HR DataMart Campus User Guide

Created: 10/28/2011

Updated: 04/15/2019

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HR DataMart Overview

The UNC System Office created the HR DataMart in 2012 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 can close their 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 the for the month.

The data in the HR DataMart allows the System Office and campuses to run various reports for internal purposes as well as the state and federal requirements. It is also a means of promoting and 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:

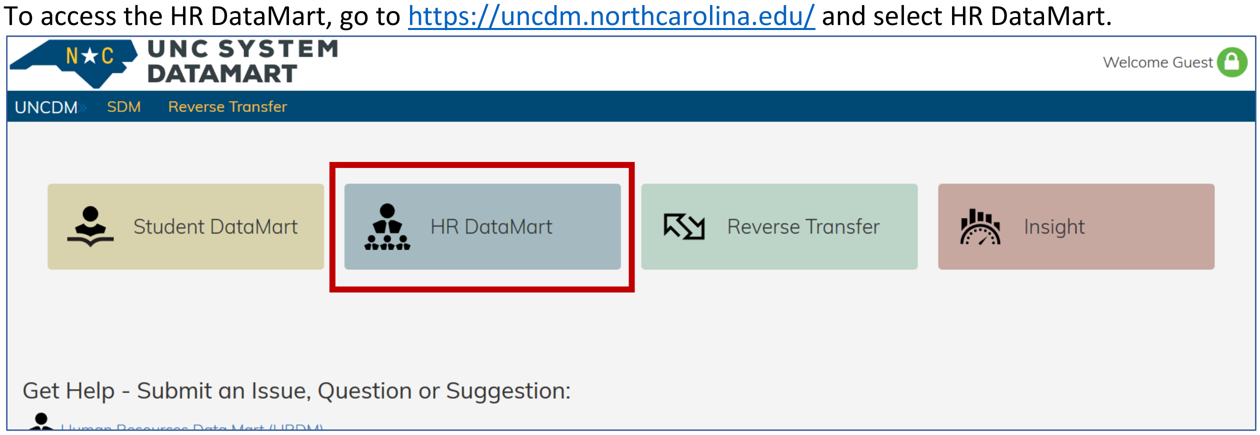
- Benefits
- Compensation
- Employees
- Employee Position
- Positions
- Position Budget
- Performance Rating

The datafeeds are used to create datasets/views that can be used for reporting.

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

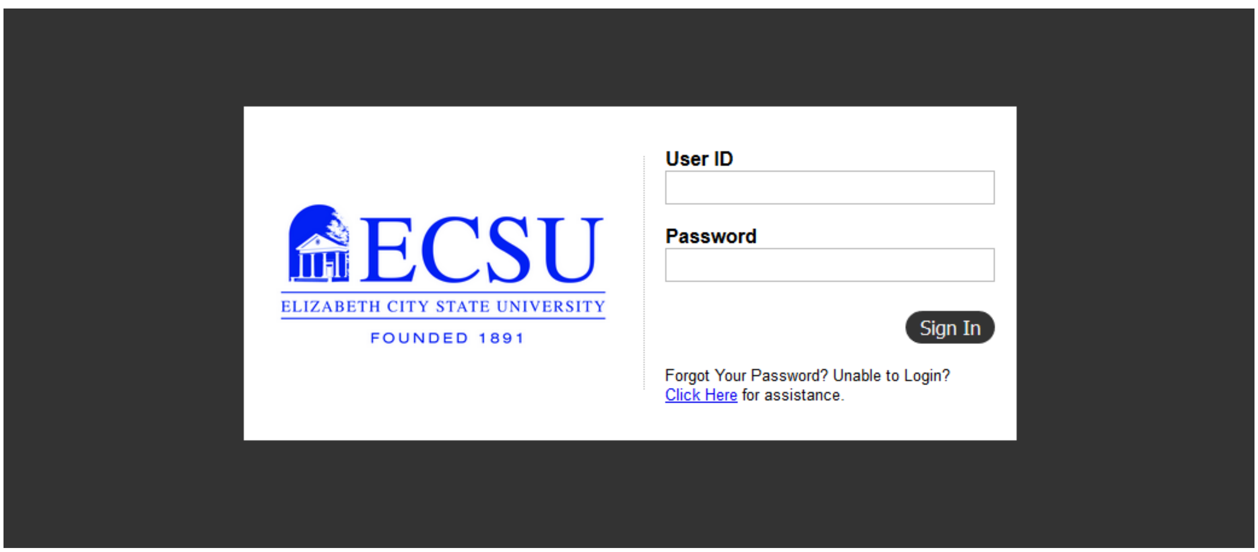
HR DataMart Login

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



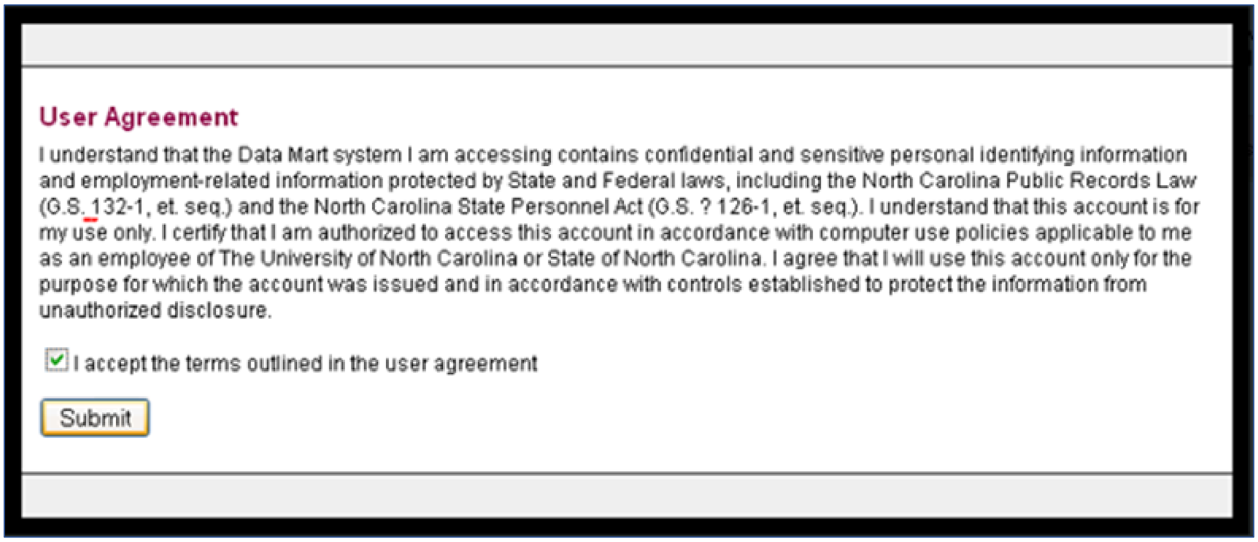
Select your campus from the list of campuses
Click ‘**Login through your campus**’ button

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.



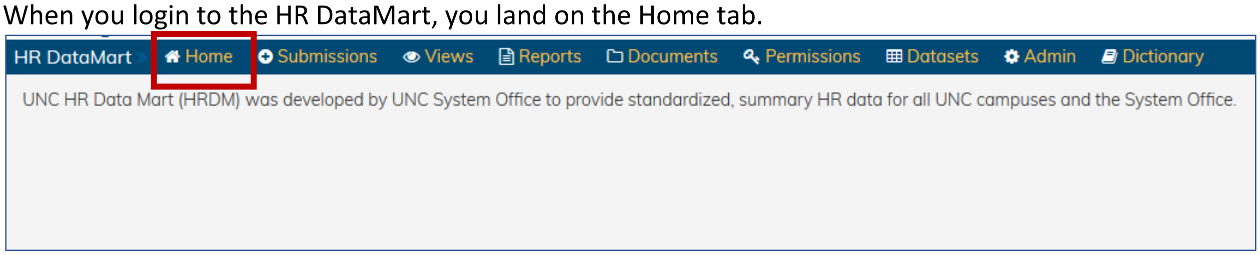
HR DataMart Tabs Overview

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

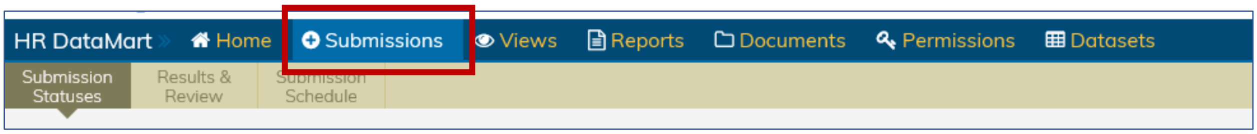
When you login to the HR DataMart, you land on the Home tab.



Submissions

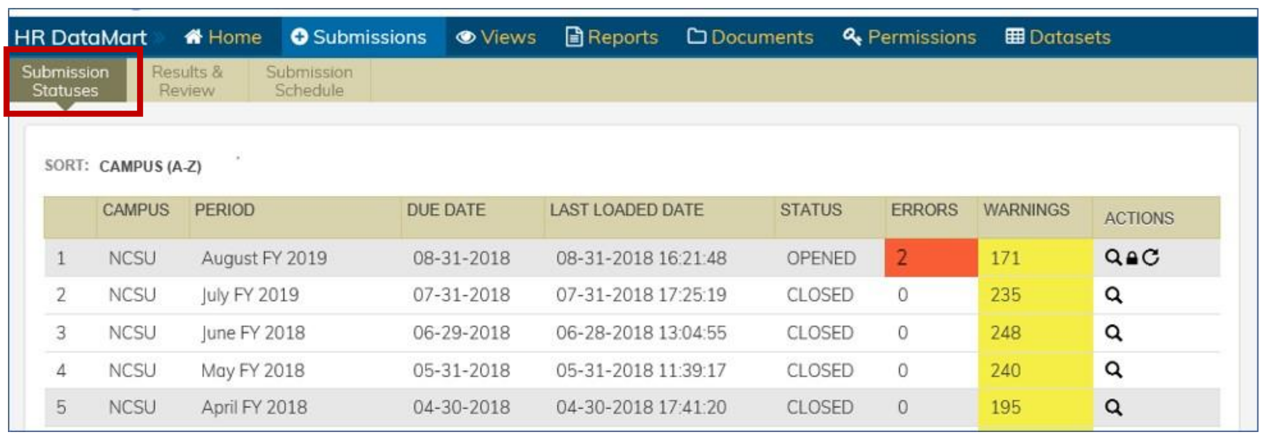
The Submissions tab shows the monthly submission information for your campus. There are three subtabs under the Submissions tab:

- Submission Statuses
- Results & Review
- Submission Schedule



Submission Statuses

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

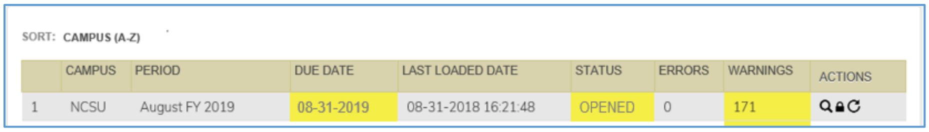


	CAMPUS	PERIOD	DUE DATE	LAST LOADED DATE	STATUS	ERRORS	WARNINGS	ACTIONS
1	NCSU	August FY 2019	08-31-2018	08-31-2018 16:21:48	OPENED	2	171	
2	NCSU	July FY 2019	07-31-2018	07-31-2018 17:25:19	CLOSED	0	235	
3	NCSU	June FY 2018	06-29-2018	06-28-2018 13:04:55	CLOSED	0	248	
4	NCSU	May FY 2018	05-31-2018	05-31-2018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

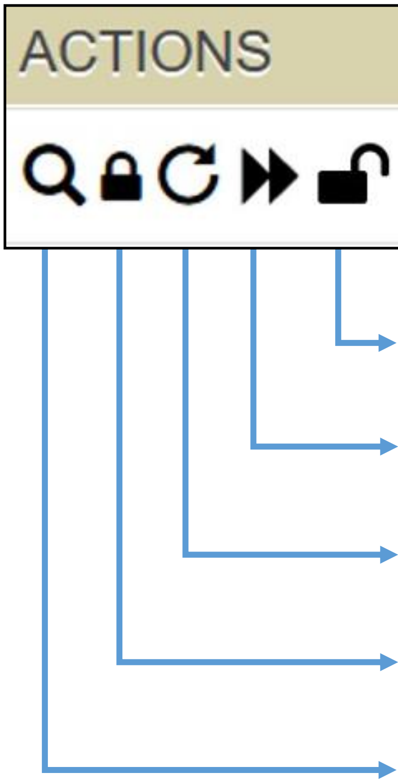
- **CAMPUS:** Name of campus that submitted the data.
- **PERIOD:** The submission period.
- **DUE DATE:** Date the submission for that period is due. Campuses are given a 3 business day grace period after the Due Date to close their submissions.
- **LAST LOADED DATE:** Date the data was last loaded.
- **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.

a. Highlights of the DUE DATE and STATUS if the submission is still open and: it is past the submission due date, a new month has started, and there are 0 (zero) errors



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: 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**, **Reload Submission**, **Close Submission** and **Open Next**.

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

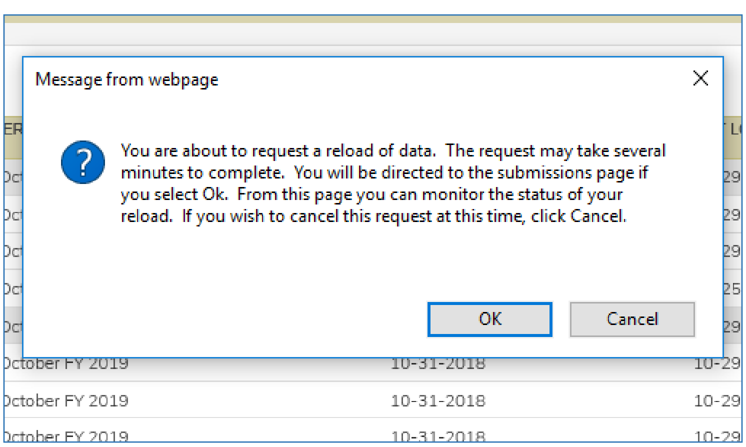
Open Next manually opens and pulls data for the next period when the current/last period is closed.

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 specific campus users can load submissions.
Note: When users select "Reload Submission", the following message appears:



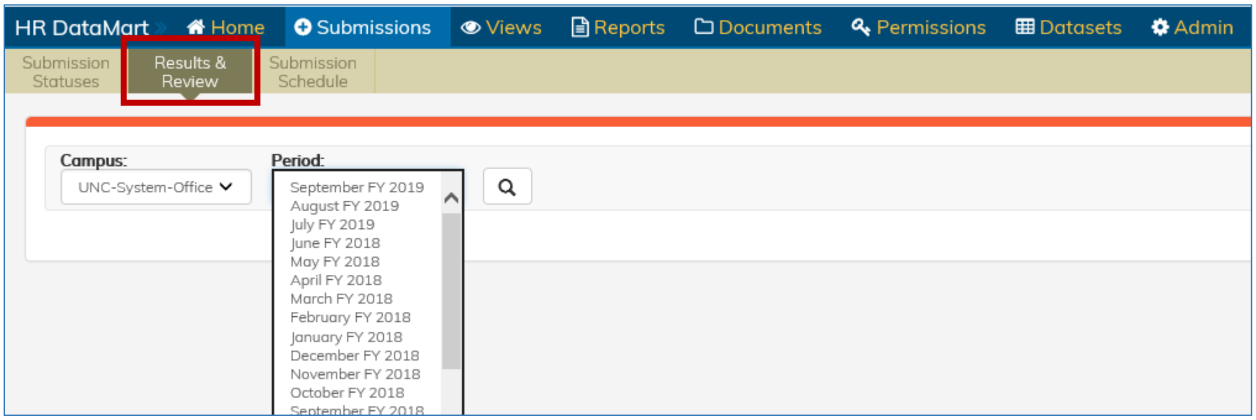
The campus can reload once the submission is open for that period.

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.

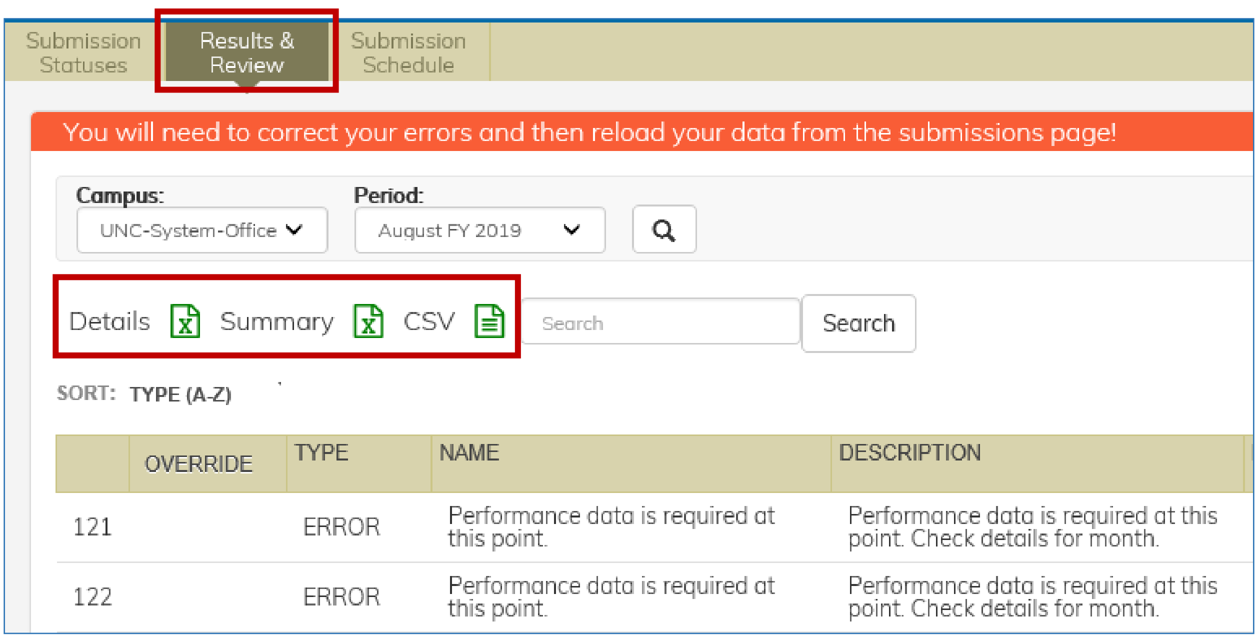
Review & Results

The Reviews & Results tab shows details about each successful submission to the Data Mart. Select a period and click the Search icon to get 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 errors/warning Summary or Details icons to export your results to an Excel or CSV file.

Submission Schedule

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

Submission Statuses | Results & Review | Submission Schedule

Submission Schedule

#	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:

SEPTEMBER 2018

Sun	Mon	Tue	Wed	Thu	Fri	Sat
						1 Period Start Date
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21 Period Open Date	22
23	24 Period Open Date	25	26	27	28 Period Due Date	29
30	1 October Grace Period	2	3	4	5	6

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

- **PERIOD START DATE:** The first day of the period, usaually 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 morning of 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 to determine if it is valid or if there are errors.
  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.

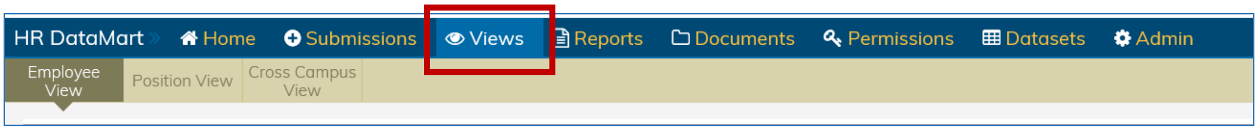
- **MANUAL LOAD:** If there were errors in the data load, the campus staff will need to investigate and correct as necessary. Then they can manually reload the data submission.

- **AUTO CLOSE:** If there are no errors on the morning of 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 wait for the next period to make any data corrections.

Views

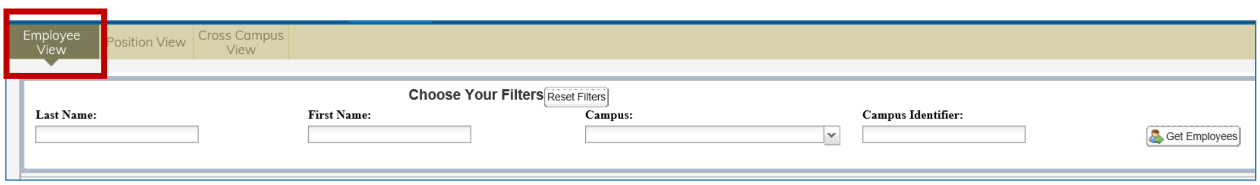
This section allows users to see data related to Employee View, Position View, and Cross Campus View. This allows you to view data for employees, positions and across multiple campuses.



Employee View

The Employee view provides information for one employee, using the following search criteria:

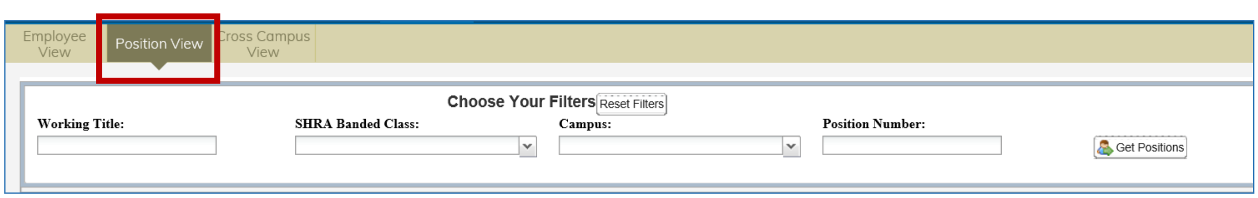
- Last Name
- First name
- Campus
- Campus identifier



Position View

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

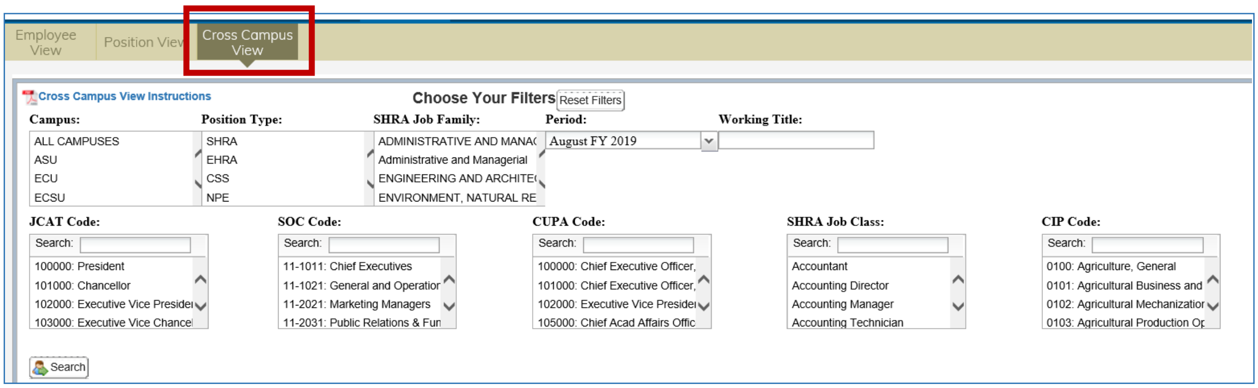
- Working Title
- SHRA Banded class
- Campus
- Position Number



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
- Working title
- JCAT code
- SOC code
- CUPA code
- SHRA job class

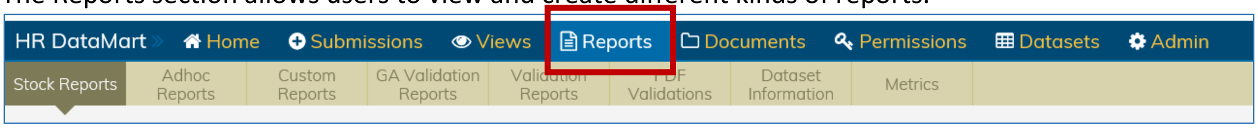


Note:

- 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 in the upper right to reset all filters.
- CSS category is specific to ECU.
- COS category is specific to NCSU.
- Working Title searchbox requires at least 3 characters.
- Periods are defined by FISCAL year; for example, December 2017 would translate as “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 another campus’s data, please approach that campus directly, or create a ticket at hrdm@northcarolina.edu.

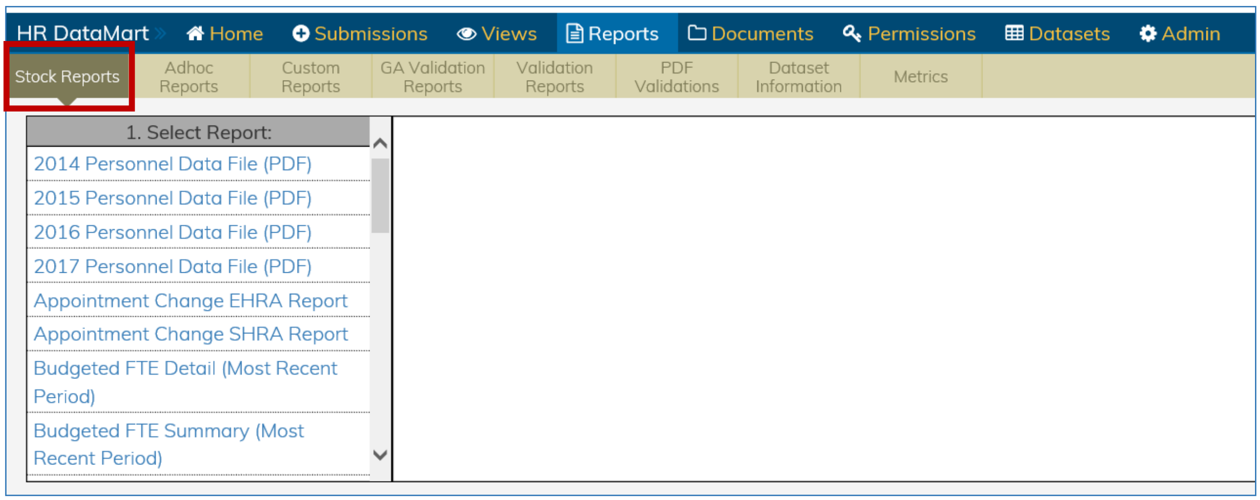
Reports

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



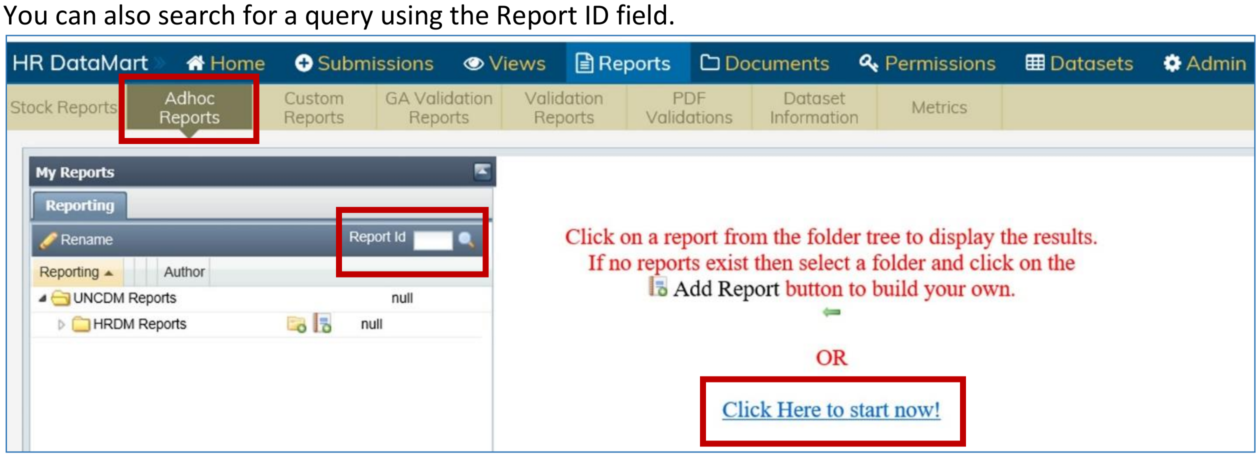
Stock Reports

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

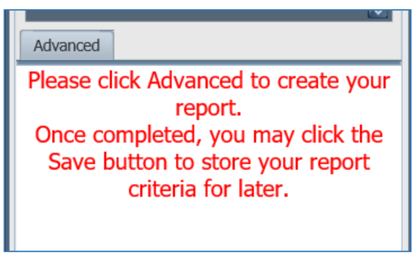
- Select **'Click Here to start now!**'
- Click the **Advanced** tab

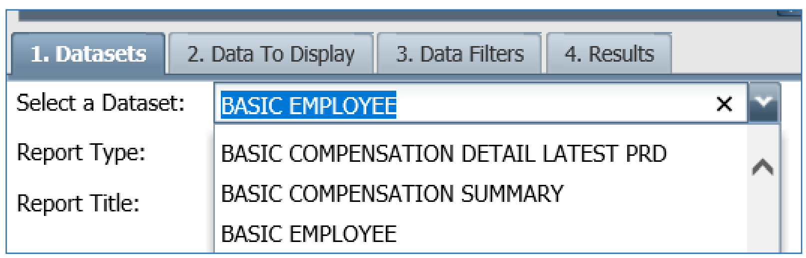
Step 1: Select a Dataset

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

  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 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.



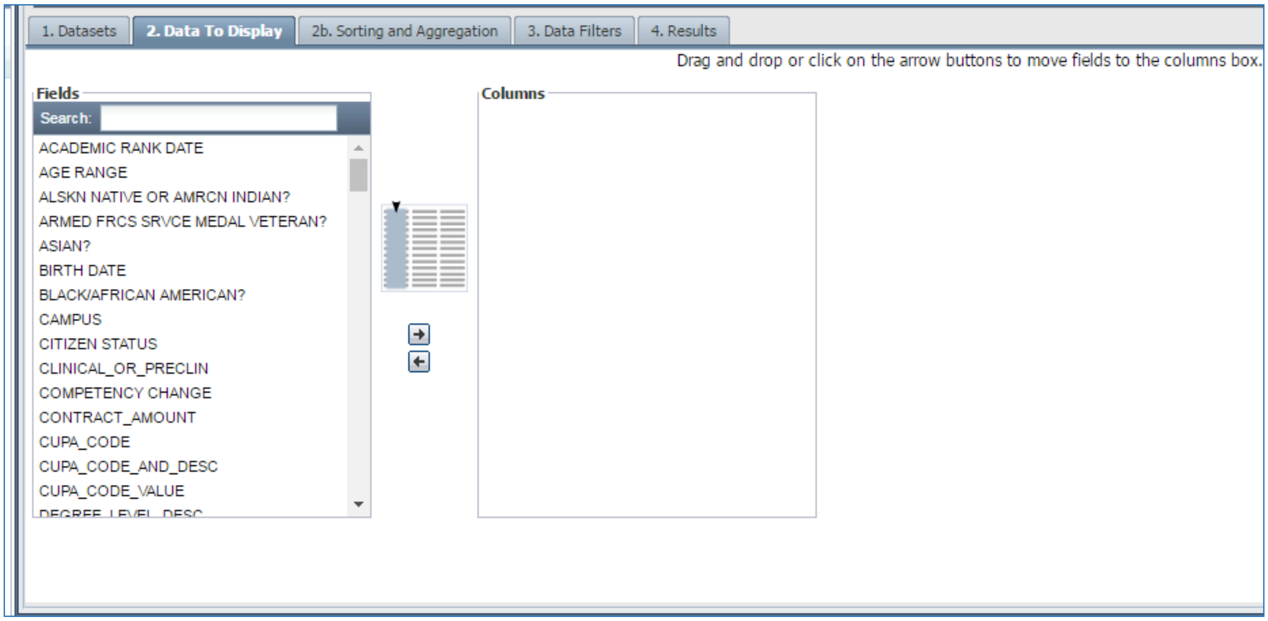


Report Title

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.

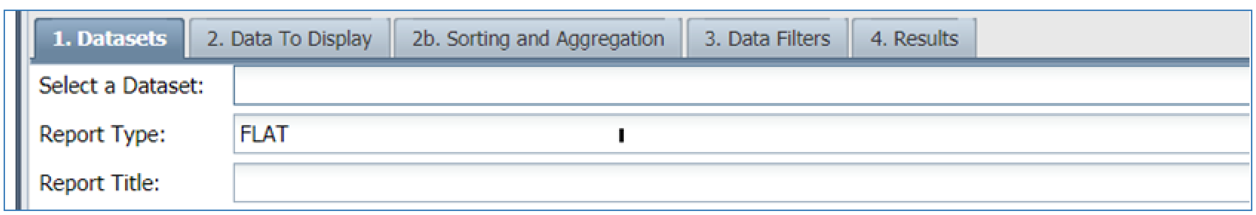
Step 2: Select Data to Display

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.



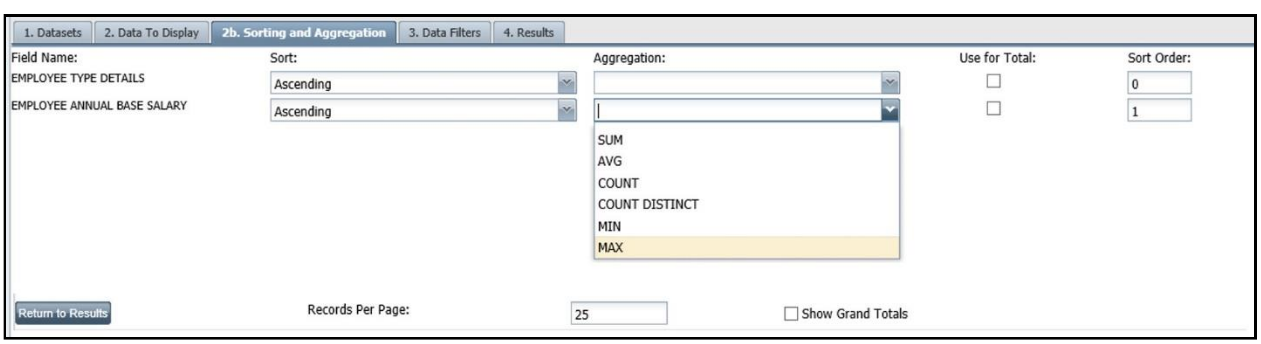
Note: The Fields list contains a list of all the available datasets. You can also search for fields.
Note: Columns allows you to select which fields you want to include in your report.
Use the arrows in the middle to move fields from the field list to the columns and vice versa, or drag and drop fields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



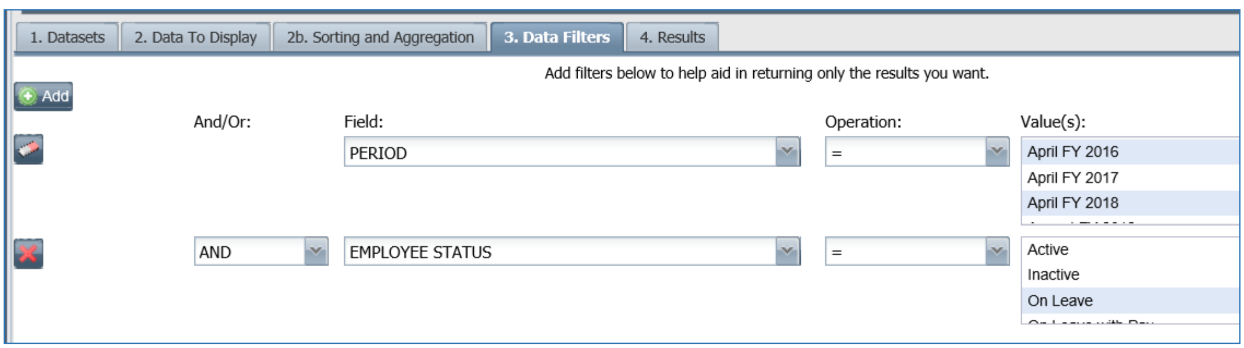
Use for Total
The chosen aggregation will be added to any other checked field to create a row total. Example: Base Salary + Other Salary could be added for a combined total; or, alternately, you could leave Other Salary unchecked so that only Base Salary goes toward the row total.

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.

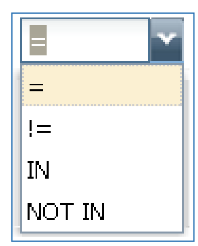
Show Grand Totals
Sum all of the total columns for each row into one master total row

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.

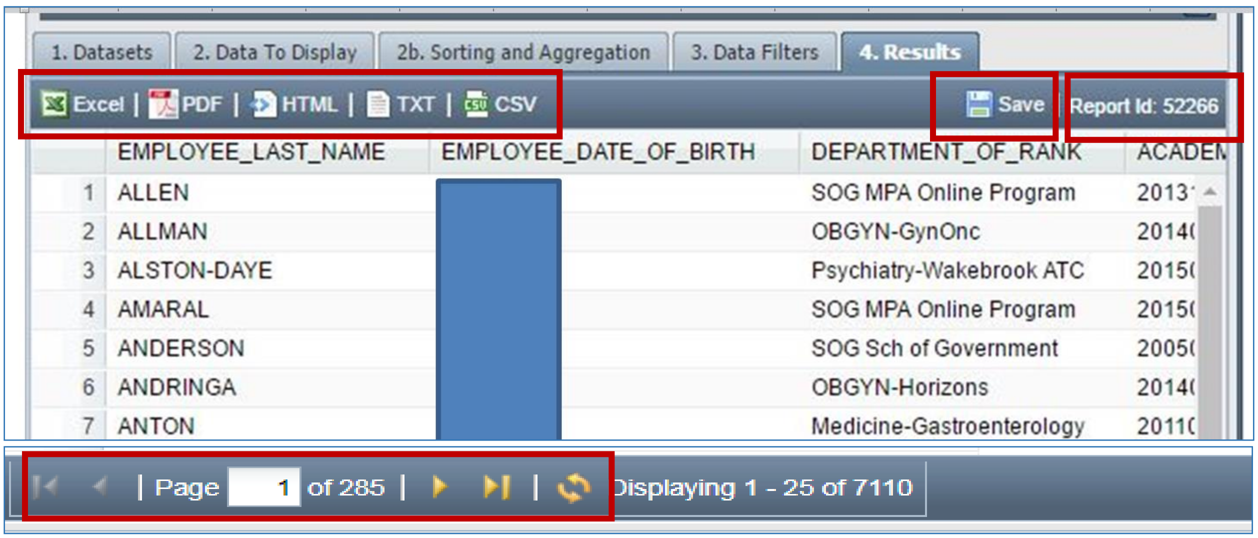
Erase Filters: Click the eraser icon to erase any filters.

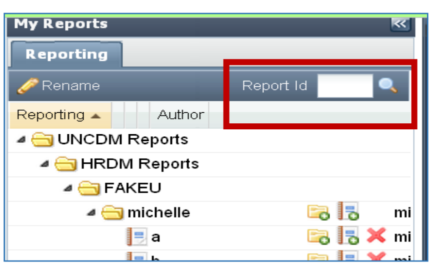
Step 5. Results
The Results tab shows the output of your query/report selections.

- **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.

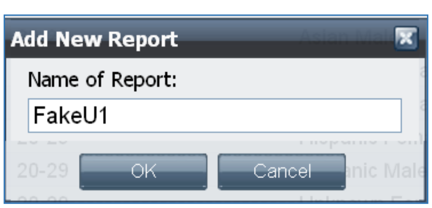
- **Report ID:**
  Report ID is the number specifically associated with this report this number allows you to quickly generate a specific report without having to re-create the report. The report ID can be shared with others so they can re-run the same report or make modifications and save the new report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

- **Pagination** - users can use the arrows at the bottom of the window to scroll through the pages if results exceed one page or 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 click on the search icon.

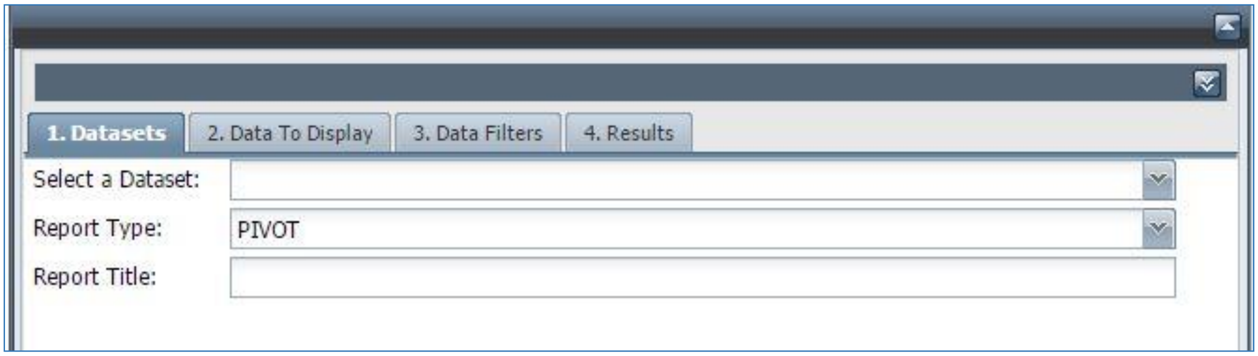


Note: If selection criteria for a report is changed, a new report ID is generated and the new report can be saved with a new name.

Creating a Pivot report

Step 1: Select a Dataset

Select the **PIVOT** Report Type



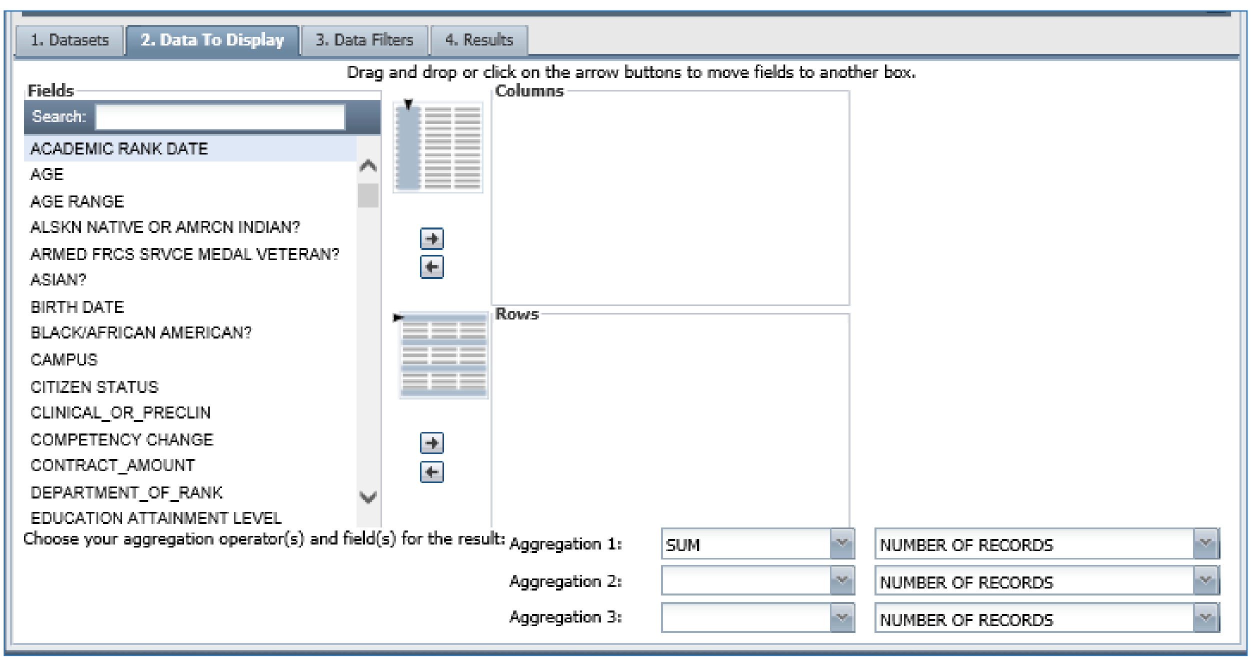
There are two types of reports (Pivot and Flat)

Flat reports allow you to sort, count, total or average data using only columns and rows, without the ability to drill down (Flat report was detailed in an earlier section of this user guide).

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

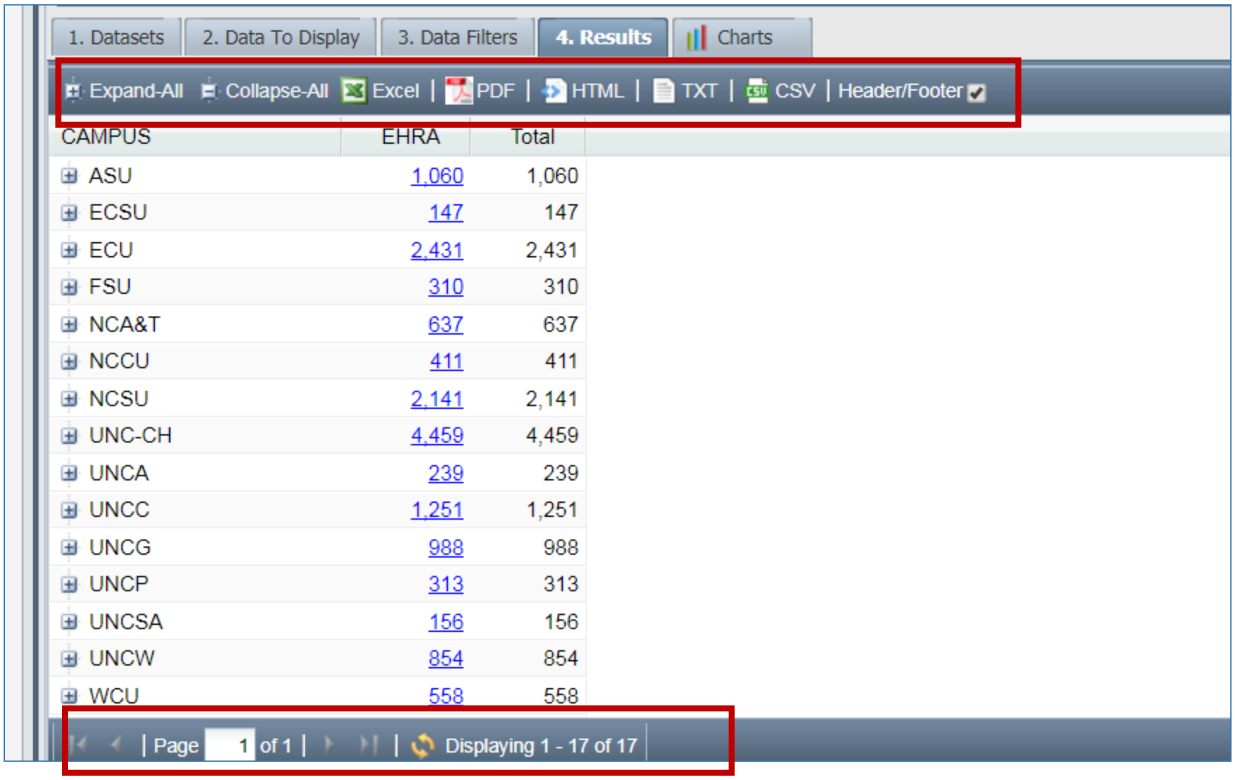
This is the display for Report Type 'Pivot'. Drag and drop or click on the arrow buttons to move selected fields to or from the columns and rows boxes.



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



CAMPUS	EHRA	Total
ASU	1,060	1,060
ECSU	147	147
ECU	2,431	2,431
FSU	310	310
NCA&T	637	637
NCCU	411	411
NCSU	2,141	2,141
UNC-CH	4,459	4,459
UNCA	239	239
UNCC	1,251	1,251
UNCG	988	988
UNCP	313	313
UNCSA	156	156
UNCW	854	854
WCU	558	558

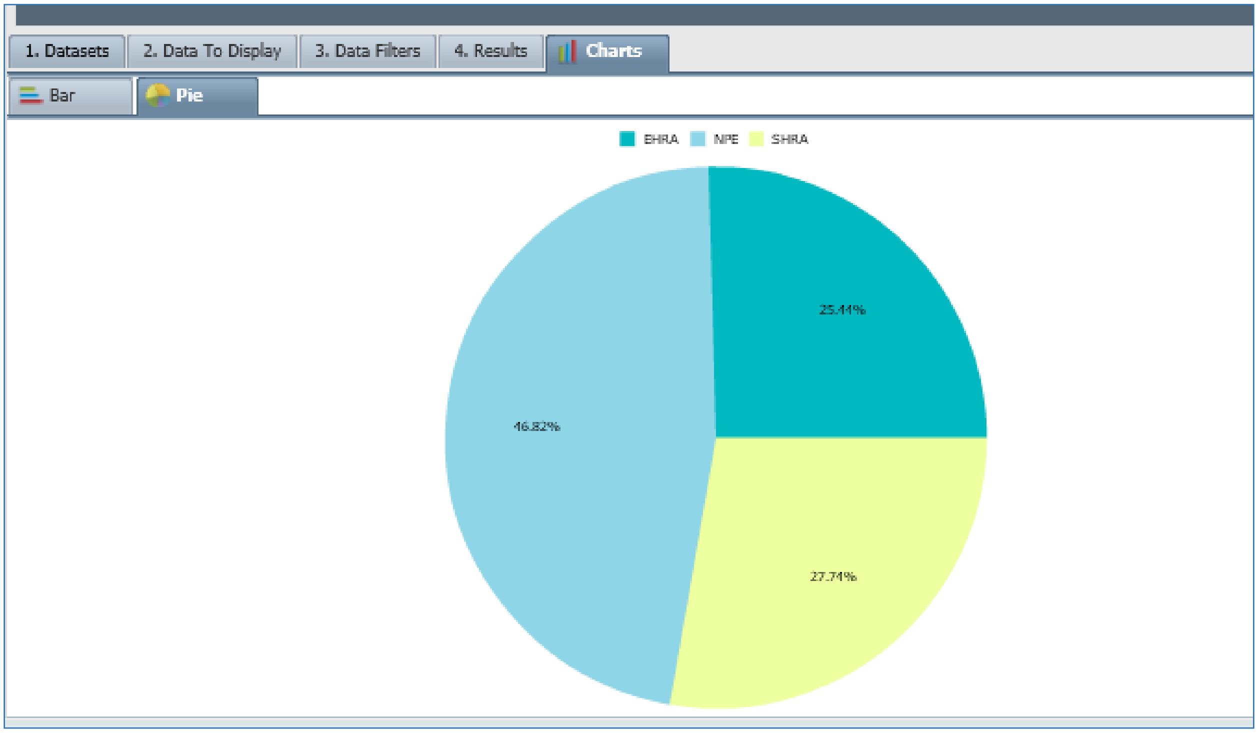
Use the top controls to expand all/collapse all or export the results to different file formats. Page through or refresh the results with the pagination controls at the bottom of the results.

Drill Down

CAMPUS	EHRA	Total
ASU	1,060	1,060
ECSU	147	147
191000	12	12
200000	38	38
201000	42	42
202000	31	31
205000	2	2
206000	21	21
212000	1	1
ECU	2,431	2,431
FSU	310	310

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
Provides 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: 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.

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

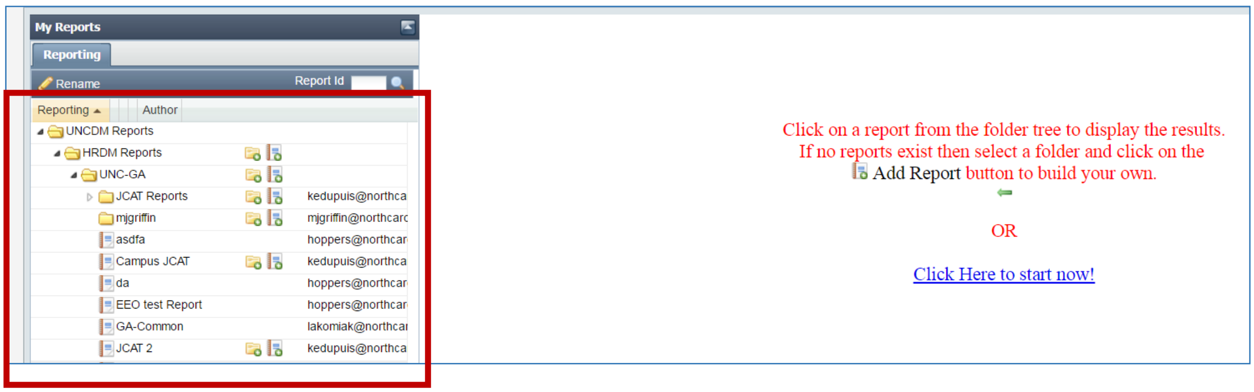
Pie Charts
Only allow one column
Only the first level of rows will be used. These will become the legend
The percentages will be based off of the total number
The use of filters is vital in order to create relevant pie charts.

Copy/Share/Delete Reports

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

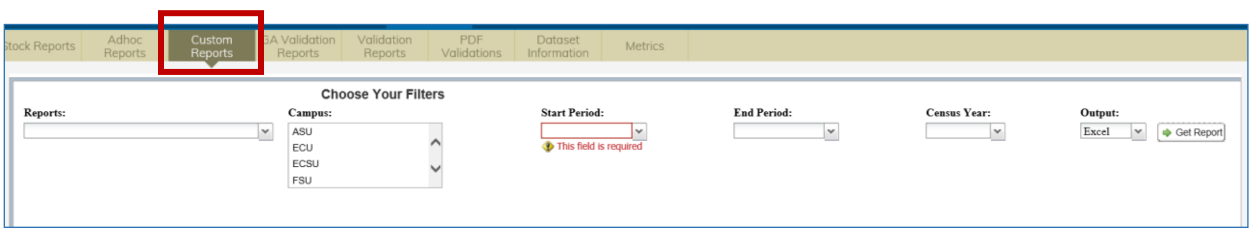
To move a personal report into a shared folder, click and drag the report from your personal folder to the campus destination folder. Look for the green plus icon, indicating it will be added before releasing your mouse.

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.



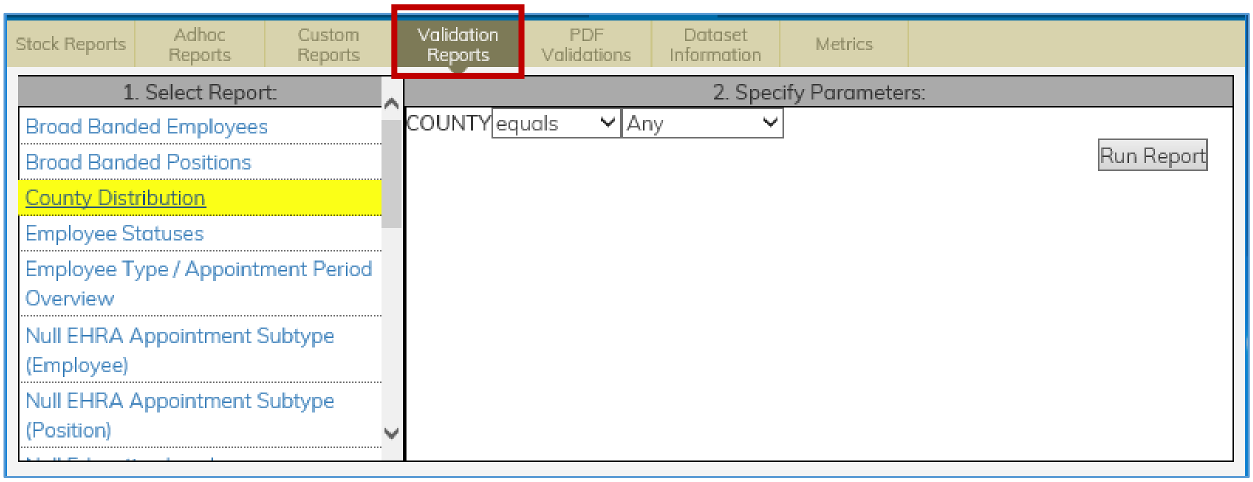
Step 1: Choose the Report from the Reports dropdown.

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

Step 3: Choose the Output type.

Validation Reports

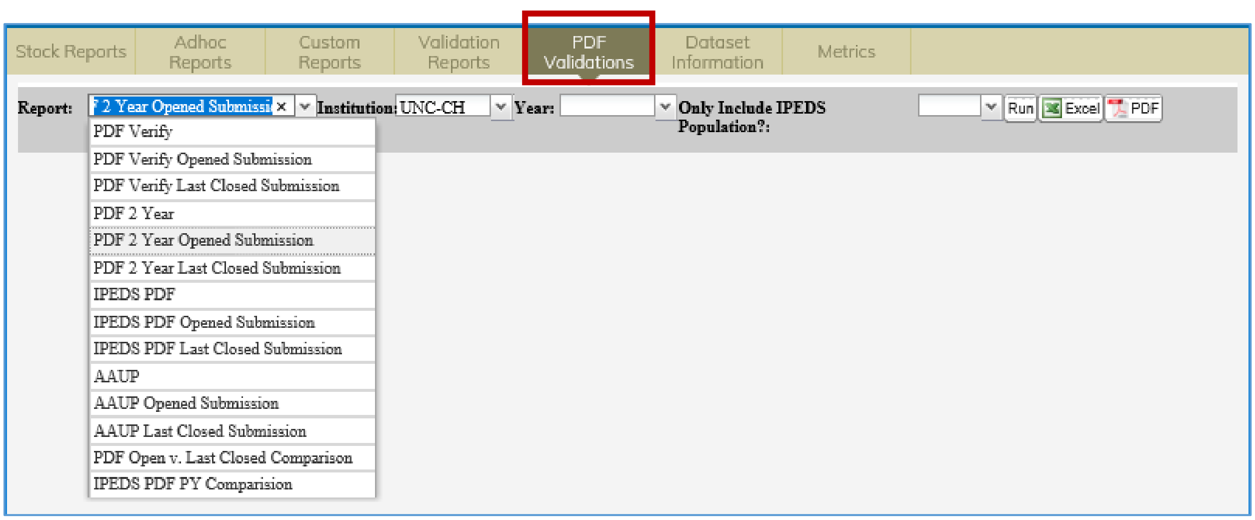
Validation reports provide a quick overview of key data elements for data integrity review. Select the report and appropriate parameters to view the results



PDF Validations

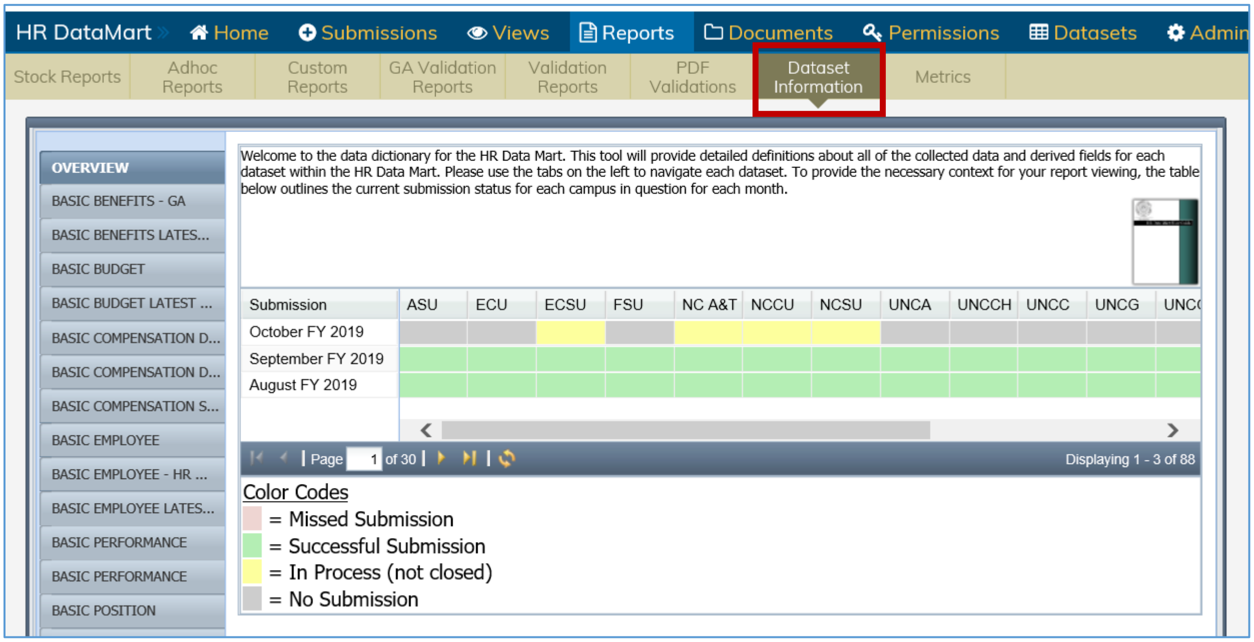
The PDF Validations reports allow you to run various previous and current submissions using the PDF logic and compare to prior PDFs.

Select the report and appropriate parameters to view the results



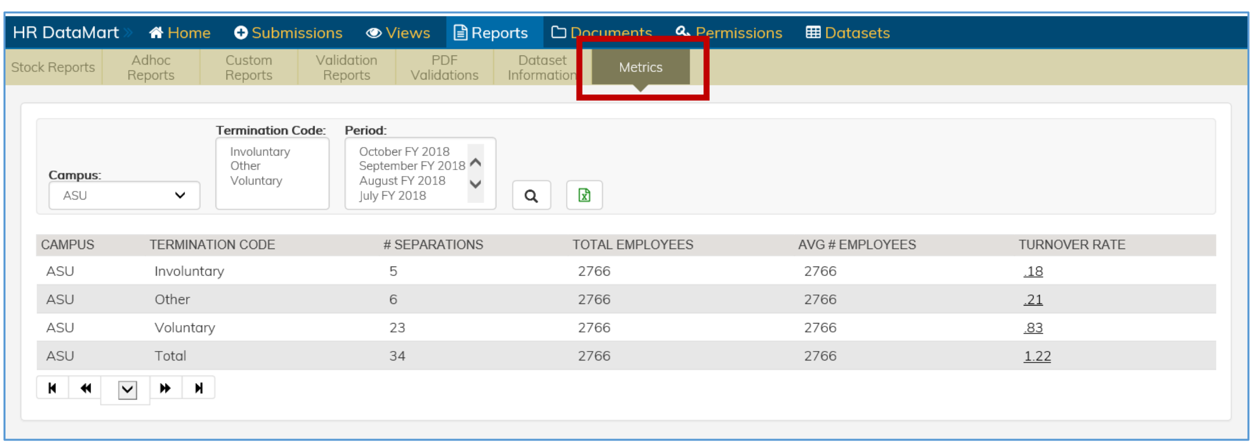
Dataset Information

Datasets provides detailed definitions about all of the collected data elements and derived fields for each dataset within HR DataMart. You can select a dataset to view its data dictionary. This page also displays information on the most recent submissions.



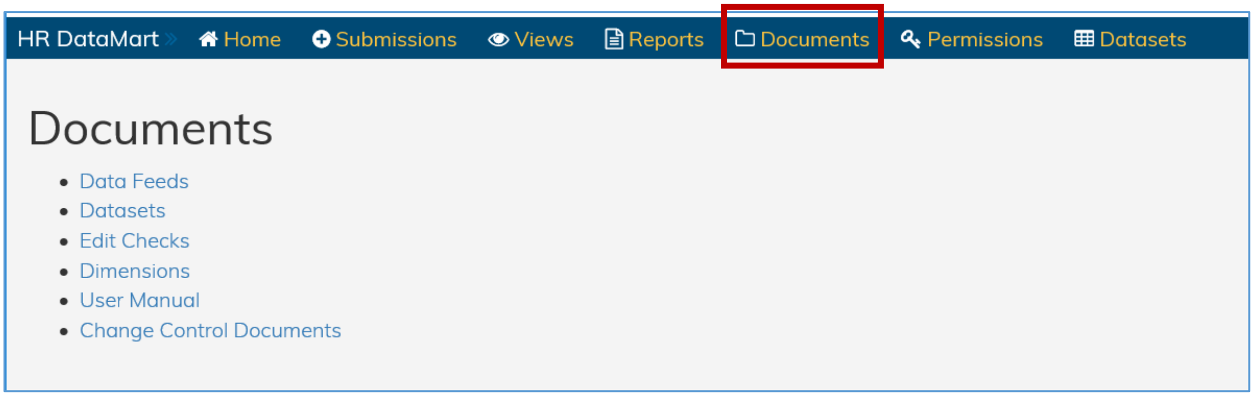
Metrics

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



Documents

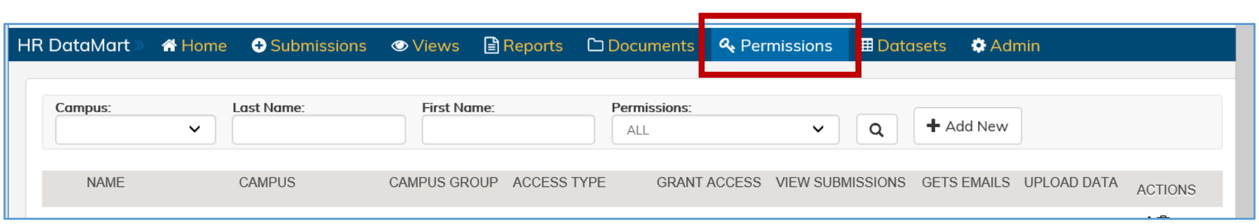
This section has information on Data Feeds, Datasets, Edit Checks, Dimensions and the user manual.



Data Feeds: Information on the data feeds submitted by the campuses.
Datasets: Information on datasets/views used for reporting.
Edit Checks: Edit check functionality does data verification and validation. This process is to ensure data collected is standardized.
Dimensions: Defines the expected and accepted data values to ensure consistency.
User Manual: HRDM user manual.
Change Control Documents: Documents used for the annual HRDM enhancements.

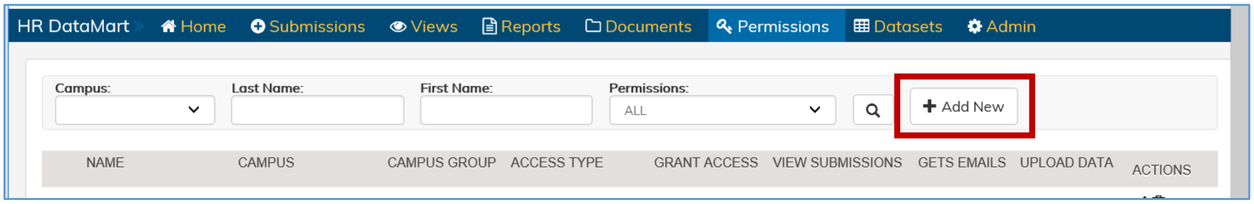
Permissions

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. In Custom Reports, there is a report called User Permissions (Reports >> Custom Reports >> User Permissions) that displays a list of users for your campus.

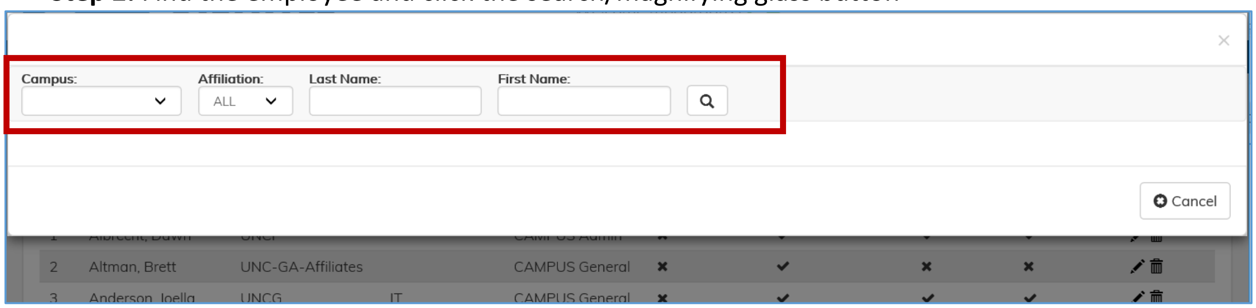


Add a New User

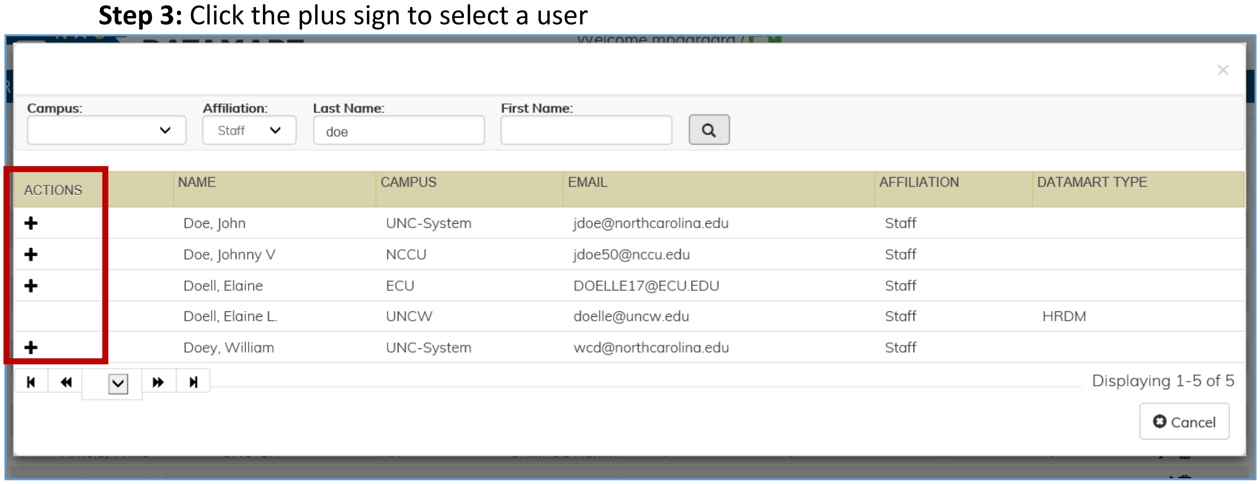
Employee must have already logged into HRDM for their campus credentials to be recognized.
Step 1: Click the + Add New user button



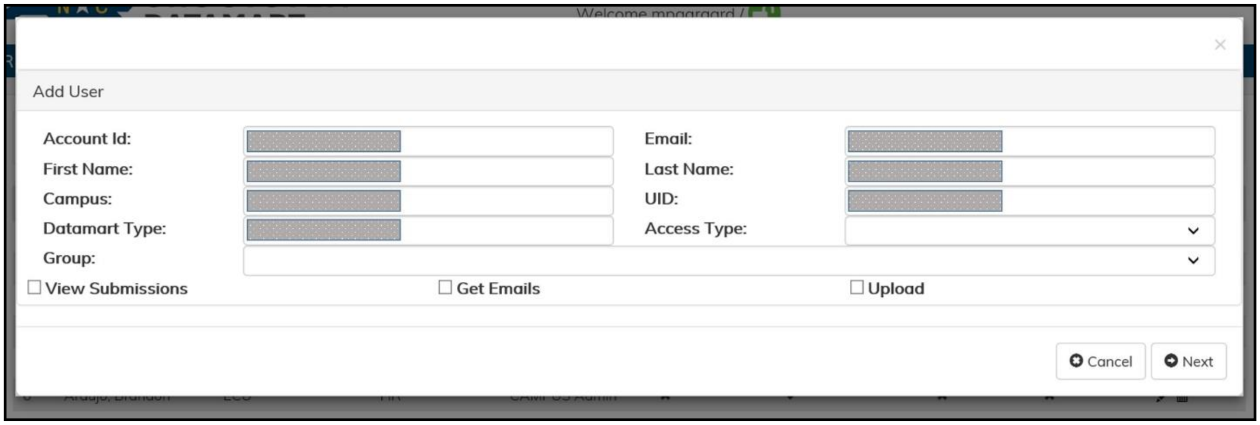
Step 2: Find the employee and click the search/magnifying glass button



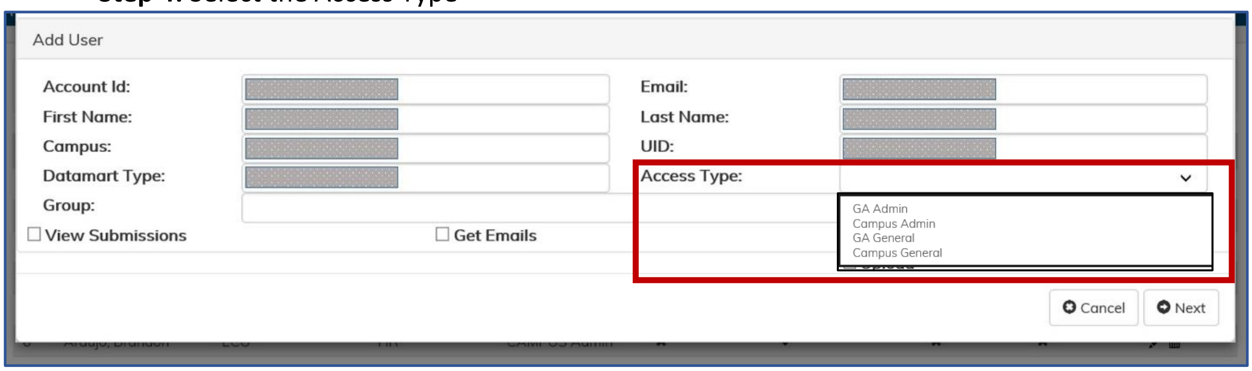
Step 3: Click the plus sign to select a user



The system displays the user’s information



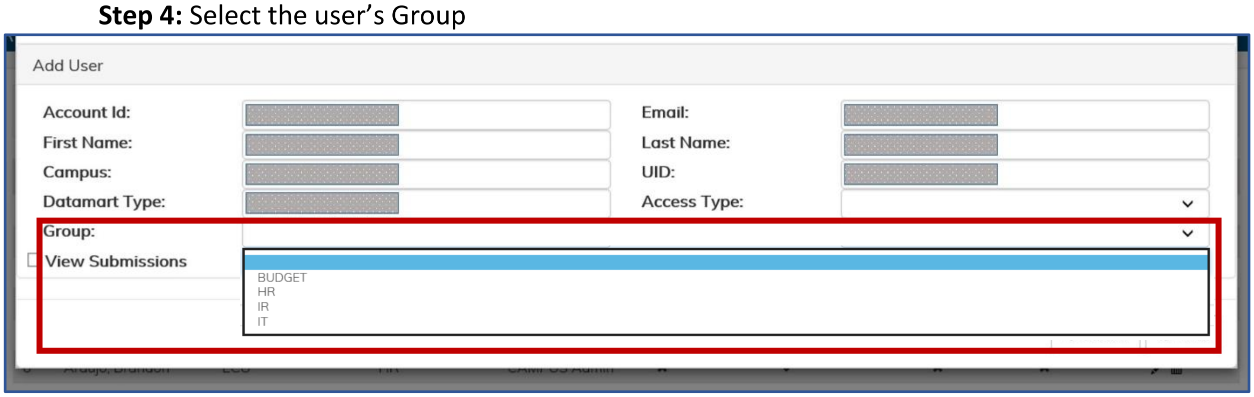
Step 4: Select the Access Type



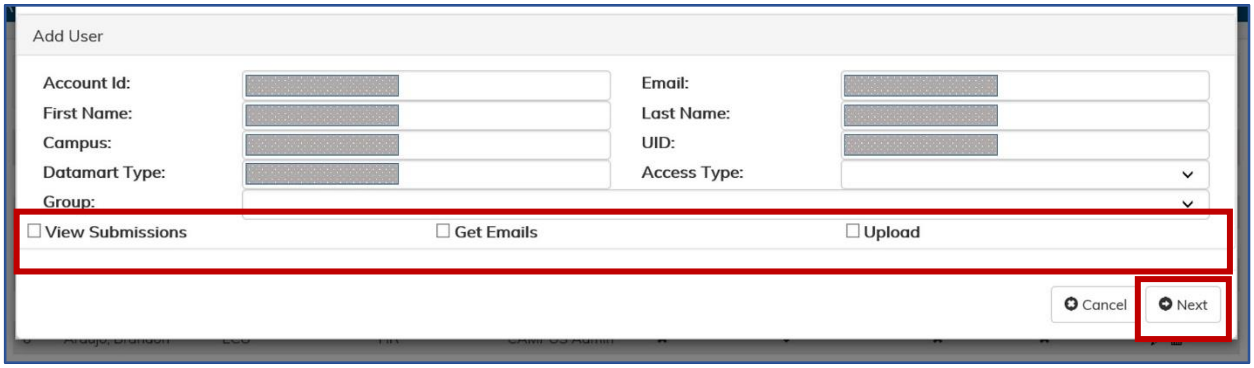
Campus Admin: will have access to all HRDM data including Performance Review scores.

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

Step 4: Select the user’s Group



Step 4: Select the user's permissions and click the Next button



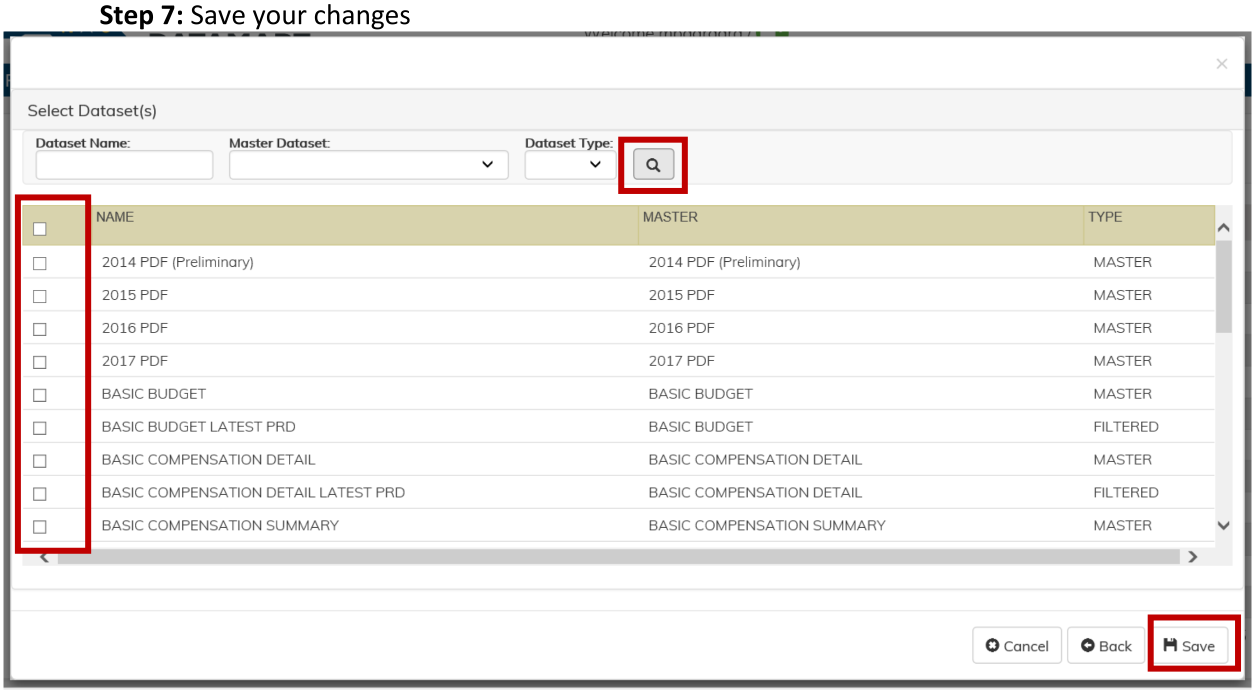
Select the all the options this employee should have:

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

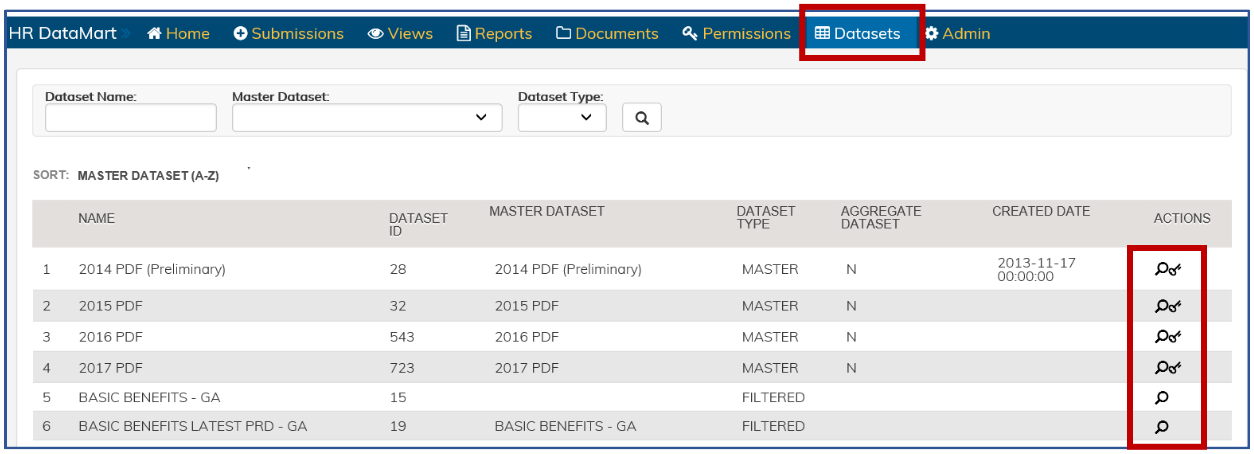


Datasets

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

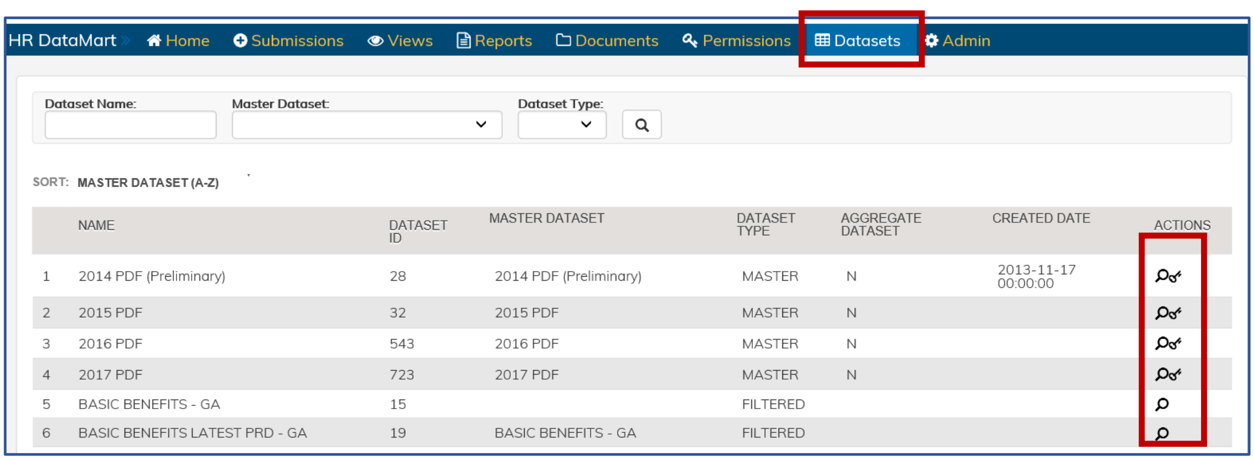
View users with access to a Dataset

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.

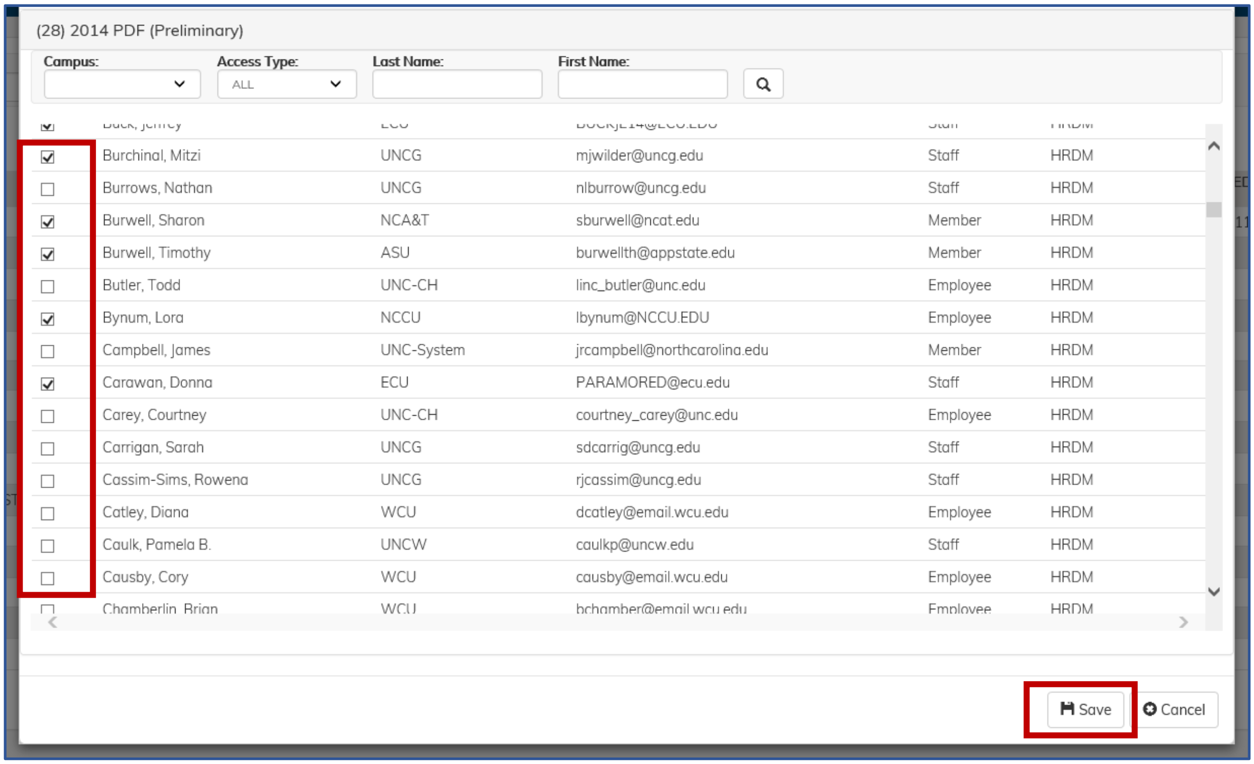


Modify an existing User Permissions

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



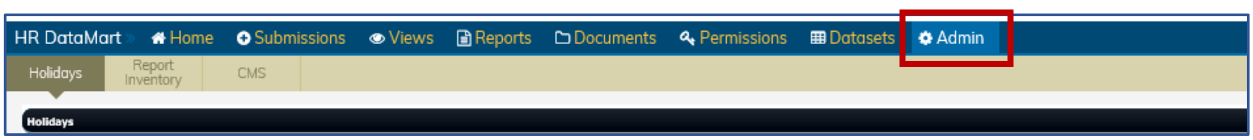
Find the user and check/uncheck the checkbox to add or remove access for this dataset
Click the Save button



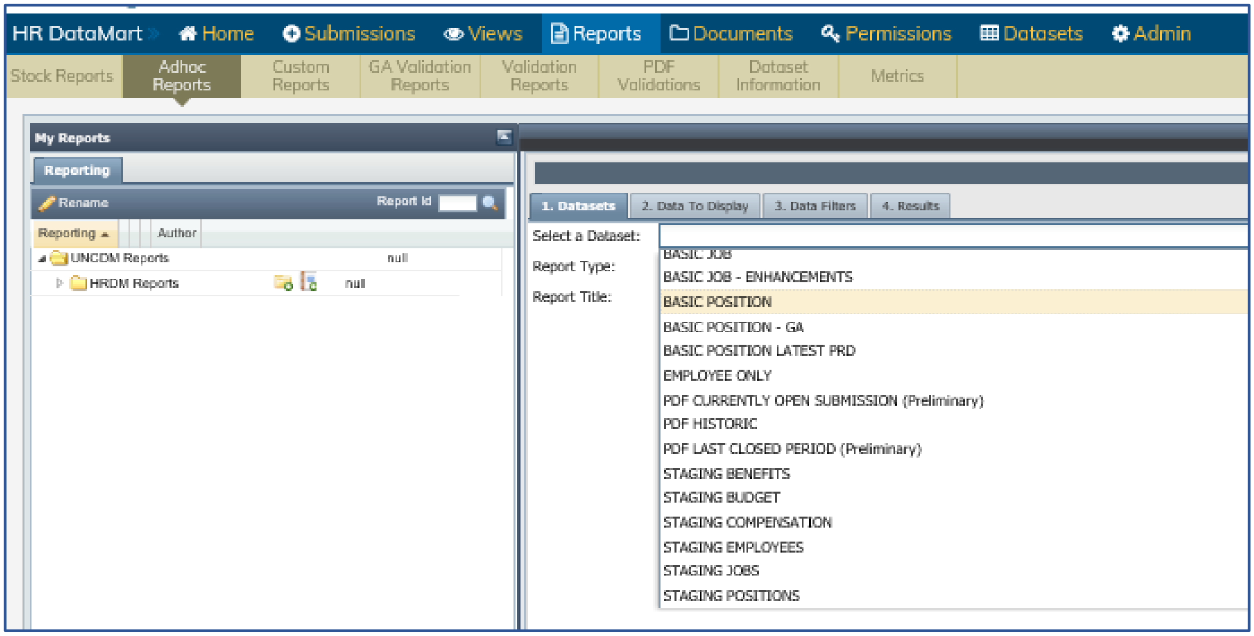
You can run the Reports/ Custom Reports/User Permissions to review your changes.

Admin

The Admin menu is available to the System Office Admin and gives access to all campuses and data. Several Custom Reports and Datasets are only accessible to System Office Administrators and System Office General Users.
This section allows admins access to the Holiday Schedule, Report Inventory and CMS.

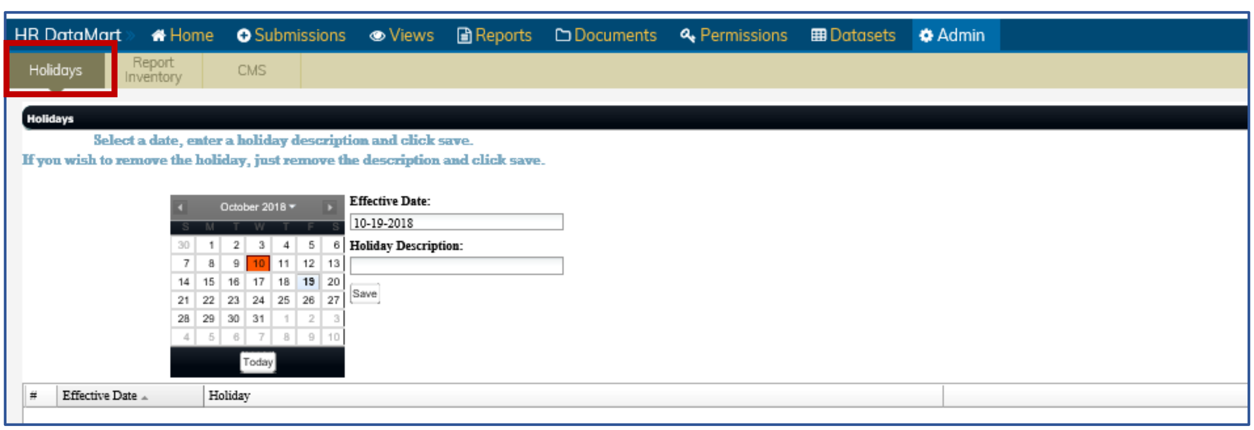


Some System Office Admins have access to the Staging Tables (in the Dataset list) in Adhoc Reports. This access allows the admins to see the data a campus is submitting before the submission is closed and assist the campus with troubleshooting errors.



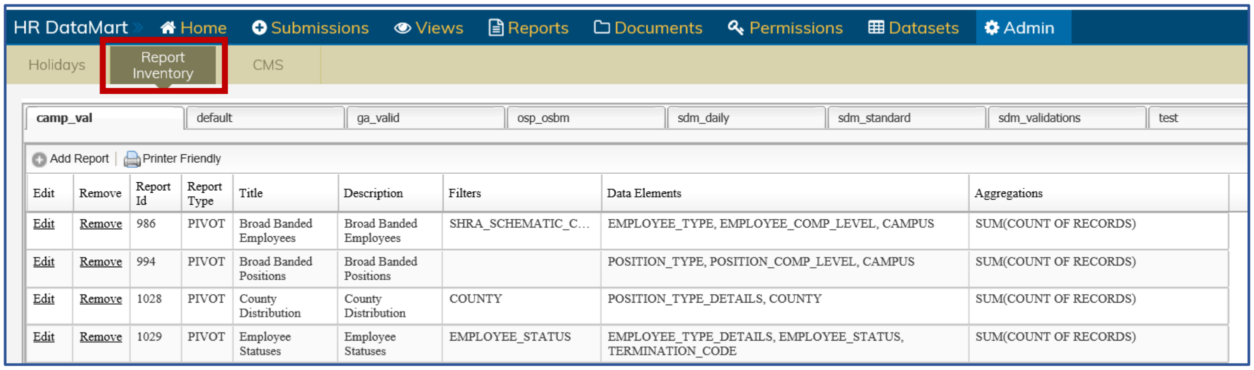
Holiday Schedule

The Holidays tab allows you to add holidays to the system.



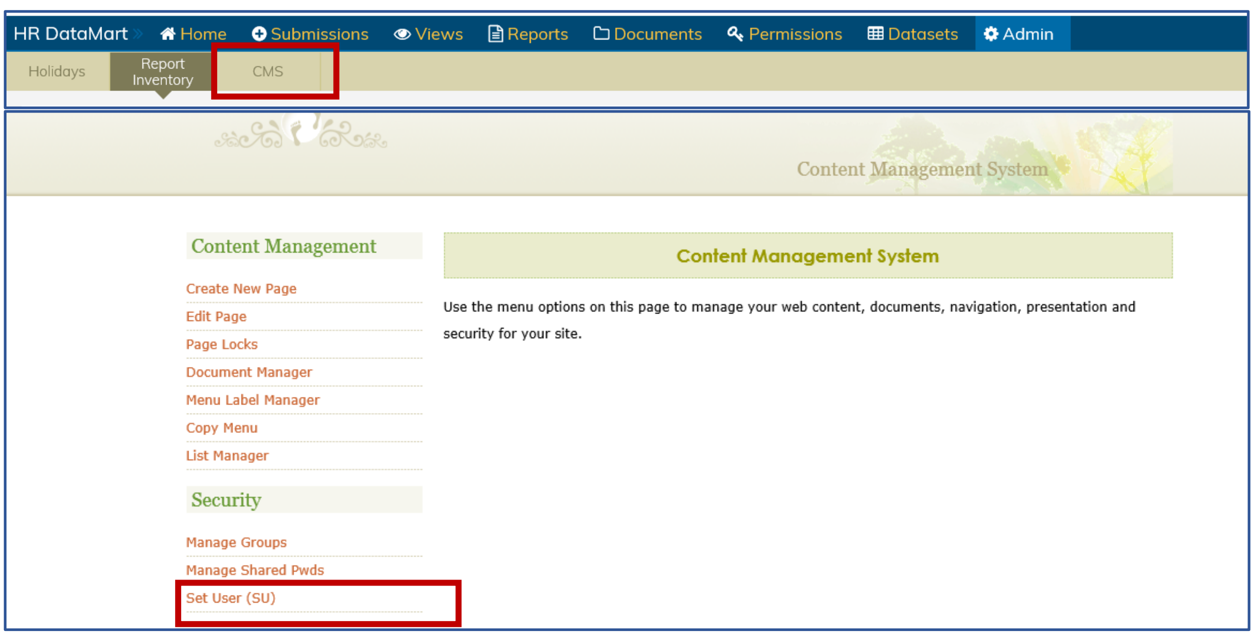
Report Inventory

Lists every stock report along with its related data elements



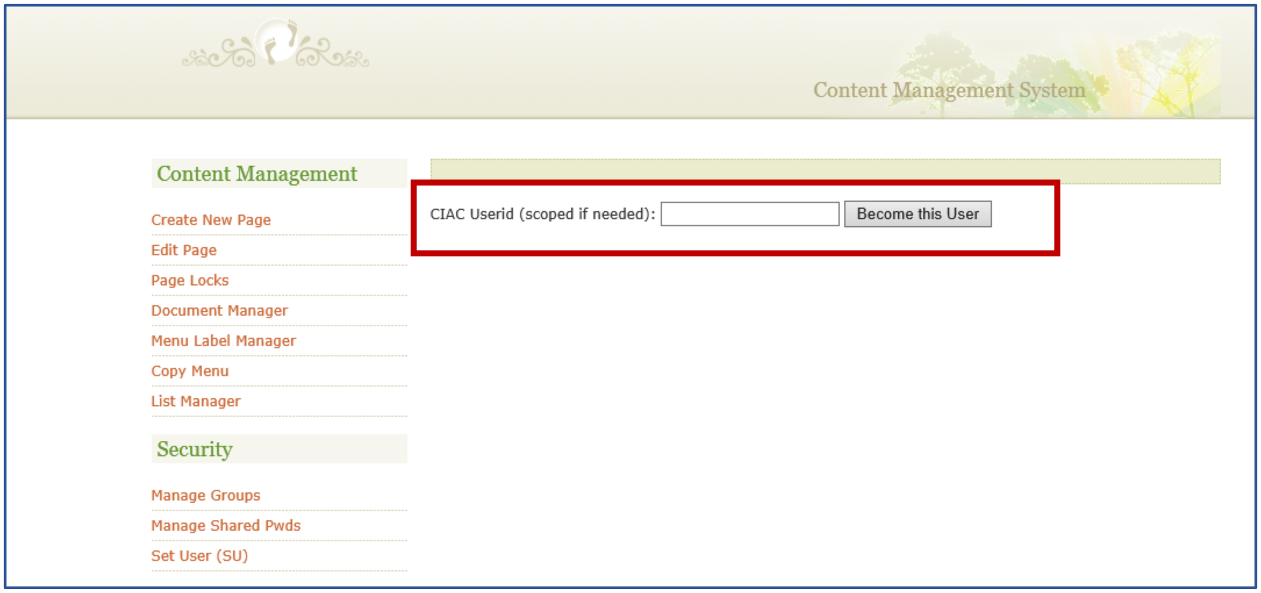
CMS

CMS allows users to manage web content, documents, navigation, presentation and security for the site. Admins can also impersonate users. System Office Administrators can primarily use the CMS set user function to create report for an OSHRA member who do not have access to a particular report/Dataset. The OSHR member can then run the report after it is generated by System Office admin.



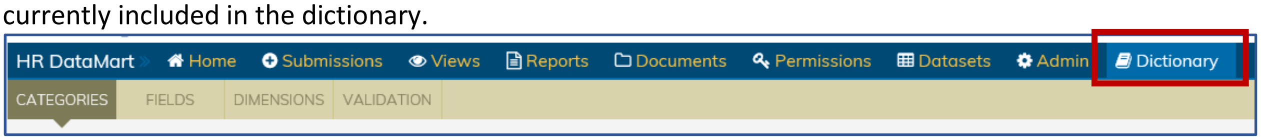
To impersonate a user, click the Set User (SU) link
The system displays the userid textbox

Enter the user's email and click the 'Become this User button (To find the user's email in the system, go to the Permissions menu and search for the user)
When you 'become this user' you are impersonating the user in HRDM



Dictionary

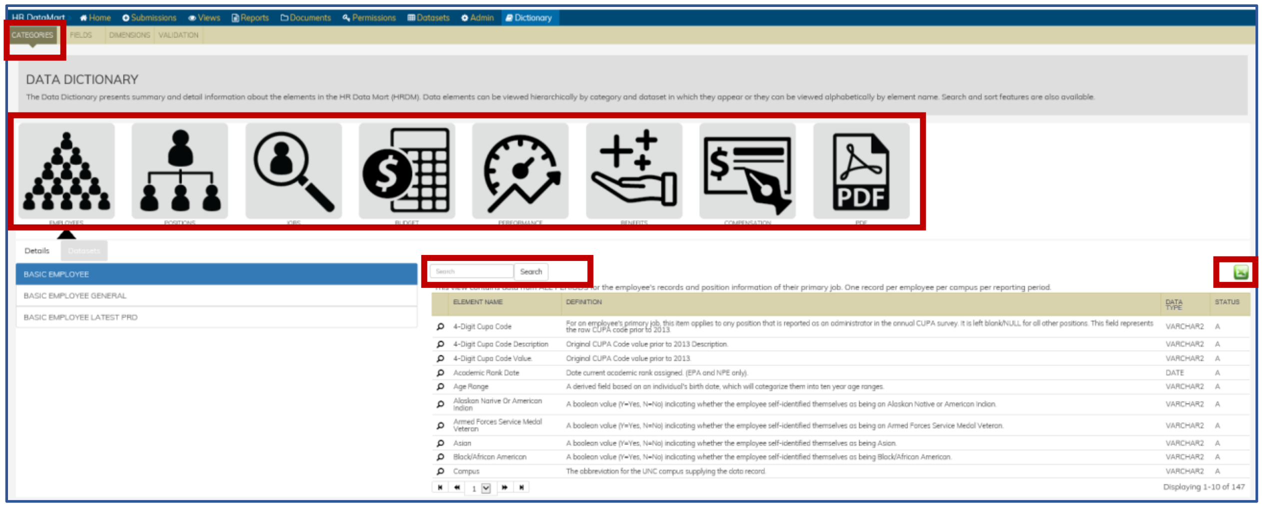
The Dictionary was added in 2019 so it is not on prior screenshots. The Dictionary contains information about the datasets, fields, dimensions and validations/edit checks in the HRDM. This data dictionary will eventually replace the Excel documents that currently store such information. The data feeds are not currently included in the dictionary.



Categories

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

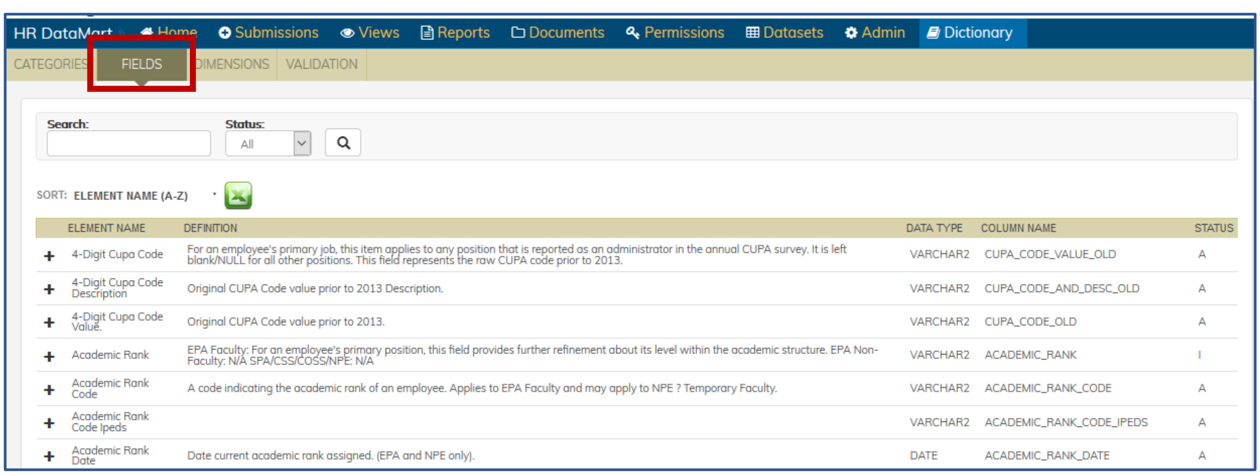
- Select each dataset to view the fields included in that dataset.
- Use the search box to search for fields in the selected Dataset.
- Export all fields for the selected Dataset using the Excel button.



Fields

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

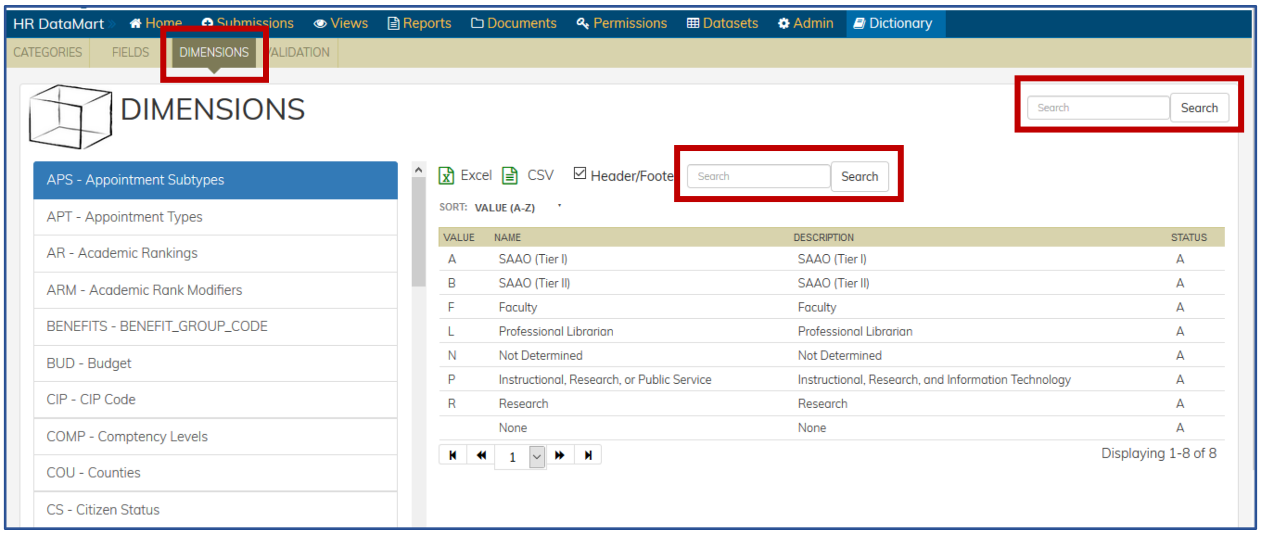
- Use the search box to search for fields in the HRDM Datasets.
- Use the status dropdown to filter the field list.
- Export all fields for the selected Dataset with the Excel button.
- Click the plus (+) sign to view details, datasets and history for a field.



Dimensions

Dimensions contains information for the dimensions included in the Datafeeds.

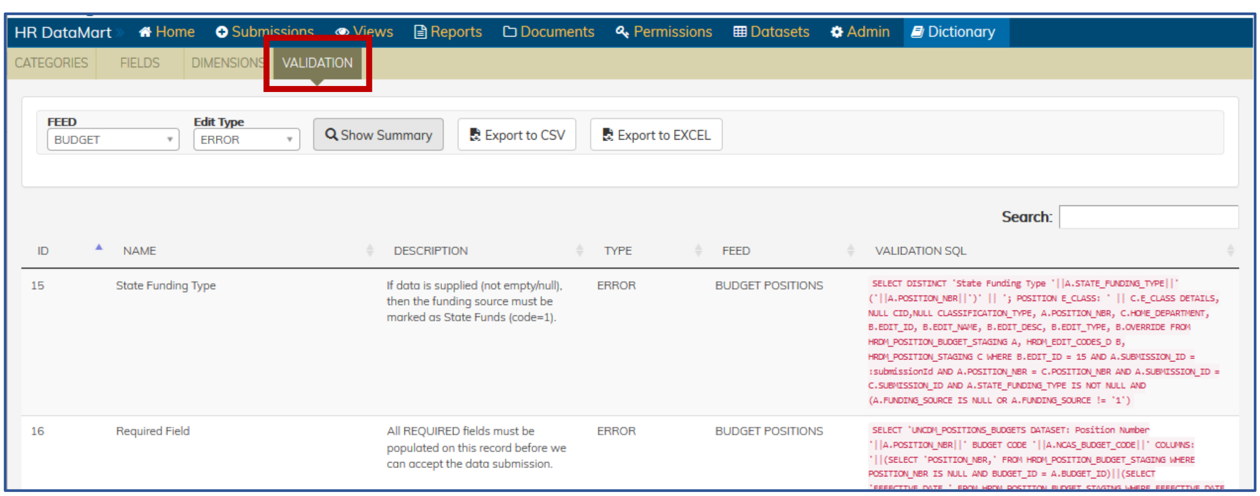
- Select a dimension on the left to view the dimension options
- The top search allows you to search the Dimension list on the left
- The lower search allows you to search for a specific item in the selected dimension list



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!