Executive Summary

Request 11 – People Soft Data to OUPRD PS Schema

Updated 10/26/2016

Under the direction of University leadership, HR is building the capacity to develop analytics for benefits, retirement, and employment data of the OU workforce using Tableau.

Request 11 will provide for delivery of the source HR PS tables directly to the OUPRD PS schema for the purpose of reporting and analytics via Tableau. Data access will only be granted to specific users who currently have access to these tables in PeopleSoft.

User Stories

- o As HR, we want to visualize turnover data, retirement eligibility, insurance participation, etc.
- o As University leadership, we'd like to develop the capacity to do analytics on benefits, retirement, and employment data using Tableau.

Sample Application

Workforce turnover data, retirement eligibility, and insurance participation will be consumed by the analytics tool Tableau for the development of visual analytics for department/user consumption and interaction:

1. Data Scientist will connect to OUPRD PS Schema via Tableau to develop analytics as requested.
2. Specific end users in HR and Leadership with approved access will view visuals as developed by the Data Scientist.

Delivery and Timeline

- o **Delivery Method:** Based on technical resource recommendations
- o **Timeline:** 11/30/2016**
- o **Project Execution:** Submit to PGB for resource allocation upon DGCC approval.
  - o **Project Acceptance:**

Data Validation Checklist

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Category 1: HR

- o Method: Meeting in person
- o Time stamp: 11/09/2016
- o Attendees/participants: JP Morgan, Terri Pinkston, Marcy Fleming, Glenn Hansen
- o Data Spec presented: v1.0
- o Session Notes: HR users with previously granted permissions would be accessing the data they already have access to using a different method/system. This does not grant non HR/HR Specified users access to these tables.
- o Validation Decision: Package was validated for use cases defined in exec summary
- o Data Classification: HR
- o Category Specific Items:
    - o Any requests to add Non HR tables to the PS Schema in OUPRD would require committee approval.
    - o Any request to grant Non HR/HR specified users access to these tables would require committee approval.

Process Notes
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Updated 11/09/2016

Validation Planning

- o   Consulted: Marcy Fleming, Glenn Hansen, Kevin Boydstun, Terri Pinkston

Validation Notes
Attendees: JP Morgan, Terri Pinkston, Marcy Fleming, Glenn Hansen
Date: 11/09/2016

- o   Caveats:
    - o   Any requests to add Non HR tables to the PS Schema in OUPRD would require committee approval.
    - o   Any request to grant Non HR/HR specified users access to these tables would require committee approval.

Data Specification

Request 11 - PeopleSoft Tables to PS Schema in OUPRD

v1.0 - Updated: 11/09/16

Category	Attribute Name	Source (SOR)	Schema	Location	Read/Write	Description	Notes	Validated By
HR	PS_HEALTH_DEPENDNT	PeopleSoft	PS	OUPRD PS Schema	Read			
HR	PS_DEPENDENT_BENEF	PeopleSoft	PS	OUPRD PS Schema	Read			
HR	PS_DEP_BENEF_IND	PeopleSoft	PS	OUPRD PS Schema	Read			
HR	PSXLATITEM	PeopleSoft	PS	OUPRD PS Schema	Read			
HR	PS_ADDRESSES	PeopleSoft	PS	OUPRD PS Schema	Read			
HR	PS_BENEF_PLAN_TBL	PeopleSoft	PS	OUPRD PS Schema	Read			
HR	PS_BEN_PROG_PARTIC	PeopleSoft	PS	OUPRD PS Schema	Read			
HR	PS_DEPT_TBL	PeopleSoft	PS	OUPRD PS Schema	Read			
HR	PS_DISABILITY_BEN	PeopleSoft	PS	OUPRD PS Schema	Read			
HR	PS_EMPLOYMENT	PeopleSoft	PS	OUPRD PS Schema	Read			
HR	PS_FSA_BENEFIT	PeopleSoft	PS	OUPRD PS Schema	Read			Marcy Fleming - Requestor; Kevin Boydstun - Technical Resource; Terri Pinkston - Data Owner
HR	PS_HEALTH_BENEFIT	PeopleSoft	PS	OUPRD PS Schema	Read			
HR	PS_JOB	PeopleSoft	PS	OUPRD PS Schema	Read			
HR	PS_JOBCODE_TBL	PeopleSoft	PS	OUPRD PS Schema	Read			
HR	PS_LEAVE_ACCRUAL	PeopleSoft	PS	OUPRD PS Schema	Read			_____
HR	PS_LEAVE_PLAN	PeopleSoft	PS	OUPRD PS Schema	Read			Approved: 11/09/2016
HR	PS_LIFE_ADD_BEN	PeopleSoft	PS	OUPRD PS Schema	Read			
HR	PS_NAMES	PeopleSoft	PS	OUPRD PS Schema	Read			
HR	PS_PERSON	PeopleSoft	PS	OUPRD PS Schema	Read			
HR	PS_PERS_DATA_EFFDT	PeopleSoft	PS	OUPRD PS Schema	Read			
HR	PS_PERS_NID	PeopleSoft	PS	OUPRD PS Schema	Read			
HR	PS_PER_ORG_ASGN	PeopleSoft	PS	OUPRD PS Schema	Read			
HR	PS_POSITION_DATA	PeopleSoft	PS	OUPRD PS Schema	Read			
HR	PS_RTRMNT_PLAN	PeopleSoft	PS	OUPRD PS Schema	Read			
HR	PS_SAVINGS_PLAN	PeopleSoft	PS	OUPRD PS Schema	Read			