HR DATA INSIGHTS

USER GUIDE

Contents

Introduction

Welcome to HR Data Insights. This application offers a comprehensive platform for accessing employee and transaction data for agency review and analysis. This user guide will walk you through the features and functionalities of the application to help you make the most of its capabilities.

Purpose of HR Data Insights

HR Data Insights (HRDI) is a query tool which will support an agency's need to filter and download historical employee and transaction data, sourced from Cardinal, and transformed to user readable values. Much of the query functionality of HRDI, such as user selected filter criteria and save queries, was patterned after e480 and eTrans queries.

The goal of HRDI is to provide access to data that can be leveraged for custom agency analysis. By providing Cardinal data that is more readable and decoded to user readable values, HRDI is the tool made to enhance the efficiency and effectiveness of current HR processes.

The application can be accessed through DHRM's SecurePass portal. All staff is required to complete SecurePass training prior to accessing the HRDI application. Training can be accessed in DHRM's COV Learning Center.

Getting started

HR Data Insights is housed within DHRM's SecurePass portal. After registration to SecurePass is completed, a user must then be granted access to the HRDI application. Supervisors can reach out to their agency's aSO or aHRD to request application access.

Once application access is established, log into SecurePass and select "HRDataInsights" under the *Applications* section, from the left side menu.
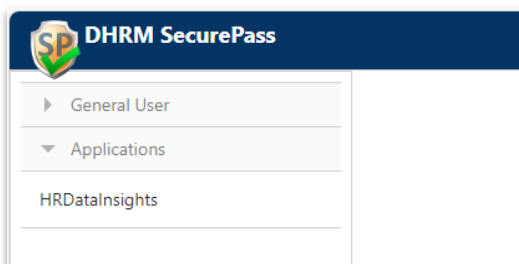
Navigation Menu

HR Data Insights features a user-friendly navigation menu, providing easy access to key functionalities.

Click on the menu icon to expand or collapse the side menu and view the options. The menu options may vary based on your access level settings.
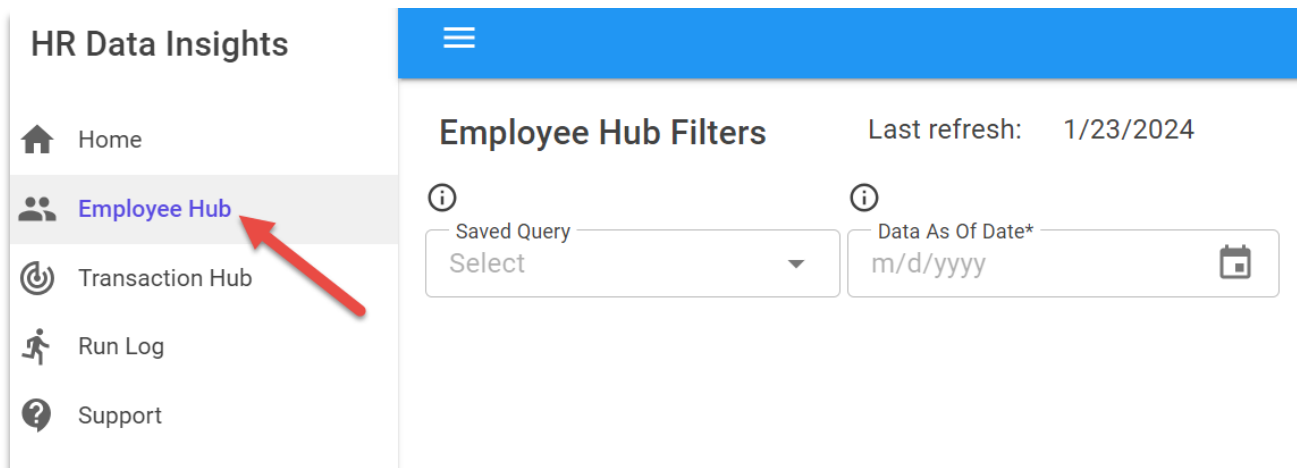

Home

The landing page displays the application logo and provides a security specific notification. This page will also be used to display system specific messages.
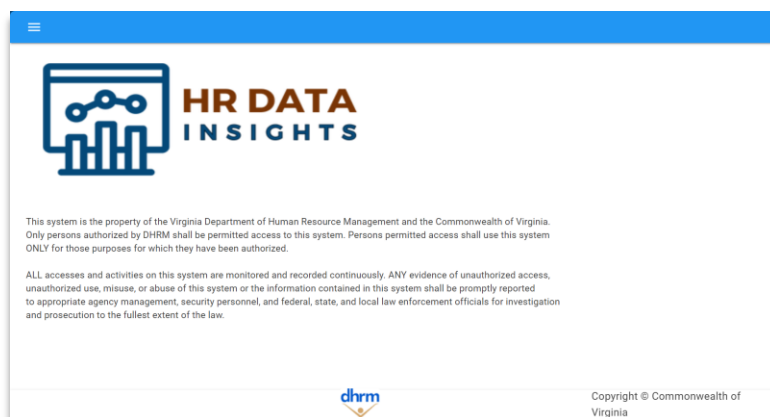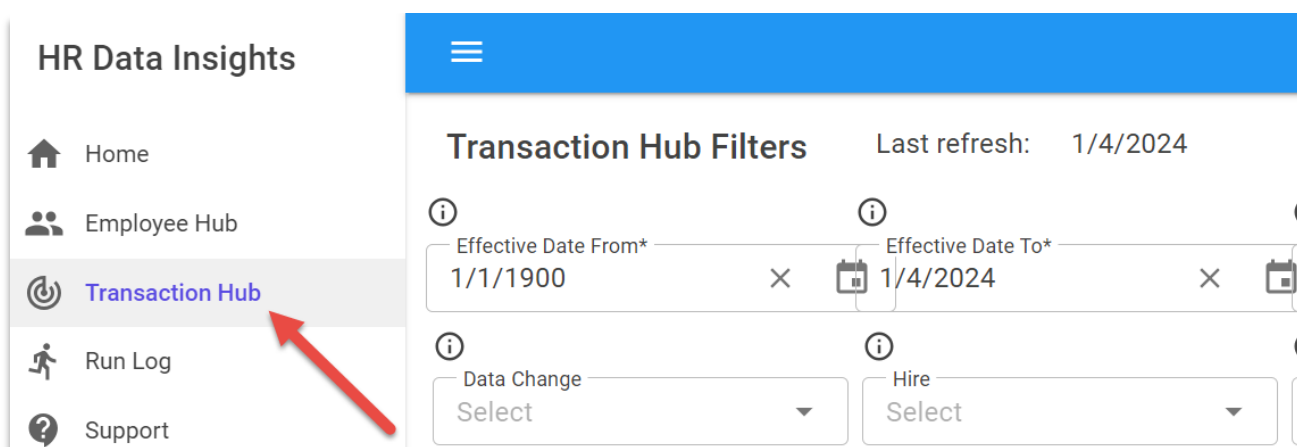
Employee Hub

The Employee Hub provides the ability to run a saved query or create a new query against Employee data on a single historic date.


Transaction Hub

The Transaction Hub provides the ability to run a saved query or create a new query of historic transaction data within the user defined range of transaction effective dates.

Run Log

The Run Log enables users to view the historical logs of previously executed queries specific to the user and data hub. The user will also have the option to reload and edit the query criteria.
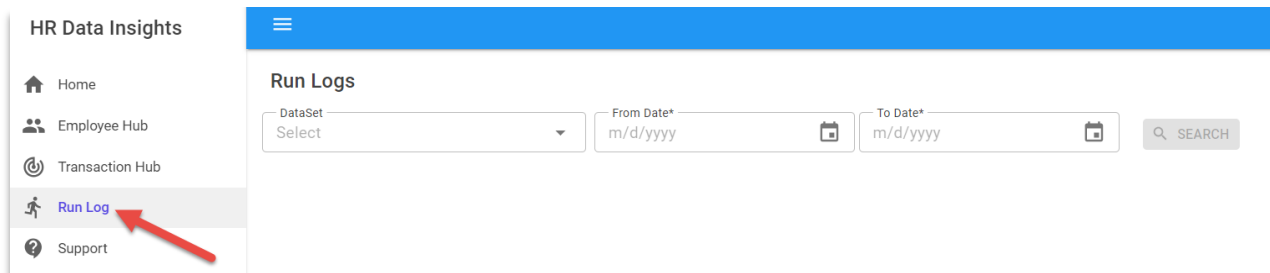
Support

Support provides access to help resources and support for any HRDI assistance needed.

Help support tickets can be created directly through the *Support Inquiry Form* link.
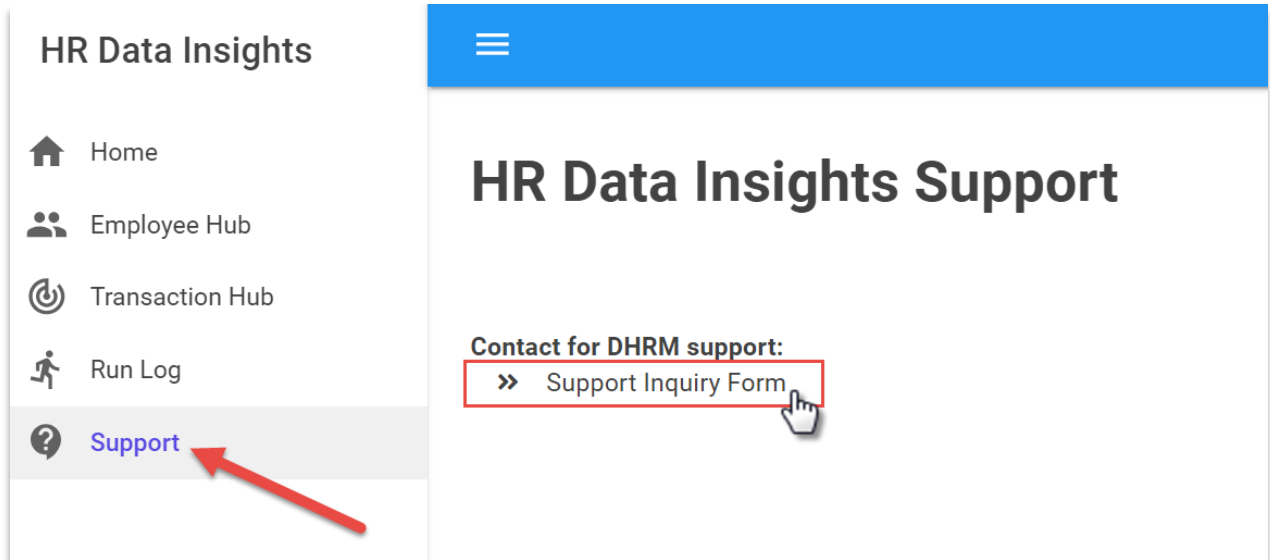
Employee Hub

The Employee Hub is a central component of HRDI. There you can build queries to extract employee/agency/position data specified to your agency's needs.

The filters allow for selecting the criteria of the query. The user can then save the query, run the query, or clear the page.

Select any of the desired filters from the dropdowns and include specific columns from the *Columns* dropdown. Once all your selections are complete, click *Run Query* to run the data query.
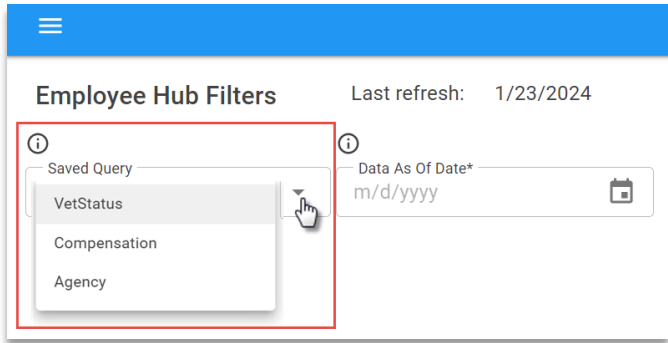
Steps for defining query parameters:
Select Employee Hub from menu.
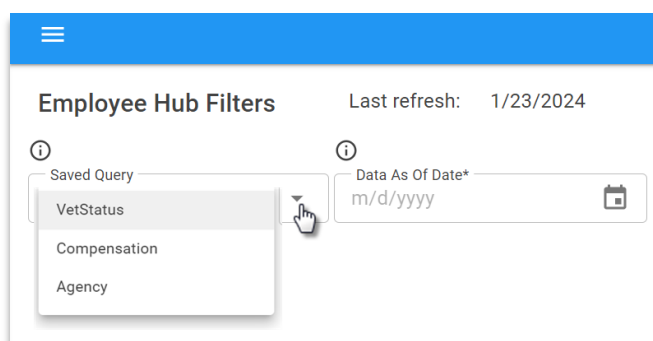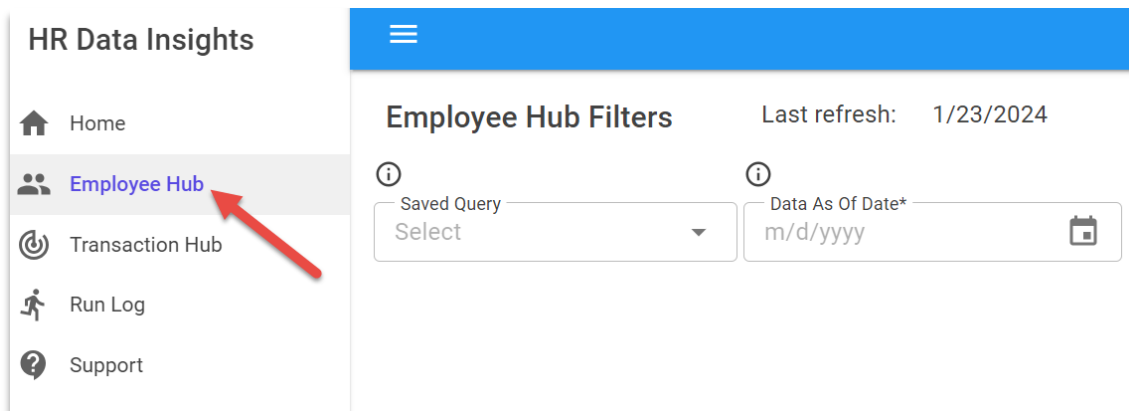
To build data set parameters, you can choose them from the *Saved Query* dropdown menu or input a date in the *Data As Of Date* field. Utilize filters to define and limit the desired dataset by choosing options from the different fields as indicated in the screenshot below. (For detailed directions on using *Data Filters,* see section here.) Alternatively, if a saved query was selected, run the query parameters as is or adjust the filters as needed. Select *Run Query* to view the data set.

After a query is run, the user can download the returned data to their PC. Click _DOWNLOAD_ at the top right corner of the screen to begin the process.

Saved Query

Use the _Saved Query_ dropdown to search and select previously saved data queries. Saved queries can also be selected as templates for building queries without having to start from scratch.
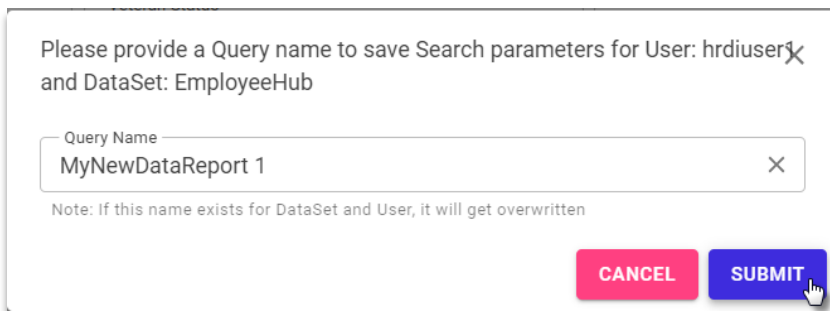
NOTE: If not utilizing a saved query proceed to entering a date in the *Data As Of Date* control.)

Click *Save Query* to store a query for ease of access in the future.
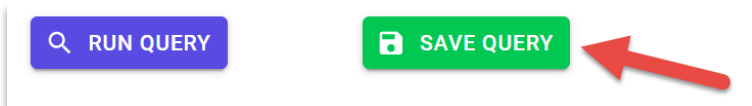
A pop-up window appears requiring one to set a query name and finalize the save by clicking *Submit.*

Save Query User Tips

1. **Automatically Logged Parameters**: Each time a query is executed, its parameters are automatically saved in a run log.

2. **Not All Queries Need Saving**: Many times, query parameters don't need to be saved as a formal "Saved Query."

3. **Limit Saved Queries**: Keep the number of Saved Queries manageable by reserving them for reusable templates with logical names that match the query's purpose.

4. **Know When to Save**: Save a query as a default template when it includes commonly used columns or parameters, streamlining future access to frequently needed data.

Filter Data by Date

The employee/agency/position data is stored as snapshots, representing how the data appeared on a particular date. The date entered in the *Data As Of Date* field will return the snapshot for that date. **The date is required.**

- A date can be manually typed using a m/d/yyyy format.
- Press enter on keyboard to submit, and press enter again once date on the calendar is confirmed as accurate.
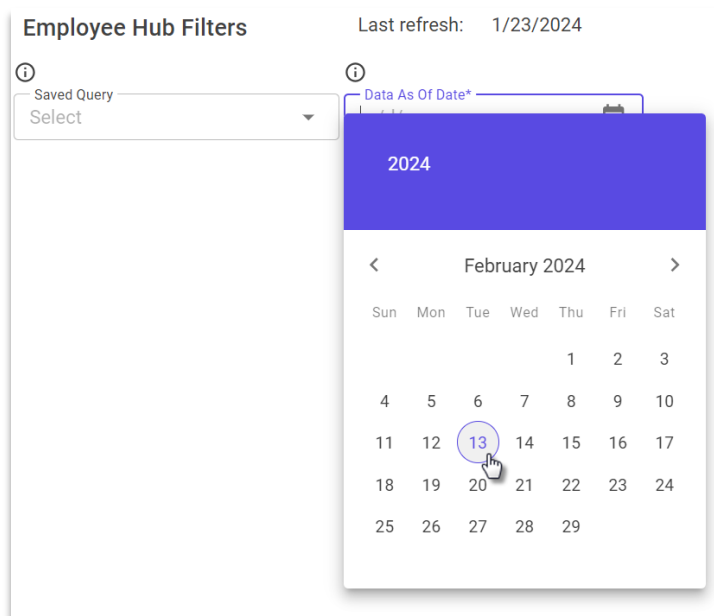

- Alternately, click the calendar icon and select a day from the calendar tool.

Data Filters

Utilize filters to define and limit the desired dataset.

NOTE: The business unit (*Agency*) dropdown will be limited to the list of business units permissioned to the user in SecurePass.

The "Last refresh" denotes the last data snapshot date available.

For each filter where the "i" icon ⓘ is displayed help text is available. Hover the mouse over the icon to display the text.

View values in each filter dropdown by clicking the arrow in the filter field.

Click the checkbox next to each field you want to select.

NOTE: More than one selection from the dropdown list of values can be checked.

Be sure to always include at least one selection from the *Columns* filter dropdown. (For list of Employee Hub columns see Appendix 1.)

NOTE: For the Employee Hub, except for the *Columns* filter, the default action is to include all values if none of the filter options are selected.

To clear out all filter fields, click the *Clear* button in the top right-hand corner.
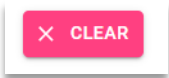
Running Query

Once all your filtering selections are complete, click *Run Query* to run the data query.

The query results will be displayed in a grid.

NOTE: Larger datasets may require additional time to return the data.

If more rows per page in the grid are desired the arrow next to *Rows per page* can be selected by clicking on the arrow.
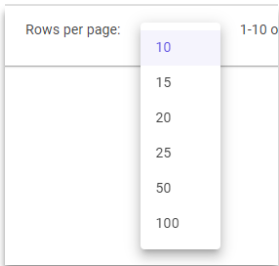
To return to the query criteria page click *GO BACK*.

Download

The query results can be downloaded by clicking on the download button:

The results will be downloaded to the user's download folder.

NOTE: If the result set is less than or equal to 5000 rows the results will be downloaded as a single spreadsheet. If a result set exceeds 5000 rows, the results are downloaded as a zip file containing two compressed files: a spreadsheet with the query parameters and a CSV file with the query results.
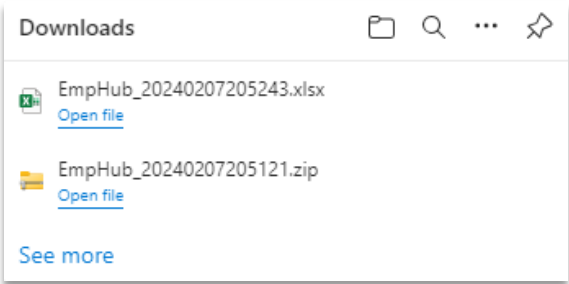
The Excel spreadsheet for datasets <= 5000 rows, has two tabs.

The *Search Params* tab will contain the query parameters entered to return the downloaded dataset contained in the *Items* tab.

	A	B	C	D	E	F
1	AsOfDate	09/13/2023				
2	BusinessUnit					
3	Secretariat	12				
4	ParentBusinessUnit					
5	Columns	DataAsOfI	Secretaria	Secretaria	ParentBus	ParentBus	B
6	DisabilityStatuses					
7	EmployeeAgeGroups					
8	TotalCompensationFrom					
9	TotalCompensationTo					
10	MinorityStatuses					
11	PositionEEO4Categories	Profession	Techniciar	Officials and Administrators		
12	PositionPayGrades					
13	PositionStatuses					
14	PositionTemporalSatuses					
15	PositionTypes	Salaried; r	Classified			
16	PreferredGenders					
17	Race					
18	Sex					
19	VeteranStatuses					
20	RunLogId	11727				
21	ReportingDate	2/7/2024 9:38:42 AM				
22						

Search Params | Items | +

If the number of rows exceeds 5000, the downloaded file will be zipped. Extract the contents of the compressed folder by unzipping it.

The folder will contain two files of different formats: one CSV and one XLSX.

The Excel spreadsheet (.xlsx) will contain only the *Search Params* tab. The CSV file will contain the data in an *Items* tab. Both files can be opened in Excel.

Transaction Hub

The Transaction Hub is tied to transaction data which can be queried for a range of transaction effective dates and filtered by selecting from a list of action reasons associated with specific categories of transactions.

This query portal provides the ability to run a saved query or create a new query of transaction data. By inputting a date in the *Effective Date From* and *Effective Date To* controls, one can select a transaction effective date range of which to query.

Additionally, the filters allow for defining the criteria of the query by selecting specifics from the field dropdowns. For the Transaction Hub the *Columns* filter defaults to all columns selected. The user can utilize the dropdown to deselect columns if they are to be omitted from the query results. (For list of Transaction Hub columns see Appendix 2.)

The user can then save the query, run the query, or clear the page. After a query is run, the user can download the data to their PC by clicking *Download* on the query results screen. For more information on Filtering, Running, Downloading, or Saving queries see those sections in the Employee Hub section.

Transaction Hub Filters

- The *Last refresh* date denotes the last completed import of transaction data.
- The *Effective Date* control fields represent a date range within which the transaction effective date of all transactions to be included in the query results would fall. The *From* and *To* date range fields default in values but can be adjusted.
- The *Business Unit* (agency) will only include business units permissioned to the user in SecurePass for HR Data Insights.

All other filters, with the exception of the *Columns*, represent transaction categories where the valid values of the filter represent the reason(s) for the action.

For example, for the *Retirement* action category the action reasons are:

If any action reason on *any* of the action filters is selected, then only that reason(s) will be included in the query results.

USER TIP: If no action reason is selected on ANY of the action filters, then all values will be included.

Run Log

The Run Log feature provides a historical record of data runs within an application hub. This is especially useful for reruns of previously run queries or using a previously run query as a starting point for a new query.

The parameters, *RunLogId* and *ReportingDate* created are downloaded with query results enabling the correlation of the run log and the dataset created.

After downloading the results of a query, the *RunLogID* and *ReportingDate* on the *Search Params* tab can be used to find the query parameters in the HRDI *Run Logs*.

Search for a specific query in the *Run Logs:*

1. **DataSet Filter**: Select the data set "Hub" to perform the log search – EmployeeHub or Transaction Hub.

2. **Set From/To Date Range**: Specify a date range to view data runs within a specific timeframe.
   - *From Date*: Begin date in the range.
   - *To Date*: End date in the range

3. **Search Logs**: After data set hub and date range are defined, select *Search* to run log query.

4. **Log Id & Reporting Date**: To find a specific data set, refer to *Id* and datetime columns and compare them to the *RunLogId* and *ReportingDate* field values in the *downloaded report.

*example view of downloaded .xlsx file

Support

If you encounter any issues or have questions about HR Data Insights, the *Support* section can help. For personalized assistance, open a ticket using the *Support Inquiry Form* link on the screen.

Congratulations! You are now ready to navigate and leverage the full potential of HR Data Insights to make informed HR decisions.

Appendix 1 – Employee Hub Columns

Column Name	Column Name (Continued)
DataAsOfDate	EmployeeHomeAddressLine3
SecretariatNumber	EmployeeHomeAddressLine4
SecretariatName	EmployeeHomeAddressCity
ParentBusinessUnit	EmployeeHomeAddressState
ParentBusinessUnitName	EmployeeHomeAddressCountry
BusinessUnit	EmployeeHomeAddressPostalCode
BusinessUnitName	EmployeeHomeAddressCounty
BusinessUnitAddress1	EmployeeHomePhone
BusinessUnitCity	EmployeeWorkPhone
BusinessUnitPostalCode	EmployeeEmailOption
BusinessUnitState	EmployeeWorkEmailAddress
Company	EmployeePersonalEmailAddress
PositionDepartmentID	EmployeeBirthDate
PositionDepartmentName	EmployeeAgeGroup
PositionLocation	EmployeeSex
PositionNumber	EmployeePreferredGender
PositionJobcode	EmployeePreferredPronoun
PositionType	EmployeeEthnicGroup1
PositionJobcodeName	EmployeeEthnicGroup2
PositionWorkTitle	EmployeeEthnicGroup3
PositionWorkTitleShortDescription	EmployeeRace
PositionEffectiveStatus	EmployeeMinorityStatus
PositionStatus	EmployeeCitizenshipStatus
PositionReviewDate	EmployeeDisabledStatus
PositionRegularTemporaryRestricted	EmployeeMilitaryStatus
PositionFullQuasiPartTime	EmployeeVeteranStatus
PositionMonths	EmployeeDisabledVeteranStatus
PositionFLSAStatus	EmployeeMaritalStatus
PositionLevel	EmployeeType
PositionAppointmentCategory	EmployeeOriginalHireDate
PositionVPAEligible	EmployeeAgencyStartDate
PositionStandardHours	EmployeeLayoffNoticeDate
PositionFullTimeEquivalency	EmployeeProbationExpirationDate
PositionMaximumHeadcount	EmployeePriorServiceMonths
PositionFilledOpen	EmployeeContinuousStateServiceDate

PositionSalaryAdministrationPlan	EmployeeLeaveServiceDate
PositionSalaryAdministrationPlanDescription	EmployeeVSDPEnrollmentDate
PositionGrade	EmployeeSTDClaimNumber
PositionPayGrade	EmployeeExpectedReturnDate
PositionStep	EmployeeTerminationDate
PositionSOCCode	EmployeeCurrentPerformanceRating
PositionEEO4Category	EmployeeRecallEligible
PositionWorkersCompensationCode	EmployeeCurrentPositionEntryDate
PositionCriticalOrHardToHire	EmployeeRoleBeginDate
PositionEligibleForTelework	EmployeeDepartmentEntryDate
PositionAlternateWorkSchedule	EmployeeClassification
PositionEconomicInterest	EmployeeVPACovered
PositionConfidential	EmployeeEPRCategory
PositionHealthCertificate	EmployeeLeavePlanEligibiltyGroup
PositionSensitive	CompensationFrequency
PositionSafetySensitive	EmployeePaygroup
PositionPhysicalRequirements	EmployeeHealthAgencySubgroupNumber
PositionCertificationRequirement	EmployeeHealthAgencySubgroupDescription
PositionLicenseCode1	EmployeeMonthsPays
PositionLicenseCode2	EmployeeBillPremiumCode
PositionLicenseCode3	EmployeeBillPremiumDescription
PositionLanguageRequirement	EmployeeGradeEntryDate
PositionAgencyUseField1	EmployeeCompensationRate
PositionAgencyUseField2	EmployeeStateSalary
PositionAgencyUseField3	EmployeeNonStateSalary
PositionAgencyComments	EmployeeSpecialPay
PositionFiller	EmployeeTotalCompensation
PositionSupervisorPositionNumber	EmployeeHourlyRate
PositionSupervisorEmployeeID	EmployeeAnnualRate
PositionSupervisorEmployeeName	EmployeeTemporaryPay
PositionTimeAttendanceApprover	EmployeeMilitarySupplementalPay
PositionTimeAttendanceApproverID	EmployeeWorkMode
PositionTimeAttendanceApproverName	EmployeeTaxLocationCode
PositionBudgetLevel	EmployeeAgencyUseField1
EmployeeID	EmployeeAgencyUseField2
EmployeeStatus	EmployeeAgencyUseField3
LinkedDependentEmployeeID	EmployeeTenureStatusContractType
EmployeeName	EmployeeContractOrAppointmentExpectedEndDate

EmployeeLastName	EmployeeLast4SSN
EmployeeFirstName	EmployeeNonAutoPay
EmployeeMiddleName	EmployeeTotalMonthsOfService
EmployeeNameSuffix	PositionCount
EmployeeHomeAddressLine1	EmployeeCount
EmployeeHomeAddressLine2	

Appendix 2 – Transaction Hub Columns

Column Name	Column Name (Continued)
SecretariatNumber	PositionNumber
SecretariatName	PositionEEO4Category
ParentBusinessUnit	PositionRoleCode
ParentBusinessUnitName	PositionRoleCodeName
BusinessUnit	PositionDepartmentID
BusinessUnitName	PositionDepartmentName
Company	PositionGrade
EmployeeID	PositionType
EmployeeRecordNumber	PositionRegularTemporaryRestricted
EmployeeFirstName	PositionStandardHours
EmployeeLastName	PositionLevel
EmployeeBirthDate	PositionAppointmentCategory
EmployeeSex	TransactionCategory
EmployeePreferredGender	CardinalAction
EmployeeRace	CardinalActionDescription
EmployeeMinorityStatus	CardinalActionReason
EmployeeDisabledStatus	CardinalActionReasonDescription
EmployeeMilitaryStatus	TransactionID
EmployeeDisabledVeteranStatus	TransactionEffectiveDate
EmployeePositionEntryDate	TransactionEffectiveFiscalYearQuarter
EmployeeClassification	TransactionEffectiveSequence
EmployeeEPRCategory	EmployeeCompensationRate
EmployeePaygroup	EmployeeStateSalary
EmployeeLeavePlanEligibiltyGroup	EmployeeNonStateSalary
EmployeeType	EmployeeSpecialPay
EmployeeAlternateWorkSchedule	PayChangeAmount
EmployeeAgencyStartDate	PayChangePercentage
	LastUpdateDateTime
	TransactionFiller