



Query Repository View Enhancements (Project IUUN0020)

Financial Workgroup

July 21, 2003 - 149 ASTeCC - 3:00 – 4:20

ATTENDEES:

Dale Austin, Jayna Cheesman, Debra Claunch, Penny Cox, Chris Donahoe, Kathy Hamperian, Louise Hensley, Courtney Higdon, Susan Krauss, Keith LaVey, Gary Lindle, Jennifer Miles, Sue Myers, Barry Rankin, Diane Skoll, Erin Wallett, Lu Wang, Scott Wood

GUESTS:

Louise Hensley, Susan Krauss, Erin Wallett

PRESIDING:

Jayna Cheesman

PROJECT COORDINATOR:

Jayna Cheesman, Kathy Hamperian

AGENDA ITEM	DISCUSSION
<ul style="list-style-type: none"> • Handouts 	<ul style="list-style-type: none"> ▪ Name Game ▪ UKHRS_RPT Views dated 7/21/03
	<ul style="list-style-type: none"> ▪ Jayna said IT would be attending the next Provost Business Officer meeting on July 24, 2003 and would be reviewing the Name Game with them, as well as the Element Naming Standards being implemented.
<ul style="list-style-type: none"> • HRS Security 	<ul style="list-style-type: none"> ▪ Jayna said HRS security has been implemented on the 10 views currently available to the users. She said later in the meeting we would talk about the proposed element names for these views and the naming standards would be put in place before the users are encouraged to use these views instead of the Sybase views. Jayna said IT would propose a timeframe for implementing the new views, and would notify the users. Users will have to migrate from the _SYB views to _RPT views and will be given time to convert their queries and reports.
<ul style="list-style-type: none"> • Metadata 	<ul style="list-style-type: none"> ▪ Keith said the Purchasing/Vendor and FRS AP element names and definitions were recently loaded. He said all the definitions they have access to in IDMS are now part of the metadata found on the Reporting web site: https://reporting.uky.edu/. Keith said there may be some elements without descriptions because the descriptions are not in IDMS.
<ul style="list-style-type: none"> • DWE Change Requests 	<ul style="list-style-type: none"> ▪ Jayna said Diane has been working on a master plan for the change requests that have been received. Jayna said she and Keith meet once a week to prioritize these requests. She said there are about 12 requests at the high level and each has multiple steps.
<ul style="list-style-type: none"> • DWE Change Requests 	<ul style="list-style-type: none"> ▪ Discussion about the request to load the deleted FRS account records. Jayna said users will have to exclude deleted records from future reporting based on the element indicating the record was 'deleted'.. She said further details will be sent to the users. Chris said they were unable to report on prior year data since the accounts were deleted each year. Users can report on prior year data or exclude it from their reports.
<ul style="list-style-type: none"> • Name Game 	<ul style="list-style-type: none"> ▪ Jayna explained the elements listed on the page are either current column names or proposed element names. She said she wanted the users to raise their hand if they knew each element. She said she was looking for the name of the element, not just a description. ▪ CSFERSCD: Civil Service/FERS . Only one person knew this element. (Existing name.)

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	<ul style="list-style-type: none"> ▪ ACCT_ORIG_FND_AMT: Account Original Fund Amount. About 10 people knew this element. (Standard name.) ▪ DEGRCD: Degree Code. About 10 knew this element. Jayna asked which degree code this was, for the student or the employee? It is hard to determine based on the current element name. (Existing name.) ▪ DEPTNO: Department Number. Everyone recognized this element. Again Jayna said it is hard to determine which department number this is. (Existing name.) ▪ EMP_DEGR_MJR_CIP_CD: Employee Degree Major Construction in Progress Code. About 2/3 recognized this element. CIP is listed as “Construction in Progress”, but is also known as the Classification of Instruction Program. (Standard name.) ▪ ACCT_TITLE: Everyone recognized this element. Jayna asked if this was the short title or long title and said it was hard to determine from the limited information. (Existing name.) ▪ BUD_SUPPR: Budget Suppression. Very few recognized this element. Chris said it is not used and is tied to the transaction, not the account. (Existing name.) ▪ TCC_JA_ACCADVLMT: Employee Maximum Vacation Hours. No one recognized this element since it is not used. (Existing name.) ▪ UXFEL_S_L_LSDS_INCLUDE: Subsidiary Ledger Distribution Sheet Include. About 5 recognized this element. (Existing name.) ▪ VALID_PAYROLL: Valid for Payroll. About 10 recognized this element. Dale explained HRS uses this element to flag which accounts are valid for payroll purposes. (Existing name.) ▪ FISCAL_YR: Fiscal Year. Everyone identified this element. Jayna asked which system and records this fiscal year was associated with, HRS, FRS, etc. (Existing name.) ▪ EMP_HOME1_ADDR: Employee Home Address (Line 1). Everyone recognized this element. (Standard name.) ▪ EMP_EARN_1MO_PRIOR_HRS: Everyone recognized this. (Standard name.) ▪ MAP_ACCT_NO: Everyone recognized this. (Existing name.) ▪ S_L_SCHOOL: Skip, element not used. (Existing name.) ▪ ORIGBUDGET: Original Budget. Everyone was able to name this element. Jayna asked what this element was associated with account, position, etc. (Existing name.) ▪ PRIORMO1HOURS: Duplicate of element listed above. (Existing name.) ▪ S_L_FBM046_RESP: Responsible Roll-Up. About 4 recognized this element. (Existing name.) ▪ EMP_ASGN_FTE_VAL: Employee Assignment Full Time Equivalent Value. Everyone recognized this element. (Standard name.) <p>• Jayna said the purpose of the exercise was to show why standard element names are important. She said IT would be sticking with the format for naming standards, which is a Prime Word, Qualifier(s), Class Word. Jayna said for data management purposes, elements identified as “Codes” should have a translation table. She said having elements named properly would make it easy to cross check the elements that should have translation tables with them.</p>
<ul style="list-style-type: none"> • Discussion Items 	<ul style="list-style-type: none"> ▪ Proposed Element names (handout): ▪ Group/Flag/Code: Jayna said Flag is usually an element with only two values, yes/no, zero/one, etc. She said Code elements usually have unlimited values. She said Group elements are codes, but generally signify a grouping of some kind. Jayna said the workgroup had originally decided that Code would be used for Code elements and for Flag

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	<p>elements, since there are few elements with only two values. Some Flag elements mentioned are the Ledger Sheet Distribution, Valid for Payroll, Rehire and Payroll Approval Flag. The workgroup said that whatever the element is currently called on the Screen in IDMS or in the System is what should be used with the new naming standards.</p> <ul style="list-style-type: none"> ▪ Group/Code/Number: Jayna said there are differences between a Code and a Number. She said “Account Number” is a numeric value, while “Object Code”, which has an English translation, is a Code. (NOTE: An element with a classification of ‘NUMBER’ can be alphanumeric. Examples include department number and room number. However unlike elements with a “CODE” classification, “NUMBER” elements may <u>not</u> always have a translation. Department number does, but room number doesn’t.) ▪ Calendar Year/Fiscal Year/Academic Year: Jayna asked if these should be Class Words or a Qualifier + Class Word. If each is a Class Word, the element names could be shorter. She said the examples from other institutions use both formats. Jennifer said CY for Calendar Year could be confused for Current Year. There are two fiscal years, the Federal and Institutional. There are two Financial Aid fiscal years. Kathy suggested giving the users time to think about this and discuss it at the next meeting. (NOTE: Other users have requested “YEAR” be the classification and “Fiscal”, “Calendar”, etc. be qualifiers, since there are so many “types” of years.) ▪ Abbreviations on 4-5 character words: General discussion about abbreviating words that are 5 characters or less. Jayna said the standards used by other institutions are not consistent. Everyone agreed they would like to see 5 character or less words spelled out. Spell out ‘birth’, “first”, “last”, “start”, etc. ▪ Start versus Begin: Jayna said the recommendation is to use Begin instead of Start because of the confusion with the abbreviation for Start, Street and Saint. The workgroup recommended the name stay consistent with what the system calls it. Jayna said Begin would be used if the element is a date field. ▪ View V_EMP: General discussion on the view names. It was decided this would be renamed V_EMP_DEMO for Employee Demographics. ▪ FTE: Discussion about whether FTE is an amount, number or percent. It is not stored as a percent, but can be derived to be 100%. Listing this element as a Value is okay according to the workgroup. ▪ Merge views: Discussion about the old views POSFUND and POSFUND TC. After discussion, the workgroup recommended these views be merged. The TC view includes the translated codes. A user would get the translation instead of the actual code. ▪ Labor Distribution: On the handout, elements on lines 79 through 91 will be changed to “labor Distribution Override”. ▪ EMP_ASGN_LBR_DISTRB_OVRD_AMT and EMP_ASGN_LBR_DISTRB_OVRD_PCT: Jayna asked Keith to check if this is an Amount or Percent Class element. Chris said it could be either and is set at the transaction level. She said there are examples where the value is shown as 10,000 %, but should have been \$10,000. She said the edits do not always work properly. <ul style="list-style-type: none"> ▪ DATA QUALITY: The edits on EMP_ASGN_LBR_DISTRB_OVRD_AMT and EMP_ASGN_LBR_DISTRB_OVRD_PCT need to be checked. ▪ EMP_SEPRTN_CTGRY_CD or EMP_TERM_CD: Jayna asked if this should be the Separation Code or Termination Code. This will be deferred to Human Resources. Penny said the HR managers meet every other Monday and had a meeting today. The element is called something different depending on the screen the user is looking at. ▪ Jayna said Job is a Primary Word and the Job Classification view is independent of a job or position. She asked if JCC is understood as a common acronym. The workgroup said this should be deferred to Human Resources. (NOTE: Provost

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	<p>business officers said JCC is commonly understood.)</p> <ul style="list-style-type: none"> ▪ Discussion about using CLASS or CLSFCTN as an abbreviation for Classification. Jayna said CLASS can mean many things, it could be an abbreviation for Classification, Classes or Courses. ▪ The workgroup said Title should be spelled out. Someone asked if Title is spelled out 99% of the time, and then had to be abbreviated due to length limitations on the element name, would this be a problem. Jayna said it would be hard to automate certain activities, such as users searching for words containing the abbreviations if the names are not consistent. ▪ Discussion about data accuracy. Naming the elements to be consistent with what the users see on the screens is important. Jayna said she would like the names to be as explanatory as possible to minimize the number of times users have to look at the definitions for the elements. ▪ Kathy said IT receives as many requests for training on the data as on reporting. Jayna said she would like to recommend that anyone needing to report on the data be required to attend the training courses offered for the systems, so they are familiar with the data. ▪ Jayna said there has been a question about the uniqueness of the element names in relation to subsetting the data by fiscal year. She asked if fiscal year should be part of the element name. The workgroup said the element name should be consistent across fiscal years. The view should incorporate the fiscal year designation. <ul style="list-style-type: none"> ▪ ACTION: An email will be sent to the listserv to ask users to prioritize the views for the order in which the naming standards should be applied.
<ul style="list-style-type: none"> • Next Meeting 	<ul style="list-style-type: none"> ▪ Crystal Report Tool Vendor Demonstration, August 5, 2003, Hardyman Alltel Room, 1:00 – 3:00 pm ▪ Brio Report Tool Vendor Demonstration, August 7, 2003, Hardyman Alltel Room, 1:00 – 3:00 pm