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Data Warehouse Training - HR Track

Alison Campbell, HR Functional Area Coordinator

Decision Support-AITS

Goals

By the end of today's session, you should:

- ▶ Know what resources are available for reporting on data about employees and jobs

- ▶ Understand the differences between the HR universes and also between the universes and the FTE Headcount Cube

- ▶ Understand which tools to use for your various reporting needs

Terminology

- EDW – The data warehouse environment in which AITS stores and combines data for use by all University of Illinois campuses.

- BusinessObjects – an SAP suite of products which allows customers to view, sort, and analyze data.

- EDDIE – The University's acronym (Enterprise Data Delivery Information Environment) for the web-based delivery of BusinessObjects.

- Webi – short for Web Intelligence; the self-service environment for creating ad hoc queries; a component of BusinessObjects.

- Standard Report – In the case of HR, a report developed based on HR specifications to ensure the accurate delivery of data commonly needed by customers, often at the Payroll or Central HR level.

- Solution Library – Reports created for specific purposes that can easily be edited for your specific needs.

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EDW resources for data about employees and jobs

Universes - Refreshed Daily:

EDW – HR Position and Job Hierarchy

EDW – HR Employee Administration

EDW – HR Payroll

EDW – HR Leave Tracking

EDW – HR Reported Time

EDW – HRFE Paris Transactions

EDW – HRFE Paris Security

EDW – HR Retiree Rehire

EDW – HR Deduction Administration

EDW – HR HireTouch Job Forms and Approvers

EDW – HR HireTouch Job Applicants

Data Marts - Refreshed Daily:

DM – HR Payroll Reconciliation

Universes - Refreshed Monthly:

EDW – HR Headcount FTE

EDW – HR Salary Planner

Cube Analysis – Refreshed Monthly:

FTE Headcount Cube

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EDW – HR Position and Job Hierarchy and EDW – HR Employee Admin universes - What are the differences?

The most commonly used HR universes, EDW – HR Employee Admin and EDW - HR Position and Job Hierarchy, contain much of the same information about employees and jobs.

The main difference between the two universes:

▶ You will find detailed information about **employees** in the Employee Admin universe such as:

   ▶ Visa Info

   ▶ Degree History

   ▶ License and Certifications

   ▶ Work History

▶ And you will find detailed information about **jobs** in the Position and Job Hierarchy universe such as:

   ▶ Job Labor Distributions

   ▶ Service Dates and Contract Parameters

   ▶ Supervisor Information

   ▶ Work Schedule

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EDW – HR Payroll and DM - HR Payroll Reconciliation What are the differences?

They contain much of the same information about jobs and pay.

The main difference between the universe and the data mart:

▶ The Payroll universe contains historical records of payroll runs. This will include the gross pay, employer paid benefits, earnings transfers, re-issued checks, and the C-FOAPAL pay has been posted to for each employee.

▶ The data in the Payroll Reconciliation universe is static – it does not get updated each time somebody makes a retroactive payment in Banner. It is intended to help with the reconciliation of the payroll and includes data from the current fiscal year as well as the previous two fiscal years.

FTE Headcount Cube and EDW – HR Headcount FTE universe

▶ FTE Headcount Cube is useful for point in time reporting and provides the ability to drill down to see details for your department. It also contains less detail which makes it run quickly.

▶ The universe contains the same data found in the cube and enables you to create a Webi report based on that data.

▶ Headcount requires a point in time (month and day).

▶ The cube and universe contain less data than is found in Position and Job Hierarchy and other HR universes.

▶ Data is loaded only on the 10th of each month and data is retained for 10 years.

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EDW - HR Salary Planner universe

▶ Only Positions, Jobs, and Employees entered into Salary Planner can be seen in this universe.

▶ The Salary Planner universe only includes the initial and final scenarios.

▶ Always limit on a fiscal year or you will get all Salary Planner data for all years.

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EDW - HR Leave Tracking universe

- ▶ Leave Tracking contains leave, leave of absence, and FMLA data for employees.

- ▶ For most monthly employees, this data is entered into Banner only twice a year. For this reason it's important to remember when running leave reports the balances you find will reflect what was entered into Banner only and may not include recent activity.

- ▶ Use the Current Leave Balance predefined condition to obtain current balances.

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EDW - HR Reported Time universe

▶ Reported Time contains the time reported by hourly employees.

▶ Generally you will be able to find earn codes that represent no pay in this universe (as opposed to in the Payroll universe).

▶ Earn codes T900 and T950 can be used to track Extra Help hours worked.

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EDW - HR HRFE Paris Transactions universe

► The HRFE PARIS Transactions universe includes data from HRFE that is not then saved in Banner.

► You can find info such as who initiated the change, where the transaction is in the process, who the current or last owner is, etc.

► You can also write a report that will tell you how long it is taking to get a HRFE transaction through the process or how many HRFE transactions your department creates in a given timeframe.

EDW - HR Retiree Rehire universe

▶ Retiree Rehire contains data from the Retiree Rehire Application including retiree information, rehire form information, retiree pre-retirement job information, and appointment and labor distributions.

▶ It also includes routing information for the retiree rehire.

▶ When possible include UIN in your report.

▶ The Affected Annuitants Only pre-defined filter will pull only those with an Affected Annuitant value of 'Y.'

▶ The Current HAE Ind pre-defined filter will pull only the current HAE.

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EDW - HR Deduction Administration universe

- Deduction Administration contains historical records of payroll deductions taken.

- Access to this universe is limited. It is mainly used by people in the Benefits or Payroll Offices.

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EDW - HR HireTouch Job Forms and Approvers universe

- ▶ HireTouch Job Forms and Approvers universe contains data about jobs, job forms, job approvers, committee members, etc.

- ▶ Access to this universe is limited.

- ▶ Limit your report by Job ID when possible

- ▶ HireTouch data is currently two days old.

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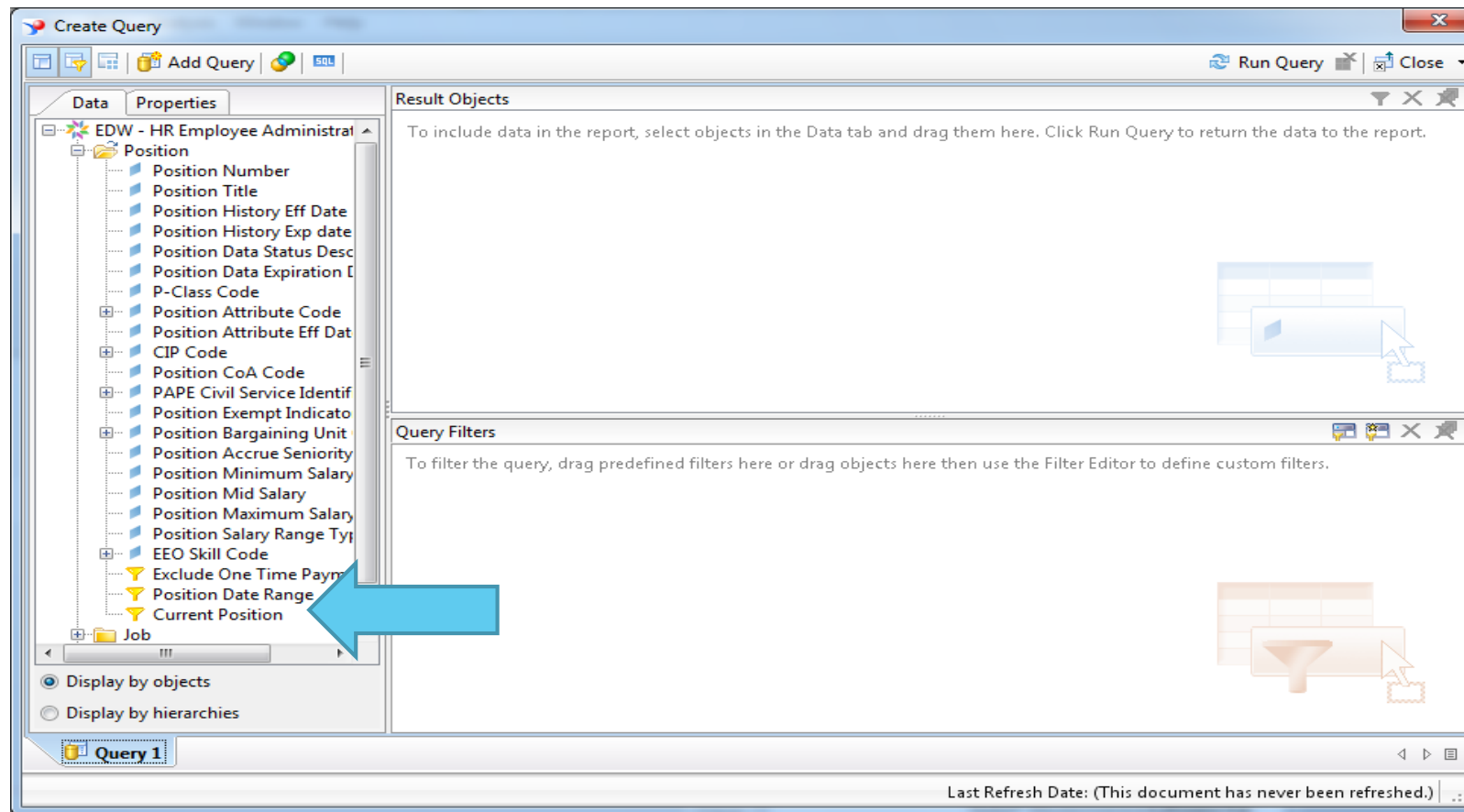
EDW - HR HireTouch Job Applicants universe

▶ HireTouch Job Applicants universe contains data about those who have applied for jobs through HireTouch.

▶ Access to this universe is limited.

▶ Limit your report by Job ID when possible

▶ HireTouch data is currently two days old.

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General tips for using HR universes

▶ HR universes contain lots of history – each time a position is updated a new row is created.

▶ Generally when you are reporting on this data you are looking for only the position or job or employee record that is active right now. We have created pre-defined filters to help you do this.

▶ For example, the "Current Employee" filter will return ONLY the one row that is the most recent employee record. This is true for Current Position, Current Job, Current Job Detail, etc. You can find these filters at the end of the folders.

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General tips for using HR universes – Current filter example:

Security

▶ Much of the HR data is wide open so that those with EDW access can view the data.

▶ Access to data that is considered sensitive is more restricted.

▶ Data such as employees' home addresses, race/ethnicity, termination reason has another layer of security and you will only be able to see this data for your employees.

▶ Data such as SSN is restricted and access is only granted to those who can express a business need and receive approval from the SSN Committee.

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Questions? Concerns?

▶ **Contact us**:
dsuss@uillinois.edu

▶ **Contact me:**
acmpbell@illinois.edu
217-333-4823

▶ **DS website:**
https://www.aits.uillinois.edu/services/reports_and_data

▶ **Sign up for additional training:**
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