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## Document Revision History

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The Human Resources Data Mart (HRDM) is designed to be an information repository, or warehouse, that incorporates human resources, benefits, and payroll earnings data. The information collected can be used by both the University System Office and institutions for regulatory reporting to agencies. The HRDM contains the following data marts:

- **Employee Profile** - The Employee Profile data mart stores actions occurring on an Employee and/or their job-related attributes in a chronological order. This information includes Employee ID, institution, department, job code, etc.

- **Employee Payroll** - The Employee Payroll data mart collects more detailed earnings information supplementing what is supplied in the Employee Profile portion of the data mart, like pay period, pay group, etc.

- **Employee Benefits** - The Employee Benefits data mart collects more detailed benefit information supplementing what is supplied in the Employee Profile portion of the data mart like plan type, coverage code, etc.
Human Resources Interface

The Human Resources Interface is the home for HRDM reporting and data submission. Use the following steps to access the interface:

1. Access the Human Resources Interface
   https://www.usg.edu/data_services/

2. Select Data Collection Application or Data Validation Reports.

3. Enter username and password.

Support for HRDM
Contact the ITS Helpdesk at http://www.usg.edu/customer_services (support request self-service) or e-mail Helpdesk@usg.edu. For emergency, business interruptions, or production down situations, call the ITS Helpdesk immediately (706-583-2001; or toll free within Georgia 1-888-875-3697).

User Access
To get access to the necessary functions of the HRDM, the HRDM Point of Contact person for your institution must contact the Help Desk with the following information: user name, title, email address, phone number and role(s) to be assigned. See the HRDM Security Roles section below for definitions of available roles.
HRDM Security Roles

HRDM Security roles are those roles that provide access to functions available within the Human Resources Interface. They are used specifically to enable/disable visual controls on the screens, and do not necessarily grant database privileges. However, user accounts, based on these HRDM Security roles, must be set up for each institution to allow access to the HR data mart.

The following section describes the HRDM Security Roles defined for the HR data mart.

Extractor (GA Tech)
- Extracts data from the source system into the HRDM
- All other Institution’s data is extracted via OneUSG Connect automatically

Reviewer
- Reviews Error/Edit reports and validates accuracy of data submitted to the HRDM.
- This role is assigned by the data area(s) that you are responsible for reviewing.

Reporter
- Reviews and/or creates various reports for institutional use.
- This role is assigned by the data area(s) for which you will be creating/reviewing reports.

Process Overview

The following is a high-level overview of the HRDM processing. Data should be submitted to the HRDM following each pay period.

1. Access the Human Resources Interface and log in.
2. Access the Human Resources Home Page.
3. Extract data (GA Tech)
   - Edit data (GA Tech). Please note that all edit errors need to be cleared before it can be loaded into the HRDM in step 7.
4. Review Edit Errors – this needs to be done by all institutions (USG and non-USG); correct data, if needed.
5. Rerun until no Edit Errors are present.
6. Load data.

HRDM Process Flow
Checklist for HRDM Data Submission

The checklist below provides the steps to transfer data from the source systems to the Human Resources Data Mart. For detailed instructions on how to complete these steps go to the Access Human Resources Interface section of this user guide.

Access Human Resources Data Mart

1. Access the Human Resources Interface.
2. Login to the Human Resources Extraction Application

Extraction Process (Applies to GA Tech only)

3. Extract HR Data

If the Extract Process is successful, begin the Edit Process.

If the Extract Process is unsuccessful (failed),
4. View Errors > View Processing Errors
5. Correct Errors
6. Re-run Extract

Edit Process

Edit HR Data (Applies to GA Tech only)

The Edit process is automated for OneUSG institutions. Non-OneUSG institutions must review Edit Errors:
7. View Errors > View Employee Profile/Payroll/Benefits Edit Error Report
8. If Edit Errors are present, correct Employee Profile/Payroll/Benefits errors in source system and repeat the process.
9. For OneUSG participating schools, data is extracted from OneUSG Connect to the HRDM each evening and run through the Editor. Non-OneUSG participating schools should wait to review Edit Errors the following day to verify that corrections made in the source system have eliminated Edit Errors.
10. Re-run Extract (Applies to GA Tech only)
Human Resources Data Collections

If the **Edit Process** is unsuccessful (failed),
17. View Errors > View **Processing Errors**
18. Correct data in source system
19. Re-run Extract Process
20. Re-Run Edit Process

If no Edit Errors, continue to **Load Process**

**Load Process (all institutions)**
21. Load HR Data

If the **Load Process** is unsuccessful (failed),
22. View Errors > View **Processing Errors**
23. Correct Errors
24. Re-run **Load**

If “SUCCESS”, data submission process is complete.

**Access Human Resources Interface**

Once the data is successfully extracted and edited, all OneUSG institutions without edit errors will be automatically loaded into the warehouse. Data from institutions with edit errors will not be loaded.

All edit errors for OneUSG institutions must be reviewed and corrected by the Institutional User.

Access the Human Resources Interface as follows:

http://www.usg.edu/georgia_institutional_intelligence/hrdm

Select “Data Collection Application”
Login with your user id and password.

The Institution Page is currently divided into three areas.

The leftmost section provides access to functionality available to the user based on role. Depending on the user’s assigned role, this section displays the buttons and links to Extract, Edit and Load HR Data and View Errors, and access HR Data Reports.

25. Only Non-OneUSG institutions will have access to the Extract HR Data action. OneUSG participating institutions have their extraction process run automatically on a nightly basis via a scheduled batch job in OneUSG Connect.

**HRDM Activity Log**: Shows all of an institution’s recent activity.

**Documentation**: Displays link to SharePoint
The Extract HR Data functionality performs the initial extraction of data from your source system into the temporary tables of the warehouse. You must be assigned the User Role of Extractor for your institution to be able to perform this functionality. Otherwise, you will not see the Extract HR Data button.

**Note:** Data is not loaded into the HRDM during this step. You must perform the Load HR Data functionality to place data in the data warehouse. The Load button will remain unavailable until all extracted data has been edited and is free of errors.

To extract HR data, perform the following:

1. In the Action area of the Institution page, click the **Extract HR Data** button.

2. The system prompts:
3. Click **OK** to continue the process. (Click Cancel to return to the Institution page). The screen displays an action status message.

4. The Extract Status will be ‘RUNNING’.

5. Click the **Refresh this report** button periodically. When the extraction completes successfully, the Activity Log will show a success status.
Human Resources Data Collections

**Edit HR Data (Non-OneUSG Schools Only – GA Tech)**

The Edit HR Data functionality edits the data that was extracted from the source system. Access to this functionality is also assigned to the user role of the Extractor. The purpose of the Edit function is to verify that data extracted complies with certain valid values and edits instituted to prevent erroneous values from being loaded mistakenly in the HRDM. To view the Valid Values, click on the HR Valid Values document Documentation section in SharePoint.

**Important: The Edit process must be performed before HR data can be loaded into the HRDM.**

1. Click the **Edit HR Data** button.

2. The system prompts:
3. Click **OK** to continue. The screen displays an Action Status message.

4. Edit Status will be ‘RUNNING’.

5. Click the **Refresh this report** button periodically. When the edit completes successfully, the Activity Log will show a success status.

If errors are present, these errors will be displayed on the Error Reports. You must view the Error Reports to determine if errors are present. If no errors were processed, the report area will remain blank.
View Error Reports (All Institutions)

The Error Reports display those errors encountered during the edit process.

Access to specific error reports is a role-based function for those assigned the Reviewer role. All those assigned the Reviewer role are granted access to view the Employee Profile Error Report; however, access to all additional error reports is based on your specific Reviewer role as described in the following sections.

*All existing errors must be corrected in the source system* and the Extract HR Data and Edit HR Data processes must be repeated. This must be continued until the Edit Reports contain no errors.

For OneUSG Connect participating institutions, ITS has developed a list of common HRDM Edit errors and steps to correct in OneUSG Connect. This document is called *Common HRDM Edit Errors* and is located in the *Documentation* section on SharePoint. Since ITS performs the Extract and Edit nightly for institutions utilizing OneUSG Connect, those schools must wait until the following day to verify that their corrections in OneUSG Connect were made correctly and that their errors have been cleared.

Access the Error Reports by clicking the **View Errors** button.
Clicking **View Errors** will open a new window with a login to the error reports. Login with your username and password.

**View Employee Profile Edit Errors Report**

The Employee Profile Edit Error Report contains all edit errors processed for Employee Profile data. This report can be viewed by all users assigned a Reviewer role.

*Note that this report also includes Faculty Data errors.*

These edit errors must be corrected and data re-extracted before a Load of HR data can be performed. To view the Employee Profile Edit Error Report, perform the following.

1. Click the **Employee Profile Official Errors** link.
2. Select your institution name from the dropdown list. (Your institution will be the only option.)

The report is displayed. It contains all Employee/Faculty Profile elements that have an associated edit error.

**NOTE:** If no edit errors were processed for your Employee Profile data the report area will remain blank.

**View Employee Payroll Edit Error Report**

The Employee Payroll Edit Error Report contains all edit errors processed for Employee Payroll data. These edit errors must be corrected and data re-extracted before a Load of HR data can be performed.

This error report can be viewed only by the users assigned the PayrollReviewer role.

To view the Employee Payroll Edit Error Report, perform the following.

1. Click the **Employee Payroll Official Errors** link.
2. Select your institution name from the dropdown list. (Your institution will be the only option.)

![University System Of Georgia Employee Payroll Official Errors]

The report is displayed. It contains all Employee Payroll elements that have an associated edit error.

**NOTE:** *If no edit errors were processed for your Employee Payroll data the report area will remain blank.*

**View Employee Benefits Edit Error Report**

The Employee Benefits Edit Error Report contains all edit errors processed for Employee Benefits data. These edit errors must be corrected and data re-extracted before a Load of HR data can be performed.

This edit error report can be viewed only by those users assigned the Benefits Reviewer role.

To view the Employee Benefits Error Report, perform the following.

1. Click the **Employee Benefits Official Errors** link.
2. Select your institution name from the dropdown list. (Your institution will be the only option.)

**NOTE:** If no edit errors were processed for your Employee Benefits data the report area will remain blank.

**View HR Processing Errors Report**

The HR Processing Errors Report contains all processing errors for HR data (i.e., failed edit or load process).

To view the HR Processing Errors Report, perform the following:

1. Click the **HR Processing Errors** link.
2. Select your institution name from the dropdown list. (Your institution will be the only option.)

![Image of University System Of Georgia HR Processing Errors]

**NOTE:** If no processing errors occurred for your HR Processing data, the report area will remain blank.

To download a spreadsheet of all the errors in a particular report, click **Download CSV**.

### Reports

To access the HRDM reports, click the **View Reports** button from the Action menu.
The HR Reports page is displayed.

![Human Resources Data Collection](image)

**Extraction Data Reports**

The Extraction Data Reports allow you to view the most recent data extracted from your source system prior to loading data to the HRDM.

This includes:

- Employee Benefits Extraction Data – Employee Benefits Data
- Employee Payroll Extraction Data – Payroll Data
o Only users assigned the Payroll Reviewer role will have the option to view this report.

- Employee Profile Extraction Data – Address Data
- Employee Profile Extraction Data – Employee Education
- Employee Profile Extraction Data – Funds and Efforts
- Employee Profile Extraction Data – Job Data
- Employee Profile Extraction Data – Personal Data
- Employee Profile Extraction Data – Service History Data
- Employee Profile Extraction Data – Tenure Data

The Employee Profile Extraction Reports can be viewed by all users assigned a Reviewer role.

All Cognos reports are downloadable. After the report has been run successfully, click on the highlighted symbol below and select output of choice, HTML, PDF, XML or Excel. You will be prompted if you wish to open or save the file.
Load HR Data

The Load HR Data functionality transfers HR data into the data warehouse tables.

**Important: The Edit process must be performed before HR data can be loaded into the HRDM.**

To Load HR data into the warehouse, perform the following:

1. In the Action area of the Institution page, click the **Load HR Data** button.

2. The system prompts:
3. Click **OK** to continue the process. (Click **Cancel** to return to the Institution page). The screen displays an action status message.

4. Load Status will be ‘RUNNING’.

5. Click the **Refresh this report** button periodically. When the extraction completes successfully, the Activity Log will show a success status.

Once the HR data has been extracted, edited, and loaded into the data mart, the data submission process is complete.