# 2022 Human Resources Data Validations Webinar

October 18, 2022
Leslie Hodges
Research and Policy Analysis

## **Logistics & Introduction**



Please **mute** microphone when not speaking



To ask questions:

Type your question in the chat

We will stop periodically to address chat questions and you can un-mute your microphone to talk.



Following the webinar, we will send slides to all attendees.

Webinar will be recorded and saved in Teams.

## Agenda



**Team Members** 



Data Flow, Timeline & New User Access



iPEDS HR



**Digest HR** 



**Refresh Schedule** 



Changes to survey for 2022



Guidance for data validations



**Questions/Comments** 



#### **HRDM Team Members**

### ITS Administrative Services

- Jason Beitzel
- Debbie Exum
- Laurie Bush
- Jackson Cleveland

### Research and Policy Analysis

- Cherry Zhang
- Phyllis Gagne
- Rachana Bhatt
- Patrick Harris
- Leslie Hodges

#### Shared Services Center

- Kristine Lesher
- Kim Gore
- •Team

#### **DBAs**

- •Wesley Rice
- Steve McDaniel
- •Team



#### **Data Flow**

Data entered in PeopleSoft

Data extracted to USO

**HR Reports** 

**PeopleSoft** 

HR Data
Collection

(Cognos)

**IPEDS HR** 

Digest HR (Listserv)

All cohorts on PeopleSoft



### **Data Validations Timeline**

Nov. 1, 2022

Validation opens for IPEDS HR and Digest HR reports

Nov 1-Jan 13

- Institutions review data
  - IPEDS HR Reports available for review in Cognos\*
  - Digest HR Reports produced and emailed to HR POC listserv.
- Institutions make corrections in PeopleSoft so changes can be reflected in IPEDS and Digest reports

Nov. 22, 2022

- Digest HR reports distributed via listserv, and rerun and circulated on bi-weekly basis
- IPEDS data will not be complete until all October payroll records are extracted. May want to wait until ~Nov 3<sup>rd</sup> to look at data.



#### **Data Validations Timeline**

Dec 7, 2022

IPEDS HR survey data uploaded to NCES site by RPA (initial)

Jan. 13, 2023

• Deadline for all PeopleSoft corrections

Jan. 20, 2023

- Data finalized and frozen (MAY NOT BE CHANGED)
  - IPEDS HR survey data uploaded to NCES website by RPA (final)
  - Digest HR reports run and posted on website by RPA

#### **Access for New Users**

#### New users need:

#### Access to NCES website

 Request from institution's IPEDS-Keyholder

## Access to HRDM POC listserv and IPEDS HR Cognos reports

- Submit an ITS Help-Desk ticket to <u>helpdesk@usg.edu</u>
- Information on the security roles to request can be found here

#### Email to helpdesk

Subject: 2022 HRDM Data Validations, User Access

#### Be sure to include:

- Name, email address, and title
- Which system you need access to (HRDM POC list and/or HR Cognos reports)



## **IPEDS HR Reports**

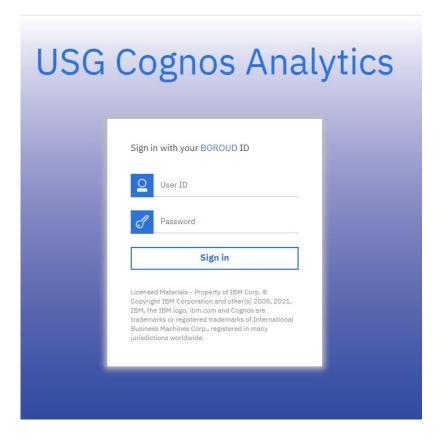


PEDS Integrated Postsecondary Education Data System

**IPEDS Survey Components** 



## IPEDS HR Reports: Cognos Website

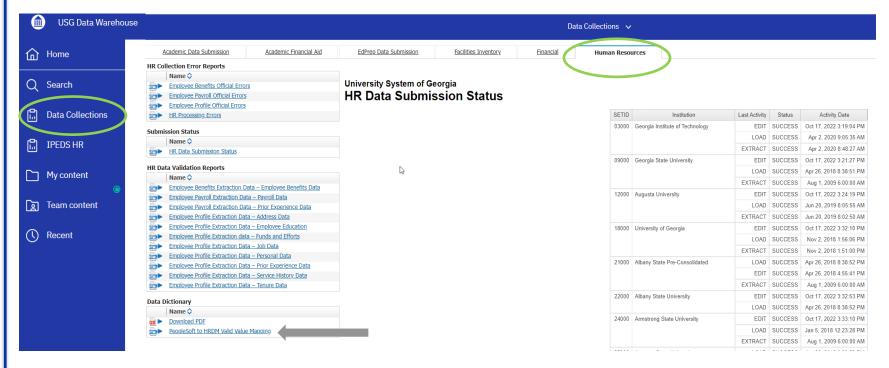


https://analytics.ds.usg.edu/bi/

Log on using your credentials



## IPEDS HR Reports: Cognos Data Collection Reports



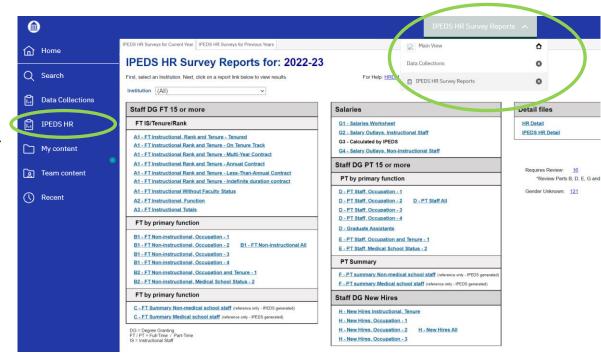
- Click on 'Data Collections' on the left
- Click on the 'Human Resources' tab on the top
- For more information on running the collection reports, see <a href="here">here</a>



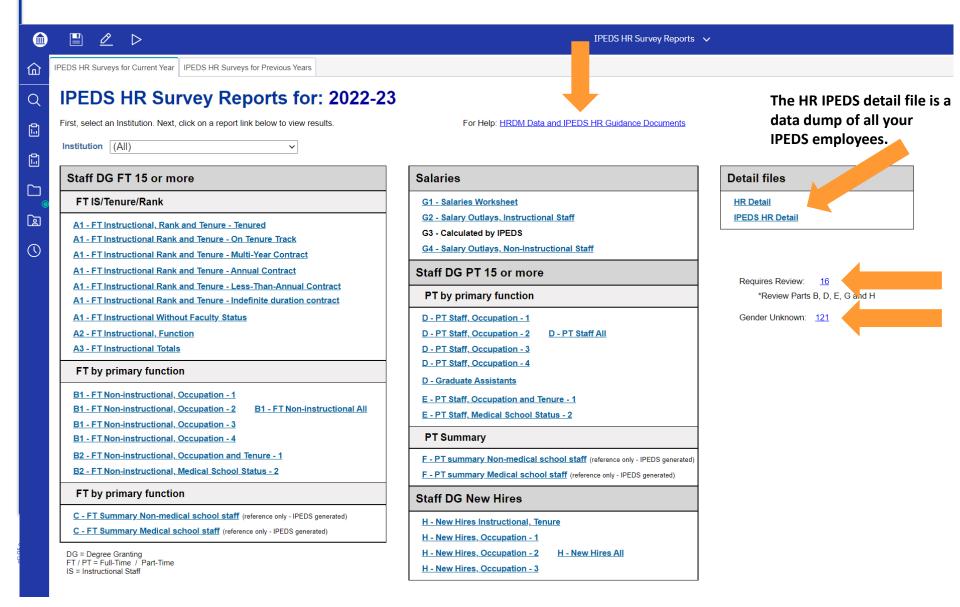
## IPEDS HR Reports: Cognos IPEDS HR Survey Reports

Click on 'IPEDS HR' on the left

- From the dropdown at the top, choose 'Data Collections' or 'IPEDS HR Survey Reports'
- Definitions provided in IPEDS Report Descriptions & Data Definitions guidance document



# IPEDS HR Reports: Cognos Data Collection Reports



### **IPEDS HR**

#### Reports:

## Cognos Requires

## Review Errors

Reports with possible "requires review" errors (Parts B, D, E, G, H)

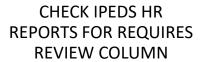
#### Part B - Number of full-time non-instructional staff by occupational category, gender, and race/ethnicity

) 		Affairs and Other Education Service Occupations	Occupations	Financial Operations Occupations	Engineering, and Science Occupations	Arts, Design, Entertainment, Sports, and Media Occupations	Review	Total
Male	Nonresident alien				34	1	3	49
	Hispanic/Latino	18	2	2	29	7	1	202
	American Indian or Alaska Native	1						7
	Asian	1		3	47	2	3	125
	Black or African American	115	12	14	73	38		2,047
	Native Hawaiian or Other Pacific Islander				1			5
	White	149	49	65	472	134	5	3,183
	Two or more races	8	1	1	9	2		52
	Race and ethnicity Unknown	11	1	3	36	7		231
	Total	303	65	88	701	191	12	5,901
Female	Nonresident alien	3			38	4	1	72
	Hispanic/Latino	45	1	9	15	10		308
	American Indian or Alaska Native			3	2	1		15
	Asian	19	1	2	91	4	2	238
	Black or African American	370	19	63	97	47		3,930



## IPEDS HR Reports: Cognos Requires Review Errors







REVIEW THE 'REQUIRES'
REVIEW USER GUIDE'
ONLINE

Employees in the 'Requires Review' column **do not** fit the definition of any IPEDS occupational category and **will not appear** in the IPEDS HR Survey upload file unless the job code or activity percent distributions are changed.



# IPEDS HR Reports: Uploading files to NCES

#### IPEDS 2022-23 Data Collection System

#### IPEDS HELP DESK

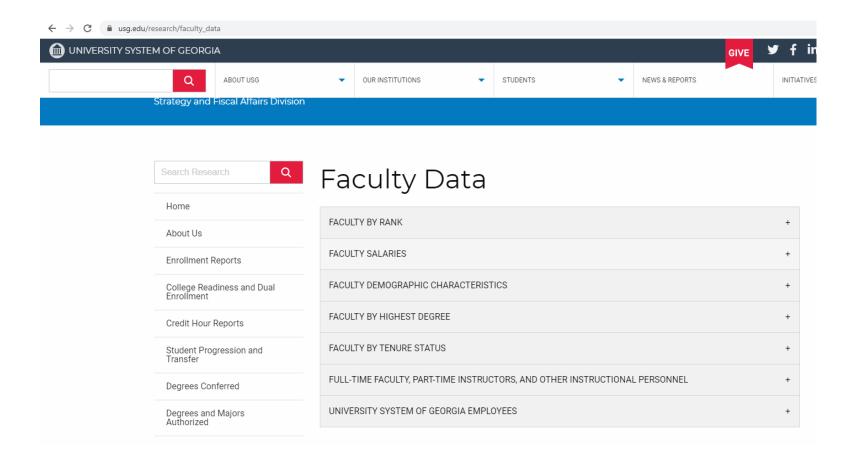
(877) 225-2568 | ipedshelp@rti.org OMB NO. 1850-0582 v.30 : Approval Expires 8/31/2025

				User ID	Password	LOGIN Forgot Passwo
FALL		WINTER	WINTER			
Components	Institutional Characteristics Completions 12-month Enrollment	Components	Student Financial Aid Graduation Rates 200% Graduation Rates Admissions Outcome Measures	Components	Fall Enrollment Finance Human Resources Academic Libraries	
Keyholders	15 days left (Closes Oct 19)	Keyholders	Opens Dec 07 (Closes Feb 08)	Keyholders	Opens Dec 07 (Closes Apr 05)	
Coordinators	29 days left (Closes Nov 02)	Coordinators	Opens Dec 07 (Closes Feb 22)	Coordinators	Opens Dec 07 (Closes Apr 19)	

#### https://surveys.nces.ed.gov/IPEDS

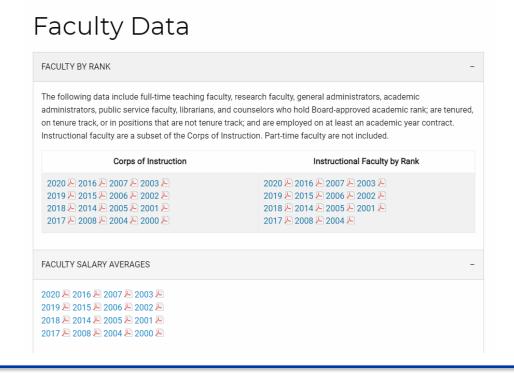
Upload files generated from HR Cognos reports, then uploaded to NCES RPA will upload to NCES site on 12/07, and again 1/20, intermediate uploads must be requested







- Starting November 22, Digest HR Reports are emailed every two weeks during the validation period to reflect changes.
- Definitions provided in <u>Digest Data Definitions</u> guidance document
- Final reports posted on <u>Faculty Data</u> website also updated





HRDMX0103 Instructional Faculty by Highest Degree

HRDMX0102 Instructional Faculty by Rank HRDMX0107 Average Instructional Faculty Salary HRDMX0106 Instructional Faculty by Race/Ethnic Origin

HRDMX0106 Instructional Faculty by Gender

HRDMX0105 Instructional Faculty by Tenure Status

HRDMX0101 Corps of Instruction HRDMX0108
Full-Time
Employees by
Occupational
Class

HRDMX0109 Full-Time Employees by Gender HRDMX0109
Full-Time
Employees by
Race/Ethnic
Origin

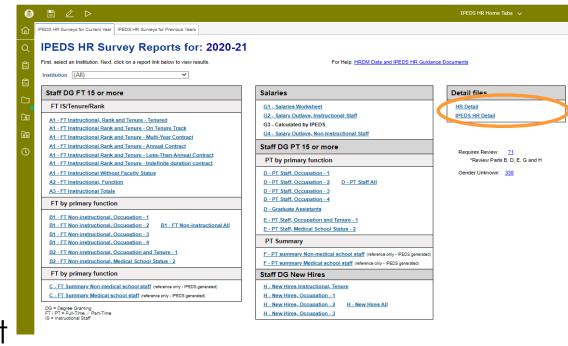
HRDMX1011 Number and Pct of Courses by Instructor Type



### Data Preview, Prior to Nov. 1

Before validation opens, detail files provide a preview of your data.

- Available data dumps:
  - HR Detail
  - HR IPEDS detail (subset, only what is relevant to IPEDS)





### **OneUSG HRDM Refresh Process**

Data lag between PeopleSoft and Cognos

HCM update Monday, 5pm



Cognos update Wednesday, 8 am

Data lag between PeopleSoft and NCES website

Dec. 7, 2022 & Jan. 20, 2023



After Dec. 7, 2022

Uploads by request



#### No changes to the IPEDS survey or extraction process for this collection







# But some things do change...

- The extraction has been modified to improve timing by pulling fewer years of data. This should end the errors we saw last year which resulted in no data loaded!
- Please review previous years' changes (located in the 'archived' section of the website) as necessary.
- We will keep you updated if other changes need to be made



## Guidance





## Guidance Data Validations: Service Now Tickets

Questions about HR data discrepancy issues? Submit an ITS Help Desk Ticket (helpdesk@usg.edu)

#### Email to helpdesk

Subject: 2022 HRDM Data Validations

#### Be sure to include:

- Brief description of the data issue/discrepancy
- Provide emplids OR names as examples
- Provide screenshot of issue (if necessary)
- DO NOT include SSNs



### Guidance

### **Human Resources Data Element Dictionary**

### **New Features**



## Guidance HRDED Intro Page

#### **Human Resources Data Element Dictionary**

The data element dictionary provides detailed information about each of the data elements stored in the Human Resources Data Mart (HRDM). The table below describes the information found in each field for each data element.

Element Name	Element Number
Category	Grouping of data elements, for example, Employee Payroll
Description	The description provides clarification on the information contained in the field. If the field is no longer in use, it will be specified in the description. If the PeopleSoft data entry field has a different name that the element name, it will be noted here.
Data Type	Character/Number/Date
Length	Maximum length of entry
Format	Date format, otherwise blank
Collection Period	Frequency of data extracted from PeopleSoft into HRDM
Business Practices	Provides information on how to input information, including relevant knowledge articles. Knowledge articles are labeled as practitioner or employee self-service processes. Knowledge articles are located in USG Service Now ( <a href="https://usg.service-now.com/usgsp">https://usg.service-now.com/usgsp</a> ).
Validation Rules	Severity Code Description
M-P-I M-I	Evaluation rules during extraction that will cause errors

#### Valid Values

Code Description

This section includes all HRDM valid values, both those currently in use and those that are no longer active. This is because historical data are still extracted and used for reporting. For information on which values are currently active refer to the "PeopleSoft to HRDM Valid Value Mapping" report in Cognos – in the PS Status column, 'A' indicates an active value and 'I' indicates an inactive value. This report is located here: Cognos > Data Collections > Human Resources > 'PeopleSoft to HRDM Valid Value Mapping'

## Guidance HRDED Intro Page

Data 9	Source	Provider	Source of the data (Primarily PeopleSoft or Human Resources Data Mart (HRDM))					
		Table	In the source application, this is the table where the element value is stored					
		Column	the source application table, this is the column where the values are stored					
		Page	If relevant, the PeopleSoft page where the information is entered					
I		Navigation	If relevant, the navigation to the PeopleSoft page where the information is entered					
Effecti	tive Terms	Start	Date the element was first collected					
		End	Date the element stopped being collected, (None) if the element is currently collected.					
Target	t Files	Target Type	Table Name Column Name					
		This section	describes where the data are stored in the HRDM					
Chang	ge History	Date N	Votes					
This section includes information about any changes made to the element over time								



## Guidance HRDED Valid Values

- For paired code/description elements, only the code element will contain the list of codes and descriptions.
- For elements with many values that are updated frequently (e.g., Job Code), valid values will not be listed in the HR DED but can be found in the <u>PeopleSoft to</u> <u>HRDM Valid Value Mapping Report</u>

<u>.</u>		Cui	rrent HRDM Valid Values
Element ID	Element Name	HRDM Value	HRDM Description
HED004	Degree Level	01	No Formal Education
HED004	Degree Level	02	Elementary School Completed
HED004	Degree Level	03	Some High School
HED004	Degree Level	04	High School Graduate
HED004	Degree Level	05	Terminal Occupation Program
HED004	Degree Level	06	Terminal Occupation Program
HED004	Degree Level	07	Some College - Less than 1 Yr
HED004	Degree Level	10	Associate Degree
HED004	Degree Level	13	Bachelor Degree
HED004	Degree Level	14	Post Bachelors
HED004	Degree Level	15	First Professional
HED004	Degree Level	17	Masters Degree
HED004	Degree Level	18	Post Masters
HED004	Degree Level	21	Doctorate Degree
HED004	Degree Level	С	One Year Certificate
HED004	Degree Level	Е	2 yr vocatinal Certificate
HED004	Degree Level	F	Advanced Certificate



## Guidance HRDED Valid Values - Translation

Not all values are the same in OneUsg as in the HRDM. The second part of the <u>PeopleSoft to HRDM Valid Value Mapping</u>
<u>Report</u> shows the relationship between PeopleSoft and HRDM values

People Soft to HRDM Valid Value Mapping									
Element ID	Element Name	PS Field Name	PS Value	PS Description	PS Status	HRDM Value	HRDM Description	Translated	
HED004	Degree Level	EDUCATION_LVL	01	No Formal Education	Α	01	No Formal Education	NO TRANSLATIO	
HED004	Degree Level	EDUCATION_LVL	02	Elementary School Completed	Α	02	Elementary School Completed	NO TRANSLATIO	
HED004	Degree Level	EDUCATION_LVL	03	Some High School	Α	03	Some High School	NO TRANSLATIO	
HED004	Degree Level	EDUCATION_LVL	04	High School Graduate	Α	04	High School Graduate	NO TRANSLATIO	
HED004	Degree Level	EDUCATION_LVL	05	Terminal Occupation Prog DNC	Α	05	Terminal Occupation Program	NO TRANSLATIO	
HED004	Degree Level	EDUCATION_LVL	06	Terminal Occupation Program	Α	06	Terminal Occupation Program	NO TRANSLATIO	
HED004	Degree Level	EDUCATION_LVL	07	Some College - Less than 1 Yr	Α	07	Some College - Less than 1 Yr	NO TRANSLATIO	
HED004	Degree Level	EDUCATION_LVL	08	One Year College	I	80	One Year College	NO TRANSLATIO	
HED004	Degree Level	EDUCATION_LVL	09	Two Years College	I	09	Two Years College	NO TRANSLATIO	
HED004	Degree Level	EDUCATION_LVL	10	Associate Degree	Α	10	Associate Degree	NO TRANSLATIO	
HED004	Degree Level	EDUCATION_LVL	11	Three Years College	I	11	Three Years College	NO TRANSLATIO	
HFD004	Degree Level	FDUCATION I VI	12	Four Years College	1	12	Four Years College	NO TRANSI ATIO	



# Guidance HRDED Updated Elements

Please note that not all elements have been updated yet, though the project did prioritize elements related to IPEDS reporting

Check the change history for a 2022 review date

Change History	Date	Notes
	Jan 1, 2005	New Element
	Nov 6, 2009	Added ADP Translations.
	Jul 30, 2018	ADP Element Name: SEX; ADP Table: PERSONAL_DATA
	Jul 30, 2018	Old PS Menu Path: Workforce Administration, Increase Workforce, Hire Employe
	Jul 30, 2018	Old PS Page: Personal History; Old PS Page Field Name: Gender
	Jul 30, 2018	Old PS Table: PS_PERS_DATA_EFFDT; Old PS Table Field: SEX
	Mar 8, 2022	Element reviewed and updated

# Guidance OneUSG Job Aids

https://usg.servicenow.com/usgsp?id=kb\_article\_view&sysparm\_article =USGKB0011977&sys\_kb\_id=633c0980db0a6010ee065 cb8dc9619bb&spa=1

\*NOTE: You will need to log in with your SSO credentials to access the job aids information



## Guidance Website:

https://www.usg.edu/research/reporting resources/hrdm data

#### RESEARCH AND POLICY ANALYSIS Strategy and Fiscal Affairs Division HRDM Data and IPEDS HR Search Research Home Guidance Documents About Us 2022 HRDM PRESENTATION, IPEDS HR AND DIGEST HR **Enrollment Reports** College Readiness and Dual Enrollment 2022 HRDM CHANGES ARCHIVED HRDM GUIDANCE DOCUMENTS Credit Hour Reports previous Student Progression and Transfer documents archived here!



#### **Guidance:** Website

#### 2022 HRDM PRESENTATION, IPEDS HR AND DIGEST HR

#### **Presentations**

This section will contain this presentation

#### **IPEDS**

- Schedule, Report Descriptions, and Definitions
- Cognos User Guide
- BCAT Crosswalk
- How to handle Requires Review

#### **Digest**

• Schedule, Report Descriptions, and Definitions



#### **Guidance:** Website

#### **Archived HRDM Guidance Documents**

ARCHIV	ARCHIVED HRDM GUIDANCE DOCUMENTS								
Year	Presentation	IPEDS	Digest	Changes					
2021	• 2021 HRDM Data Validation Presentation 🕒	2021 IPEDS HR Data     Validation     Schedule       2021 Cognos User     Guide       2021 Report     Descriptions and Data     Definitions       2021 BCAT SOC     Crosswalk       2021 How to Handle     Requires Review	<ul> <li>2021 Digest HR Data Validation Schedule </li> <li>2021 Data Definitions </li> <li>2021 USG Faculty Definitions </li> </ul>						
2020	2020 HRDM Data     Validations     Presentation	2020 IPEDS Data     Validation     Schedule       2020 IPEDS HRDM     Survey Report     Definitions       2020 Cognos User     Guide	<ul> <li>2020 Digest HR Data Validations Schedule  2020 HRDM Digest Reports and Definitions  USG Faculty Definitions </li> </ul>	<ul> <li>Citizenship Change </li> <li>MCOP Change </li> <li>CIP Change </li> <li>Funding and Effort Change </li> <li>Unknown Gender </li> </ul>					



### Q&A, Contact Info



For access and data validation questions or issues **send an e-mail to HelpDesk**.

The subject line "2022 HRDM Data Validations" will route your questions faster!

Additional Questions: Leslie.Hodges@usg.edu

