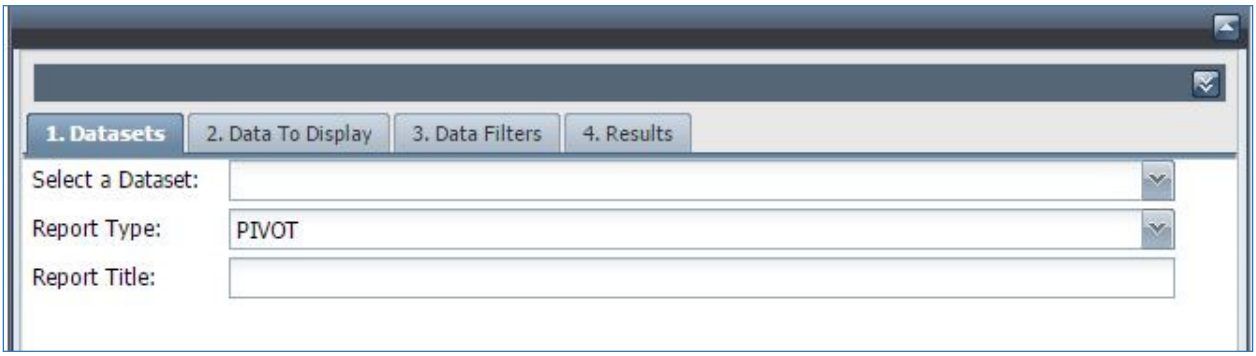


Note: If selection criteria for a report is changed, a new report ID is generated and the new report can be saved with a new name.

Creating a Pivot report

Step 1: Select a Dataset

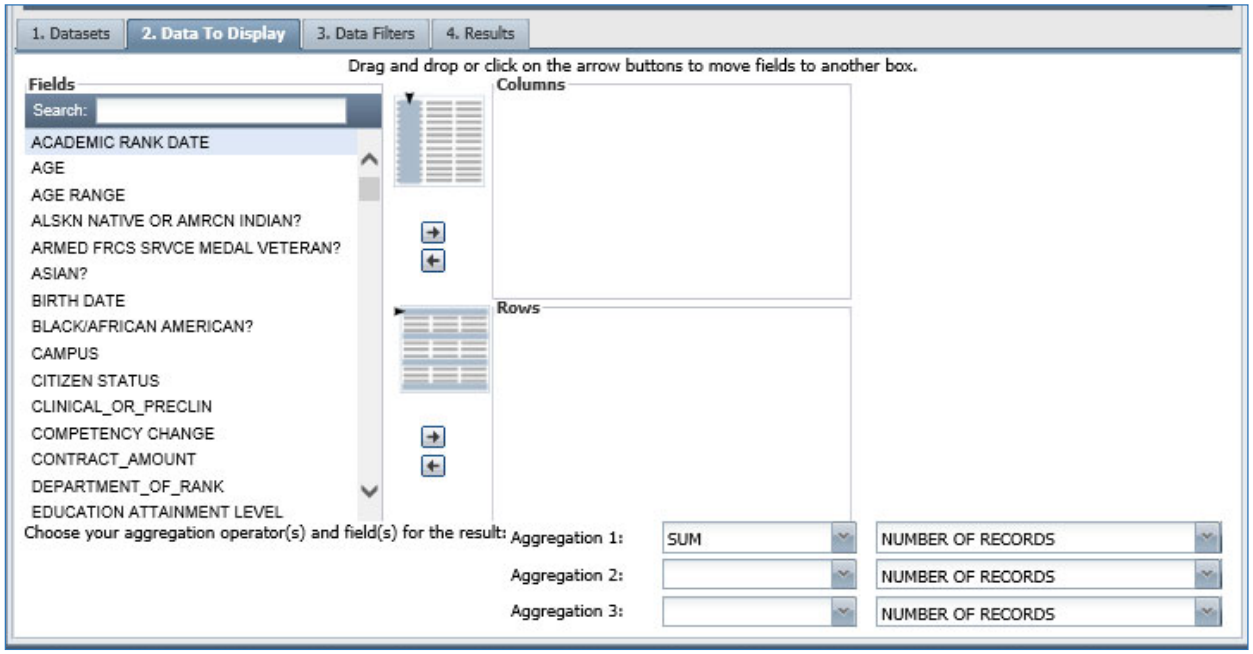
Select the **PIVOT** Report Type



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.

Step 2: Select Data to Display

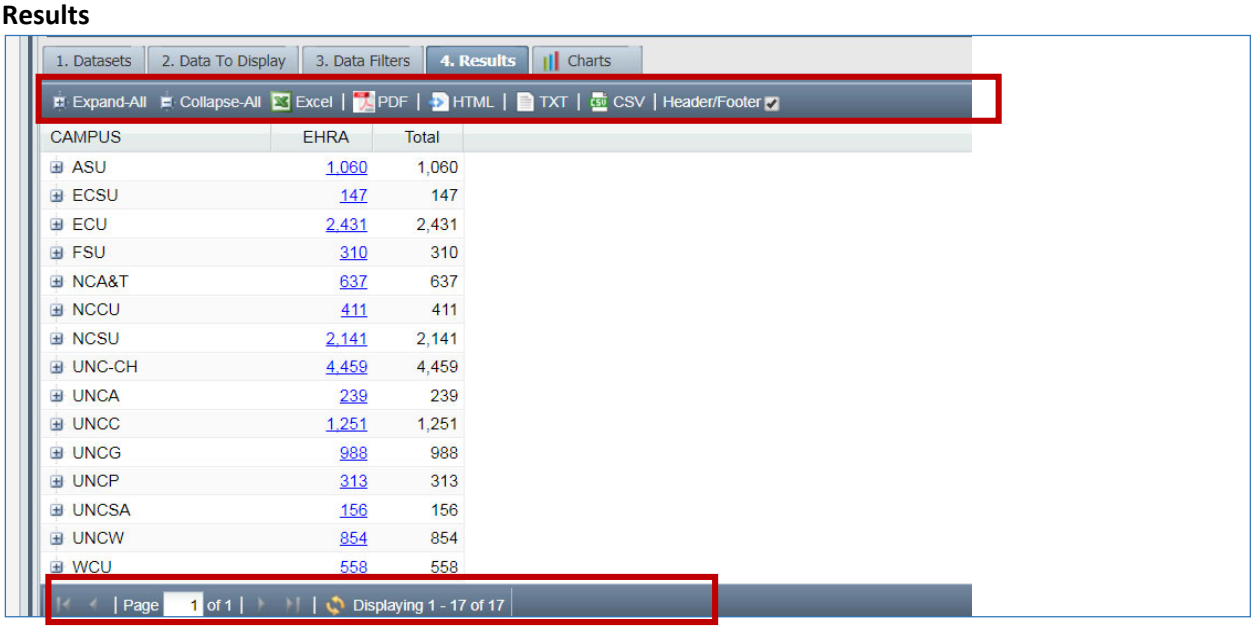
This is the display for Report Type 'Pivot'. Drag and drop or click on the arrow buttons to move selected fields to or from the columns and rows boxes.



Fields Column: Contains a list of fields from the selected dataset. Drag or use the arrows to select the fields you want in the rows/columns boxes.

Aggregation Operator & Field: This controls the operator and field for the aggregation. If left blank, it will count the number of unique records.

Results



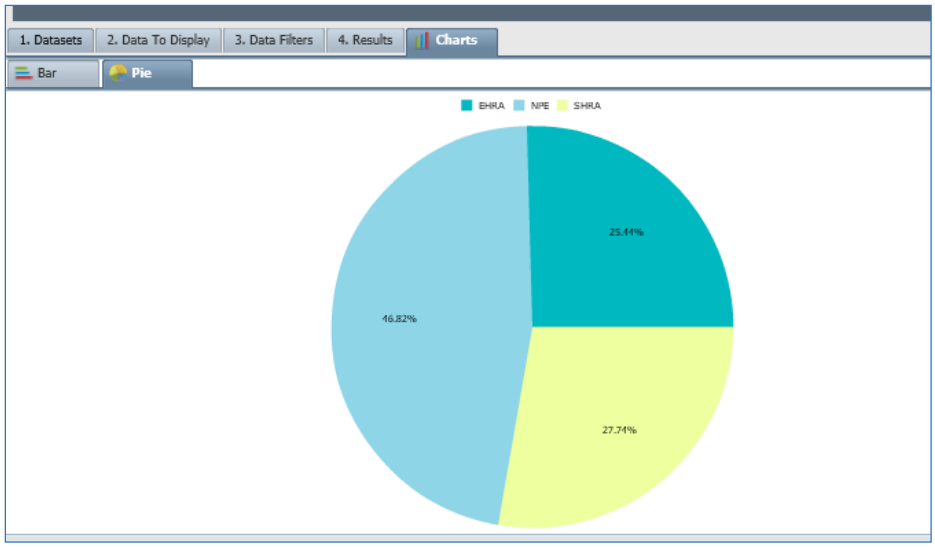
Use the top controls to expand all/collapse all or export the results to different file formats.
Page through or refresh the results with the pagination controls at the bottom of the results.

Drill Down

If you added more than 1 row of data to display in a pivot table, click the "+" sign beside each row to expand to the next level of data.

Charts

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



Note: Although you can generate charts from flat files, they are mainly derived from Pivot Tables.

Note: 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.

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

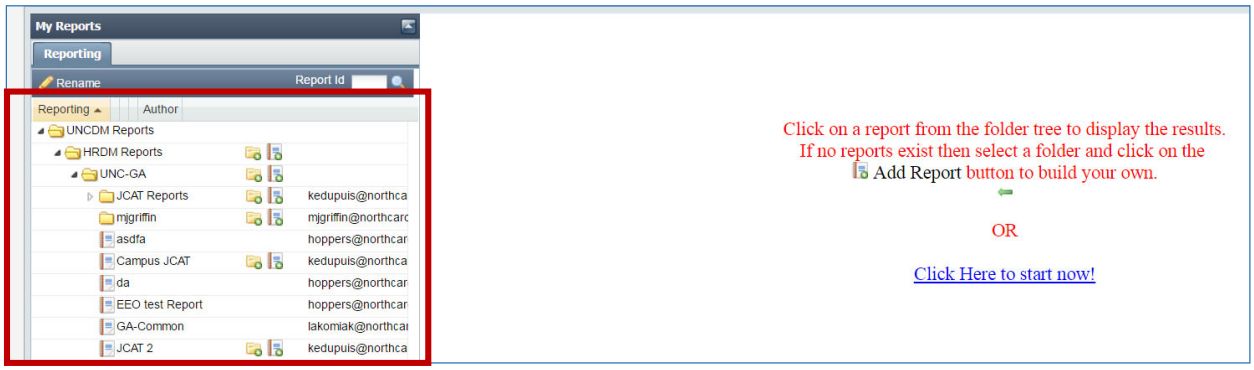
Pie Charts
Only allow one column
Only the first level of rows will be used. These will become the legend
The percentages will be based off of the total number
The use of filters is vital in order to create relevant pie charts.

Copy/Share/Delete Reports

You can copy reports from your personal folders and share them through the shared campus folders.

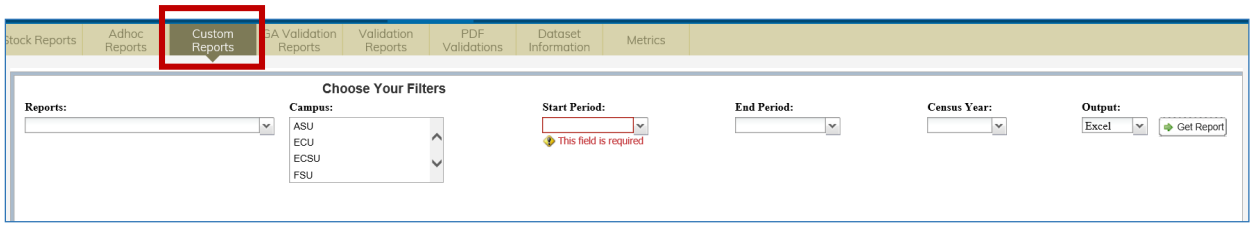
To move a personal report into a shared folder, click and drag the report from your personal folder to the campus destination folder. Look for the green plus icon, indicating it will be added before releasing your mouse.

You can delete a report by selecting the red X displayed to the right of the report you shared.



Custom Reports

Custom Report is reporting interfaces for special, standardized reports created by the System Office.



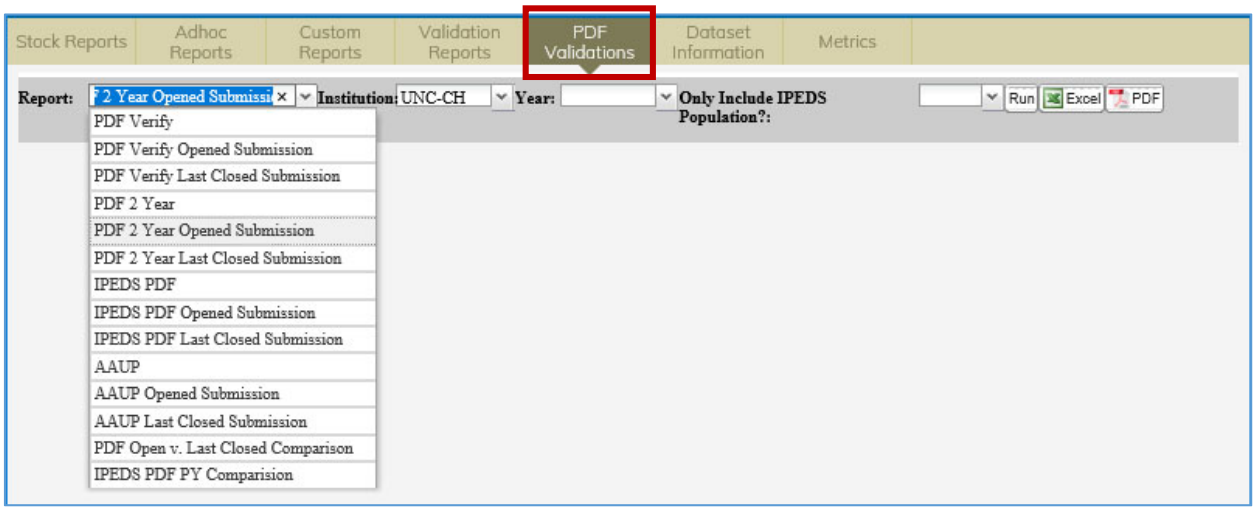
Step 1: Choose the Report from the Reports dropdown.

Step 2: Parameters are different for each custom report. Select the appropriate parameters based on the selected report.

Step 3: Choose the Output type.

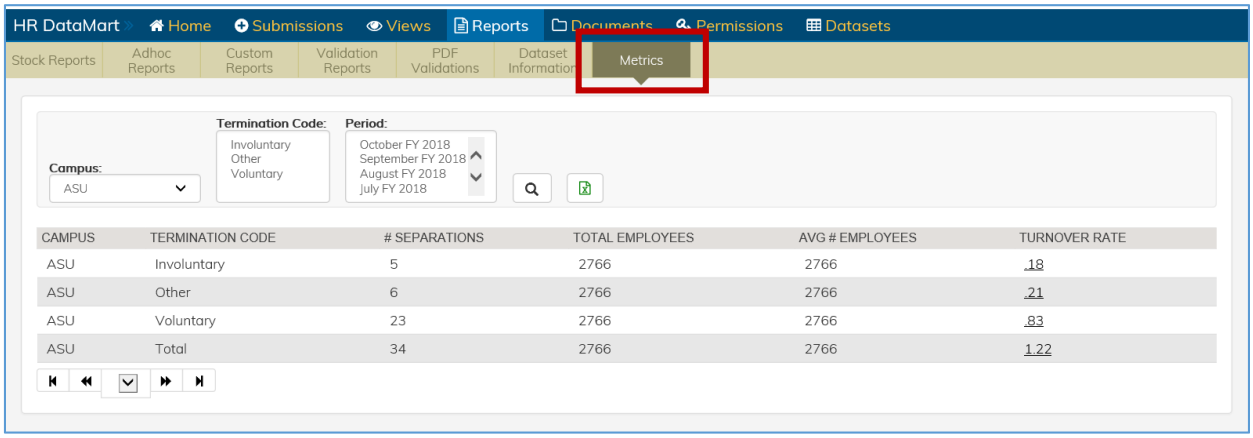
PDF Validations

The PDF Validations reports allow you to run various previous and current submissions using the PDF logic and compare to prior PDFs. Select the report and appropriate parameters to view the results.



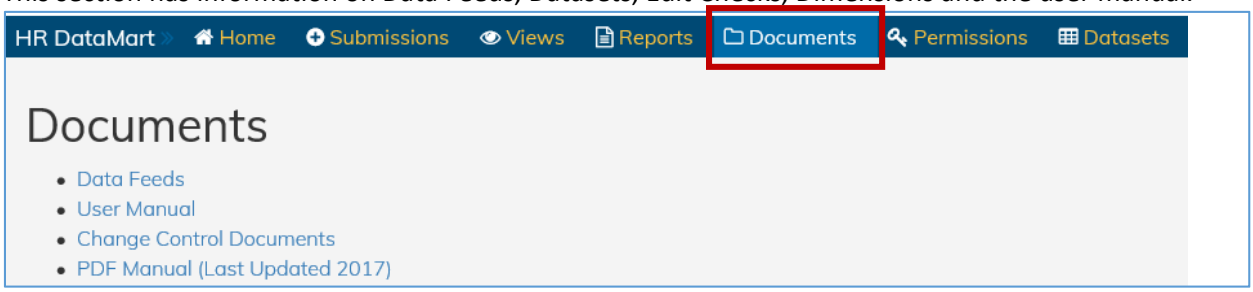
Metrics

The Metrics page allows you to view termination metrics based on campuses, termination codes and periods. You can also export the metric to an Excel file.



Documents

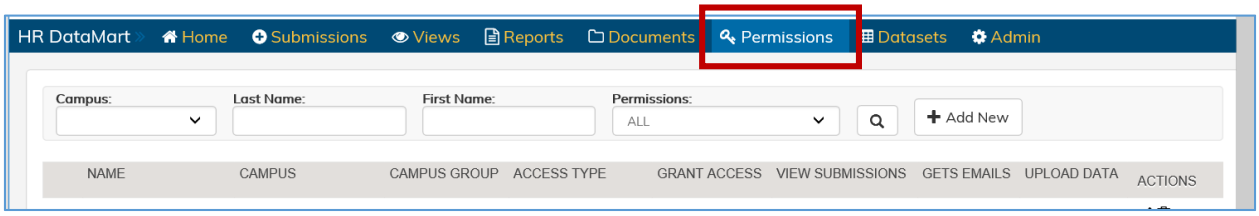
This section has information on Data Feeds, Datasets, Edit Checks, Dimensions and the user manual.



Data Feeds: Information on the data feeds submitted by the campuses.
User Manual: HRDM user manual.
Change Control Documents: Documents used for the annual HRDM enhancements.
PDF Manual (Last Updated 2017): Old PDF manual. Updated PDF fields and definitions are in the Dictionary.

Permissions

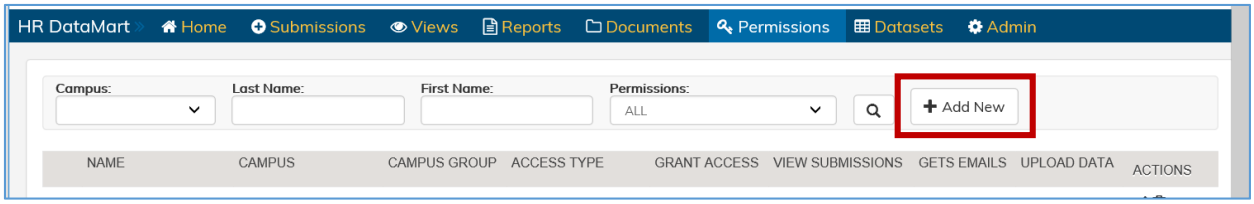
Displays a list of campus users, their role and permissions. Campuses will designate a Campus HR DataMart Administrator and Backup Administrator to assign campus users roles and access to HR DataMart. To view a list of your campus HRDM users, go to HRDM >> Reports >> Custom Reports >> User Permissions and run the report.



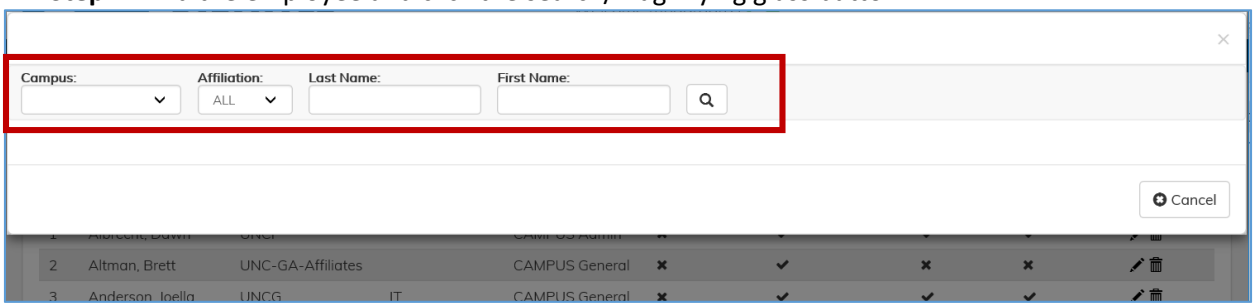
Add a New User

Employee must have already logged into HRDM for their campus credentials to be recognized.

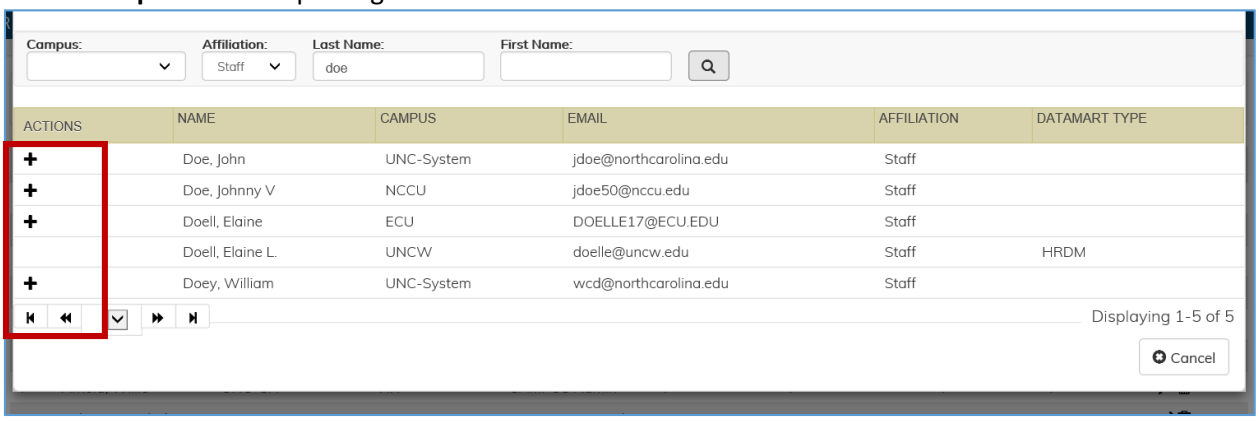
Step 1: Click the + Add New user button



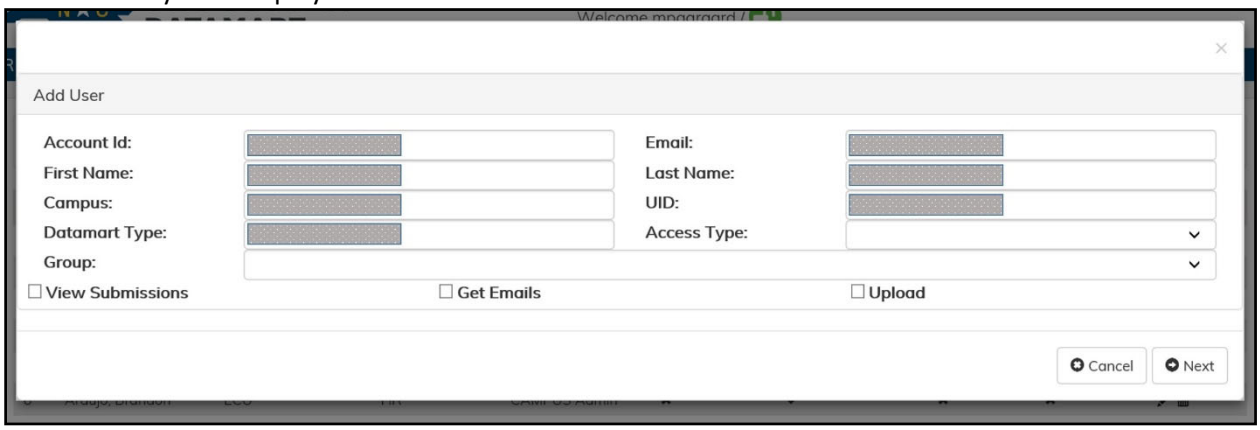
Step 2: Find the employee and click the search/magnifying glass button



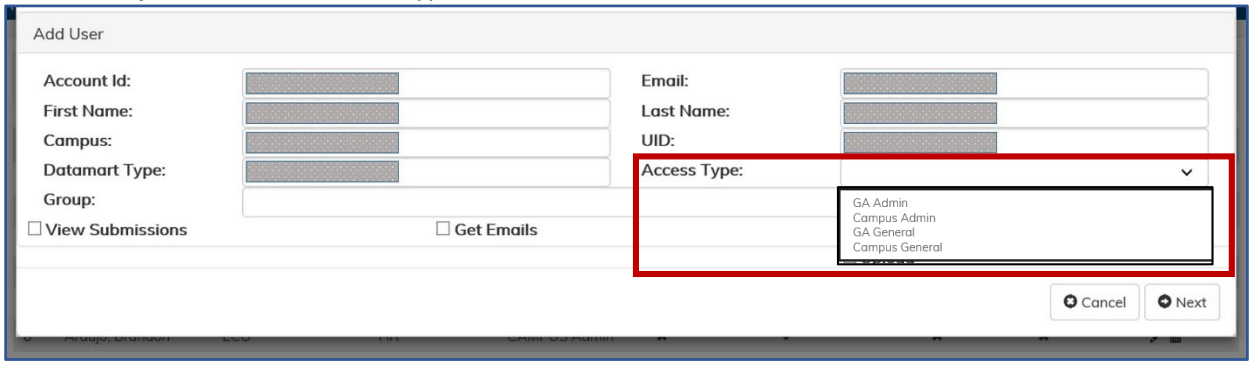
Step 3: Click the plus sign to select a user



The system displays the user's information



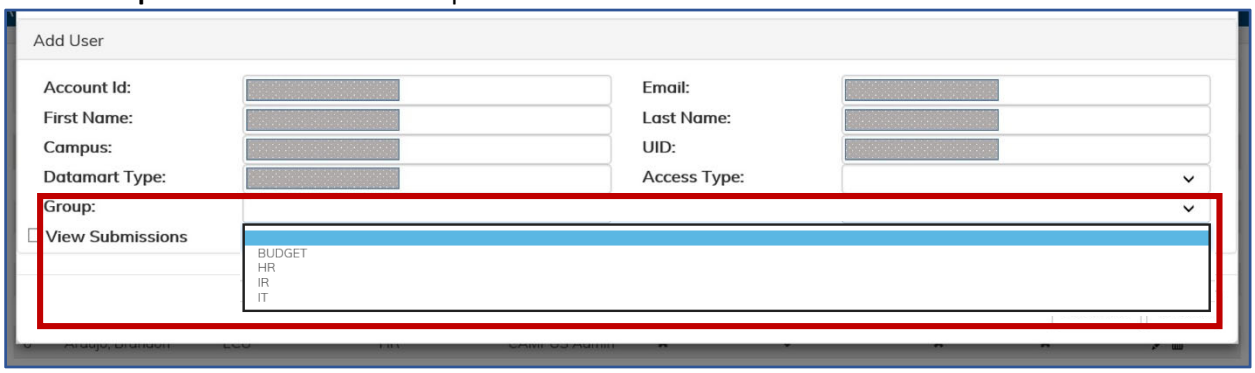
Step 4: Select the Access Type



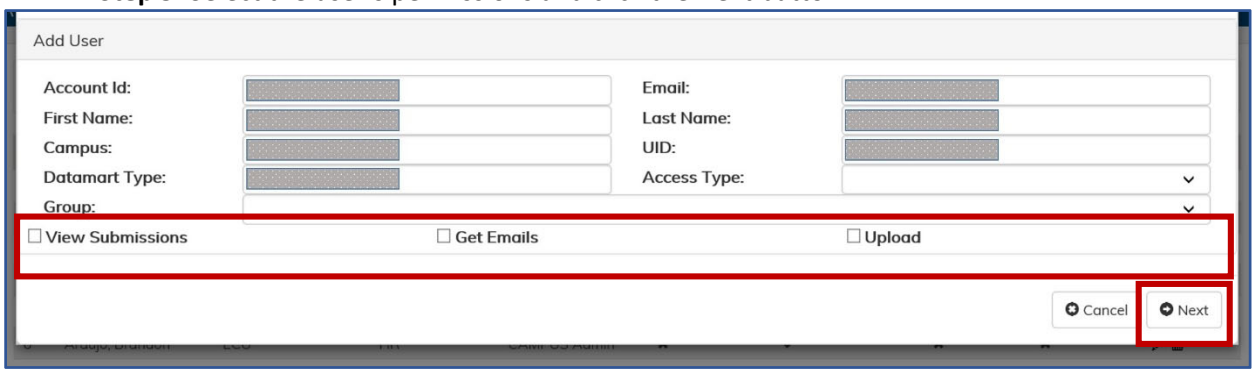
Campus Admin: will have access to all HRDM data including Performance Review scores.

Campus General: will have access to all HRDM excluding Performance Review scores (most campus employees will be assigned this type).

Step 5: Select the user's Group



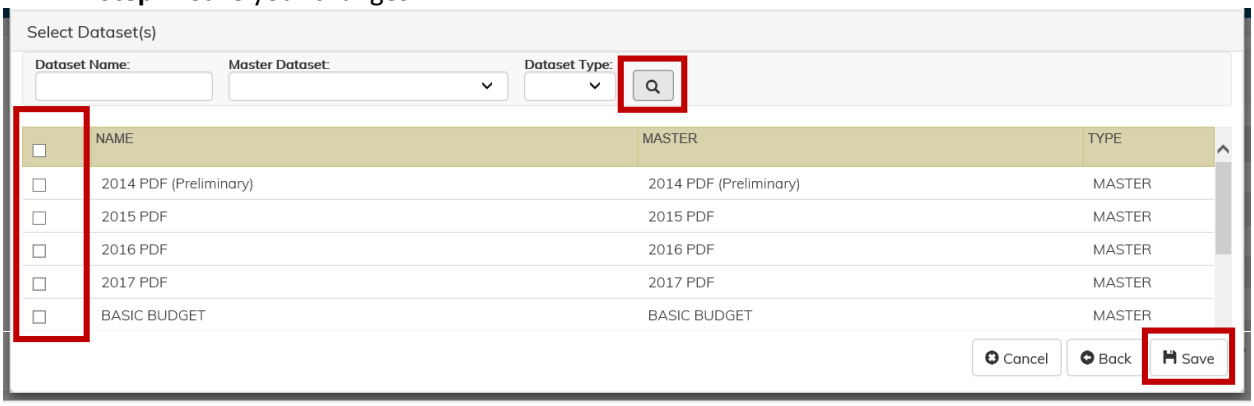
Step 5: Select the user's permissions and click the Next button



Select the all the options this employee should have:

View Submissions: Can view monthly HRDM submissions
Get Emails: Receives HRDM notification emails
Upload: Can load monthly submissions in HRDM

Step 5: Search for datasets (just clicking the search button will display all datasets)
Step 6: Select the datasets that the user should access
Step 7: Save your changes



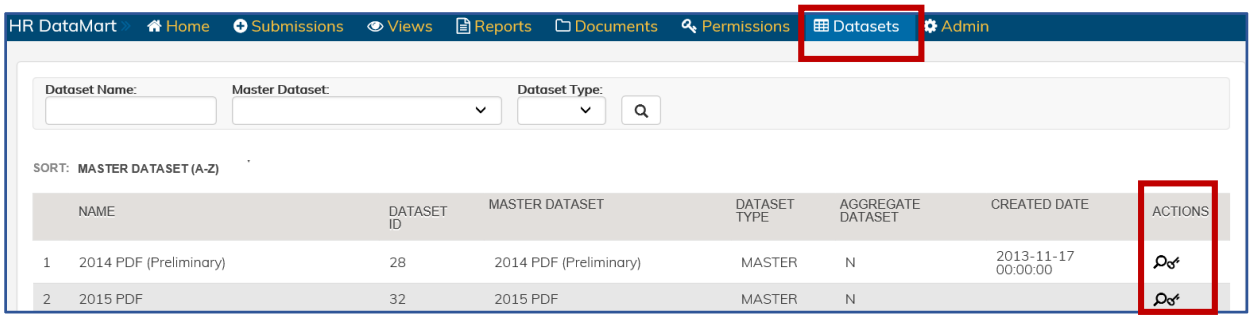
Datasets

Allows you to view available datasets and view/add/remove users for the datasets.

Note: To view fields information and other details for the datasets, see the Dictionary.

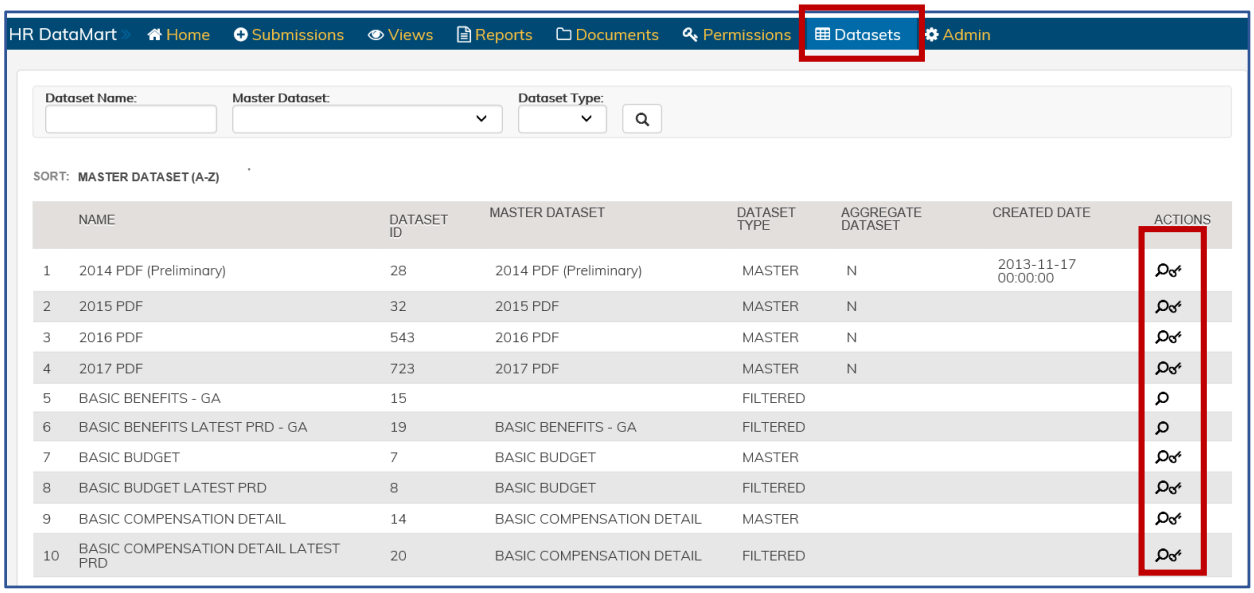
View users with access to a Dataset

Click the Datasets Menu and find the Dataset you want
Select the search icon in the Actions column to see all the users assigned a specific dataset.

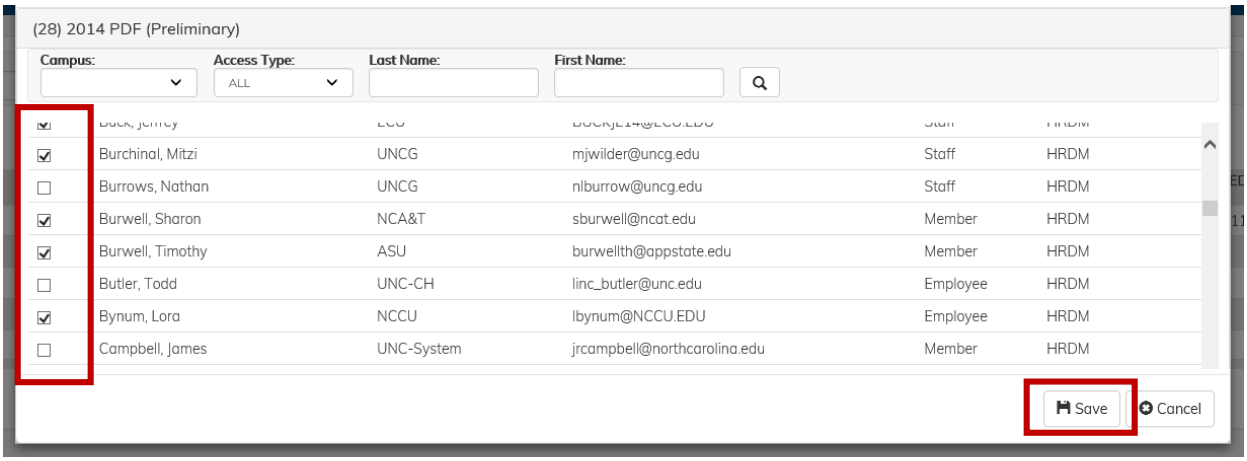


Modify an existing User Permissions

Click the Datasets Menu and find the Dataset you want
Select the key icon in the Actions column to open the Permissions page.



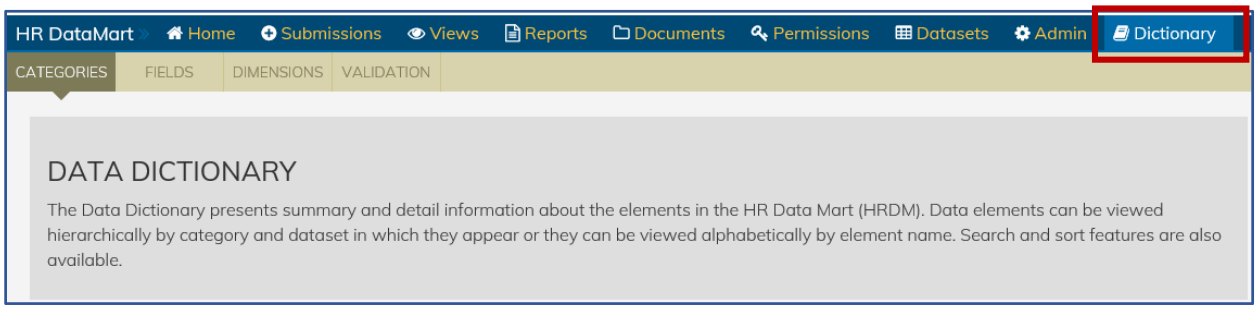
Find the user and check/uncheck the checkbox to add or remove access for this dataset
Click the Save button



You can run the Reports >> Custom Reports >> User Permissions report to review your changes or see which datasets your campus users can access.

Dictionary

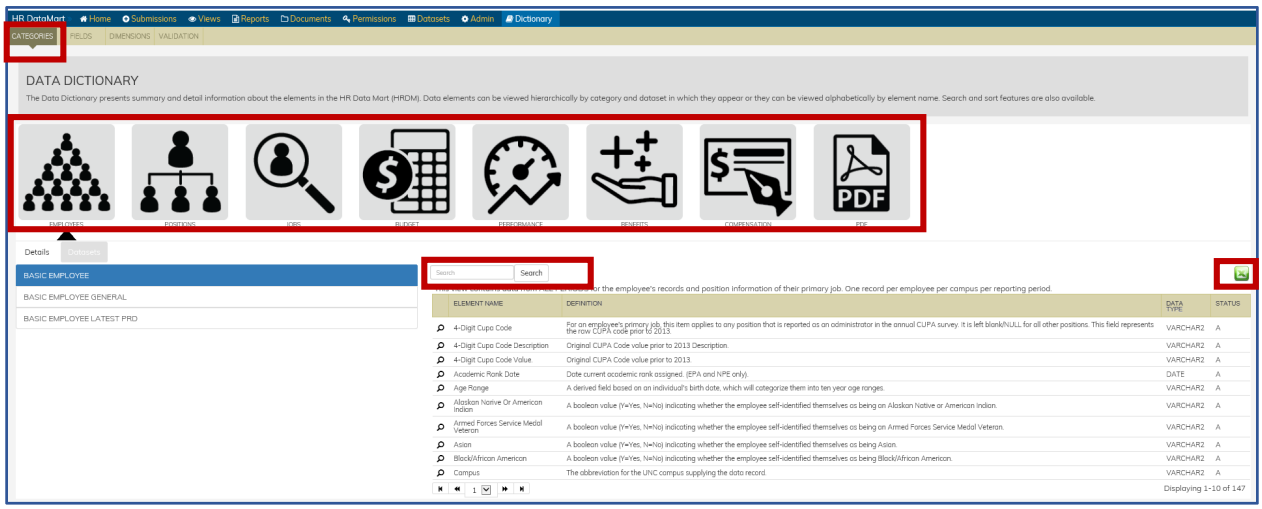
The Dictionary was added in 2019 so it is not on some prior screenshots. It contains information about the datasets, fields, dimensions and validations/edit checks in the HRDM. This data dictionary replaces the old Datasets, Edit Checks and Dimensions spreadsheets in Google Docs. The datafeeds are not currently included in the dictionary, they are accessible from the Documents page.



Categories

Categories shows the datasets based on the seven datafeeds. Selecting a category allows you to view its related datasets.

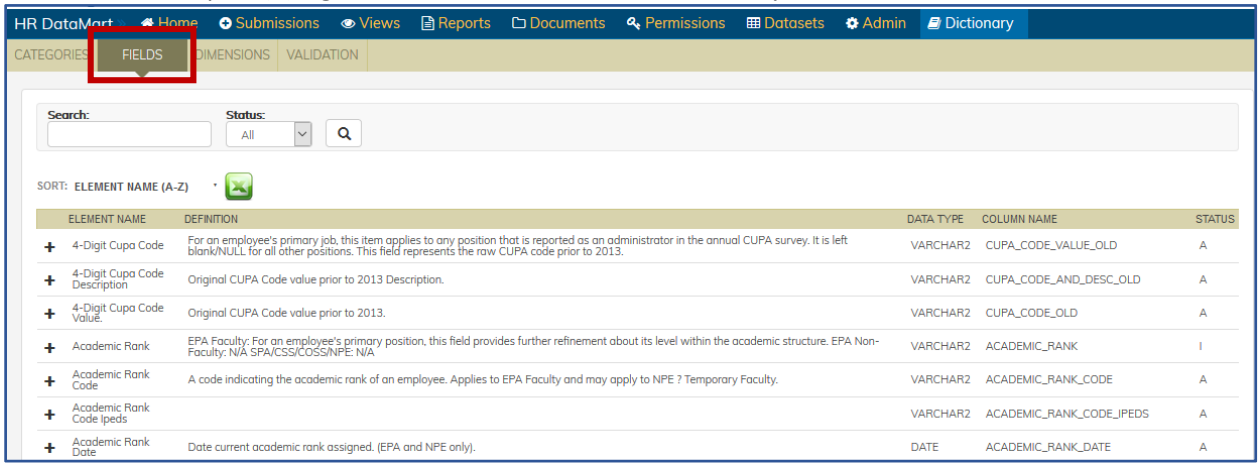
- Select each dataset to view the fields included in that dataset.
- Use the search box to search for fields in the selected Dataset.
- Export all fields for the selected Dataset using the Excel button.



Fields

Fields allows you to view all of the fields in the HRDM Datasets.

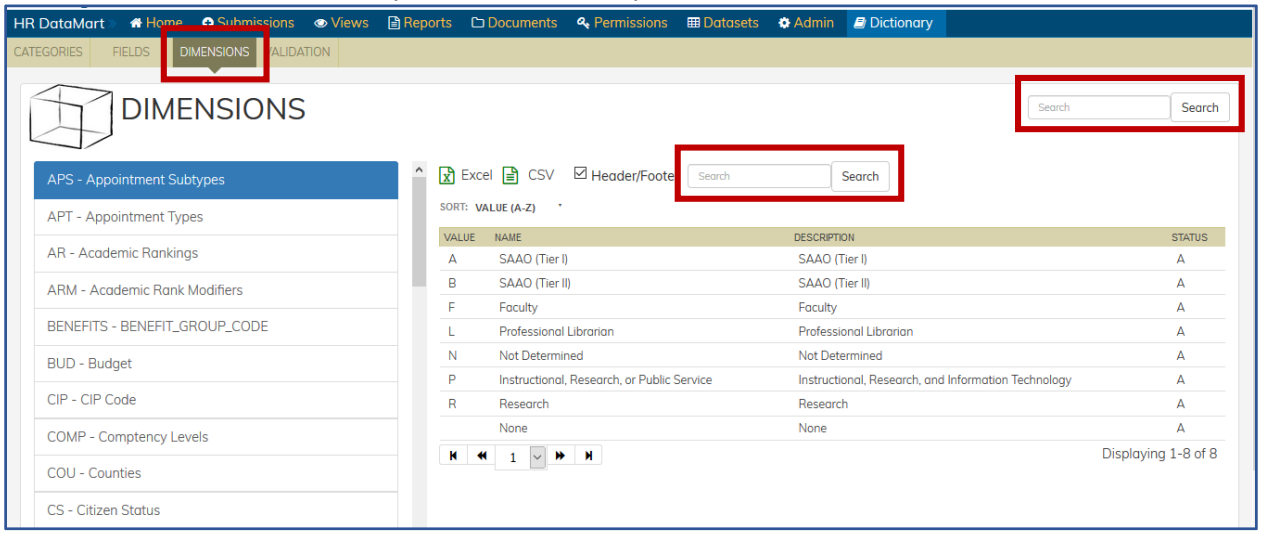
- Use the search box to search for fields in the HRDM Datasets.
- Use the status dropdown to filter the field list.
- Export all fields for the selected Dataset with the Excel button.
- Click the plus (+) sign to view details, datasets and history for a field.



Dimensions

Dimensions contains information for the dimensions included in the Datafeeds.

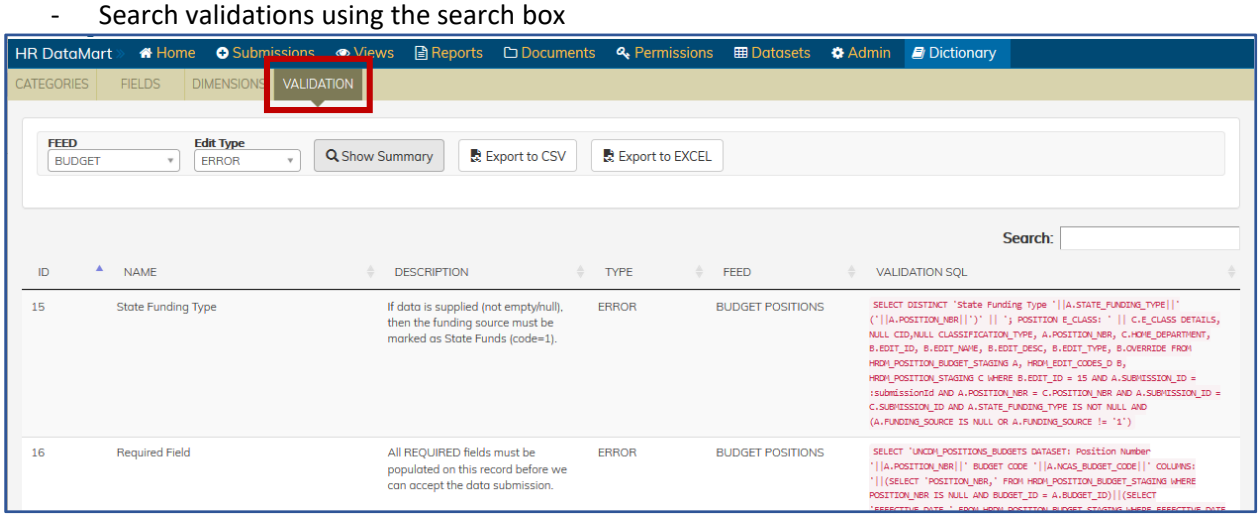
- Select a dimension on the left to view the dimension values
- The top search allows you to search the Dimension list on the left
- The lower search allows you to search for a specific item in the selected dimension list



Validation (Edit Checks)

Validation shows the validations/edit checks used for the Datafeeds. Use this tab to troubleshoot HRDM errors and warnings.

- Select Feed and Edit Type and click Show Summary to view errors/warnings
- Use the Export buttons to export to Excel or CSV
- Search validations using the search box



The End!