

**THE UNC
SYSTEM**



HR DataMart Campus User Guide

Created: 10/28/2011

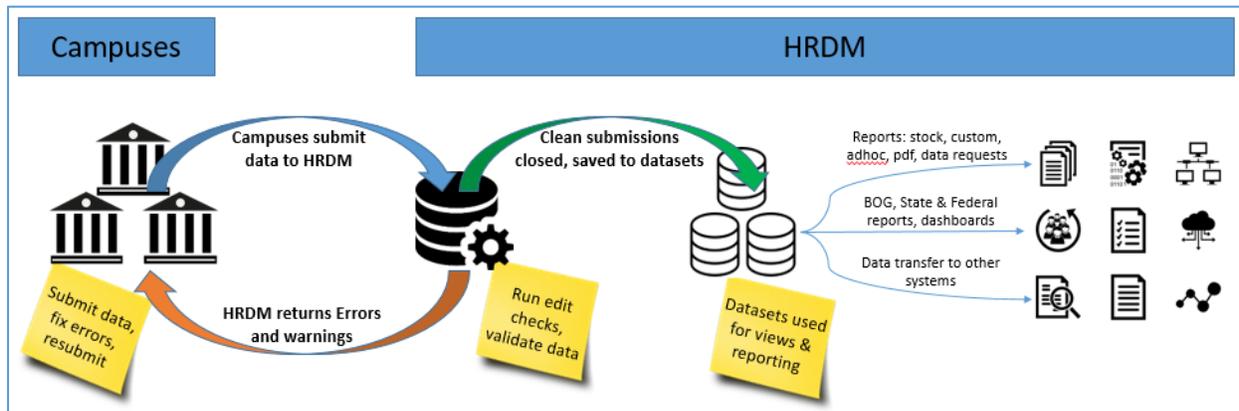
Updated: 07/8/2022

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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:

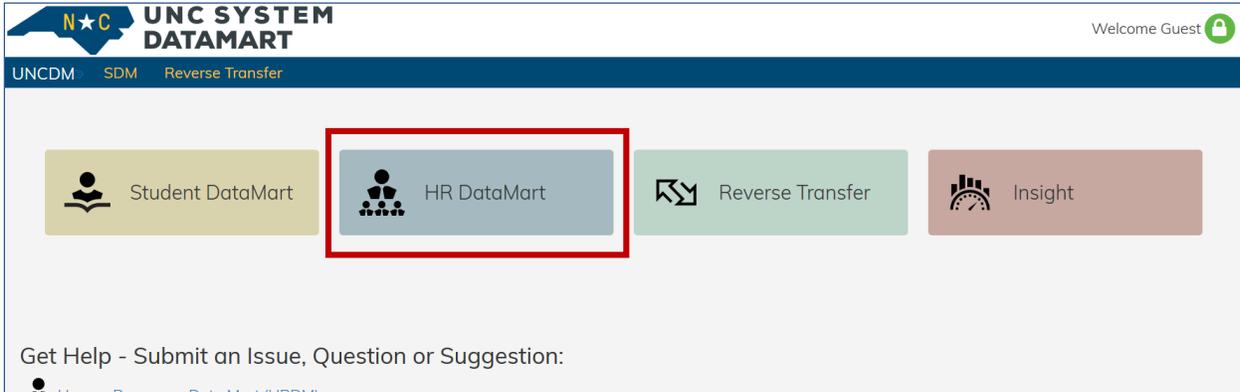
- **Benefits:** Benefit plans, payment information.
- **Compensation:** Payroll information.
- **Employees:** Information on employees.
- **Employee Position:** Job data for employees.
- **Positions:** Position information.
- **Position Budget:** Funding information for positions.
- **Performance Rating:** 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).

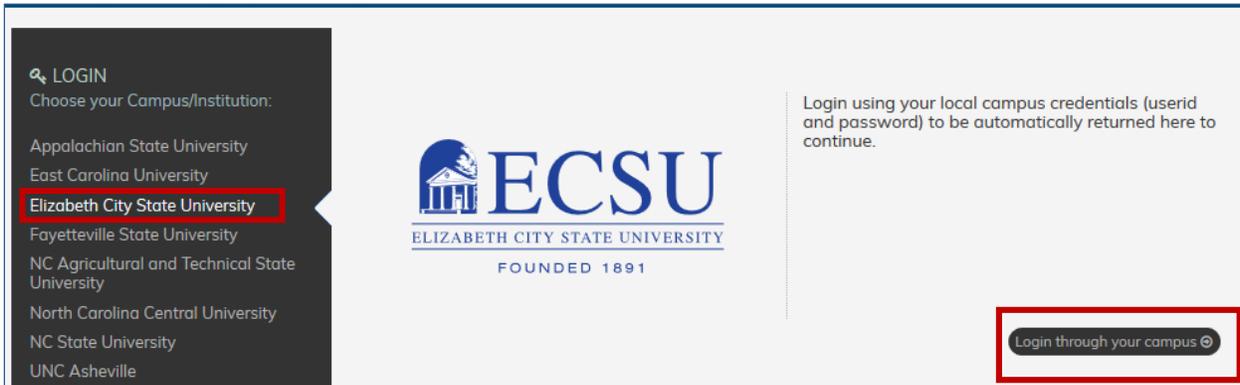
This user guide is for campus users who run the HR DataMart submissions, run reports, manage users and perform other campus related actions in the system. If you need help, have questions or need HRDM training, contact hrdm@northcarolina.edu.

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

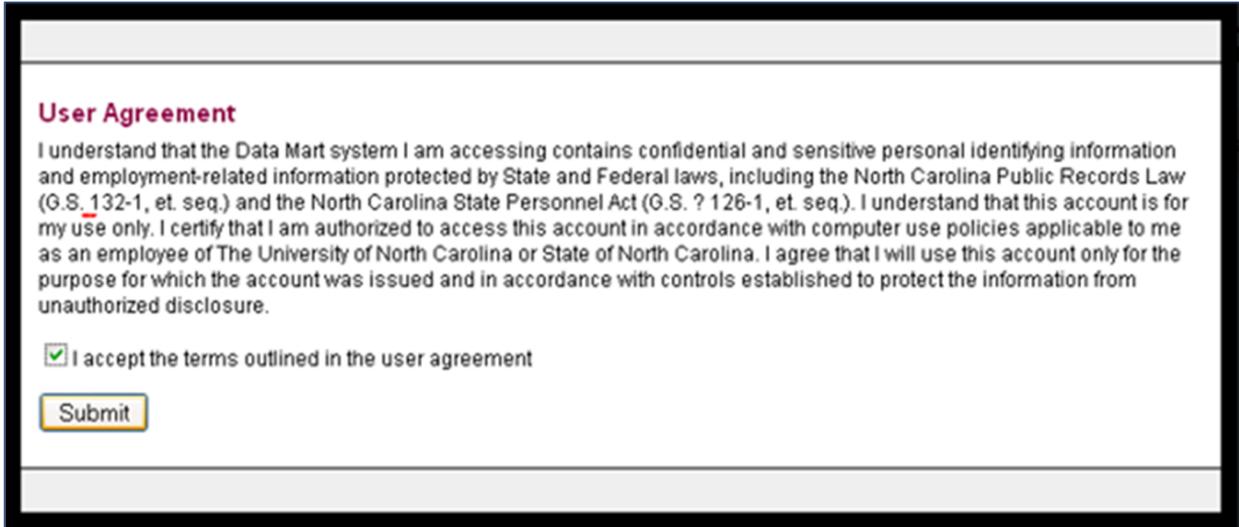


The system will open your campus login screen
Enter your university network Username and Password.
Click 'Sign In'.



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.



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

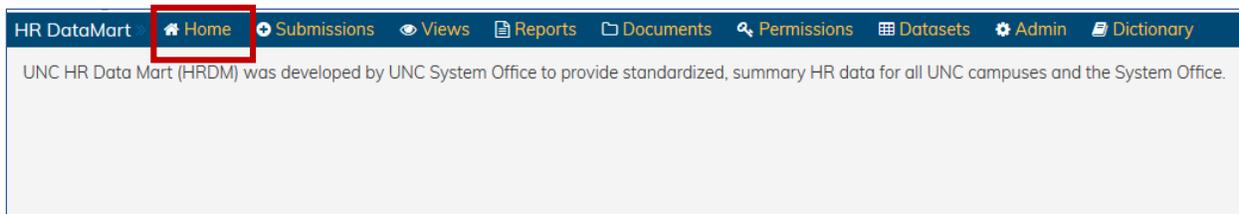
HR DataMart Tabs Overview

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

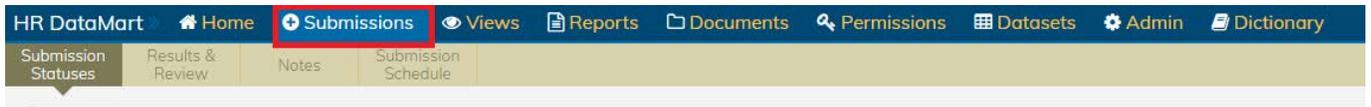
After you login to the HR DataMart, the system displays the Home tab.



Submissions

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

- Submission Statuses
- Results & Review
- Notes (Added in 2022 so therefore will not be on all screenshots)
- Submission Schedule



Submission Statuses

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

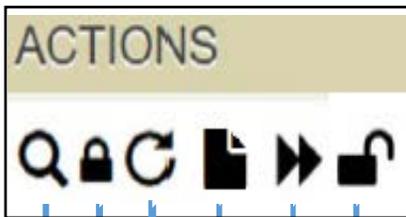
	CAMPUS	PERIOD	DUE DATE	LAST LOADED DATE	STATUS	ERRORS	WARNINGS	ACTIONS
1	NCSU	August FY 2019	08-31-2018	08-31-2018 16:21:48	OPENED	2	171	🔍 🗑️
2	NCSU	July FY 2019	07-31-2018	07-31-2018 17:25:19	CLOSED	0	235	🔍
3	NCSU	June FY 2018	06-29-2018	06-28-2018 13:04:55	CLOSED	0	248	🔍
4	NCSU	May FY 2018	05-31-2018	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:
 - OPENED:** The submission is open for the period. Only one period is open at a time.
 - CLOSED:** The submission is closed for the period
 - 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.

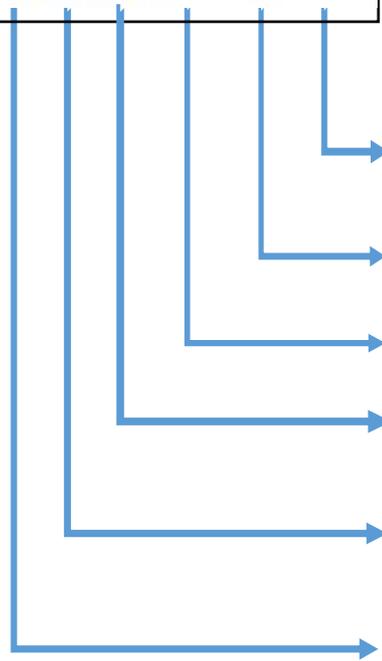
System highlights the **DUE DATE** and **STATUS** if the submission is still open and it is past the submission due date.

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**, **Notes**, **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.

Notes allows you to view a status at each step in the submission process.

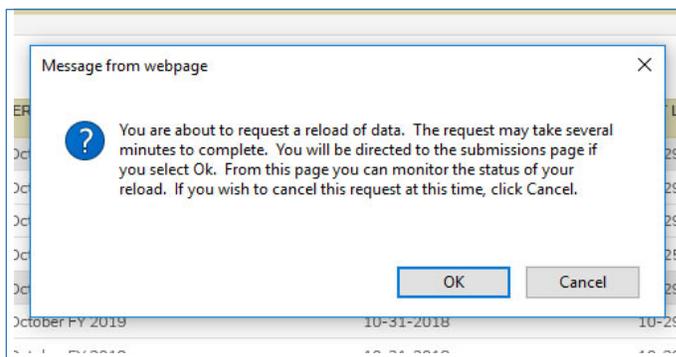
Reload Submission allows you to load your data into the HRDM while it is open.

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:



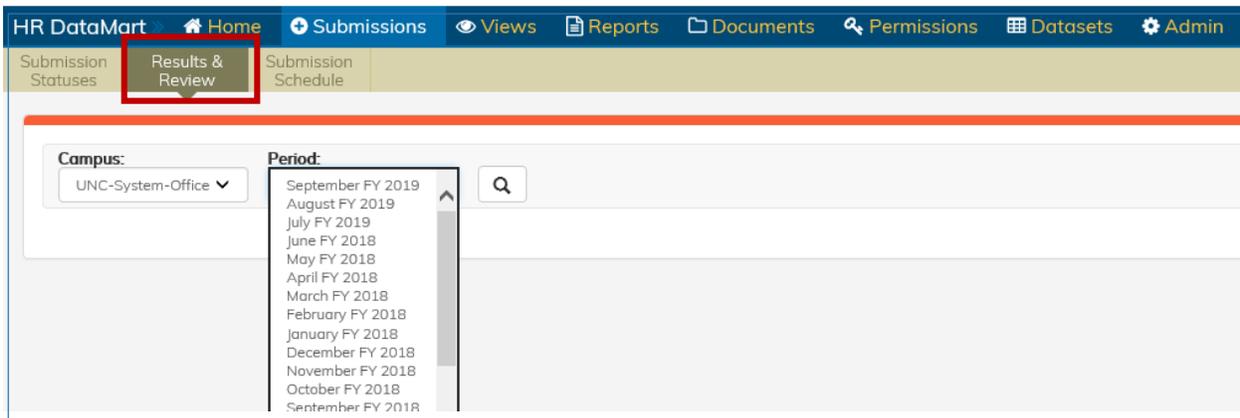
The campus can reload once the submission is open for that period.

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.

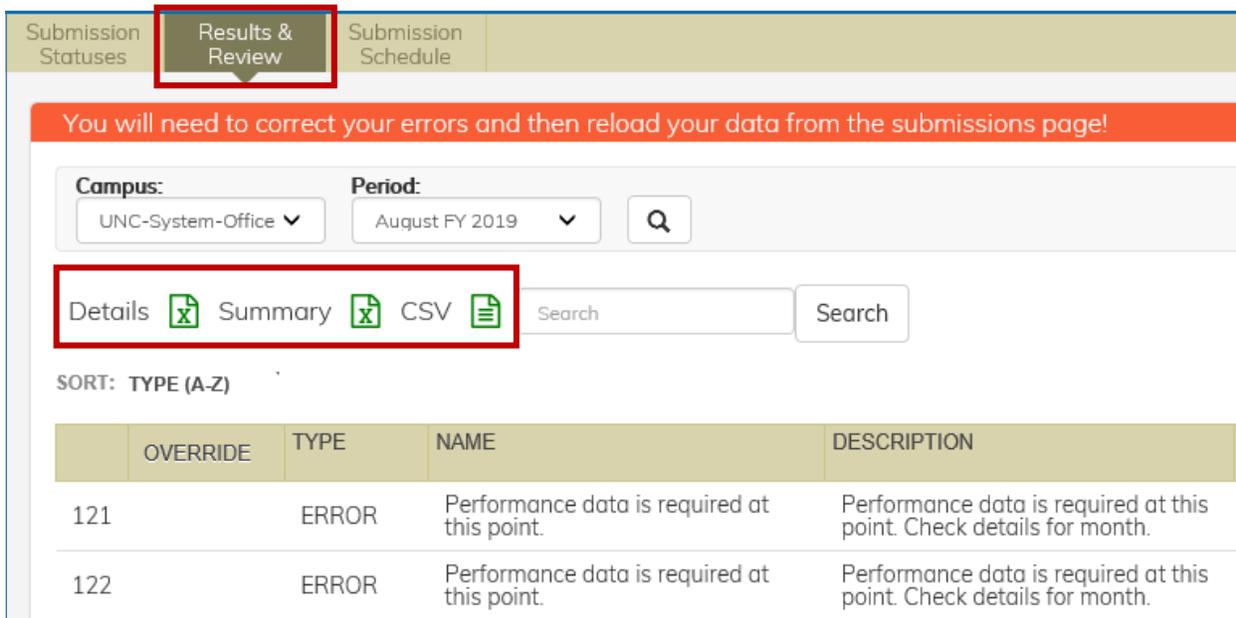
Results & Review

The Reviews & Results tab shows details about each successful submission to the Data Mart. Select Period. Click the Search icon to view the results.



Validation Errors and Warnings

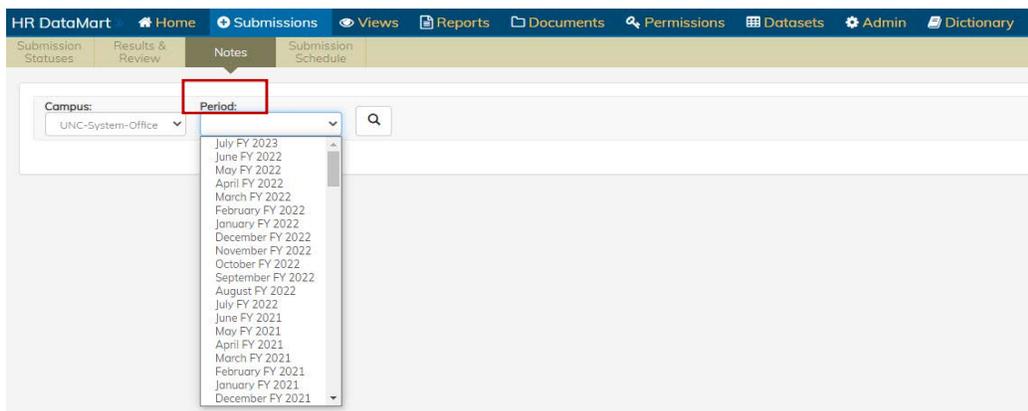
The search shows a list of errors (current period only) and warnings for the selected period. Previous periods will have only warnings since all of their errors would be resolved.



Note: Use the errors/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.

Notes

The Notes tab allows you to view the status at each step in the submission process. Select a Period. Click the Search icon to view results.



HR DataMart | Home | Submissions | Views | Reports | Documents | Permissions | Datasets | Admin | Dictionary

Submission Statuses | Results & Review | Notes | Submission Schedule

Campus: UNC-System-Office | Period: July FY 2023

STEP	STATUS
Load Initiation	SUCCESSFUL
DEPT Web Service completed (Time: 0.90 secs)	SUCCESSFUL
DEPT VIEW Data loaded = 151 dept records (Time: 0.70 secs)	SUCCESSFUL
Database Query (Time: 2.08 secs)	SUCCESSFUL
EMPLOYEES VIEW Data loaded = 479 employees (Time: 11.68 secs)	SUCCESSFUL
POSITIONS VIEW Data loaded = 554 positions (Time: 2.30 secs)	SUCCESSFUL
EMPLOYEE POSITIONS VIEW Data loaded = 480 employee positions (Time: 2.62 secs)	SUCCESSFUL
POSITION BUDGETS VIEW Data loaded = 520 positions budgets (Time: 1.77 secs)	SUCCESSFUL
COMPENSATION VIEW Data loaded = 457 compensation (Time: 1.46 secs)	SUCCESSFUL
BENEFITS VIEW Data loaded = 1806 benefits (Time: 1.59 secs)	SUCCESSFUL
EMPLOYEES VIEW Duplicate Terminations dropped = 14 employees (Time: 37.23 secs)	SUCCESSFUL
Edit Check for Critical Errors - (3) (Time: 4.90 secs)	FAILED
Data Load Overall Status (Time: 68.79 secs)	FAILED

An error occurred in the load process.ERROR

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:

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	25	26	27	28 Period Due Date	29
30	1 October	2	3	4	5	6
	Grace Period					

- **PERIOD:** Reporting time frame, currently setup as a monthly period
- **PERIOD START DATE:** The first day of the period, usually 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.

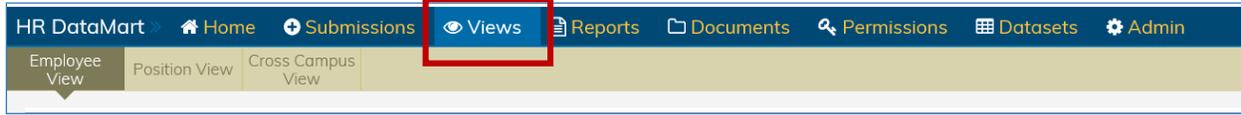
- **PERIOD DUE DATE:** The due date is 5 business days after the period open date. All errors should be resolved and the campuses should close the current period. If errors are not resolved, the system remains opened. If there are no errors on the due date, the system automatically closes the period.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

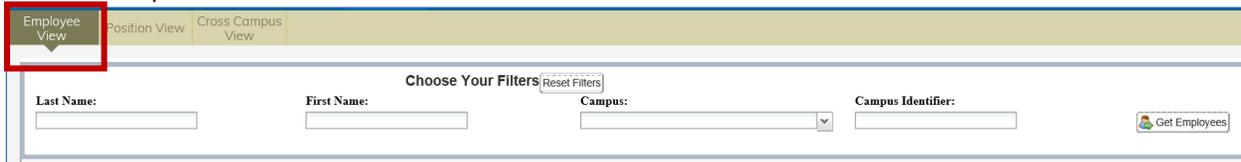
This section allows users to see data related to Employee View, Position View, and Cross Campus View. This allows you to view data for employees, positions and across multiple campuses.



Employee View

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

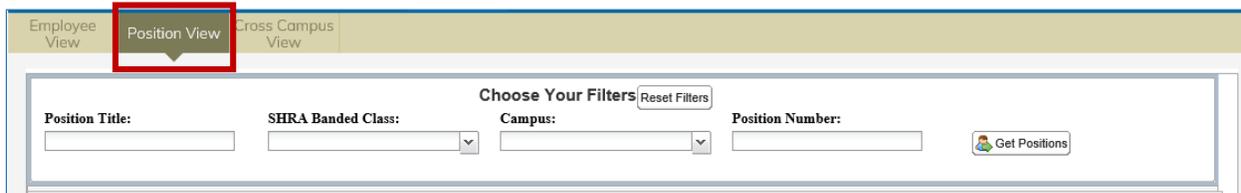
- Last Name
- First name
- Campus
- Campus identifier



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

Employee View Position View **Cross Campus View**

Cross Campus View Instructions Choose Your Filters [Reset Filters](#)

Campus: ALL CAMPUSES ASU ECU ECSU

Position Type: SHRA EHRA CSS NPE

SHRA Job Family: ADMINISTRATIVE AND MANA Administrative and Managerial ENGINEERING AND ARCHITECTURE ENVIRONMENT, NATURAL RE

Period: August FY 2019

Working Title:

JCAT Code: Search: 100000: President 101000: Chancellor 102000: Executive Vice President 103000: Executive Vice Chancel

SOC Code: Search: 11-1011: Chief Executives 11-1021: General and Operator 11-2021: Marketing Managers 11-2031: Public Relations & Fur

CUPA Code: Search: 100000: Chief Executive Officer. 101000: Chief Executive Officer. 102000: Executive Vice President 105000: Chief Acad Affairs Offic

SHRA Job Class: Search: Accountant Accounting Director Accounting Manager Accounting Technician

CIP Code: Search: 0100: Agriculture, General 0101: Agricultural Business and 0102: Agricultural Mechanizator 0103: Agricultural Production Or

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.

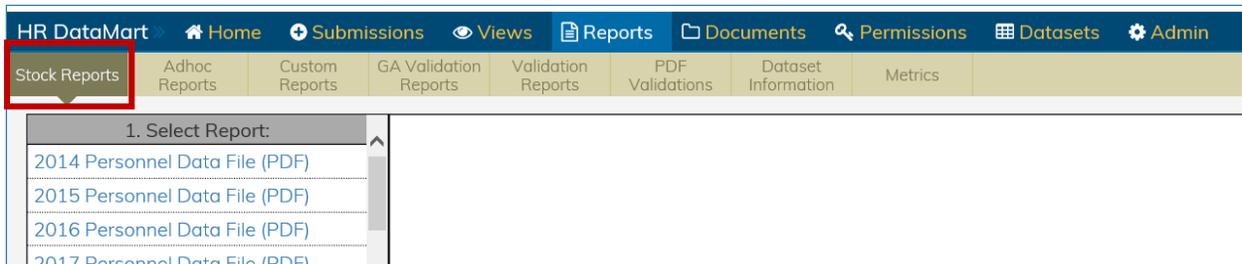
Reports

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



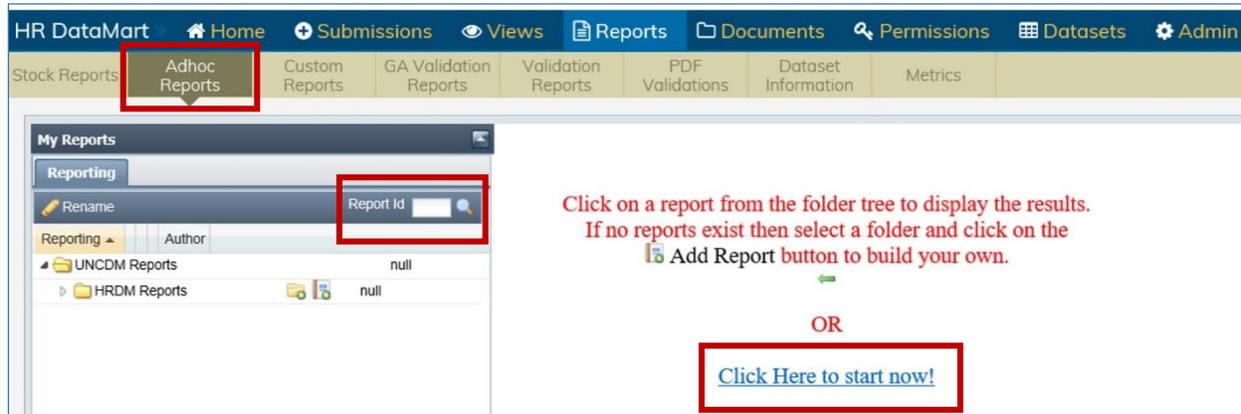
Stock Reports

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.

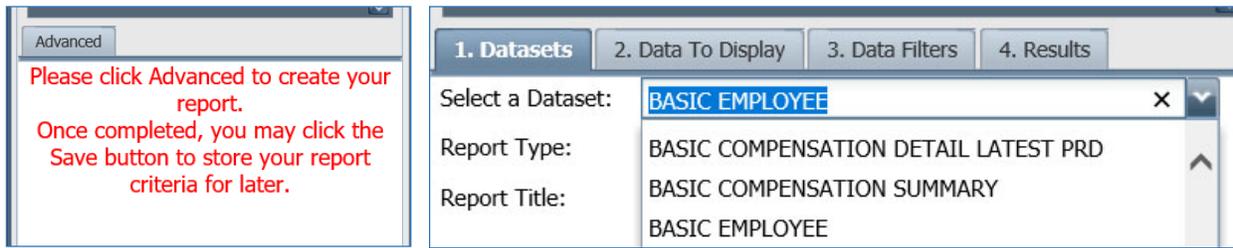
Step 1: Select a Dataset

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.

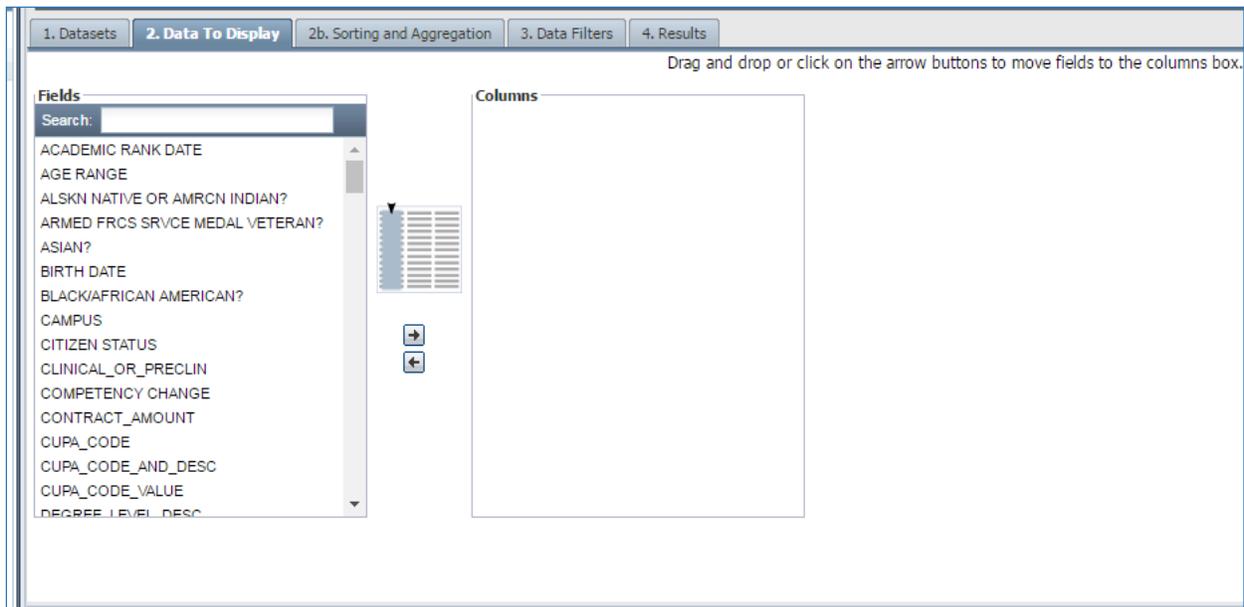


Report Title

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

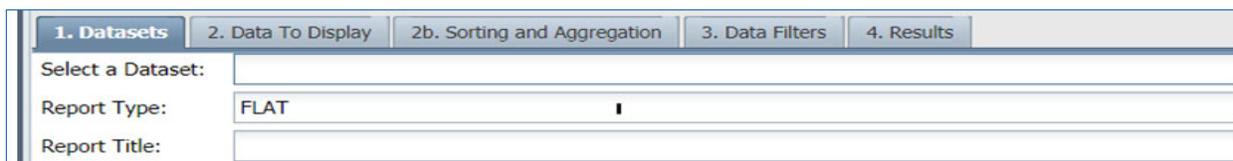
This is the display for Report Type 'Flat'. Drag and drop or click on the arrow buttons to move selected fields to the columns box.



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

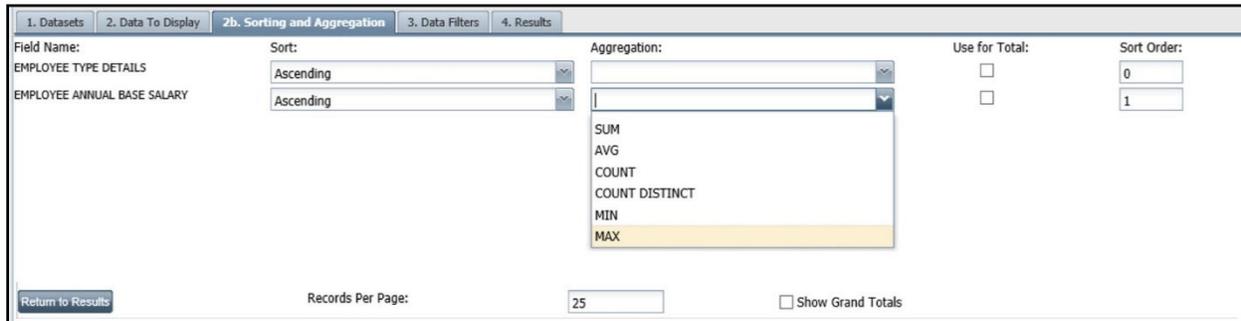


Step 2b: Sorting and Aggregation (Optional)

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

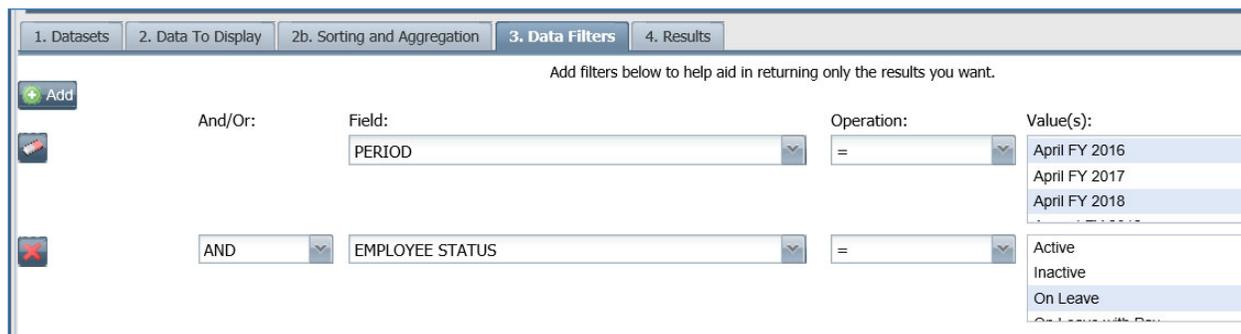
A numeric value that controls the order of the sort. It will DEFAULT to the order of the fields in the selected on Data to Display tab. Therefore, you can drag/drop the sort order on that tab as well.

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.

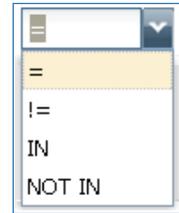


Field: You can select the field from the list for filter criteria.

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.

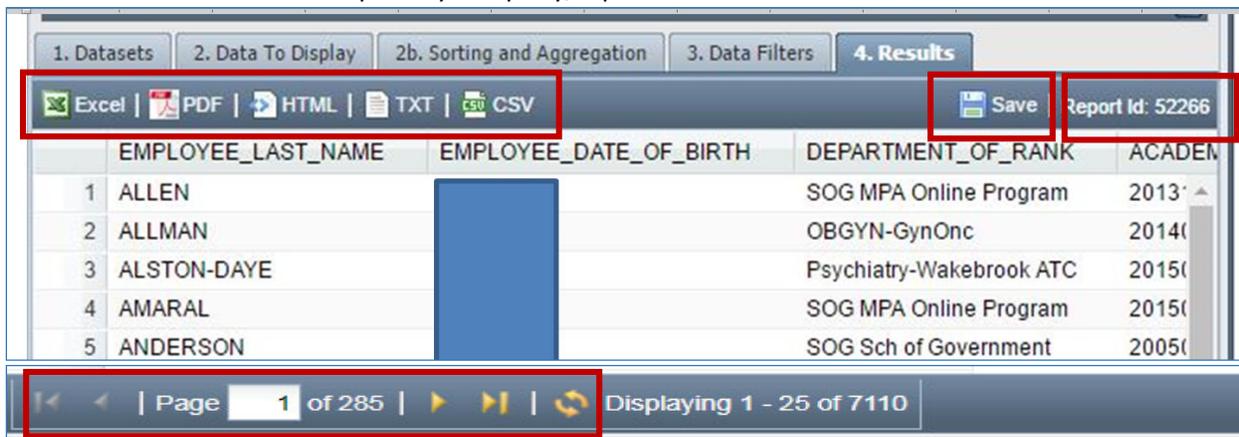


Value: Depending on the underlying data type of the field, enter a value, select a date, or click on a list of items in a dropdown to specify the details.

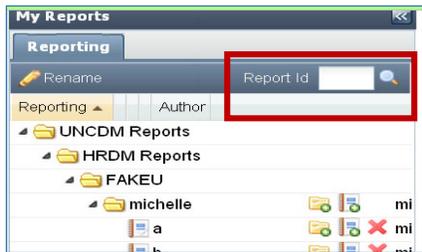
Erase Filters: Click the eraser icon to erase any filters.

Step 5. Results

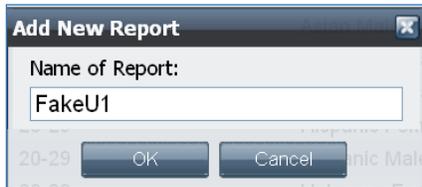
The Results tab shows the output of your query/report selections.



- **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.

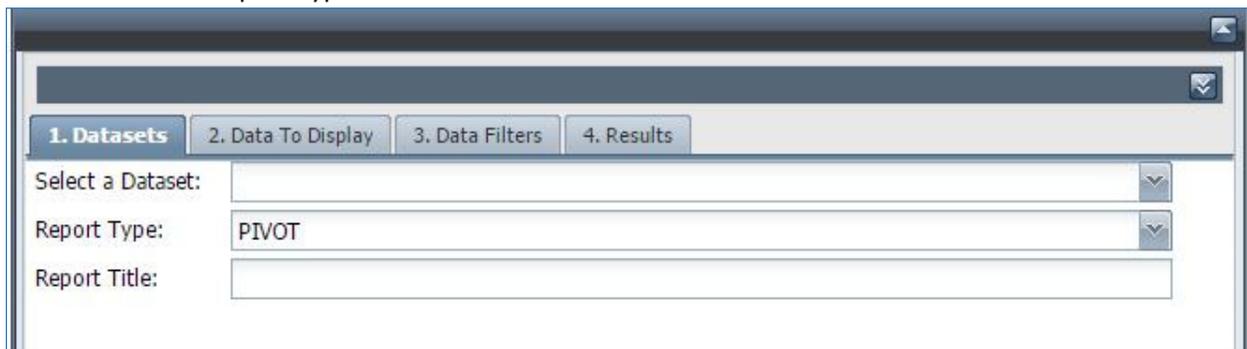


Note: If selection criteria for a report is changed, a new report ID is generated and the new report can be saved with a new name.

Creating a Pivot report

Step 1: Select a Dataset

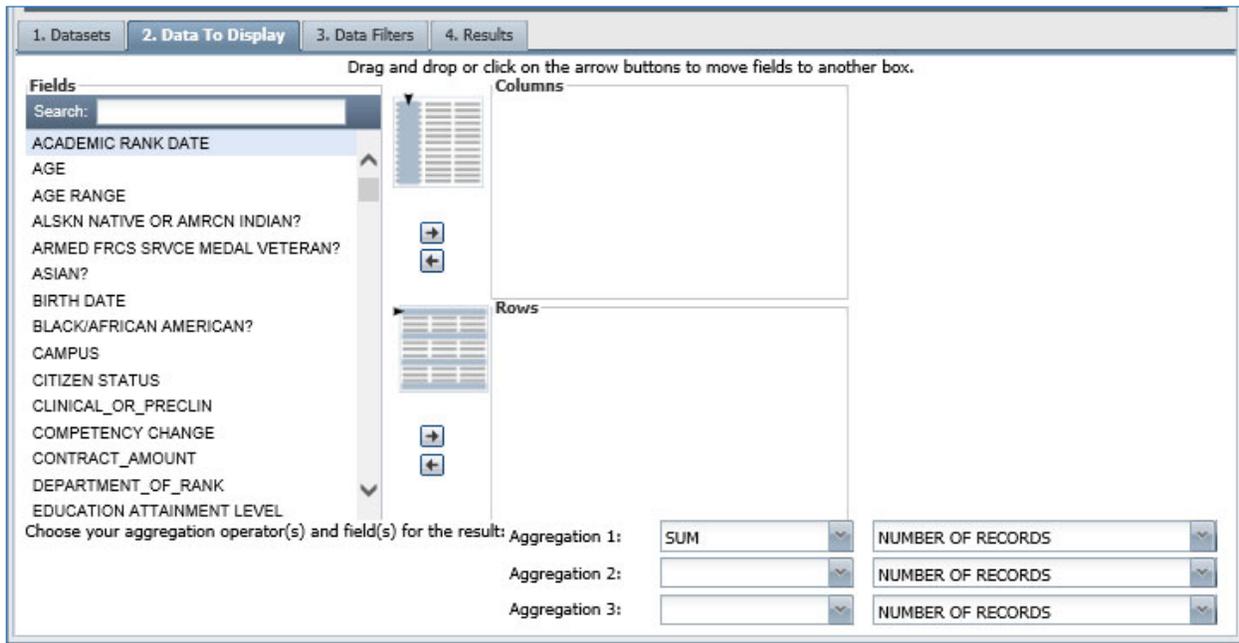
Select the **PIVOT** Report Type



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

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

Expand-All Collapse-All Excel PDF HTML TXT CSV Header/Footer

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

Page 1 of 1 | Displaying 1 - 17 of 17

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.

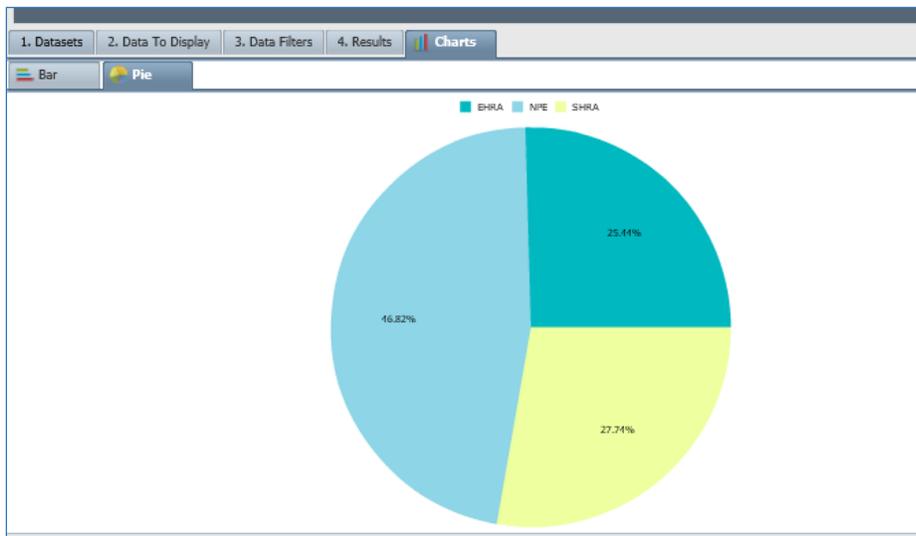
Drill Down

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

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

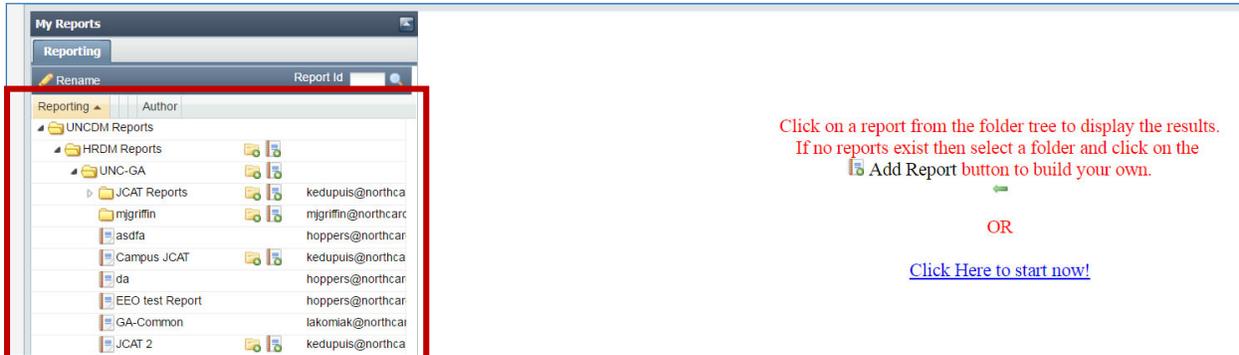
- Only allow one column
- Only the first level of rows will be used. These will become the legend
- The percentages will be based off of the total number
- The use of filters is vital in order to create relevant pie charts.

Copy/Share/Delete Reports

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

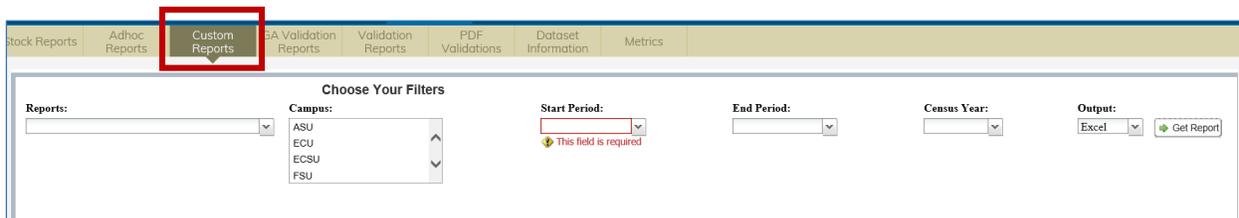
To move a personal report into a shared folder, click and drag the report from your personal folder to the campus destination folder. Look for the green plus icon, indicating it will be added before releasing your mouse.

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.



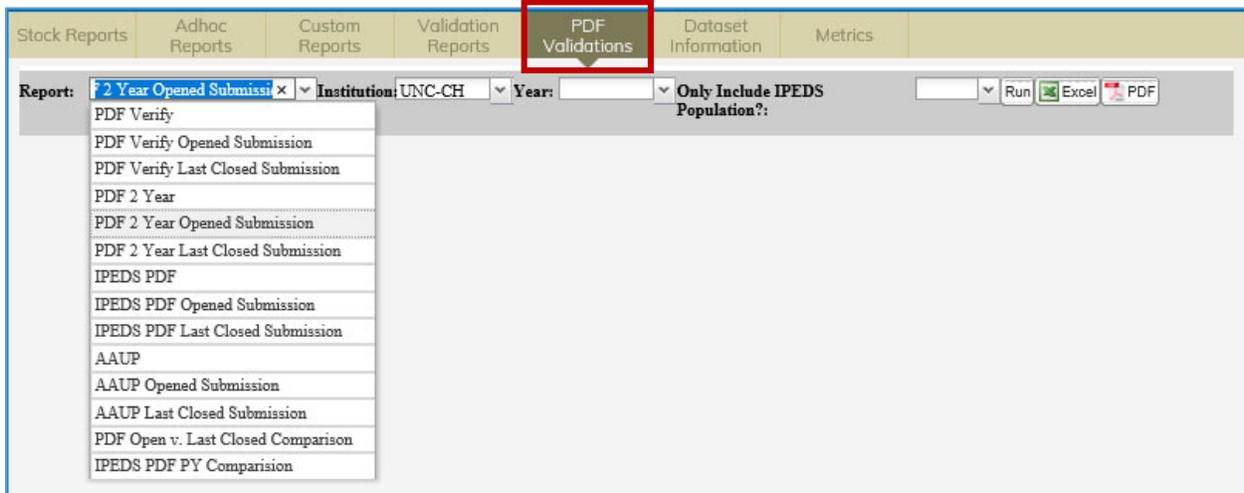
Step 1: Choose the Report from the Reports dropdown.

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

Step 3: Choose the Output type.

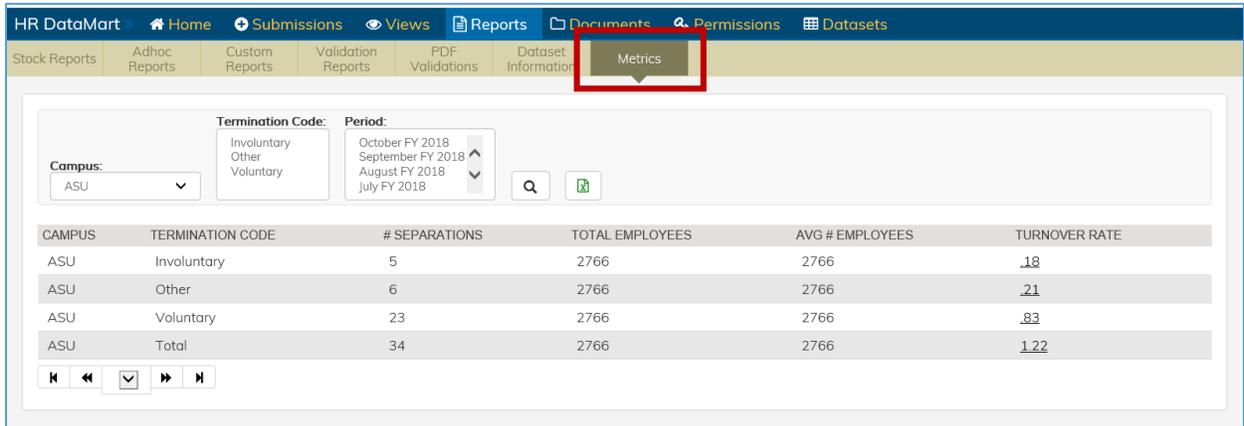
PDF Validations

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.



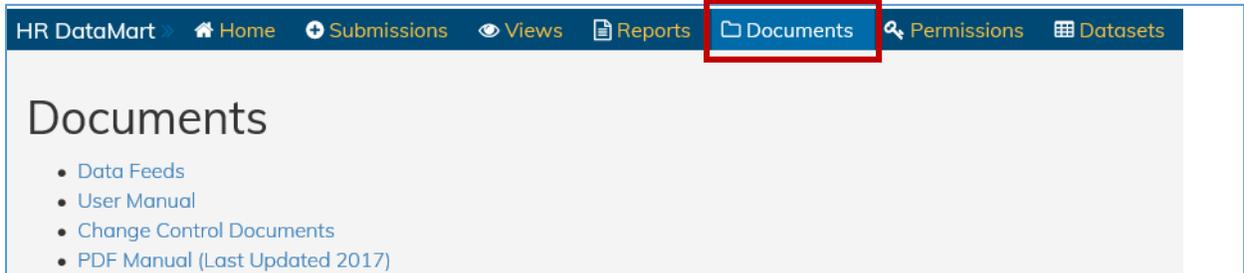
Metrics

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.

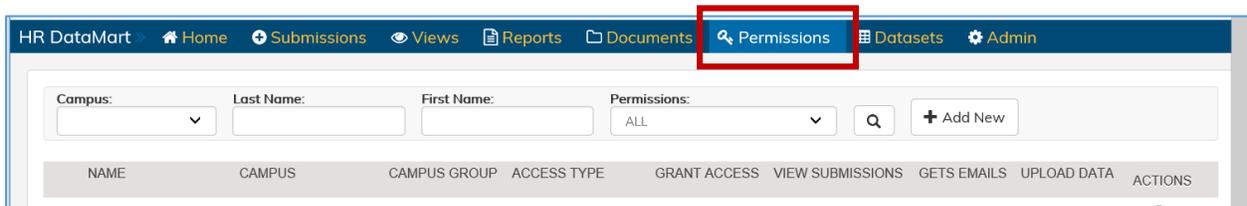
User Manual: HRDM user manual.

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

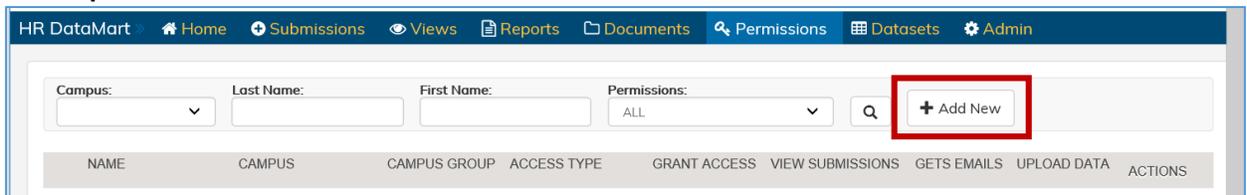
Displays a list of campus users, their role and permissions. Campuses will designate a Campus HR DataMart Administrator and Backup Administrator to assign campus users roles and access to HR DataMart. To view a list of your campus HRDM users, go to HRDM >> Reports >> Custom Reports >> User Permissions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



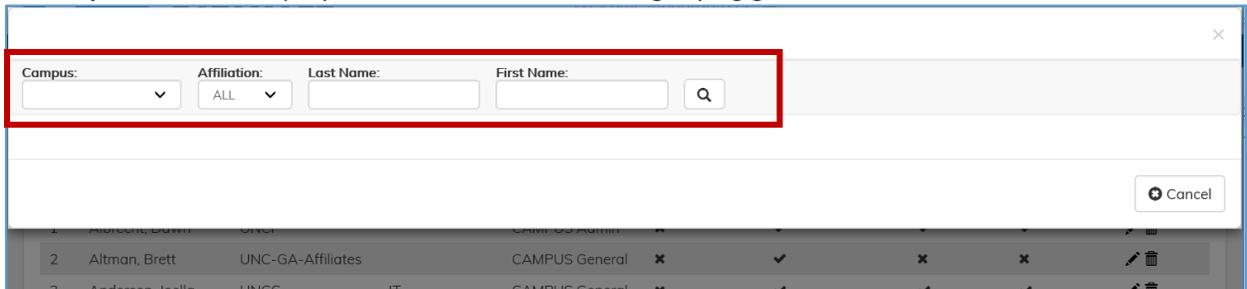
Add a New User

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

ACTIONS	NAME	CAMPUS	EMAIL	AFFILIATION	DATAMART TYPE
+	Doe, John	UNC-System	jdoe@northcarolina.edu	Staff	
+	Doe, Johnny V	NCCU	jdoe50@nccu.edu	Staff	
+	Doell, Elaine	ECU	DOELLE17@ECU.EDU	Staff	
	Doell, Elaine L.	UNCW	doelle@uncw.edu	Staff	HRDM
+	Doey, William	UNC-System	wcd@northcarolina.edu	Staff	

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

The screenshot shows the 'Add User' form with various input fields. The 'Group' dropdown menu is open, showing a list of options: BUDGET, HR, IR, and IT. The dropdown menu is highlighted with a red rectangular box.

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

The screenshot shows the 'Add User' form with the 'View Submissions', 'Get Emails', and 'Upload' checkboxes selected. The 'Next' button is highlighted with a red rectangular box.

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

The screenshot shows the 'Select Dataset(s)' form. The search bar is highlighted with a red box. The table below shows the following data:

<input type="checkbox"/>	NAME	MASTER	TYPE
<input type="checkbox"/>	2014 PDF (Preliminary)	2014 PDF (Preliminary)	MASTER
<input type="checkbox"/>	2015 PDF	2015 PDF	MASTER
<input type="checkbox"/>	2016 PDF	2016 PDF	MASTER
<input type="checkbox"/>	2017 PDF	2017 PDF	MASTER
<input type="checkbox"/>	BASIC BUDGET	BASIC BUDGET	MASTER

The 'Save' button is highlighted with a red rectangular box.

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.

HR DataMart | Home | Submissions | Views | Reports | Documents | Permissions | **Datasets** | Admin

Dataset Name: Master Dataset: Dataset Type:

SORT: MASTER DATASET (A-Z)

	NAME	DATASET ID	MASTER DATASET	DATASET TYPE	AGGREGATE DATASET	CREATED DATE	ACTIONS
1	2014 PDF (Preliminary)	28	2014 PDF (Preliminary)	MASTER	N	2013-11-17 00:00:00	
2	2015 PDF	32	2015 PDF	MASTER	N		

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.

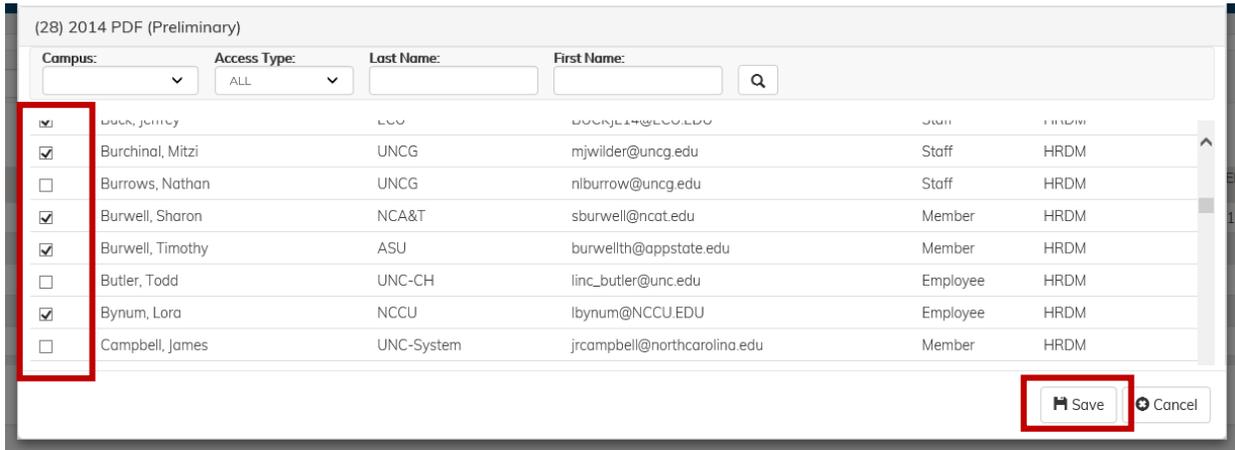
HR DataMart | Home | Submissions | Views | Reports | Documents | Permissions | **Datasets** | Admin

Dataset Name: Master Dataset: Dataset Type:

SORT: MASTER DATASET (A-Z)

	NAME	DATASET ID	MASTER DATASET	DATASET TYPE	AGGREGATE DATASET	CREATED DATE	ACTIONS
1	2014 PDF (Preliminary)	28	2014 PDF (Preliminary)	MASTER	N	2013-11-17 00:00:00	
2	2015 PDF	32	2015 PDF	MASTER	N		
3	2016 PDF	543	2016 PDF	MASTER	N		
4	2017 PDF	723	2017 PDF	MASTER	N		
5	BASIC BENEFITS - GA	15		FILTERED			
6	BASIC BENEFITS LATEST PRD - GA	19	BASIC BENEFITS - GA	FILTERED			
7	BASIC BUDGET	7	BASIC BUDGET	MASTER			
8	BASIC BUDGET LATEST PRD	8	BASIC BUDGET	FILTERED			
9	BASIC COMPENSATION DETAIL	14	BASIC COMPENSATION DETAIL	MASTER			
10	BASIC COMPENSATION DETAIL LATEST PRD	20	BASIC COMPENSATION DETAIL	FILTERED			

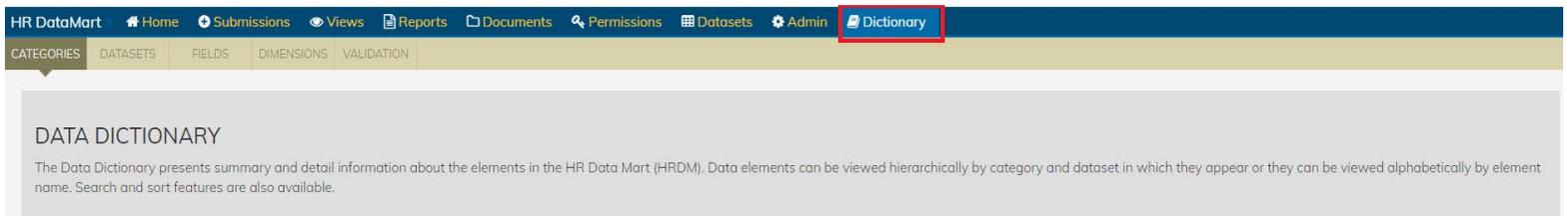
Find the user and check/uncheck the checkbox to add or remove access for this dataset
 Click the Save button



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.

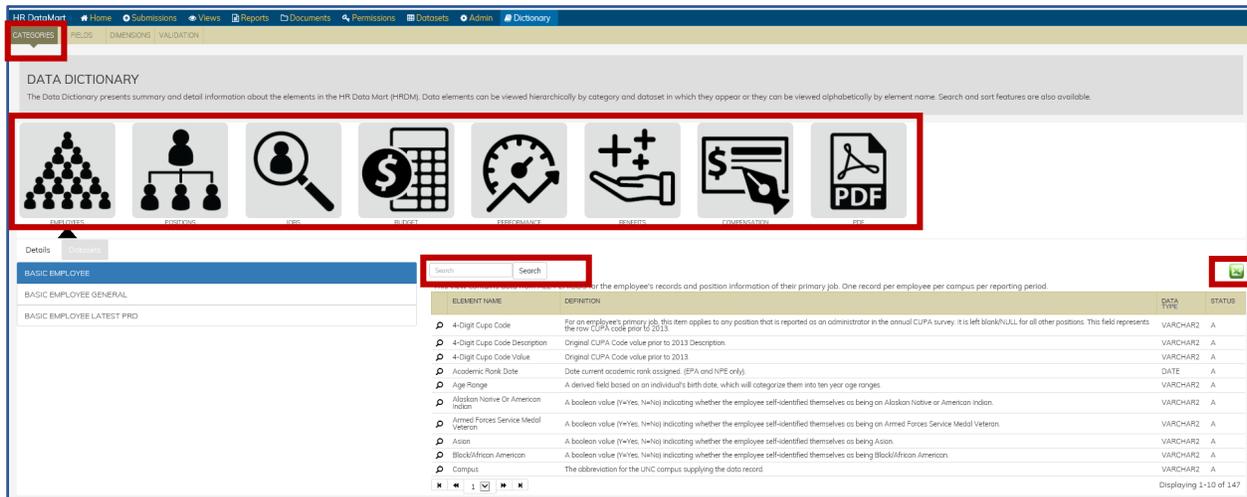


Note: The Datasets tab was added in 2022 and is therefore not on some screenshots.

Categories

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

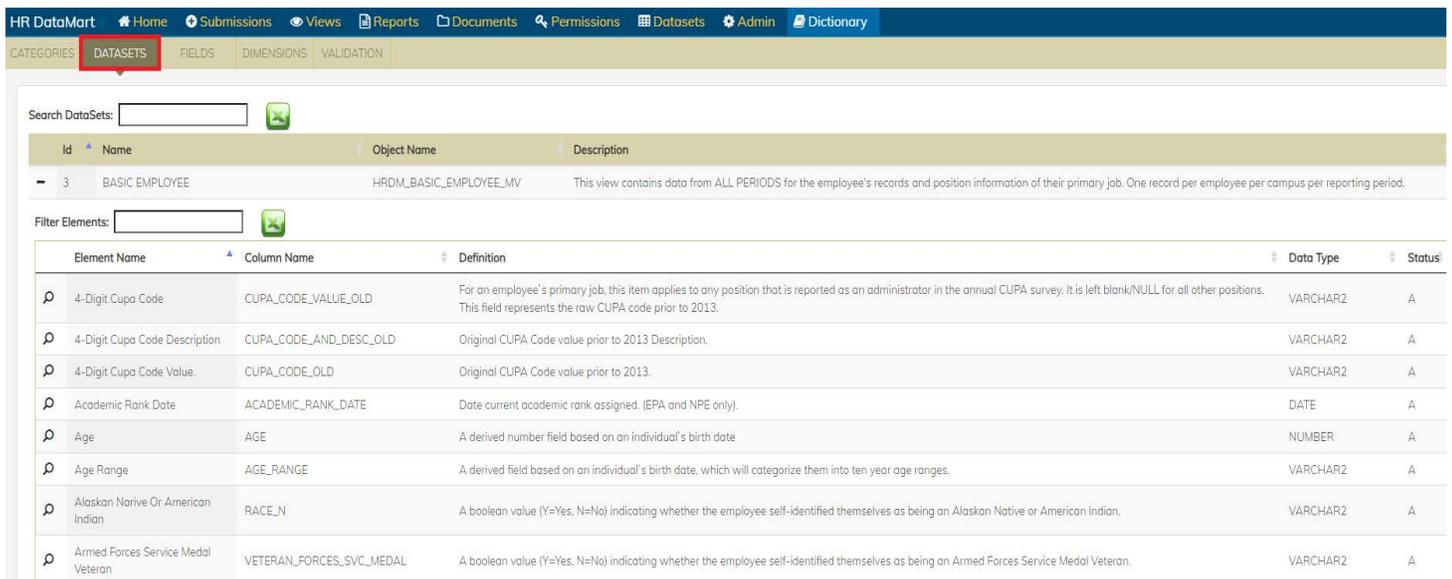
- Select each dataset to view the fields included in that dataset.
- Use the search box to search for fields in the selected Dataset.
- Export all fields for the selected Dataset using the Excel button.



Datasets

Datasets allows you to view all of the information in each view including the name of the dataset, the name of the view or object, and a description of the view.

- Use the Filter Elements box to search for elements in the view.
- Export all fields for the selected view with the Excel button.
- Click the plus (+) sign to view details of each view.



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.

The screenshot shows the 'FIELDS' tab in the HR DataMart interface. At the top, there is a search bar and a status dropdown menu set to 'All'. Below this, a table lists various fields. The table has the following columns: ELEMENT NAME, DEFINITION, DATA TYPE, COLUMN NAME, and STATUS. The fields listed include 4-Digit Cupa Code, 4-Digit Cupa Code Description, 4-Digit Cupa Code Value, Academic Rank, Academic Rank Code, Academic Rank Code Ipeds, and Academic Rank Date.

ELEMENT NAME	DEFINITION	DATA TYPE	COLUMN NAME	STATUS
+ 4-Digit Cupa Code	For an employee's primary job, this item applies to any position that is reported as an administrator in the annual CUPA survey. It is left blank/NULL for all other positions. This field represents the row CUPA code prior to 2013.	VARCHAR2	CUPA_CODE_VALUE_OLD	A
+ 4-Digit Cupa Code Description	Original CUPA Code value prior to 2013 Description.	VARCHAR2	CUPA_CODE_AND_DESC_OLD	A
+ 4-Digit Cupa Code Value	Original CUPA Code value prior to 2013.	VARCHAR2	CUPA_CODE_OLD	A
+ Academic Rank	EPA Faculty: For an employee's primary position, this field provides further refinement about its level within the academic structure. EPA Non-Faculty: N/A SPA/CSS/COSS/NPE: N/A	VARCHAR2	ACADEMIC_RANK	I
+ Academic Rank Code	A code indicating the academic rank of an employee. Applies to EPA Faculty and may apply to NPE ? Temporary Faculty.	VARCHAR2	ACADEMIC_RANK_CODE	A
+ Academic Rank Code Ipeds		VARCHAR2	ACADEMIC_RANK_CODE_IPEDS	A
+ Academic Rank Date	Date current academic rank assigned. (EPA and NPE only).	DATE	ACADEMIC_RANK_DATE	A

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

The screenshot shows the 'DIMENSIONS' tab in the HR DataMart interface. On the left, there is a list of dimension categories such as 'APS - Appointment Subtypes', 'APT - Appointment Types', 'AR - Academic Rankings', etc. At the top right, there is a search bar. Below the list, there is a search bar for the selected dimension. The main area displays a table of dimension values. The table has the following columns: VALUE, NAME, DESCRIPTION, and STATUS. The values listed include A (SAAO (Tier I)), B (SAAO (Tier II)), F (Faculty), L (Professional Librarian), N (Not Determined), P (Instructional, Research, or Public Service), and R (Research).

VALUE	NAME	DESCRIPTION	STATUS
A	SAAO (Tier I)	SAAO (Tier I)	A
B	SAAO (Tier II)	SAAO (Tier II)	A
F	Faculty	Faculty	A
L	Professional Librarian	Professional Librarian	A
N	Not Determined	Not Determined	A
P	Instructional, Research, or Public Service	Instructional, Research, and Information Technology	A
R	Research	Research	A
	None	None	A

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 screenshot shows the HR DataMart interface with the 'VALIDATION' tab selected. The interface includes a navigation bar with 'Home', 'Submissions', 'Views', 'Reports', 'Documents', 'Permissions', 'Datasets', 'Admin', and 'Dictionary'. Below the navigation bar, there are tabs for 'CATEGORIES', 'FIELDS', 'DIMENSIONS', and 'VALIDATION'. The 'VALIDATION' tab is highlighted with a red box. Below the tabs, there is a search bar and a table of validation rules. The table has columns for ID, NAME, DESCRIPTION, TYPE, FEED, and VALIDATION SQL. Two rules are visible: ID 15, 'State Funding Type', and ID 16, 'Required Field'. The 'Show Summary', 'Export to CSV', and 'Export to EXCEL' buttons are visible at the top of the table area.

ID	NAME	DESCRIPTION	TYPE	FEED	VALIDATION SQL
15	State Funding Type	If data is supplied (not empty/null), then the funding source must be marked as State Funds (code=1).	ERROR	BUDGET POSITIONS	SELECT DISTINCT 'State Funding Type' A.STATE_FUNDING_TYPE (' A.POSITION_NBR ') ' AS POSITION_E_CLASS, ' C.E_CLASS_DETAILS, NULL CID, NULL CLASSIFICATION_TYPE, A.POSITION_NBR, C.HOME_DEPARTMENT, B.EDIT_ID, B.EDIT_NAME, B.EDIT_DESC, B.EDIT_TYPE, B.OVERRIDE FROM HRDM_POSITION_BUDGET_STAGING A, HRDM_EDIT_CODES D B, HRDM_POSITION_STAGING C WHERE B.EDIT_ID = 15 AND A.SUBMISSION_ID = :submissionId AND A.POSITION_NBR = C.POSITION_NBR AND A.SUBMISSION_ID = C.SUBMISSION_ID AND A.STATE_FUNDING_TYPE IS NOT NULL AND (A.FUNDING_SOURCE IS NULL OR A.FUNDING_SOURCE != '1')
16	Required Field	All REQUIRED fields must be populated on this record before we can accept the data submission.	ERROR	BUDGET POSITIONS	SELECT 'UNCDH_POSITIONS_BUDGETS DATASET: Position Number' A.POSITION_NBR ' BUDGET CODE ' A.ANGAS_BUDGET_CODE ' COLUMNS: ' (SELECT ' POSITION_NBR, ' FROM HRDM_POSITION_BUDGET_STAGING WHERE POSITION_NBR IS NULL AND BUDGET_ID = A.BUDGET_ID) (SELECT ' EFFECTIVE_DATE ' FROM HRDM_POSITION_BUDGET_STAGING WHERE EFFECTIVE_DATE

The End!