Facilities Inventory
Data Collection (FIDC)

Data Submission & Reporting
User Guide

May 2024
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Facilities Inventory Data Collection (FIDC) Data Submission and Reporting User Guide

Purpose
The Facilities Inventory Data Collection (FIDC) occurs twice annually to report building and room inventory information.

Target Audience
This document is designed for institutional staff responsible for submitting data to the Facilities Inventory Data Collection (FIDC). This includes the Points of Contact (POCs) for each institution for the FIDC and any other staff with roles and access to complete a data extraction and review data related to the FIDC.

Scope of Document
This user guide will provide detailed instructions for each of the following processes of the Facilities Inventory Data Collection:

- Facilities Inventory Institutional User Roles
- Data Submission Process Flow
- Data Submission
- Reports
- Data Submission Errors
- Submission Status
- Data Dictionary
- Reference Code Reports

More Information and Support
For emergencies, business interruptions, or other production down situations, immediately call the ITS Helpdesk (706-583-2001 or 888-875-3697 toll-free within Georgia). For noncritical issues, log in with your username and password at https://usg.service-now.com/usgsp to submit a ticket.

Resources
Information about ITS Service Level Guidelines and the maintenance schedules can be found at https://www.usg.edu/customer_services/service_level_guidelines. For operational information on USG IT systems and services, please visit http://status.usg.edu.
Facilities Inventory Institutional User Roles

Before learning the data submission process, it is important to understand the User Roles that must be assigned to perform these procedures.

The following section explains the Facilities Inventory Institutional User Roles that must be defined for the institution to successfully complete Facilities Inventory Data Collections.

<table>
<thead>
<tr>
<th>Role Title</th>
<th>Role</th>
<th>Role Functions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Institution Facilities Extractor</td>
<td>usg_facil_extractor</td>
<td>Extract Facilities Data</td>
</tr>
<tr>
<td></td>
<td></td>
<td>View Facilities Error Reports/Logs</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Request Error Relief</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Provide Error Relief Comments</td>
</tr>
</tbody>
</table>

**Role Description**

The Extraction process collects data from the Facilities campus Operational Data Store (ODS). If any errors are returned during the extraction process, the data warehouse user interface alerts the user. These errors must be corrected before data can be accepted by the Facilities Program Management Office and loaded into the relational data warehouse.

<table>
<thead>
<tr>
<th>Role Title</th>
<th>Role</th>
<th>Role Functions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Institution Facilities Data Submission Reviewer</td>
<td>usg_facil_ods_reviewer</td>
<td>Review Facilities Preliminary / Turn-Around reports for accuracy prior to load into the relational warehouse.</td>
</tr>
</tbody>
</table>

**Role Description**

Facilities Preliminary / Turn-Around Reports must be reviewed for accuracy before data is loaded into the relational warehouse for Official Reporting purposes.
Data Submission Process Flow
Data Submission

This section provides detailed instructions for completing the data submission process. This includes the following steps:

- Confirm installation of current Academic Release (CAMPUS_ODS_FIDM_ETL_INSTALL)
- Run Data Collection Extraction process (ZADMETL)
- Access the Academic Data Submission Application
- Extract to Data Warehouse Mimic tables (USGODS)

Confirm Installation of the Current Academic Release

To successfully run the Data Collection Extraction process (ZADMETL) in Banner, the current Facilities Release (CAMPUS_ODS_FIDM_ETL_INSTALL) must be installed.

For the release information and the current ETL Execution Parameters, refer to the Data Collection Site at the following URL:  https://www.usg.edu/data_services/. The Facilities tab is under the Data Collections Documentation dropdown on the Data & Reporting Services site.

Data Collection Extraction Process (ZADMETL)

The first step in the extraction process is to run the Data Collection Extraction process (ZADMETL) to populate the tables in the USGQUEST schema on the institution’s designated database. The ZADMETL process initiates the Facilities Inventory Data Collection (FIDC) Institution Extraction, populating the Banner tables (Views) in the USGQUEST schema. The extraction process pulls data from these tables to populate the data warehouse staging tables (USGODS).

Run the ZADMETL process from the Process Submission Controls (GJAPCTL).

In the Parameter Values section, populate parameter number 01 (Data Collection to Extract?) with the value ‘F’ to extract data for the FIDC. With the cursor in the Submission section, click Save to execute the process.
Review the ZADMETL .lis and .log files to verify a successful extraction. All errors must be resolved to achieve a successful extraction.
For information on ZADMETL .lis output, including error messages and their causes, please refer to the Data Collection Extraction user documentation available at https://www.usg.edu/georgia_best/application_development_and_support/banner/userdocs.
Access the Data Collection Application

Once the data is successfully loaded into the USGQUEST schema, the Data Collection Application (Apex) should be executed to extract the academic data from the Banner tables in the USGQUEST schema and populate the data warehouse staging tables (USGODS).

1. Access the Data Collection Site at the following URL: https://www.usg.edu/data_services/.
   **Note:** This site provides access to the Data Collection Application and the Data Validation Reports. A successful extraction must be completed before reviewing reports.

2. Click the Data Collection Application link in the navigation column.
3. Select the Academic Data Collection Application (Includes ADC, Facilities, and Financial Aid) link.

![Academic Data Collection Application](image)

4. This link opens the login page for the Apex application. Enter Username and Password and click Login. **Note:** The direct URL is [https://apps.ds.usg.edu/ords/f?p=38576](https://apps.ds.usg.edu/ords/f?p=38576). Any additional numbers that may appear at the end of this URL are used to identify a current session. Do not bookmark or save a session specific URL. If issues are encountered while accessing the Apex application, clear the browser cache, close the browser and start over with the direct URL.
5. The Overview tab will display the SETID, the name of the institution, and the last successful actions per data mart.

![Overview Tab Display](image)

6. In the upper left corner of the Overview tab, click the Select DataMart dropdown list. The data marts displayed are based on permissions assigned to the user’s login. Select the Facilities option.

![Select DataMart Dropdown](image)

7. Once Facilities is selected, a new Facilities Data Collection tab appears next to the Overview tab. Click on the Facilities Data Collection tab to reach the FIDC home page. The Facilities Data Collection tab displays the institution's SETID and name, current collection and ETL package version, extraction processing steps, and last successful actions for the data mart.

![Facilities Data Collection Tab](image)
Perform an Extraction

1. On the Facilities Data Collection tab, a series of buttons appear on the left side. The available buttons may vary depending on the state of the current collection.

   - Home
   - Extract
   - Req. Error Relief
   - Start Over

2. To perform an extraction, click the Extract button.

3. A confirmation prompt will be displayed asking: “Are you sure you want to extract?” Click OK to continue with the extraction or click Cancel to return to the Home page.
4. The extraction request is submitted to the process queue, that is a staging area that manages the number of extraction requests submitted by all institutions. **Note:** If more than 5 extraction processes are currently running, the request will be placed in the queue and picked up for processing when space is available.

5. The message “Extraction request successfully submitted to the process queue!” will be displayed along with an OK button. Click OK to return to the Home page.

6. If more than 5 extraction processes are running, a new request will be placed in the queue. In this case, the Facilities ETL Summary window will display PENDING. Refresh the browser as needed to verify that the request moves from PENDING to RUNNING.

7. If the extraction request is successfully executed, the Status in the Facilities ETL Summary window will display RUNNING.
8. When the extraction process is complete, the status displays SUCCESS or FAILURE. If the status is SUCCESS, continue to the next step in the process. If the status is FAILURE, it may be necessary to contact ITS for further investigation.

<table>
<thead>
<tr>
<th>Step</th>
<th>Process</th>
<th>Datamart</th>
<th>Collection Term</th>
<th>STATUS</th>
<th>START TIME</th>
<th>END TIME</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Extraction/Edit</td>
<td>FIDM</td>
<td>20234-ST</td>
<td>SUCCESS</td>
<td>02/20/2024 10:01:30</td>
<td>02/20/2024 10:01:40</td>
</tr>
<tr>
<td>4</td>
<td>Request Load to DW</td>
<td>FIDM</td>
<td>20234-ST</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>7</td>
<td>Institution Certify</td>
<td>FIDM</td>
<td>20234-ST</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
</tbody>
</table>

9. Verify if the extraction has been completed with Validation/Edit errors. If no Validation/Edit errors have been produced, the Req. Error Relief button will be grayed out and inaccessible. This confirms that no errors are present and the Data Submission Reports are ready for review.

10. If Validation/Edit errors are present, the Req. Error Relief button will be available. Data Submission Error reports must be reviewed to determine the method of correction in the source system. Error relief should only be requested if errors cannot be resolved in the source system. **NOTE:** If the Req. Error Relief button is clicked by mistake, the Start Over button should be used and the extraction process will need to be restarted.
Reports

This section provides detailed information on the reports that are available after completing the data submission process.

- Data Submission Reports
- Data Validation Reports

Reporting Options

Two types of reports are available for use after the data have been submitted.

Data Submission Reports

The Data Submission Reports provide high-level summary information related to the data submission process. Reports include:

- Institution Summary
- Submission Status
- Submission Summary

Data Validation Reports

Data Validation Reports are preliminary reports that provide detailed data information as submitted and stored in the data warehouse mimic tables (USGODS).

These reports should be used to validate the data.
Accessing Reports

1. Access the Data Collection Site at the following URL: https://www.usg.edu/data_services/.
   Note: This site provides access to the Data Collection Application and the Data Validation Reports. A successful extraction must be completed before reviewing reports.

2. Click the Data Validation Reports link in the navigation column.

Data & Reporting Services

Information Technology Services, in partnership with Research and Policy Analysis, facilitates the collection and storage of student, curriculum, degree, financial aid, employee and facilities data from System schools for University System reporting. These data collections originate from the source systems and then are aggregated for USG, state and federal reporting. Each mart has its own collection and reporting cycle as designated by each data mart sponsor.

Access to each data mart and reporting toolset is determined by each designated institutional point of contact (Academic, Financial Aid, Facilities and Human Resources).

Data Collections

Nine data submissions occur annually from the student information system (Banner) through three data collections. These collections include the Academic Data Collection (ADC), Financial Aid Data Collection (FADC) and the Facilities Inventory Data Collection (FIDC). The Transfer Course collection also occurs during the summer.

Human Resources data are extracted from OneUSG Connect (PeopleSoft HCM application) into USG HR data mart on a daily basis from Sunday night to Thursday night for each institution. HR reports provided by USG including IPEDS HR validation reports reflect the PeopleSoft HCM data as of the previous day.

Use the links on the left side to access reporting applications (APEX, Cognos, Password Portal, etc.). To access the Data Element Dictionaries for each mart, select Reporting Resources and then Data Collection & Reporting Resources.
3. Enter User ID and Password. This is the same account information used to log in to the Data Collection Application.

4. The Cognos home page is displayed.
5. Select Data Collections on the left-hand navigation to reach the Data Collections dashboard.

![Data Collections](image)

On the left, choose one of the following icons: Data Collections: Academic Data Submission, Academic Financial Aid, Facilities Inventory, Financial or Human Resources.

6. The Cognos Dashboard is displayed. All Data Validation Reports can be accessed from this dashboard. **Note:** The data mart tabs displayed are based on permissions assigned to the user's login.

![Cognos Dashboard](image)
Data Submission Errors

The Validation Errors are located in the left navigation column of the Facilities Inventory tab.

Validation Error Summary

Under Validation Errors, the Validation Error Summary report allows the user to view the details of Validation/Edit errors encountered during the extraction.

There are three possible options to view errors: (All), Known Issue, and Error. Selecting the (All) option will display all reported known issues and errors. The Known Issue option will be shown if there are active known issues within the current collection. The Error option will be shown if there are active errors that have not been cleared.
The error reports are grouped by Category and Record Type. They can be viewed and downloaded by record type or as a summary of all errors.

Click the View/Download link in the View and Download column to see detailed Business Rule errors for a specific Record Type, Category, and Primary Element. Click the View and Download all errors for [current term] link at the bottom of the errors table to view a detailed summary of all Business Rule errors.

These reports can be downloaded using the Cognos Viewer. In the upper right corner of the report, select the dropdown menu next to the HTML icon. This menu provides download formats. Select the desired format to download the report.
Submission Status

The Submission Status is located in the left navigation column of the Facilities Inventory tab. The status displays a high-level overview of the collection status.
Data Dictionary

The Data Dictionary Reports provide a technical reference for all facilities inventory data elements. A drill-down report provides crosswalk information.

Click the “Download PDF” option to generate a data element dictionary that contains detailed information, such as definitions, validation rules, collection tables, Banner references, and collection periods.
Reference Code Reports

Reference Code Reports provide access to the Data Warehouse Reference tables.

Below is an example of the FIDM Room Usage Code Reference Table.

<table>
<thead>
<tr>
<th>ROOM_USE_CODE</th>
<th>ROOM_USE_DESCR</th>
<th>ROOM_USE_STATIONS_REQ_IND</th>
<th>FROM_TERM</th>
<th>TO_TERM</th>
</tr>
</thead>
<tbody>
<tr>
<td>010</td>
<td>Custodial Area</td>
<td>N</td>
<td></td>
<td></td>
</tr>
<tr>
<td>020</td>
<td>Circulation Area</td>
<td>N</td>
<td>00000</td>
<td>99999</td>
</tr>
<tr>
<td>030</td>
<td>Mechanical Area</td>
<td>N</td>
<td>00000</td>
<td>99999</td>
</tr>
<tr>
<td>040</td>
<td>Structural Areas</td>
<td>N</td>
<td>00000</td>
<td>99999</td>
</tr>
<tr>
<td>050</td>
<td>Inactive Area</td>
<td>N</td>
<td>00000</td>
<td>99999</td>
</tr>
<tr>
<td>050</td>
<td>Alteration or Conversion Area</td>
<td>N</td>
<td>00000</td>
<td>99999</td>
</tr>
<tr>
<td>070</td>
<td>Unfinished Area</td>
<td>N</td>
<td>00000</td>
<td>99999</td>
</tr>
<tr>
<td>110</td>
<td>Classroom</td>
<td>Y</td>
<td>20132</td>
<td>99999</td>
</tr>
<tr>
<td>115</td>
<td>Classroom Service</td>
<td>N</td>
<td>00000</td>
<td>99999</td>
</tr>
<tr>
<td>211</td>
<td>Discipline Class Laboratory</td>
<td>Y</td>
<td>00000</td>
<td>99999</td>
</tr>
</tbody>
</table>
# Appendix A: Document History

This section details the history of the document and updates made for each modification.

<table>
<thead>
<tr>
<th>Release and Date</th>
<th>Page/Process</th>
<th>Page</th>
<th>Update Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>August 2019</td>
<td>N/A</td>
<td>N/A</td>
<td>Updated to reflect GeorgiaBEST standards</td>
</tr>
<tr>
<td>August 2021</td>
<td>N/A</td>
<td>N/A</td>
<td>Updated for Cognos Upgrade</td>
</tr>
<tr>
<td>March 2023</td>
<td>N/A</td>
<td>N/A</td>
<td>Updated screen captures and site information</td>
</tr>
<tr>
<td>May 2024</td>
<td>N/A</td>
<td>N/A</td>
<td>Updated screen captures and site information</td>
</tr>
</tbody>
</table>