Information Technology Services

University System of Georgia Information Technology Services

Data & Reporting Services

Facilities Inventory Data Collection (FIDC)

Data Submission & Reporting User Guide

March 2023

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Facilities Inventory Data Collection (FIDC) Data Submissions and Reporting User Guide

Purpose

The Facilities Inventory Data Collection (FIDC) occurs twice annually to report building and room inventory information.

Target Audience

This document is designed for institutional staff responsible for submitting data to the Facilities Inventory Data Collection. This includes the Points of Contact (POCs) for each institution for the FIDC and any other staff who have roles and access to complete a data extraction and review data related to the FIDC.

Scope of Document

This user guide will provide detailed instructions for each of the following processes of the Facilities Inventory Data Collection:

- Facilities Inventory Institutional User Roles
- Data Submission Process Flow
- Data Submission
- Reports
- Data Submission Errors
- Submission Status
- Data Dictionary
- Reference Code Reports

For emergency, business interruption or other production down situations, immediately call the ITS Helpdesk (706-583-2001 or 888-875-3697 toll-free within Georgia). For noncritical issues, login with your username and password at https://usg.service-now.com/usgsp to submit a ticket.

Resources

Information about ITS Service Level Guidelines and the maintenance schedules can be found at http://www.usg.edu/customer_services/service_level_guidelines. For operational information of USG IT systems and services, please visit http://status.usg.edu.

Facilities Inventory Institutional User Roles

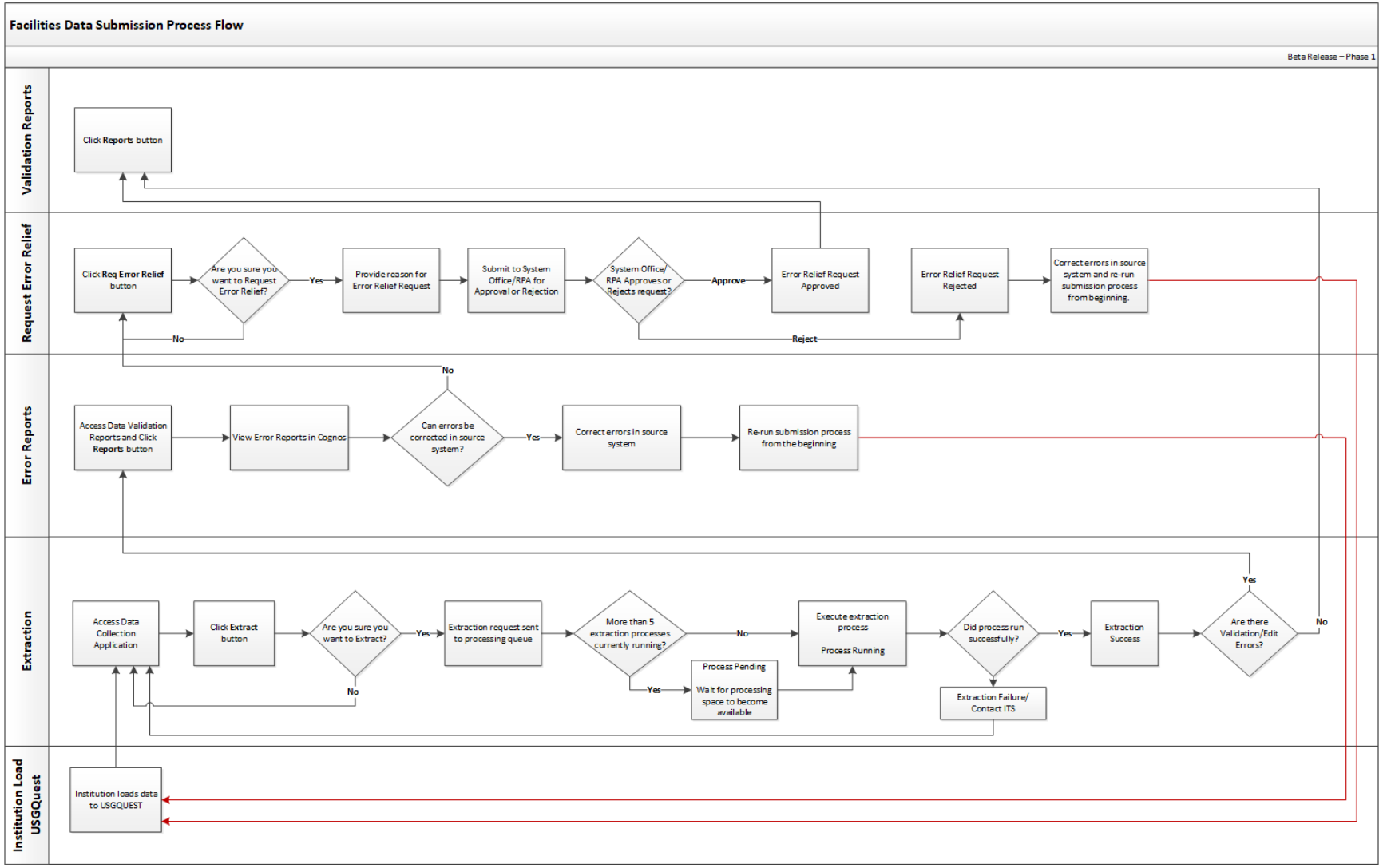
Before learning the data submission process, it is important to understand the User Roles that must be assigned to perform these procedures.

The following section explains the Facilities Inventory Institutional User Roles that are needed to successfully complete Facilities Inventory Data Collections.

Role Title	Role	Role Functions
Institution Facilities Extractor	usg_facil_extractor	Extract Facilities Data View Facilities Error Reports/Logs Request Error Relief Provide Error Relief Comments
Role Description		
The Extraction process collects data from Facilities campus ODS. If any errors are returned during the extraction process, the data warehouse user interface alerts the user that errors have been produced during the extraction. These errors must be corrected before data can be accepted by the Facilities Program Management Office and loaded into the relational data warehouse.		

Role Title	Role	Role Functions
Institution Facilities Data Submission Reviewer	usg_facil_ods_reviewer	Review Facilities Preliminary / Turn-Around reports for accuracy prior to load into the relational warehouse.
Role Description		
Facilities Preliminary / Turn-Around Reports must be reviewed for accuracy before data is loaded into the relational warehouse for Official Reporting purposes.		

Data Submission Process Flow



Data Submission

This section provides detailed instructions for completing the data submission process. This includes the following steps:

- ✓ Confirm installation of current Academic Release (CAMPUS_ODS_FIDM_ETL_INSTALL)
- ✓ Run Data Collection Extraction process (ZADMETL)
- ✓ Access the Academic Data Submission Application
- ✓ Extract to Data Warehouse Mimic tables (USGODS)

Confirm Installation of the Current Academic Release

To successfully run the Data Collection Extraction process (ZADMETL) in Banner, the current Facilities Release (CAMPUS_ODS_FIDM_ETL_INSTALL) must be installed.

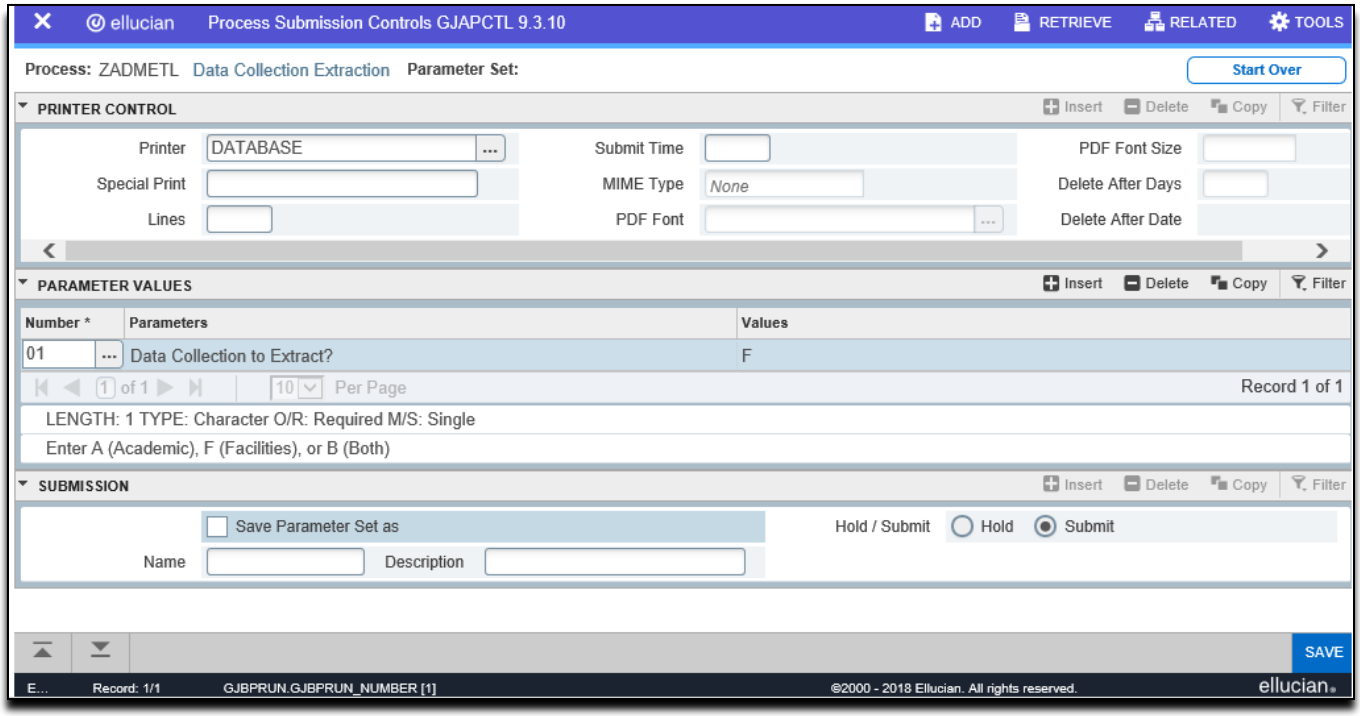
Refer to the Facilities label under the Data Collections Documentation tab of the Data & Reporting Services site--https://www.usg.edu/data_services/data_collections_documentation/facilities for the release documentation and the current ETL Execution Parameters.

Data Collection Extraction Process (ZADMETL)

The first step in the extraction process is to run the Data Collection Extraction process (ZADMETL) to populate the tables in the USGQUEST schema on the institution's designated database. The ZADMETL process is used to initiate the Facilities Inventory Data Mart (FIDM) Institution Extraction, populating the Banner tables (Views) in the USGQUEST schema. The extraction process pulls data from these tables to populate the data warehouse staging tables (USGODS).

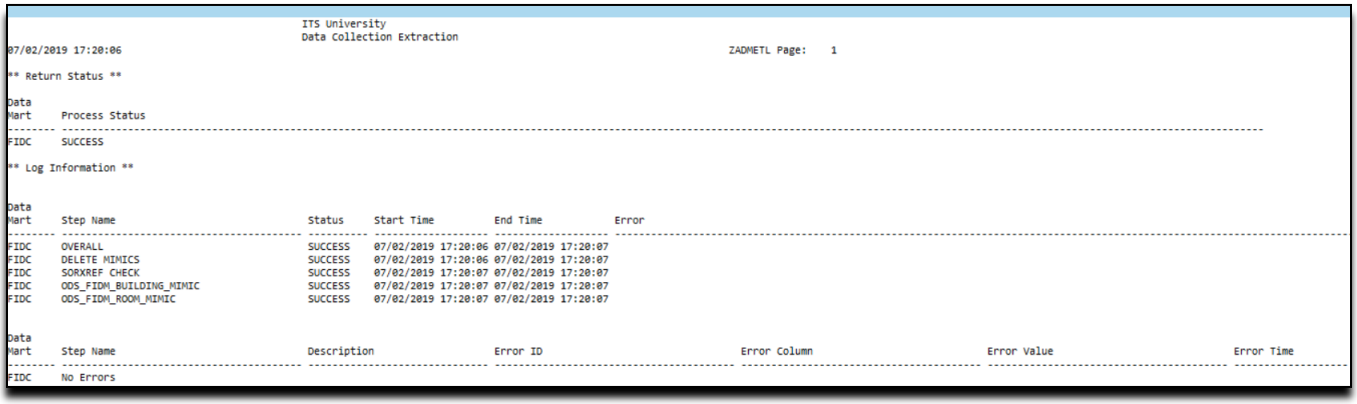
Run the ZADMETL process from the Process Submission Controls (GJAPCTL).

Populate parameter number 01 (Data Collection to Extract?) with value 'F' to extract data for the FIDC. With the cursor in the Submission section, click Save to execute the process.

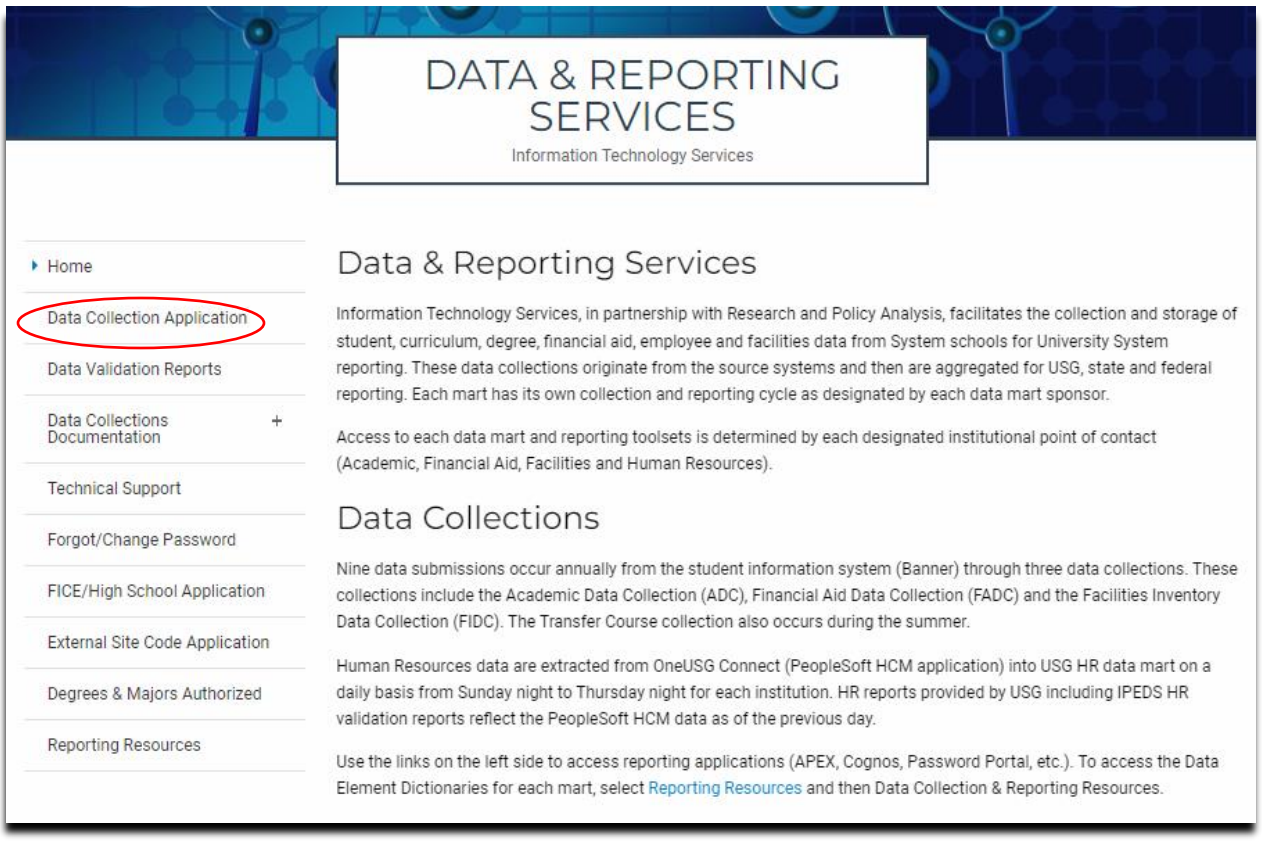


Review the ZADMETL .lis and .log files to verify a successful extraction. All errors must be resolved to achieve a successful extraction.

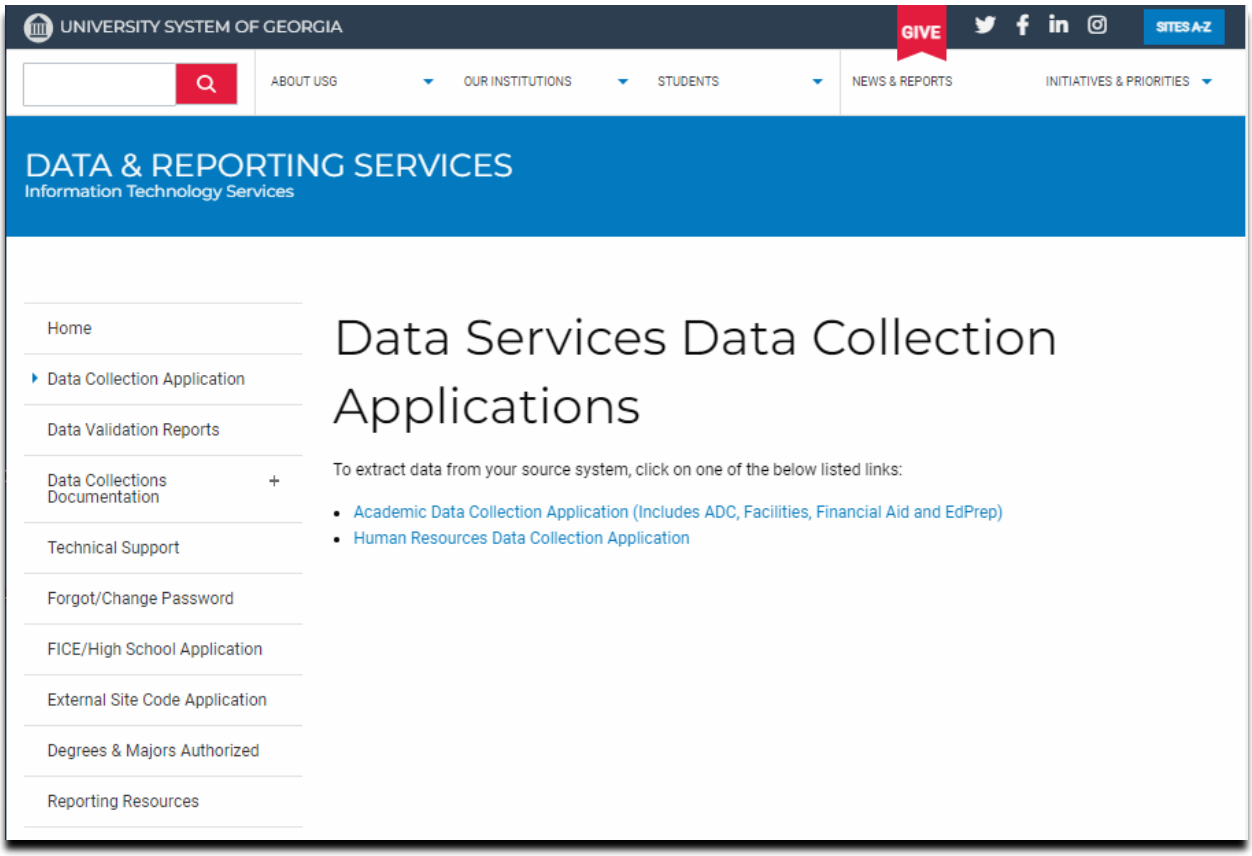
Refer to the Data Collection Extraction user documentation at https://www.usg.edu/georgia_best/application_development_and_support/banner/userdocs for details about ZADMETL .lis output, including error messages that may be encountered and the cause of the error.



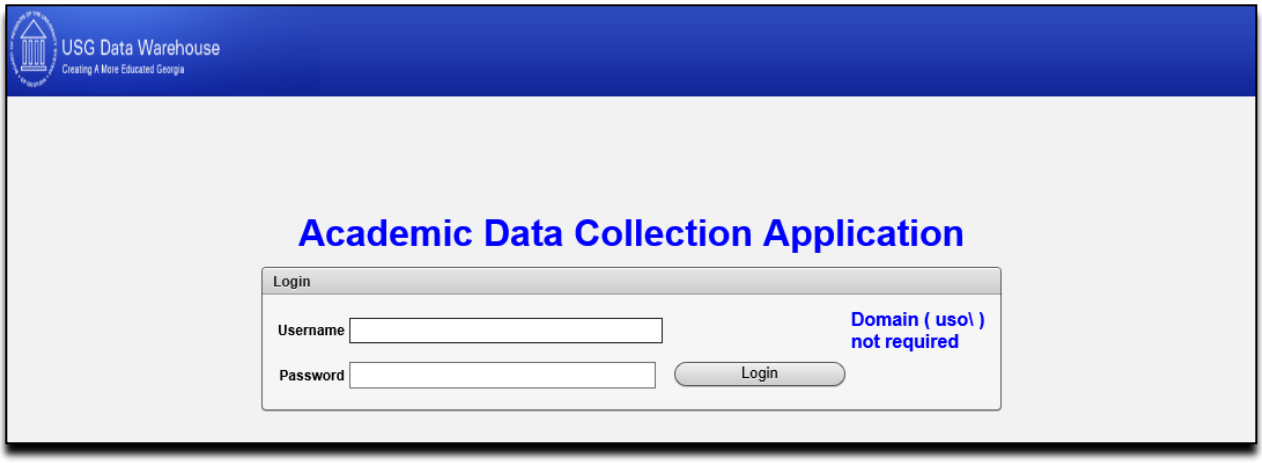
```
                                        ITS University
                                        Data Collection Extraction
07/02/2019 17:20:06                                                
```


DATA & REPORTING SERVICES
Information Technology Services
Home
Data Collection Application
Data Validation Reports
Data Collections Documentation
Technical Support
Forgot/Change Password
FICE/High School Application
External Site Code Application
Degrees & Majors Authorized
Reporting Resources
Data & Reporting Services
Information Technology Services, in partnership with Research and Policy Analysis, facilitates the collection and storage of student, curriculum, degree, financial aid, employee and facilities data from System schools for University System reporting. These data collections originate from the source systems and then are aggregated for USG, state and federal reporting. Each mart has its own collection and reporting cycle as designated by each data mart sponsor.
Access to each data mart and reporting toolsets is determined by each designated institutional point of contact (Academic, Financial Aid, Facilities and Human Resources).
Data Collections
Nine data submissions occur annually from the student information system (Banner) through three data collections. These collections include the Academic Data Collection (ADC), Financial Aid Data Collection (FADC) and the Facilities Inventory Data Collection (FIDC). The Transfer Course collection also occurs during the summer.
Human Resources data are extracted from OneUSG Connect (PeopleSoft HCM application) into USG HR data mart on a daily basis from Sunday night to Thursday night for each institution. HR reports provided by USG including IPEDS HR validation reports reflect the PeopleSoft HCM data as of the previous day.
Use the links on the left side to access reporting applications (APEX, Cognos, Password Portal, etc.). To access the Data Element Dictionaries for each mart, select Reporting Resources and then Data Collection & Reporting Resources.

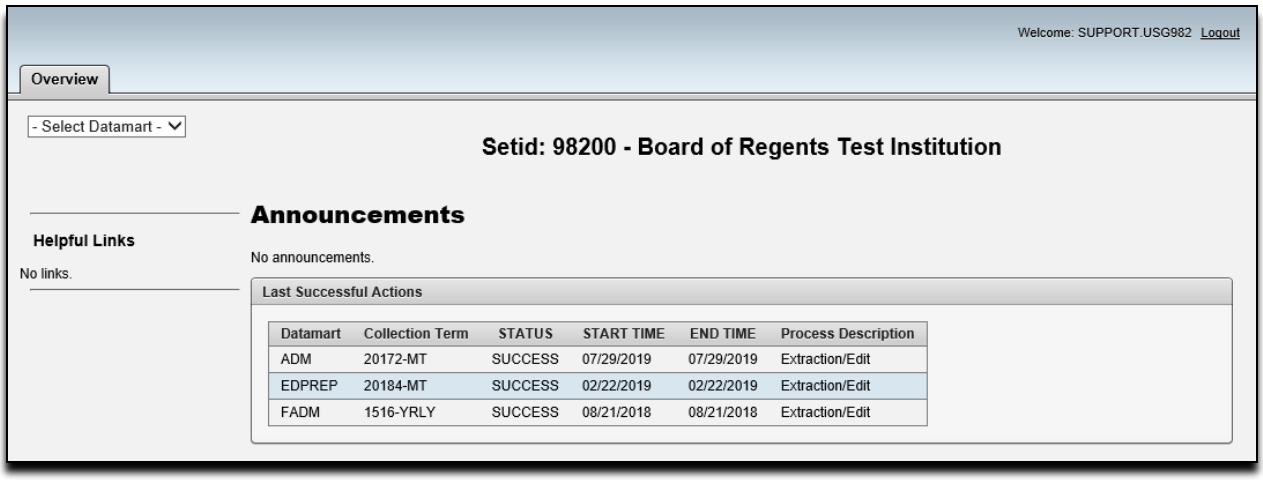
3. Select the Academic Data Collection Application (Includes ADC, Facilities, Financial Aid and EdPrep) link.



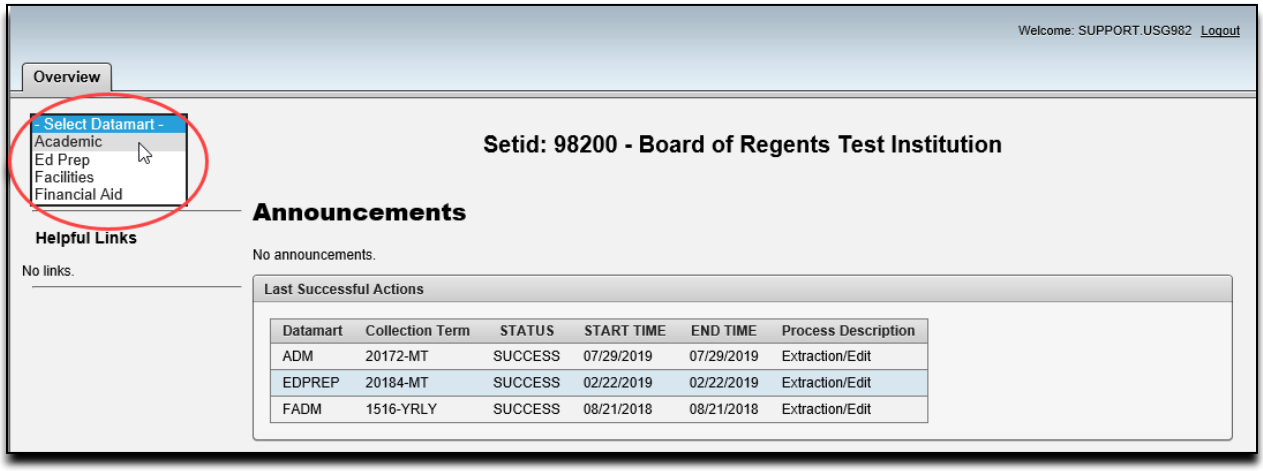
4. This link opens the login page for the Apex application. **Note:** The direct URL is https://apps.ds.usg.edu/ords/f?p=38576. Any additional numbers that may appear at the end of this URL are used to identify a current session. Do not bookmark or save a session specific URL. If issues are encountered accessing the Apex application, clear the browser cache, close the browser, and start over with the direct URL.



5. Enter Username and Password and click Login. The Overview tab will display the SETID and name of the institution and the last successful actions per datamart.



6. In the upper left corner of the Overview tab, click the Select DataMart dropdown list. The datamarts displayed are based on permissions assigned to your user login. Select the Facilities option.



7. Once Facilities is selected, a new Facilities Data Collection tab appears next to the Overview tab. Click on the Facilities Data Collection tab to reach the FIDC home page. The Facilities Data Collection tab will display the SETID and name of the institution, the current collection, and the current ETL package version, in addition to information about the extraction processing steps and the last successful actions for this datamart.

Perform an Extraction

1. On the Facilities Data Collection tab, a series of buttons appear on the left side. The available buttons may vary depending upon the state of current collection.

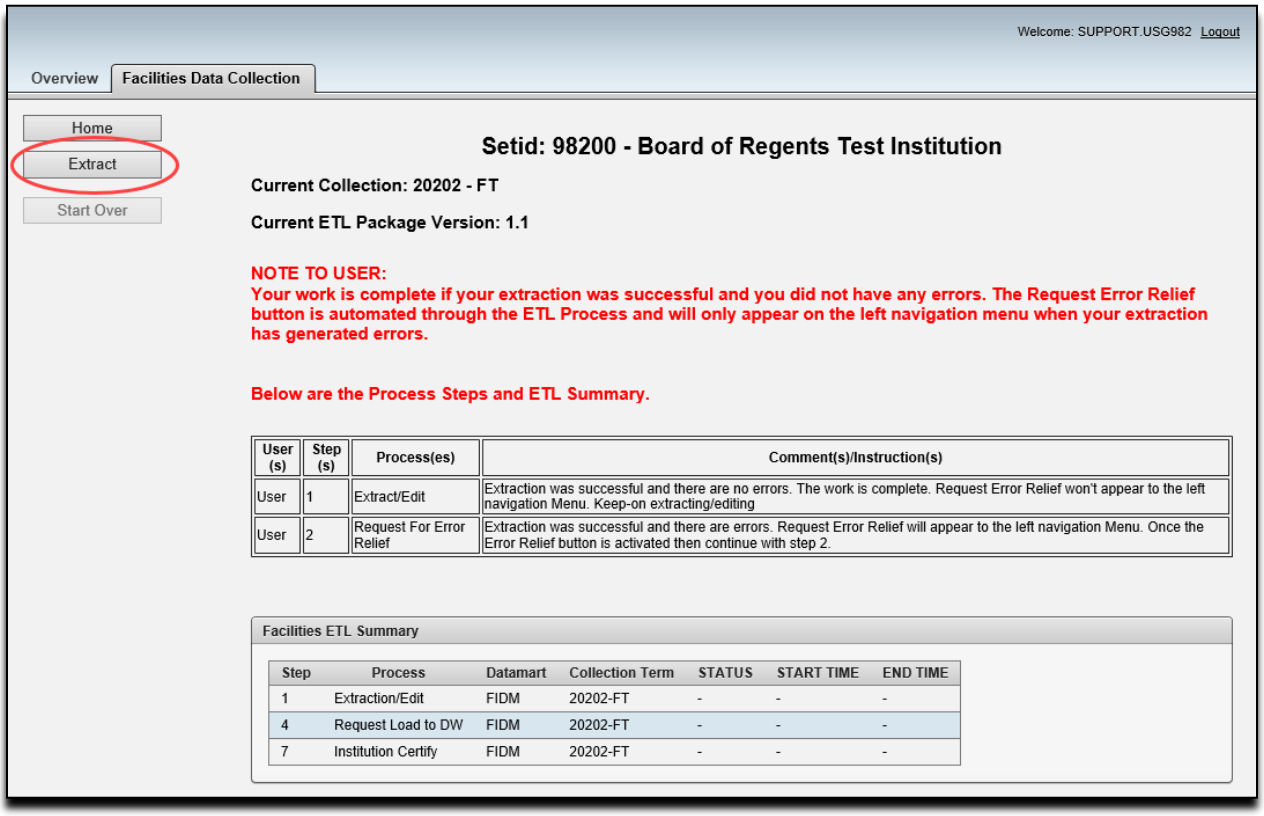
a. Home

b. Extract

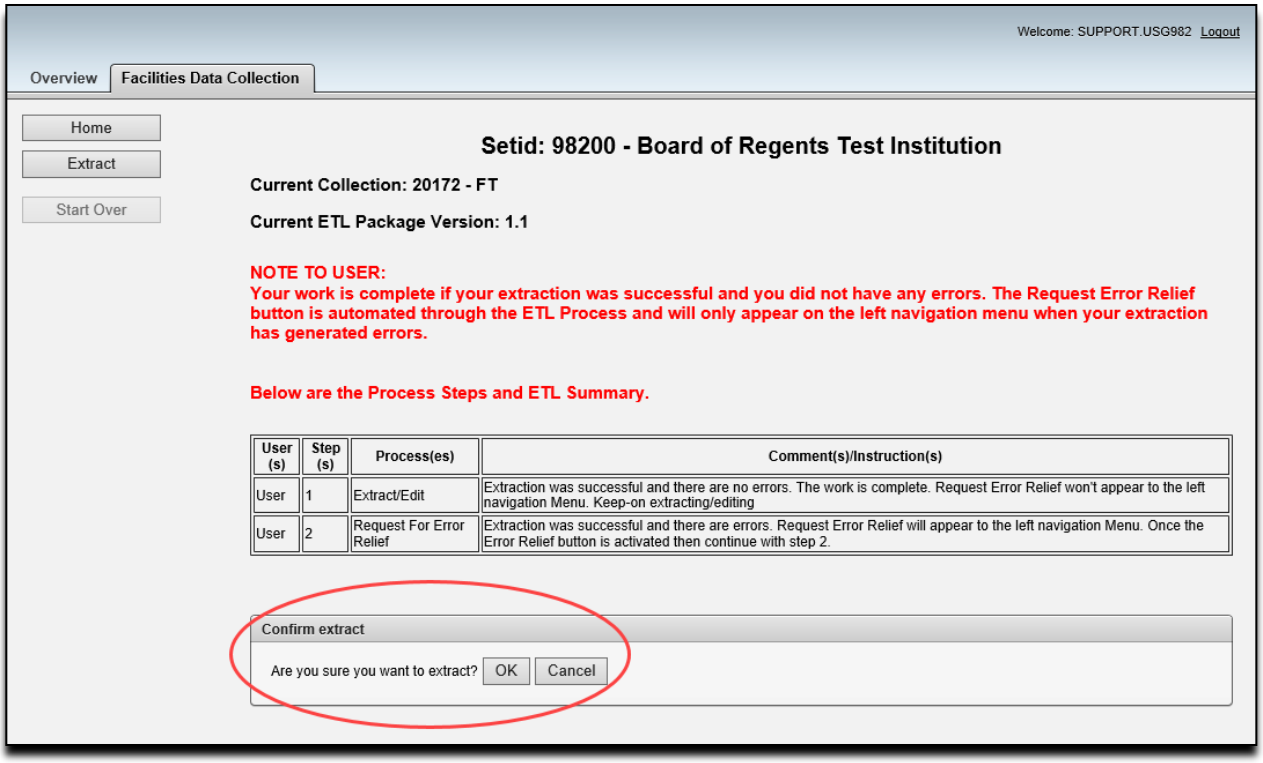
c. Req. Error Relief

d. Start Over

2. To perform an extraction, click the Extract button.

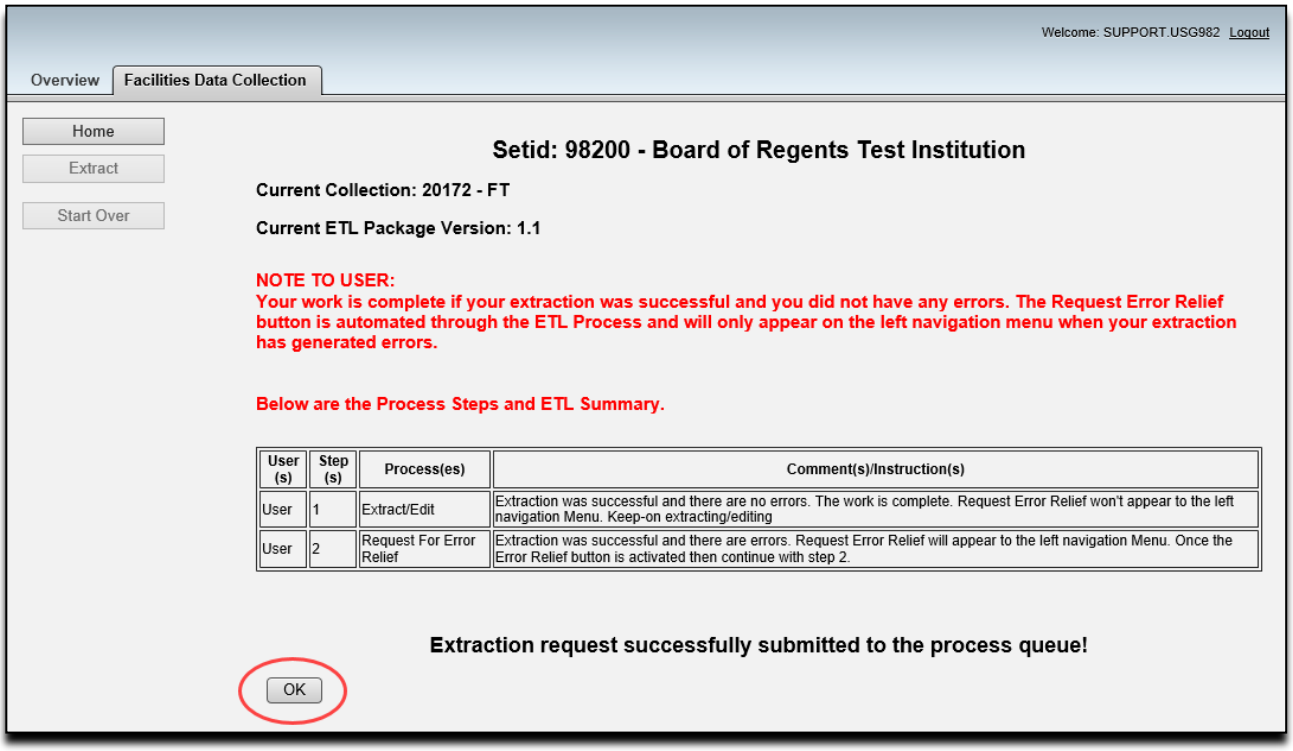


3. A confirmation prompt will be display “Are you sure you want to extract?”. Click OK to continue with the extraction or click Cancel to return to the Home page.

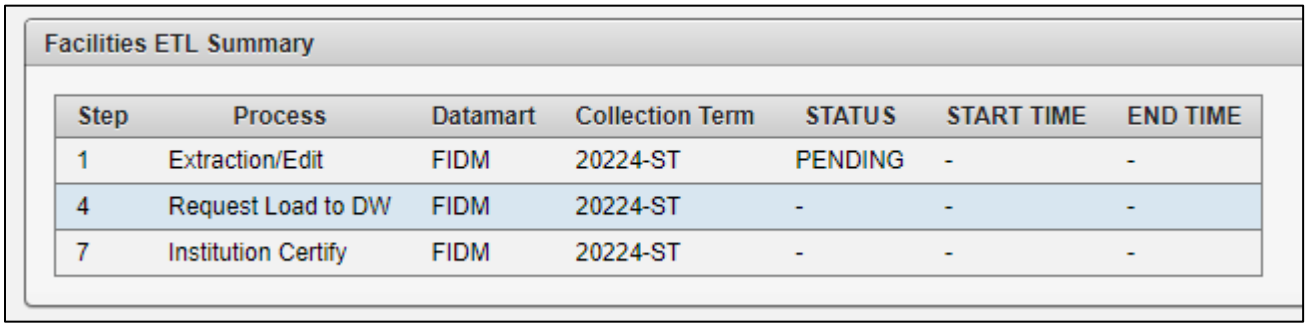


8. The extraction request is submitted to the process queue. The process queue is a staging area that manages the number of extraction requests submitted by all institutions.
   Note: If more than 5 extraction processes are currently running, the request will be placed in the queue and picked up for processing when space is available.

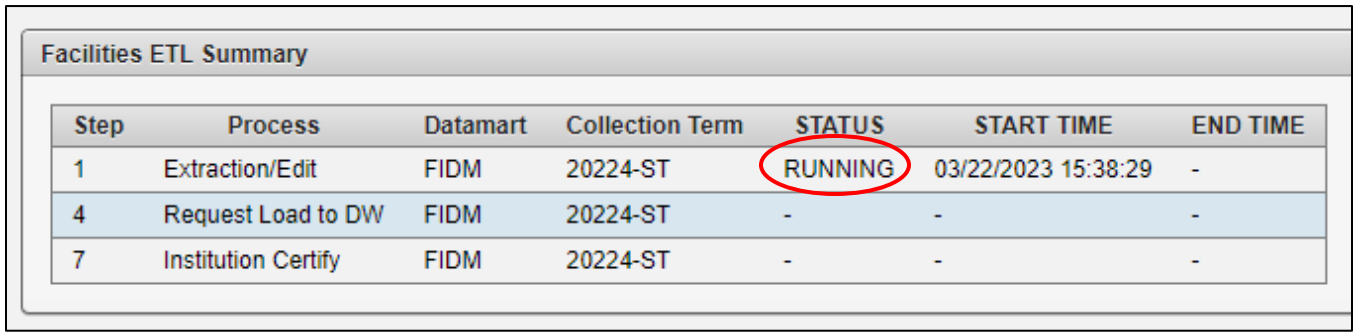
9. The message “Extraction request successfully submitted to the process queue!” will be displayed along with an OK button. Click OK to return to the Home page.



10. If extraction request is placed in the queue due to more than 5 extraction processes currently running, the Status in the Facilities ETL Summary window will display PENDING. Refresh the browser as needed to verify that the request moves from PENDING to RUNNING.



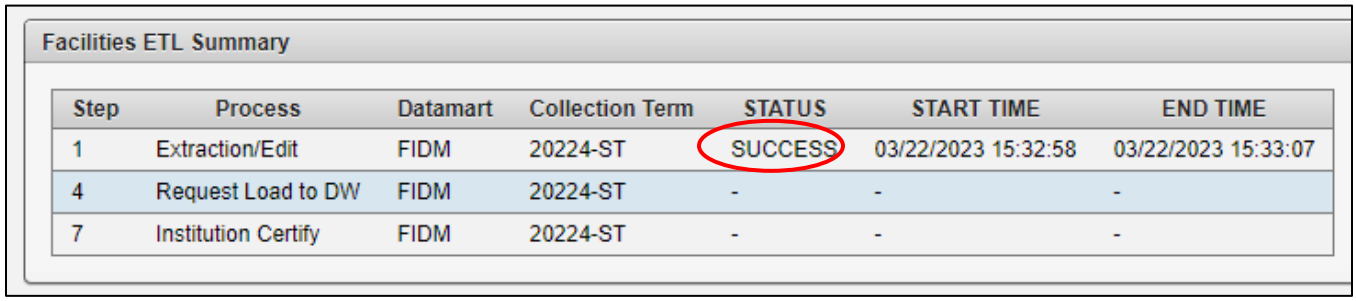
11. If extraction request is successfully executed, the Status in the Academic ETL Summary window will display RUNNING.



Facilities ETL Summary

Step	Process	Datamart	Collection Term	STATUS	START TIME	END TIME
1	Extraction/Edit	FIDM	20224-ST	RUNNING	03/22/2023 15:38:29	-
4	Request Load to DW	FIDM	20224-ST	-	-	-
7	Institution Certify	FIDM	20224-ST	-	-	-

12. When the Extraction process is complete, the status displays SUCCESS or FAILURE. If the status is SUCCESS, continue to next step in process. If the status is FAILURE, it may be necessary to contact ITS for further investigation.

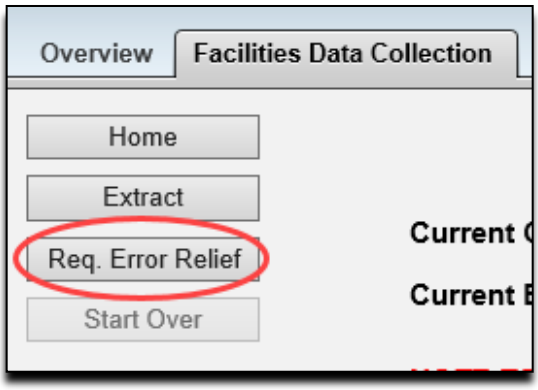


Facilities ETL Summary

Step	Process	Datamart	Collection Term	STATUS	START TIME	END TIME
1	Extraction/Edit	FIDM	20224-ST	SUCCESS	03/22/2023 15:32:58	03/22/2023 15:33:07
4	Request Load to DW	FIDM	20224-ST	-	-	-
7	Institution Certify	FIDM	20224-ST	-	-	-

13. Verify if the extraction has completed with validation/edit errors. If no validation/edit errors have been produced, the Req. Error Relief button will display as grayed-out and inaccessible. This confirms that no errors are present and Data Submission Reports are ready for review.

14. If Validation/Edit errors are present, the Req. Error Relief button will be available. Data Submission Error reports must be reviewed to determine the method of correction in the source system. Error relief should only be requested if errors exist that cannot be resolved in the source system.



NOTE: If the Req. Error Relief button is clicked by mistake, the Start Over button should be used and it will be necessary to re-start the Extraction process.

Reports

This section provides detailed information on the reports that are available after completing the data submission process.

- ✓ Data Submission Reports
- ✓ Data Validation Reports

Reporting Options

There are two types of reports available for use after the data have been submitted.

Data Submission Reports

The Data Submission Reports provide high-level summary information related to the data submission process. Reports include:

- Institution Summary
- Submission Status
- Submission Summary

Data Validation Reports

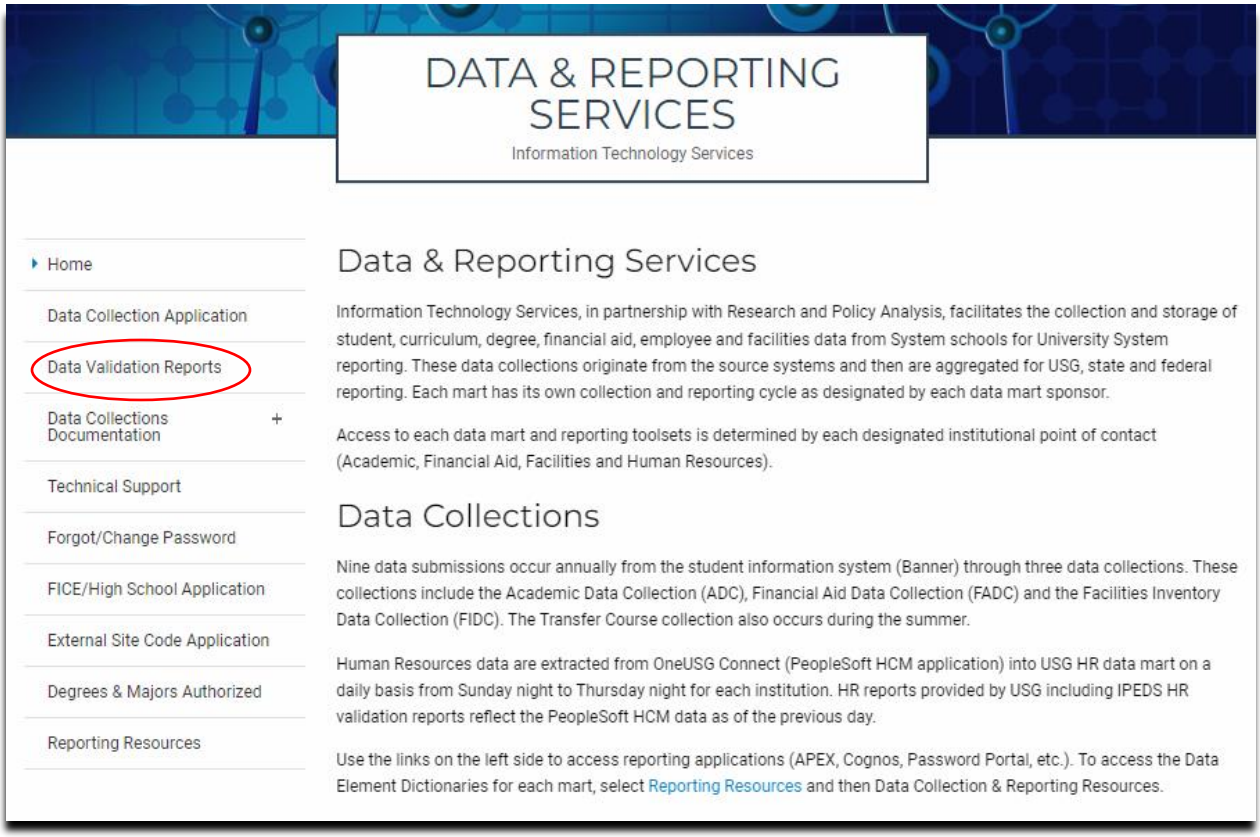
Data Validation Reports are preliminary reports that provide detailed data information as submitted and stored in the data warehouse mimic tables (USGODS).

These reports should be used to validate the data.

Accessing Reports

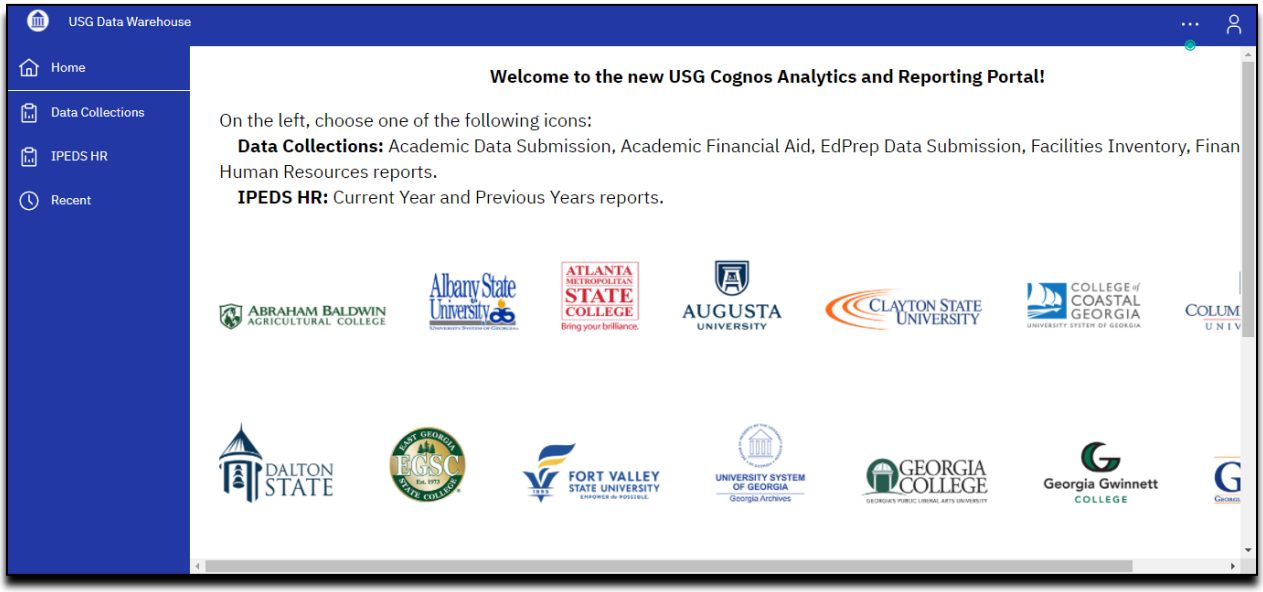
1. Access the Data Collection Site at the following URL: https://www.usg.edu/data_services/
   Note: This site provides access to both the Data Collection Application and the Data Validation Reports. Before reviewing reports, a successful extraction must be completed.

2. Click the Data Validation Reports link in the navigation column.



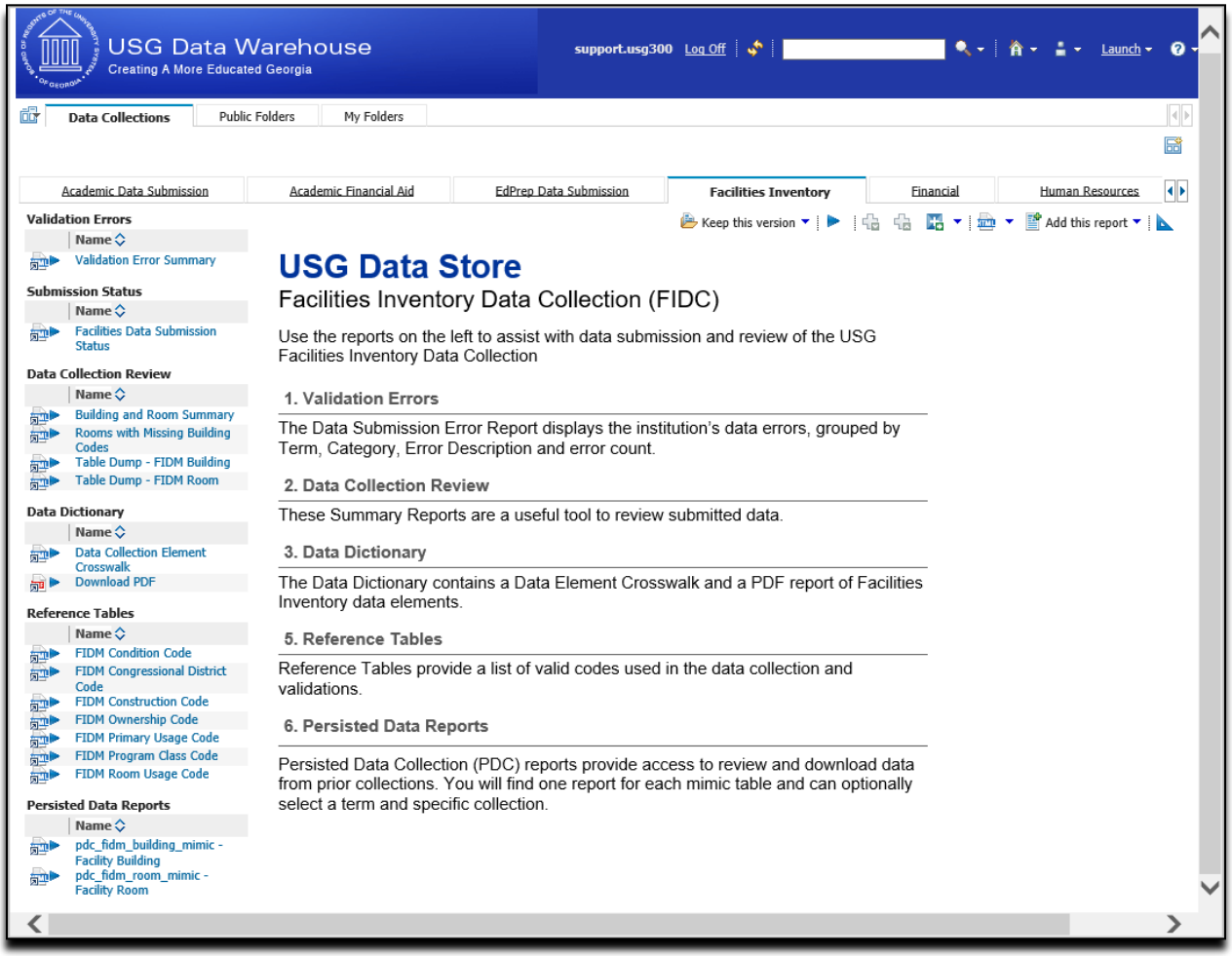
3. Enter User ID and Password. This is the same account information used to log in to the Data Collection Application.

4. The Cognos home page is displayed. Select Data Collections on the left-hand navigation to reach the Data Collections dashboard.



5. The Cognos Dashboard is displayed. All Data Validation Reports can be accessed from this dashboard.

Note: The datamart tabs displayed are based on permissions assigned to your user login.

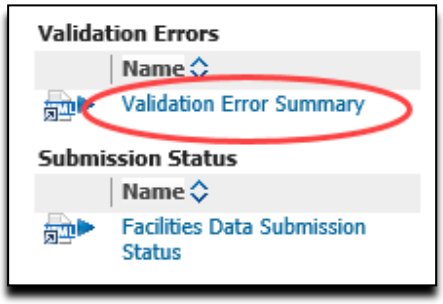


Data Submission Errors

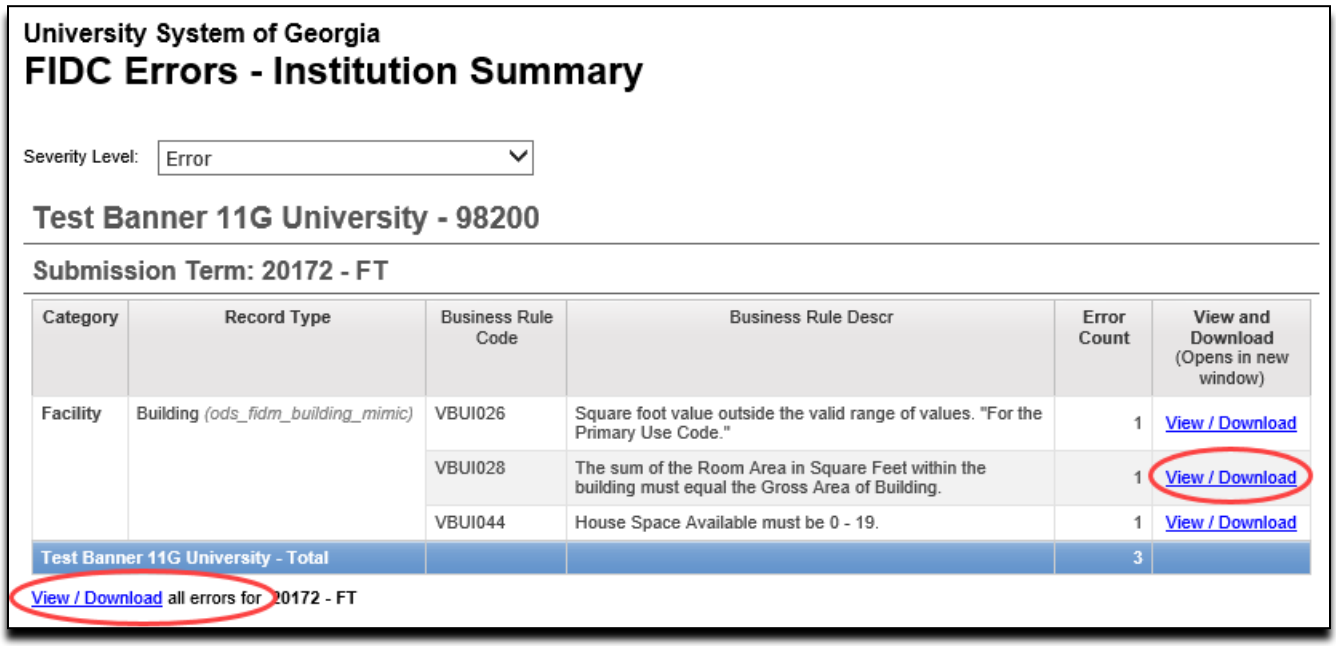
The Validation Errors are located in the left navigation column of the Facilities Inventory tab.

Validation Error Summary

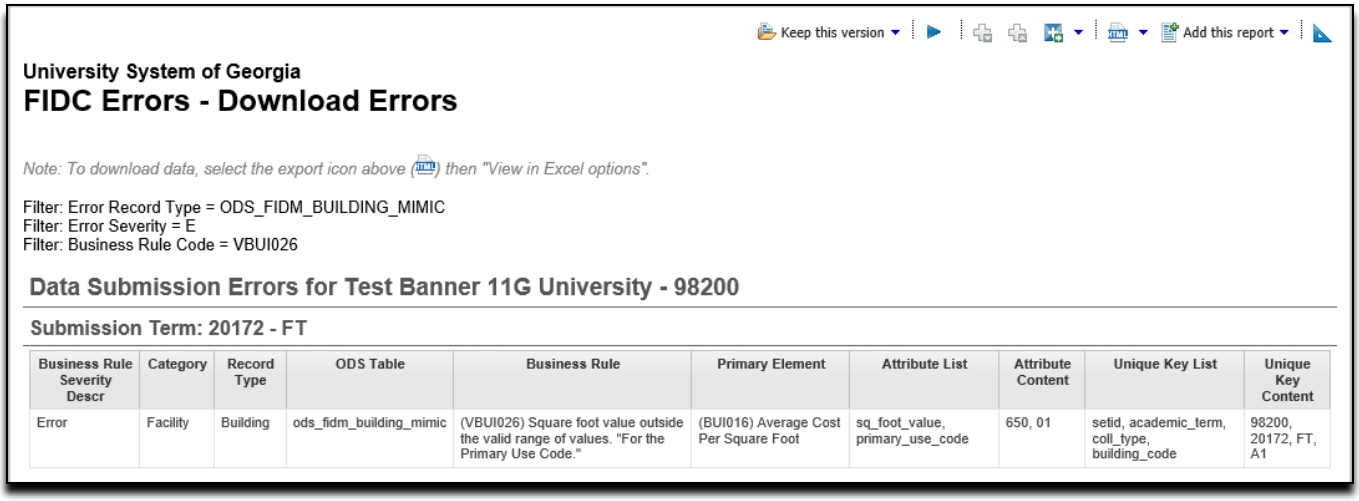
The Validation Error Summary data errors report allows the end user to view the details of validation/edit errors encountered during the extraction.



Errors are grouped by Category and Record Type and can be viewed individually by record type or as a summary of all errors.



Click the View/Download link to in the View and Download column to drill-down to additional detail for a specific Record Type. This view provides the detail of each Business Rule error (validation/edit error) produced for a specific Category and Primary Element.



Keep this version | Add this report

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FIDC Errors - Download Errors

Note: To download data, select the export icon above then "View in Excel options".

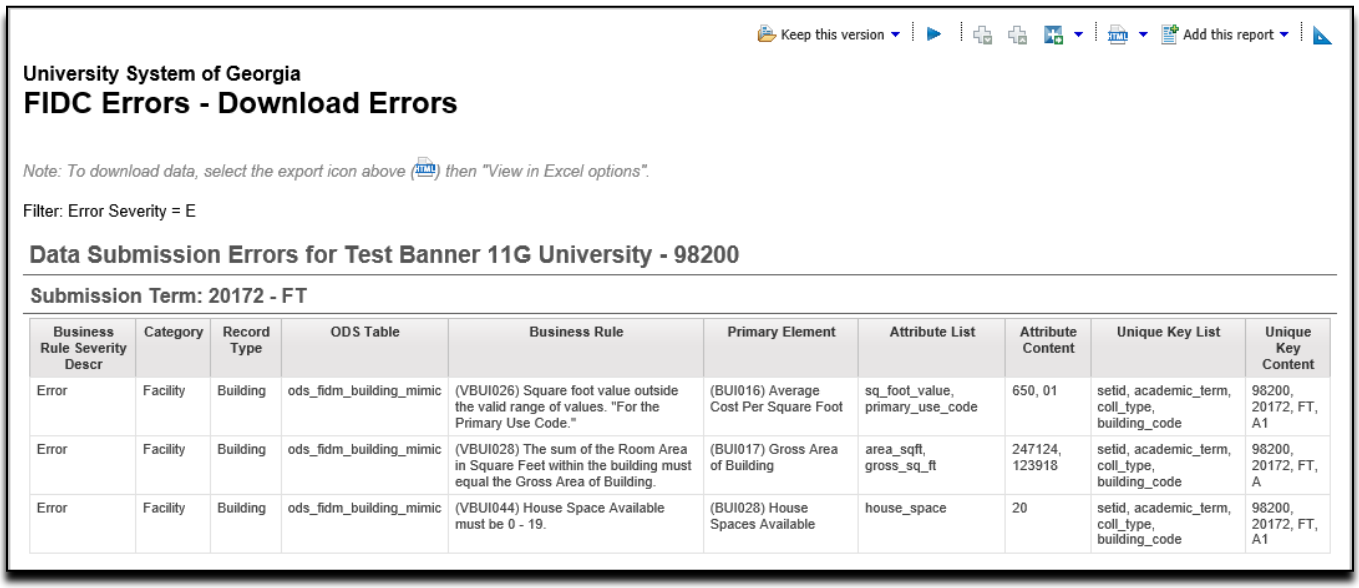
Filter: Error Record Type = ODS_FIDM_BUILDING_MIMIC
Filter: Error Severity = E
Filter: Business Rule Code = VBUI026

Data Submission Errors for Test Banner 11G University - 98200

Submission Term: 20172 - FT

Business Rule Severity Descr	Category	Record Type	ODS Table	Business Rule	Primary Element	Attribute List	Attribute Content	Unique Key List	Unique Key Content
Error	Facility	Building	ods_fidm_building_mimic	(VBUI026) Square foot value outside the valid range of values. "For the Primary Use Code."	(BUI016) Average Cost Per Square Foot	sq_foot_value, primary_use_code	650, 01	setid, academic_term, coll_type, building_code	98200, 20172, FT, A1

Click the View and Download all errors for [current term] link at the bottom of the errors table to drill-down to see a summary of all errors.



Keep this version | Add this report

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FIDC Errors - Download Errors

Note: To download data, select the export icon above then "View in Excel options".

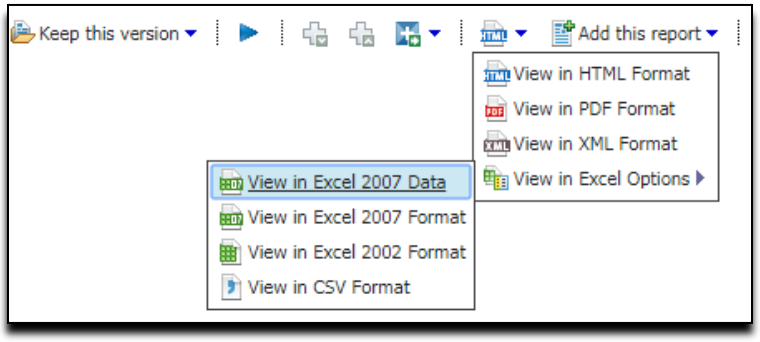
Filter: Error Severity = E

Data Submission Errors for Test Banner 11G University - 98200

Submission Term: 20172 - FT

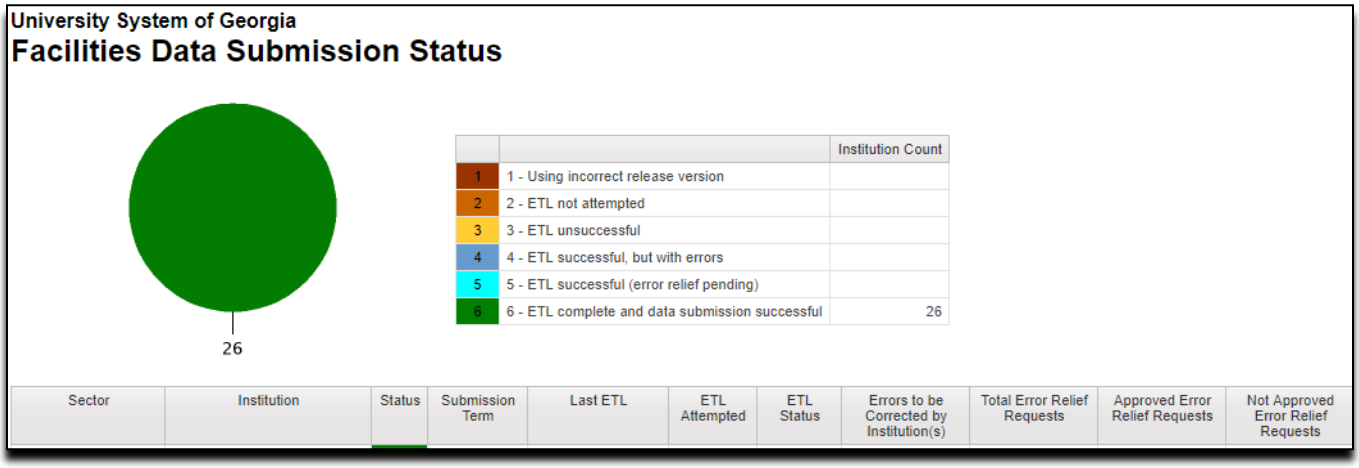
Business Rule Severity Descr	Category	Record Type	ODS Table	Business Rule	Primary Element	Attribute List	Attribute Content	Unique Key List	Unique Key Content
Error	Facility	Building	ods_fidm_building_mimic	(VBUI026) Square foot value outside the valid range of values. "For the Primary Use Code."	(BUI016) Average Cost Per Square Foot	sq_foot_value, primary_use_code	650, 01	setid, academic_term, coll_type, building_code	98200, 20172, FT, A1
Error	Facility	Building	ods_fidm_building_mimic	(VBUI028) The sum of the Room Area in Square Feet within the building must equal the Gross Area of Building.	(BUI017) Gross Area of Building	area_sqft, gross_sq_ft	247124, 123918	setid, academic_term, coll_type, building_code	98200, 20172, FT, A
Error	Facility	Building	ods_fidm_building_mimic	(VBUI044) House Space Available must be 0 - 19.	(BUI028) House Spaces Available	house_space	20	setid, academic_term, coll_type, building_code	98200, 20172, FT, A1

These reports can be downloaded using the Cognos Viewer. In the upper right corner of the report, select the dropdown menu next to the HTML icon. This menu provides download formats. Select the desired format to download the report.


Keep this version
Add this report
View in HTML Format
View in PDF Format
View in XML Format
View in Excel Options
View in Excel 2007 Data
View in Excel 2007 Format
View in Excel 2002 Format
View in CSV Format

Submission Status

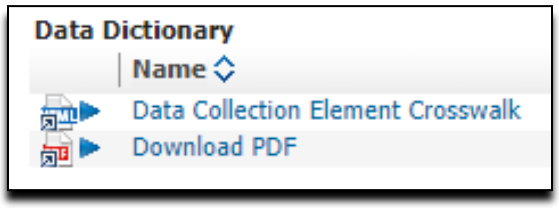
Clicking on Submission Status on the Main Dashboard provides a high-level overview of the collection status.



Data Dictionary

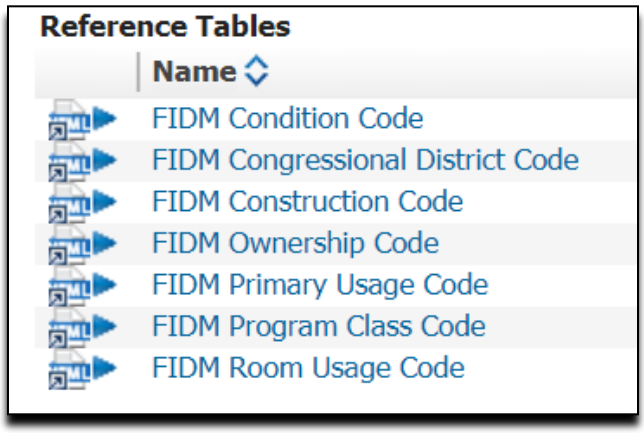
The Data Dictionary Reports provide a technical reference for all facilities inventory data elements. A drill-down report provides crosswalk information.

Click the “Download PDF” option to generate a data element dictionary that contains detailed information, such as definitions, validation rules, collection tables, Banner references, and collection periods.



Reference Code Reports

Reference Code Reports provide access to the Data Warehouse Reference tables.



Below is an example of the FIDM Room Usage Code Reference Table.

Facility Inventory Reference Table
FIDM Room Usage Code (edw_fidm_room_use_lkp)

ROOM_USE_CODE	ROOM_USE_DESCR	ROOM_USE_STATIONS_REQ_IND	FROM_TERM	TO_TERM
010	Custodial Area	N	00000	99999
020	Circulation Area	N	00000	99999
030	Mechanical Area	N	00000	99999
040	Structural Areas	N	00000	99999
050	Inactive Area	N	00000	99999
060	Alteration or Conversion Area	N	00000	99999
070	Unfinished Area	N	00000	99999
110	Classroom	Y	20132	99999
115	Classroom Service	N	00000	99999
211	Discipline Class Laboratory	Y	00000	99999

Appendix A: Document History

This section details the history of the document and updates made for each modification.

Release and Date	Page/Process	Page	Update Description
August 2019	N/A	N/A	Update to reflect GeorgiaBEST standards
August 2021	N/A	N/A	Updated for Cognos Upgrade
March 2023	N/A	N/A	Updated for screen captures and website information