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Overview

The Caltech Data Warehouse is a reporting tool that gathers data from the central administrative systems providing a way for users to analyze the data in a variety of ways. A datamart is a subset of the overall data warehouse with the data organized as a major data subject. Caltech has the following datamarts fully or partially available to the campus users:

- FAMIS
- Human Resources
- Grants Accounting
- Labor Distribution
- PO-AP

Data access to each datamart is handled in different ways. This document provides an overview of the Campus Users’ data access.

Access to the Caltech Data Warehouse begins with the Access Request process. There is an Access Request Form for each datamart. These forms are available on the IMSS web site.

FAMIS Datamart

Full access to the FAMIS datamart is limited to individuals that work in Facilities. However, there are several canned reports to which general Campus Users have access:

- Work Order Tracking **Main Page**
- Work Order Tracking (child/parent)
- Work Order Tracking (details)
- Work Order Tracking (parent/child)
- Work Order Tracking (Summary)

Unlike reports in other datamarts and in Campus Reports, there is no row-level security on these reports.
Human Resources (HR) Datamart

The Human Resources (HR) Datamart consists of essential personnel and salary information from the Oracle Applications Human Resources module. Information includes detailed information on employees such as name, address, assignments, organization, and salary.

**PLEASE NOTE:** The Campus Reports does not include any reports from the HR Datamart.

**HR Data Access**

Access to the HR Datamart is based on either your Supervisor hierarchy in Oracle OR a combination of Business Area, Organization, and Person Type.

- **Supervisor:** You must be a supervisor in order to have access based on the Supervisor hierarchy in Oracle. This grants you access to all the data in the HR Datamart for any employee who reports directly to you, as well as any of your indirect reports (i.e., everyone who reports to those who directly report to you).

- **Business Area:** There are three options for the Business Area access:
  - **Personal Info:** Allows access to personal and employment information, but no salary information.
  - **Salary History:** Provides access to current and historical salary information, in addition to personal and employment information.
  - **Salary Summary:** Provides access to summarized salary information, in addition to current and historical salary information and personal and employment information.

- **Organization:** You will see the business area information for the employees with assignments in the organization(s) to which you are given access.

- **Person Type:** Provides access to “types” of employees. You will see the business area information for the employees with the Person Type to which you have been given access.

- **Include/Exclude – Name to Include/Exclude:** In rare cases access individuals can be included or excluded from your access. For example, you may need to have access to somebody who is the correct Person Type, but has an assignment outside of the organization.
Grants Accounting (GA) Datamart

The Grants Accounting Datamart consists of essential financial reporting information from the Oracle Applications Grants Accounting module. Information in the GA Datamart includes financial summaries, budget, and cost detail.

GA Data Access

The GA Datamart security access was designed to automate access as much as possible when new PTAs are created. You may be given access to PTAs (accounts) in the GA Datamart by any combination of the following:

- **By Organization**: Access to any PTA that has the organization as the Project, Task, and/or Award Organization. If access is given to a division, that access includes any PTA that is owned by an organization under the Division in the HR organizational hierarchy. As new PTAs are created within the organization, you will automatically gain access to those accounts.

- **By PI**: Access to any PTA that has the PI named as the active Project, Task, and/or Award Manager. As new PTAs are created for the PI, you will automatically gain access to those accounts.
  
  ✓ If you have access by PI and this access includes a PTA that you do not think should be included, then the Project, Task, and/or Award Manager must be changed by Finance personnel.

  ✓ While IMSS does handle the setup of the data access, IMSS staff cannot update data in the Oracle Grants Accounting module.

- **By Organization/PI Combination**: Access to any PTA that is both “owned” by the Organization and has the PI listed as the Manager.

- **By Award**: Access to any PTA with the Award selected. If additional projects are created and linked to the Award, then you will have access to the new projects (and associated tasks) as well.

- **By Project**: Access to any PTA with the Project selected. If additional awards are created and linked to the Project, then you will have access to the new awards.

- **By Award-Project**: Access to any PTA with the specified Award-Project combination. This is useful when an Award is linked to more than one Project.

- **By Project-Task**: Access to any PTA with the specified Project-Task combination, regardless of the linked Award(s).
- **By PTA:** Access to a specific PTA. This level of access should *only* be used when an individual should have access ONLY to the specific PTA. If a new Project is being created with a single Task, we do NOT recommend providing access by the specific PTA or Project-Task because any future tasks created will not be automatically added to the individual’s access.

**Compensation Expenditures**

With each combination above, data access can be further defined to include or not include access to compensation expenditures at the cost detail level.

**PLEASE NOTE:** Summary reports (e.g., PTA Summary) will include summary totals for compensation, regardless of your access. However, if you do not have compensation access then detailed information about those compensation costs will not be available.

**Excluding Specific PTAs**

In addition to defining those PTAs to which an individual will have access, specific PTAs may also be excluded from an individual’s access. For example, if an individual should have access to all of the PTAs owned by the division EXCEPT for the GB award that includes staff salary information, the GB award can be excluded from the individual’s overall access.
Labor Distribution (LD) Datamart

The Labor Distribution (LD) Datamart consists of essential reporting information from the Oracle Applications Labor Distribution module. The LD Datamart consists of essential labor schedule and distribution information for Oracle Applications Labor Distribution module. Information in the LD Datamart includes detailed information on employees’ labor schedules, labor distributions, and labor distribution adjustments (LDAs).

LD Data Access

The data access to the LD reports included in Campus Reports is the same as in the LD datamart and handled only by IMSS Data Security. This security access is the same as the access setup in Oracle Labor Distribution.

Access may include or exclude any combination of the following:

- **By Organization:** Access to any assignment with the organization specified. A person may have more than one HR assignment. If these assignments each have a different organization it is possible to have access to only one of the person’s assignments.

- **By Employee:** Access to a specific individual, regardless of the individual’s assignment’s organization.

- **By Person Type:** Access to any individual with the specified Person Type. For example, you might have access to all Staff and Student Employees, but not to Academic Faculty or Academic Non-Faculty.

**PLEASE NOTE:** Access to the GA Datamart and access to the LD Datamart are separate processes. If you have compensation access to a PTA in the GA Datamart this does not mean you will have access in the LD Datamart to people paid on that PTA.
Purchasing / Accounts Payable (PO-AP) Datamart

The Purchasing and Accounts Payable (PO-AP) Datamart consists of essential reporting information from the Oracle Applications Purchasing and Accounts Payables modules. The PO-AP Datamart has summary and detail information about Purchase Orders, Invoices, and Payments.

Not all PO-AP reports are available to Campus Users. The reports that are available have been chosen because they contain additional information not available in the GA Datamart and will be helpful in the management of financial accounts.

PO-AP Data Access

The data access to the PO-AP reports included in Campus Reports is the same as the PTA access in the GA Datamart, and handled only by IMSS Data Security. If you are able to view an account’s data in the GA Datamart you will be able to view Purchasing and Accounts Payable information related to the account in the PO-AP Datamart.