UNIVERSITY SYSTEM OF GEORGIA

2023 Human Resources Data Validations Webinar

October 25, 2023

Leslie Hodges
Research and Policy Analysis

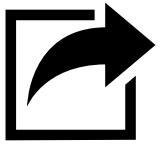
Logistics & Introduction

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.

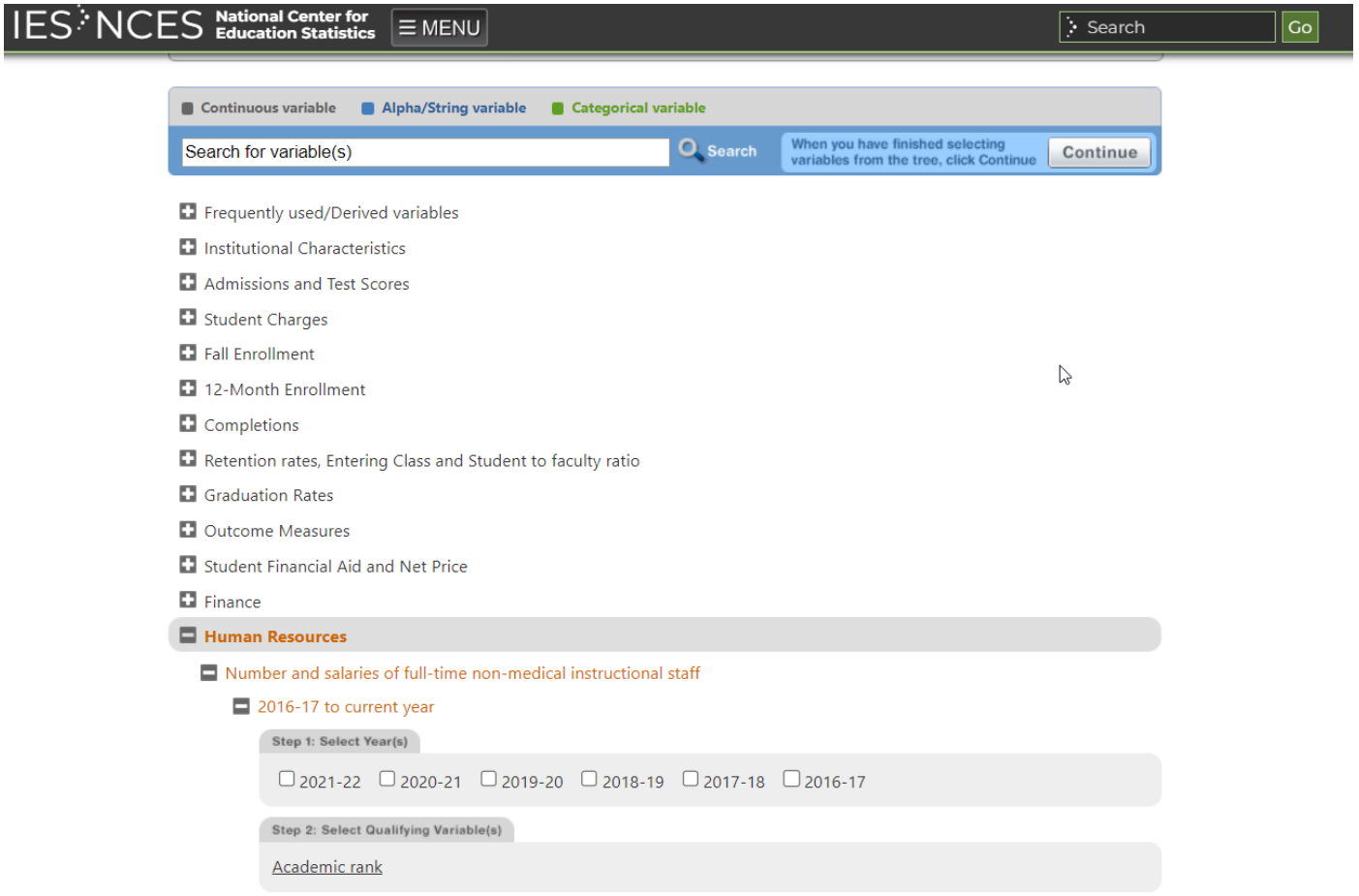
Agenda

- Team Members
- Data Flow, Timeline & New User Access
- IPEDS HR
- Digest HR
- Refresh Schedule
- Changes to survey for 2023
- Guidance for data validations
- Questions/Comments

HRDM Team Members

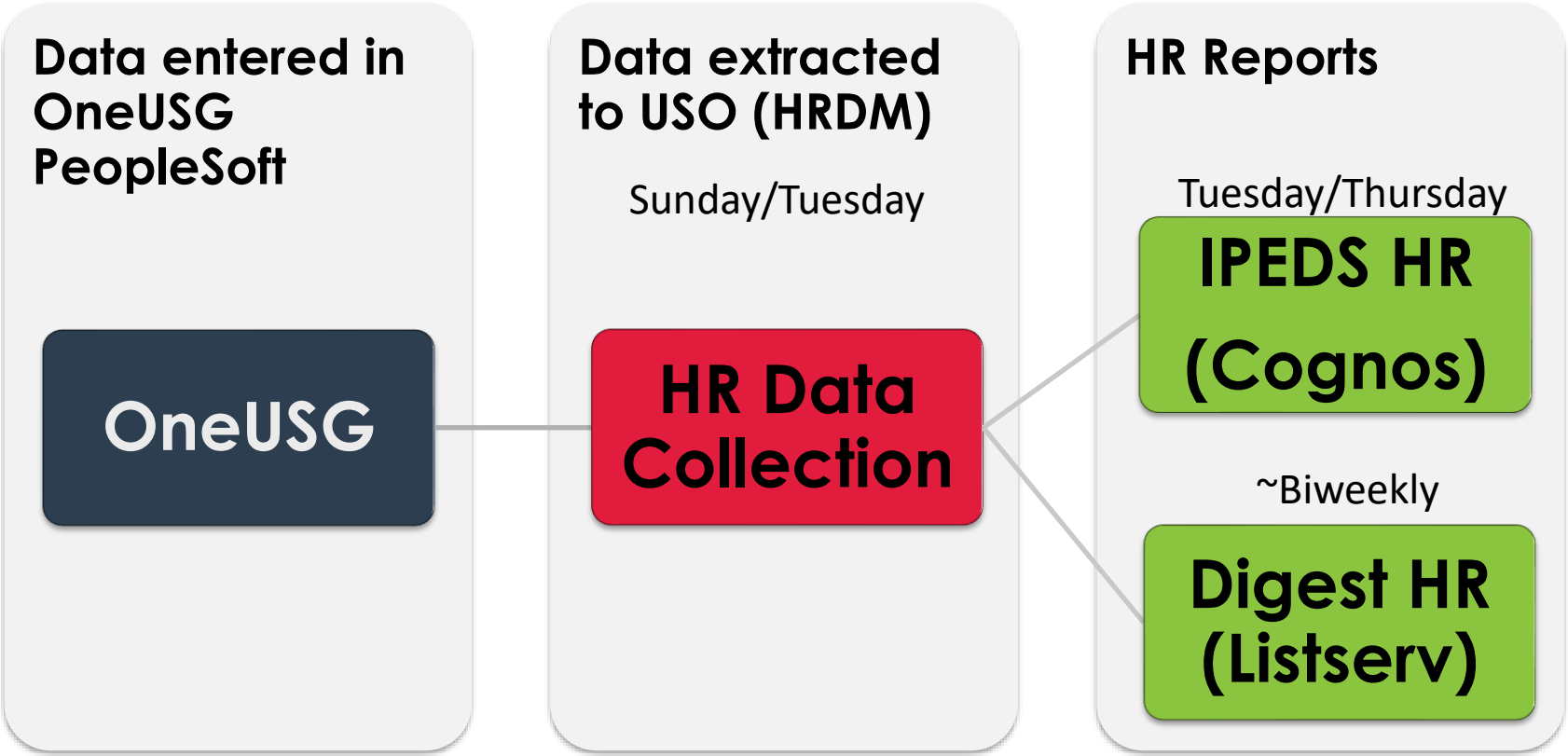
ITS Administrative Services	Research and Policy Analysis	Shared Services Center	DBAs
•Jason Beitzel •Cody Carlton •Emma Owens •Laurie Bush •Jackson Cleveland	•Cherry Zhang •Phyllis Gagne •Lori Hagood •Patrick Harris •Leslie Hodges	•Kristine Lesher •Kim Gore •Team	•Wesley Rice •Steve McDaniel •Team

What is this collection for?
IPEDS



What is this collection for?
Digest Reports

Data Flow


Data entered in OneUSG PeopleSoft
OneUSG
Data extracted to USO (HRDM)
Sunday/Tuesday
HR Data Collection
HR Reports
Tuesday/Thursday
IPEDS HR (Cognos)
~Biweekly
Digest HR (Listserv)

Human Resources Data Mart (HRDM)

The HRDM is a set of data extracted from OneUSG, translated to system level values, and used for IPEDS HR and Digest HR reporting.

- It is NOT the same as OneUSG/PeopleSoft
- It only contains a portion of the data elements found in OneUSG
- Values may be translated from what is seen in OneUSG to what is stored in the HRDM
- The HR Data Element Dictionary provides information about the relationship between each HRDM element and the OneUSG source

Data Validations Timeline

Nov. 1, 2023

- Validation opens for IPEDS HR and Digest HR reports

Nov 1- Jan 12

- 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, 2023

- 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 2nd to look at data.*

Data Validations Timeline

Dec 8, 2023

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

Jan. 12, 2024

- Deadline for all PeopleSoft corrections

Jan. 19, 2024

- 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 may 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 helpdesk@usg.edu
- Information on the security roles to request can be found here

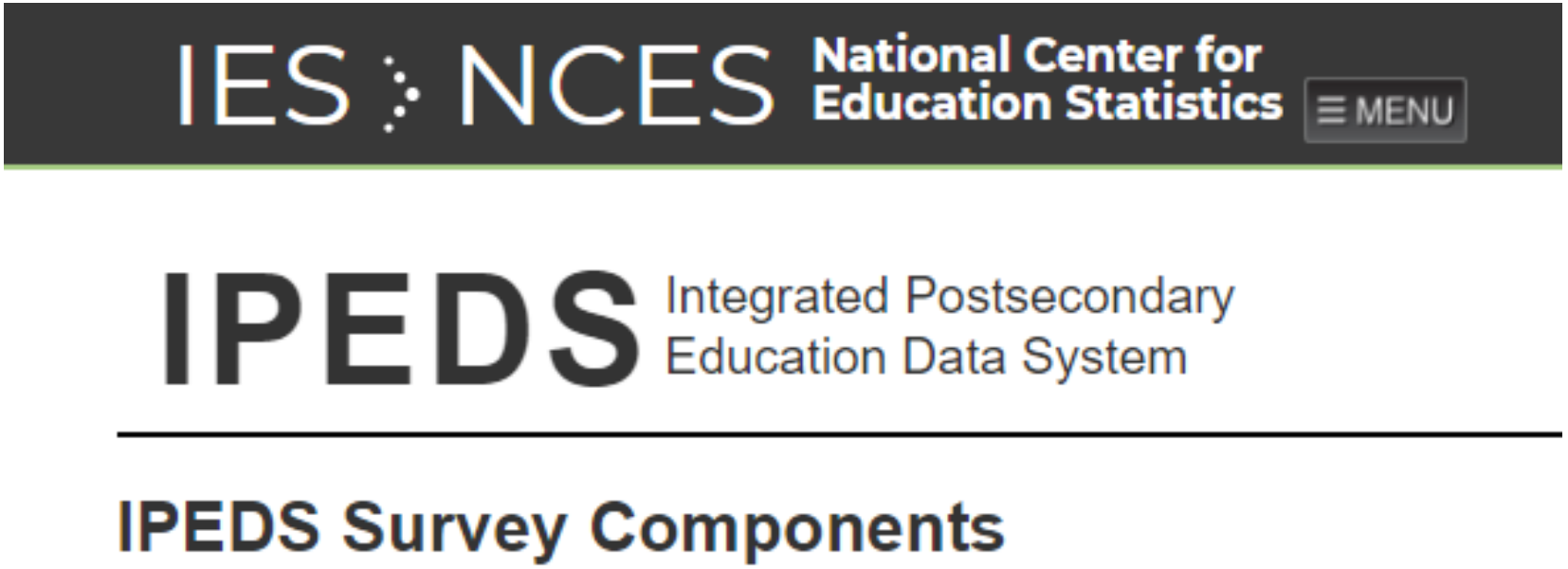
Email to helpdesk

Subject: 2023 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

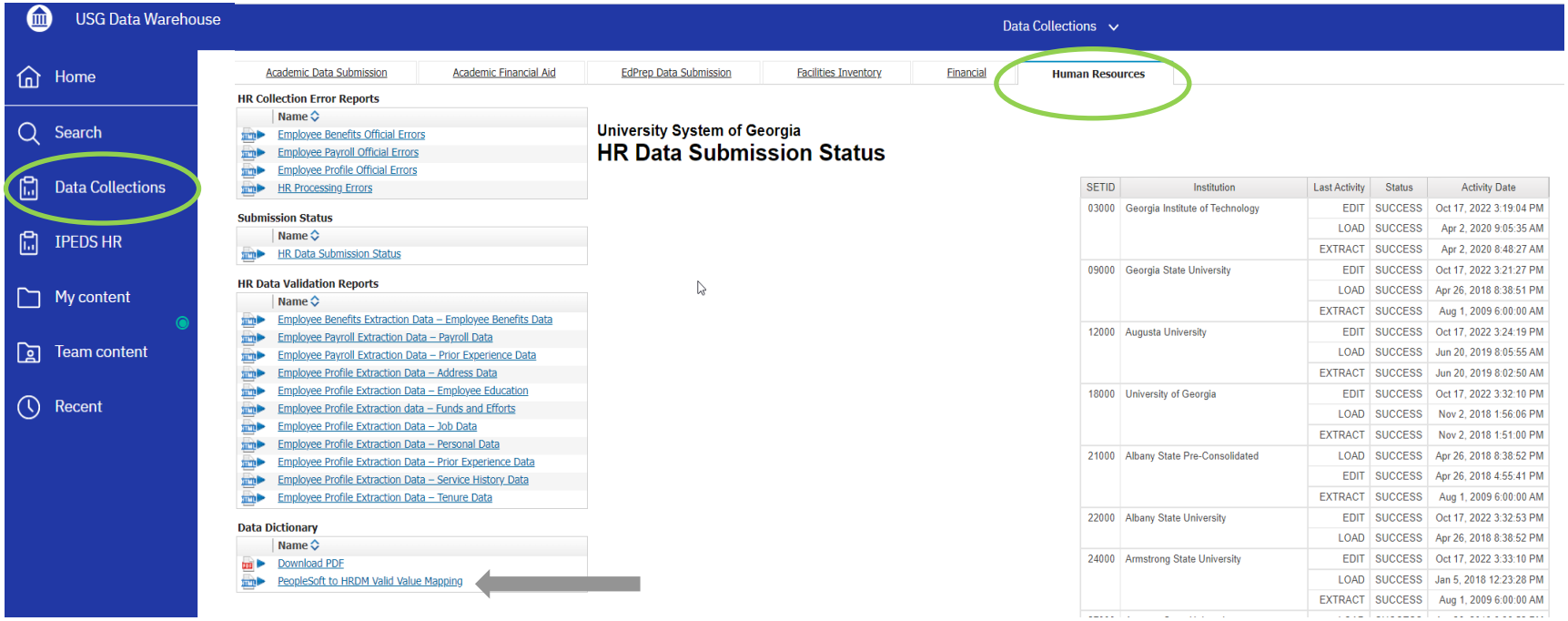


IPEDS HR Reports: Cognos Website

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

Log on using your credentials

IPEDS HR Reports: Cognos Data Collection Reports



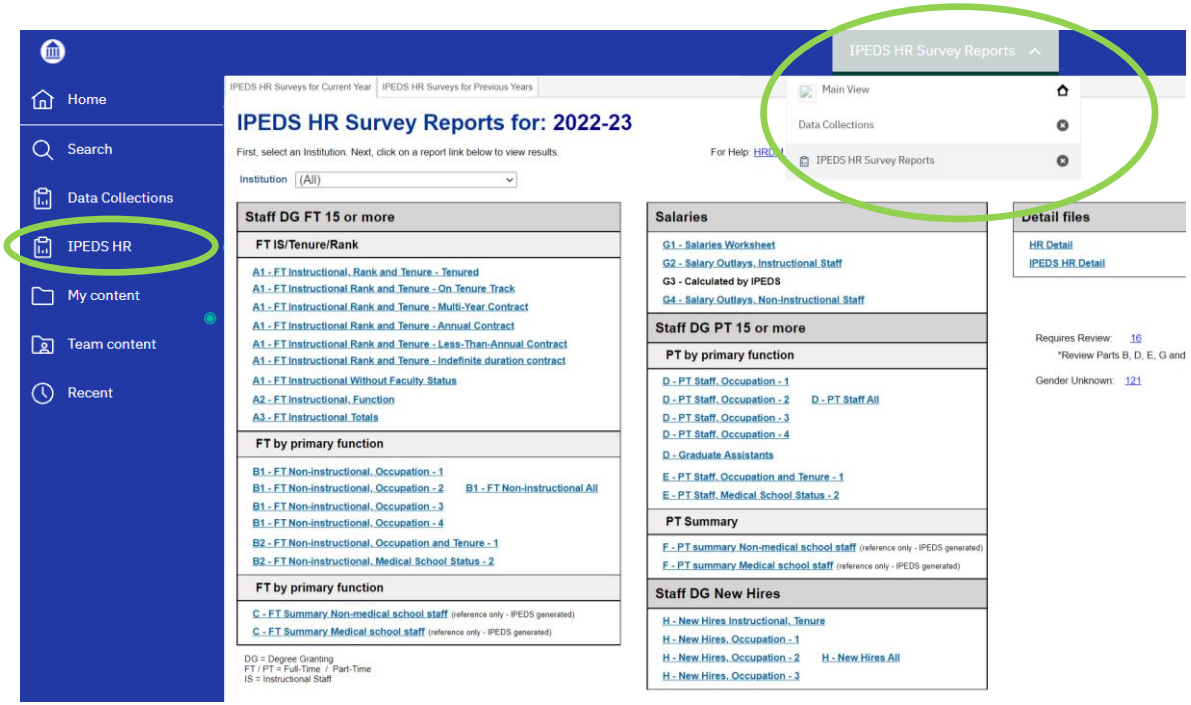
- Click on ‘Data Collections’ on the left
- Click on the ‘Human Resources’ tab on the top
- For more information on running the collection reports, see here

IPEDS HR Reports: Cognos

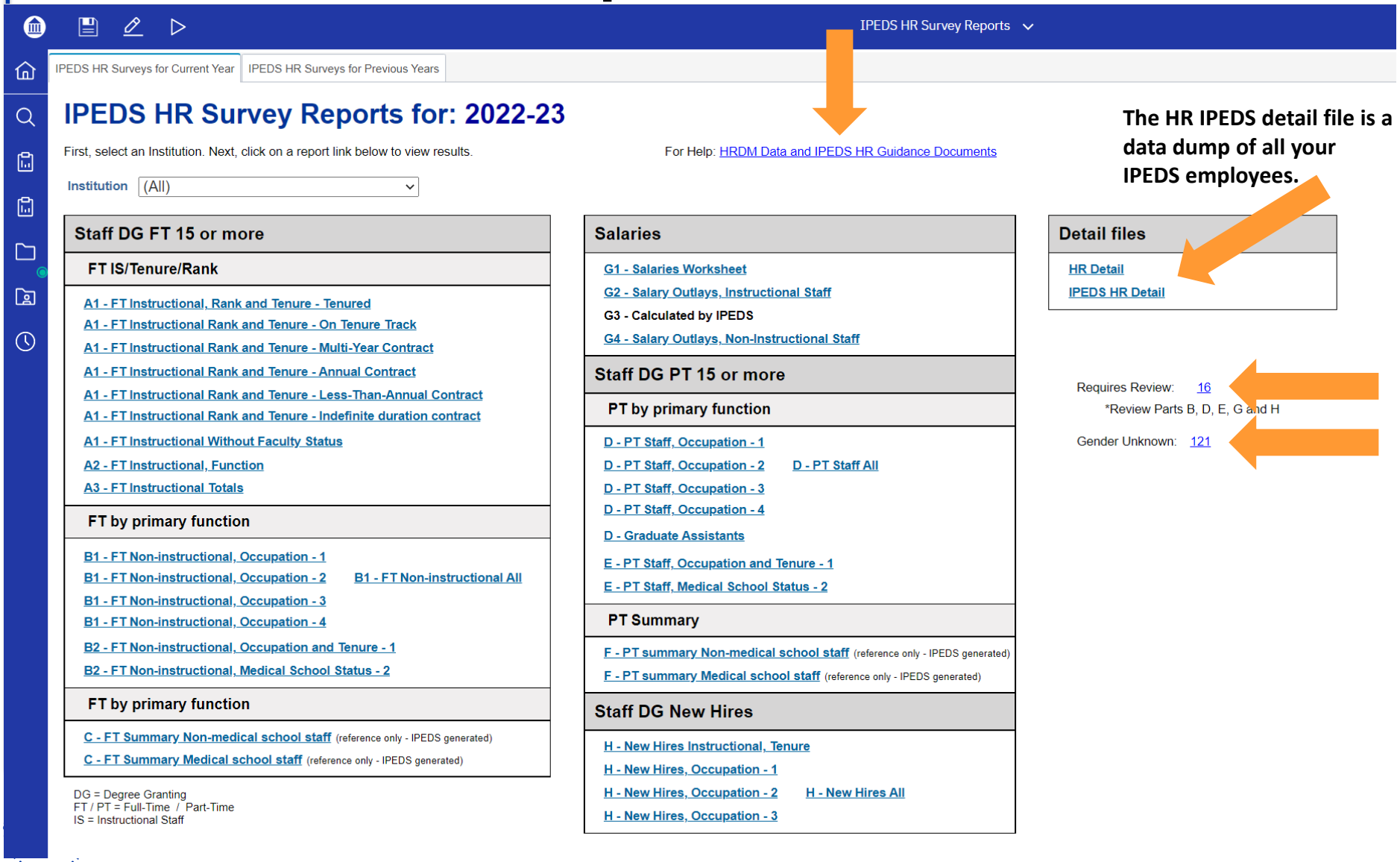
IPEDS HR Survey Reports

Click on 'IPEDS HR' on the left

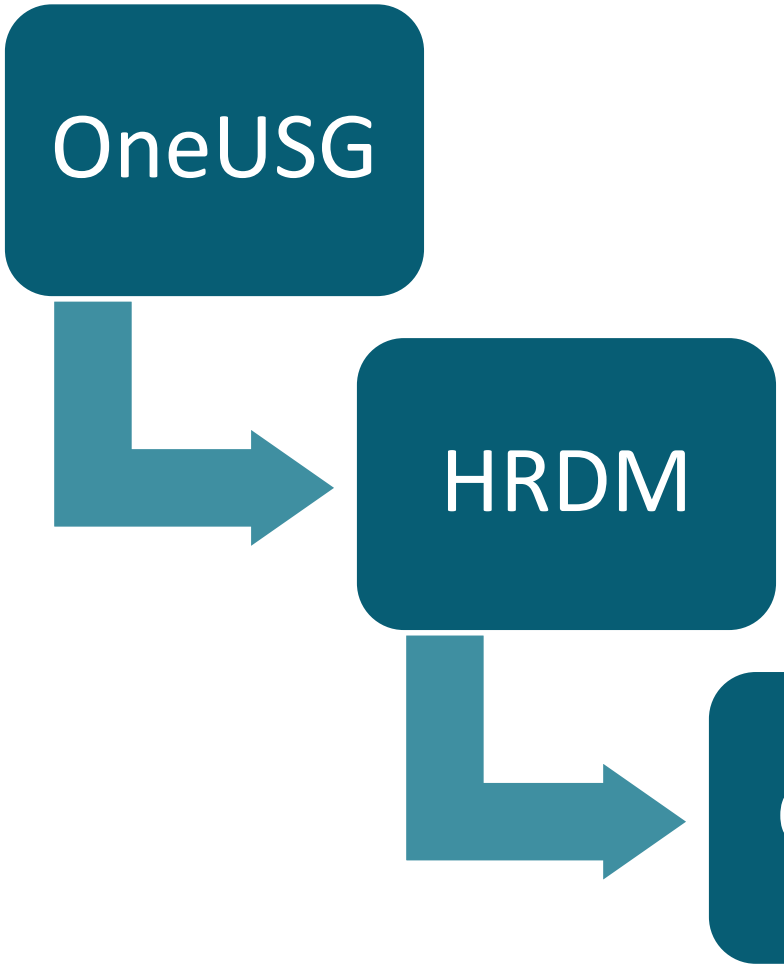
- From the dropdown at the top, choose 'IPEDS HR Survey Reports'
- Definitions provided in IPEDS Report Descriptions & Data Definitions guidance document



IPEDS HR Reports: Cognos Data Collection Reports



IPEDS HR Reports: Cognos



- See HR DED
- See translations in PS to HRDM report

- IPEDS Definitions

IPEDS HR Reports: Cognos

What you see in OneUSG may not match Cognos reports:

- **Cognos** reports are based on the HRDM
  - See HR DED and PS to HRDM translation document
- **Cognos** reports reflect the definitions used in IPEDS reports
  - See Cognos Report Definitions

IPEDS Human Resources Survey - 2022/2023
USG Cognos Report Definitions

These data definitions are applied to create reports in Cognos for review PRIOR to the IPEDS Human Resources Survey Submission. Please note that some differences between Cognos reports and files submitted to IPEDS (for example, 'requires review' or 'unknown' gender)

Variable	HRDM Field (See HRDM DED for more information)	Source Field OneUSG Table.Field	Expression
Fields in blue are entered in the Managed Faculty Events section and found in the 'Employee Faculty' section of the HRDM			
Full Time/Part Time	Fulltime Employment Indicator	PS_JOB.FULL_PART_TIME	Fulltime Employment Indicator = 'Y' or 'N'
Faculty Status	Tenure Status Code	PS_EG_TENURE_DATA.TENURE_STATUS	tenure_status_code in ('NTK', 'NA', 'TEN')
Not on Tenure Track	n/a		Always zero since we have no multi-year contracts

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

		Student and Academic Affairs and Other Education Service Occupations	Management Occupations	Business and Financial Operations Occupations	Computer, Engineering, and Science Occupations	Community, Social Service, Legal, Arts, Design, Entertainment, Sports, and Media Occupations	Requires 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

CHECK IPEDS HR REPORTS FOR REQUIRES REVIEW COLUMN

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: Cognos Requires Review Errors

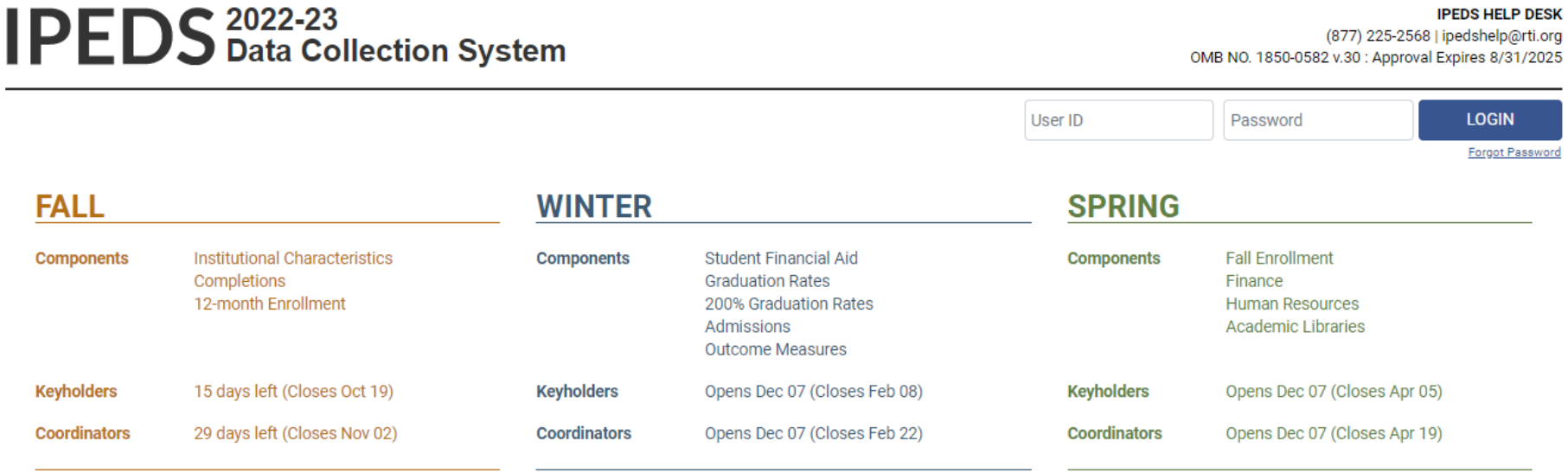
SOC = Standard Occupational Code (from the Bureau of Labor Statistics - BLS)

SOCs are set at the system level.
Institutions control the job code.

First 3 digits

BCAT to SOC crosswalk

IPEDS HR Reports: Uploading files to NCES



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

Upload files generated from HR Cognos reports, then uploaded to NCES

RPA will upload to NCES site on 12/08, and again 1/19, other uploads must be requested

Digest HR Reports

- Starting **November 22**, Digest HR Reports are emailed biweekly during the validation period
- Definitions provided in Digest Data Definitions guidance document
- Final reports posted on Employee Reports

Digest HR Reports

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

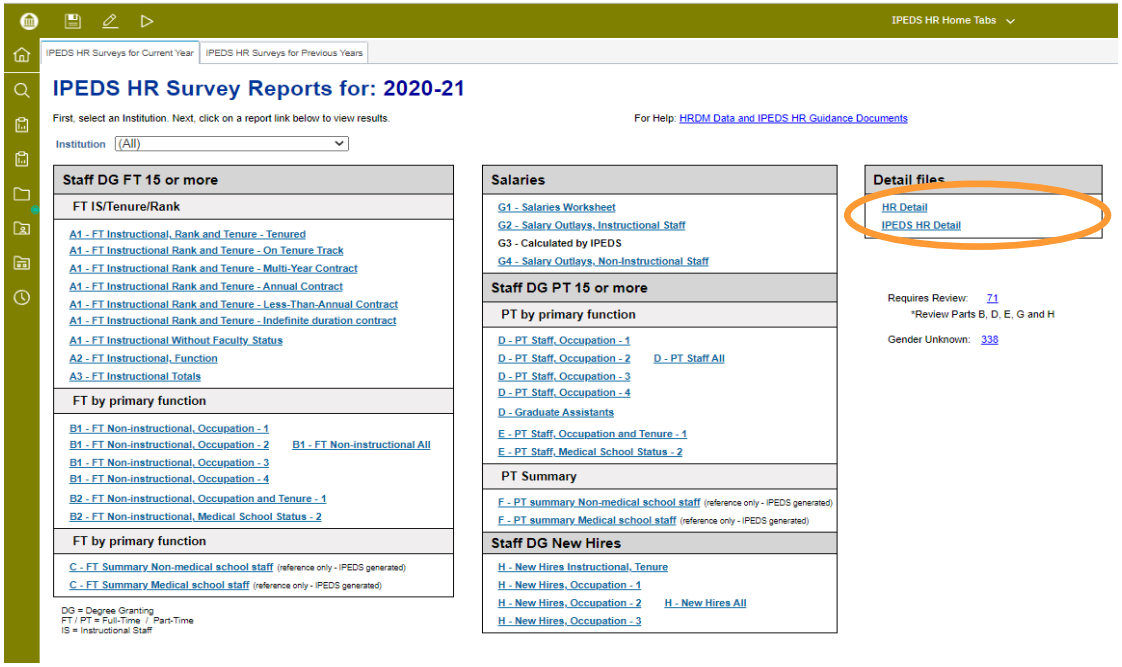
HRDMX1011 Number and Pct of Courses by Instructor Type

Digest HR Reports

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

OneUSG update
Friday, 5pm

→

Cognos update
Tuesday, 8 am

Data **lag** between PeopleSoft and NCES website

Dec. 8, 2023 & Jan. 19, 2024

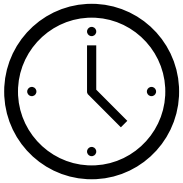
- Uploads for all institutions

After Dec 8, 2023

- Uploads by request

Some changes…but not too many

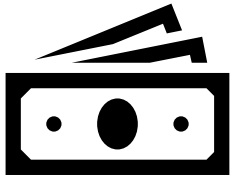
Change 1
Extraction timing



- Despite change last year to pull fewer years of data, still noticed extraction performance issues!
- Change: Extraction from OneUSG to the HRDM will NO LONGER happen daily. Now twice a week
  - Sunday night
  - Tuesday night
- Check for updates in Cognos on Tuesdays and Thursdays

http://www.tzr.io/yarn-clip/47de39a1-7e8f-4e5e-8a37-e6d7204a08d1/gif

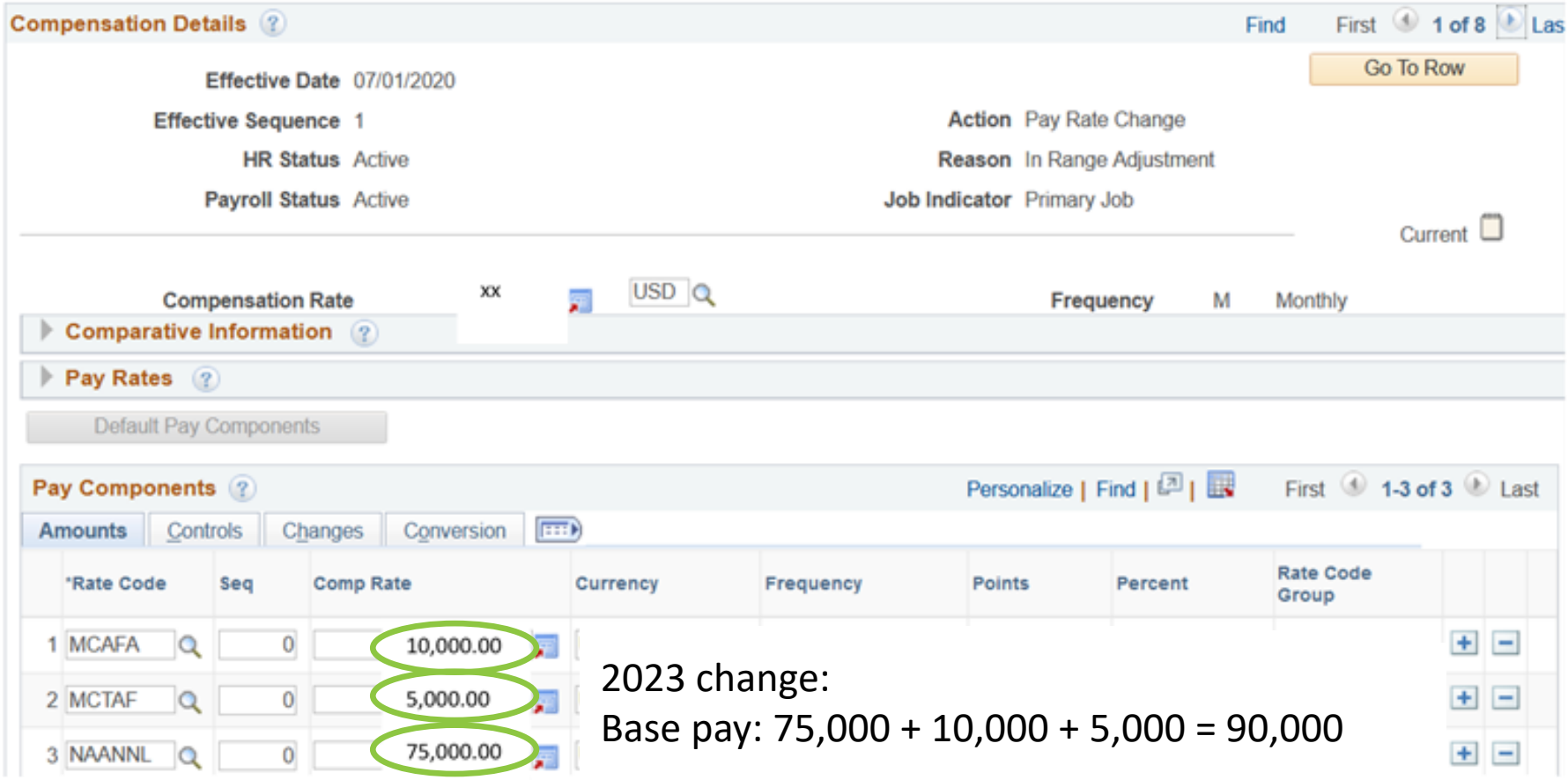
Change 2
Salary Calculations



- IPEDS requests base pay WITHOUT supplemental pay. However, some administrative pay should be included as base pay but has been separated as part of the OneUSG multiple components of pay (MCOP) approach.
  - First, the base salary reported to IPEDS would include only the base salary of 75,000 (NAANL).
  - 2020, added MCAFA to NAANL
  - 2023, adding other components

http://www.tzr.io/yarn-clip/47de39a1-7e8f-4e5e-8a37-e6d7204a08d1/gif

Change 2
Salary Calculations



2023 change:
Base pay: 75,000 + 10,000 + 5,000 = 90,000

http://www.tzr.io/yarn-clip/47de39a1-7e8f-4e5e-8a37-e6d7204a08d1/gif

Added components of pay

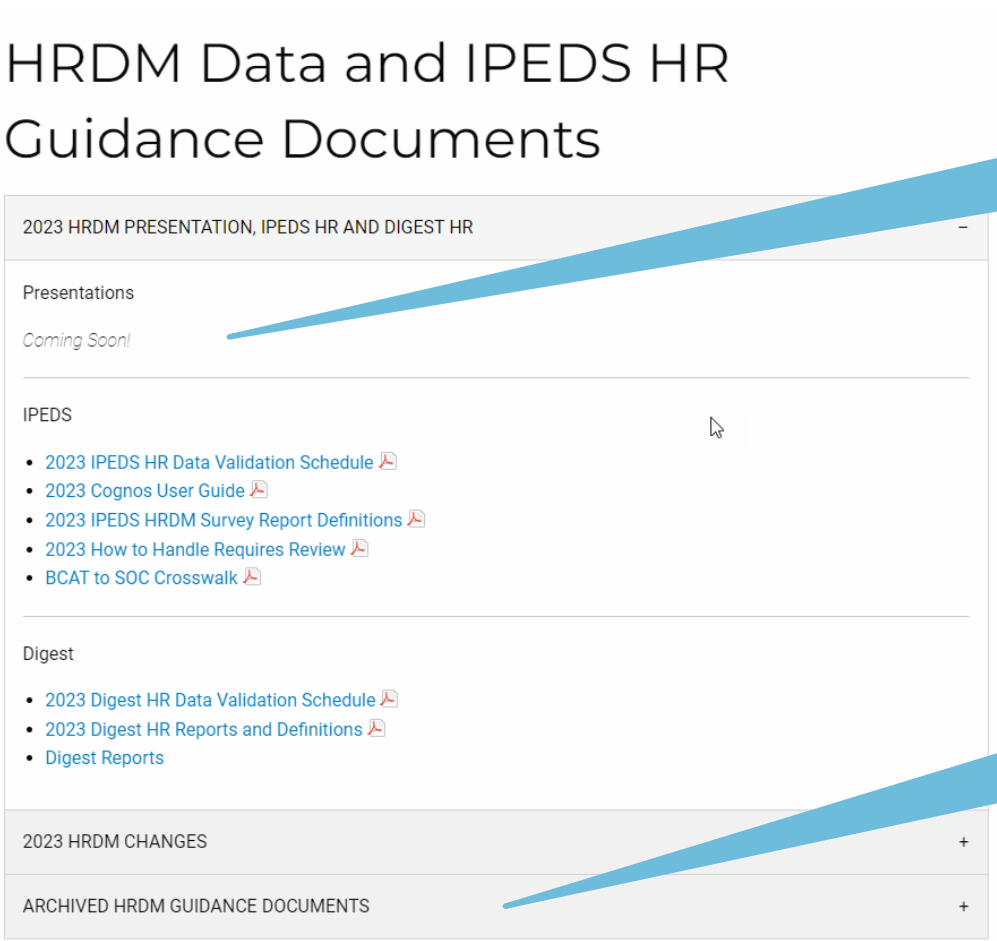
COMP_RATECD	EFFDT	EFF_STATUS	DESCR	DESCRSHORT
MCACPF	1/1/1901	A	Acad Consortium Prog Faculty	AcConPgFac
MCAFA	9/1/2021	A	Academic Faculty Admin Assign	AcadFacAdm
MCCDI	1/1/1901	A	Course Delivery Incentive	CrsDelInct
MCCHR	1/1/1901	A	Special Chair	Spec Chair
MCFYO	12/1/2022	A	First Year Odyssey/Grad First	First Year
MCOVL	1/1/1901	A	Overload	Overload
MCTAF	1/1/1901	A	Temporary Assignment Faculty	TmpAsgnFac
MCTAS	1/1/1901	A	Temporary Assignment Staff	TmpAsgnStf

2020 MCOP change documentation
2023 MCOP change documentation

Guidance

Guidance Website:

https://www.usg.edu/research/reporting_resources/hrdm_data



this presentation will be here

previous documents archived here!

Guidance
Data Validations: Service Now Tickets

Submit ITS Help Desk Ticket
helpdesk@usg.edu

Email to helpdesk

Subject: 2023 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

HRDED

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 (https://usg.service-now.com/usgsp).
Validation Rules	*Severity* *Code* *Description*
	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 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	In the source application table, this is the column where the values are stored
	Page	If relevant, the PeopleSoft page where the information is entered
	Navigation	If relevant, the navigation to the PeopleSoft page where the information is entered
Effective Terms	*Start*	Date the element was first collected
	End	Date the element stopped being collected, (None) if the element is currently collected.
Target Files	*Target Type* *Table Name* *Column Name*	
	This section describes where the data are stored in the HRDM	
Change History	*Date* *Notes*	
	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 PeopleSoft to HRDM Valid Value Mapping Report

Current 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	C	One Year Certificate
HED004	Degree Level	E	2 yr vocatinal Certificate
HED004	Degree Level	F	Advanced Certificate

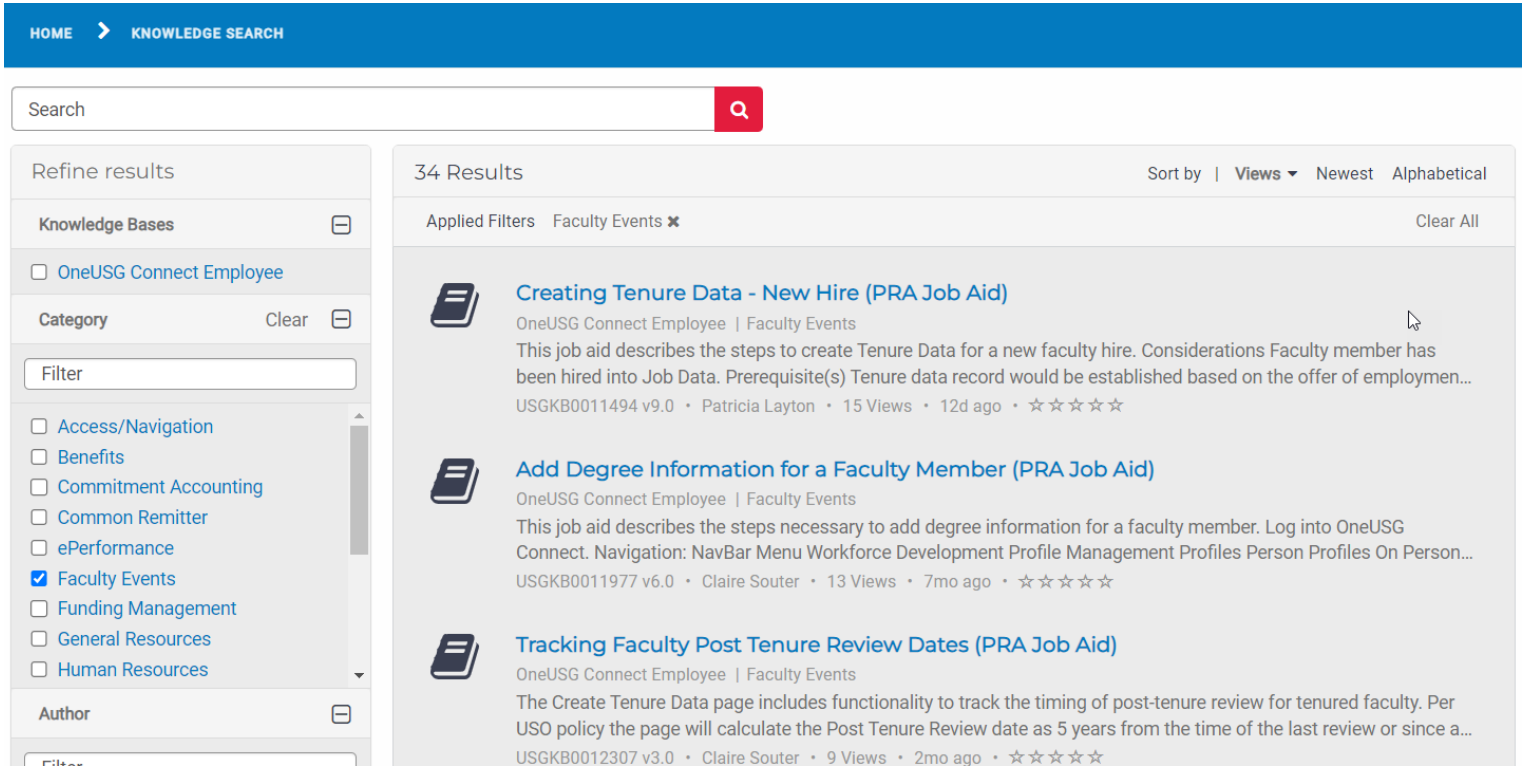
Guidance

HRDED Valid Values - Translation

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

PeopleSoft 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	A	01	No Formal Education	NO TRANSLATION
HED004	Degree Level	EDUCATION_LVL	02	Elementary School Completed	A	02	Elementary School Completed	NO TRANSLATION
HED004	Degree Level	EDUCATION_LVL	03	Some High School	A	03	Some High School	NO TRANSLATION
HED004	Degree Level	EDUCATION_LVL	04	High School Graduate	A	04	High School Graduate	NO TRANSLATION
HED004	Degree Level	EDUCATION_LVL	05	Terminal Occupation Prog DNC	A	05	Terminal Occupation Program	NO TRANSLATION
HED004	Degree Level	EDUCATION_LVL	06	Terminal Occupation Program	A	06	Terminal Occupation Program	NO TRANSLATION
HED004	Degree Level	EDUCATION_LVL	07	Some College - Less than 1 Yr	A	07	Some College - Less than 1 Yr	NO TRANSLATION
HED004	Degree Level	EDUCATION_LVL	08	One Year College	I	08	One Year College	NO TRANSLATION
HED004	Degree Level	EDUCATION_LVL	09	Two Years College	I	09	Two Years College	NO TRANSLATION
HED004	Degree Level	EDUCATION_LVL	10	Associate Degree	A	10	Associate Degree	NO TRANSLATION
HED004	Degree Level	EDUCATION_LVL	11	Three Years College	I	11	Three Years College	NO TRANSLATION
HED004	Degree Level	EDUCATION_LVL	12	Four Years College	I	12	Four Years College	NO TRANSLATION

Guidance
OneUSG Job Aids/Knowledge Articles



https://usg.service-now.com/usgsp?id=kb_search&spa=1

***NOTE: You will need to log in with your SSO credentials**

Some common issues

Tenure Status Updates

When tenure status is changed in MFE for an employee:

- the tenure status **date** must be later than the tenure status date for the **previous** tenure status
- If there are multiple tenure statuses with the same tenure status date, we cannot know which tenure status is current.

Academic Rank Updates

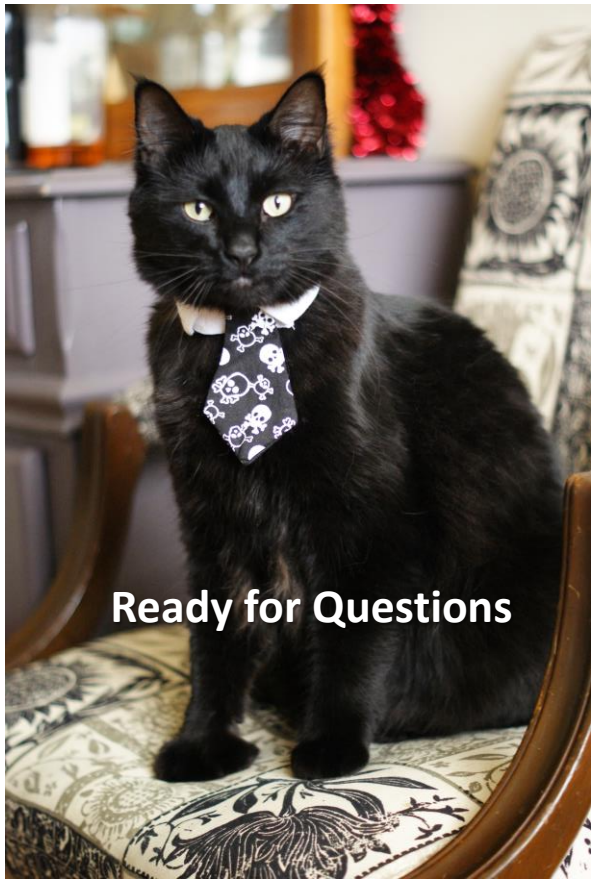
When Academic Rank is changed in MFE for an employee:

- the academic rank **date** must be later than the academic rank date for the **previous** academic rank status
- If there are multiple academic rank statuses with the same academic rank status date, we cannot know which academic rank is current.

Final Notes

- Read the reference documents online, most answers are there!
- Check dates
- Submit help desk tickets
- E-mail me as needed!

Q&A, Contact Info



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

The subject line "**2023 HRDM Data Validations**" will route your questions faster!

Additional Questions:
Leslie.Hodges@usg.edu