

# Reporting

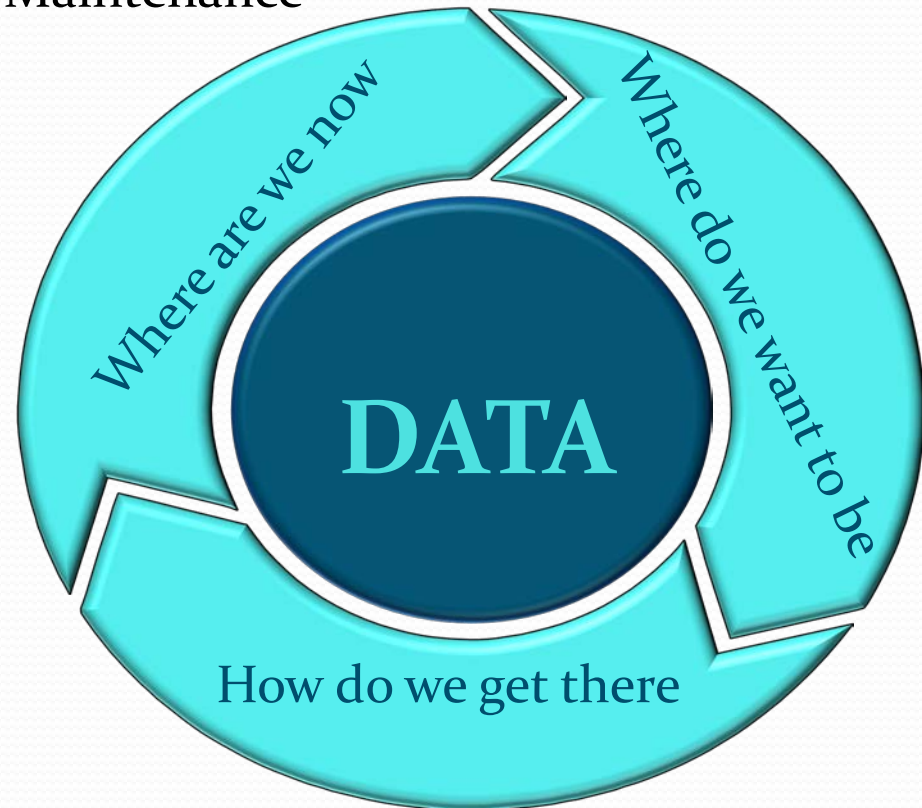
University of Houston System

Enrollment Management Production Support



# Presentation Synopsis

- ❖ Overview of Reporting
- ❖ CB Academic Reporting
- ❖ CB Facilities Reporting and Facilities Maintenance
- ❖ Federal Costing
- ❖ UHIR, Surveys, and Other Adhoc Reporting
- ❖ Data Validation Module



# The INTELLIGENCE



Intelligence = Information



# Overview of Reporting



The Reporting module includes mostly custom bolt-on system functionality that extracts and transforms data from transactional SA source records.

## Reporting functions as a Business Intelligence repository that facilitates:

- Submission of state reports to the State of Texas such as those mandated by THECB (Texas Higher Education Coordinating Board) and LBB (Legislative Budget Board)
- Submission of federal mandated reports such as IPEDS (Integrated Postsecondary Education Data System) and DHHS (Department of Health and Human Services)
- Conducting Performance Assessments, Comparative Trend Analyses, Forecasting, and Strategic Planning

# Overview of Reporting.....cont'd



## Reporting functions as a Business Intelligence repository that facilitates:

- Capturing and freezing ORD snapshots of operational data
- Completion of External Surveys and Publication of Performance Metrics such as university Fact Book, Enrollment and SCH, Average Class Size, Graduation Rates, Student Demographics, institutional online Resume for prospective students and legislators, Common Data Set, U.S. News, The Princeton Review
- Ad hoc Reporting



# Overview of Reporting.....cont'd

## Integration Points

*(example Data Elements)*



**DATA MINING**

# CB Academic Reporting



# CB Academic Reporting

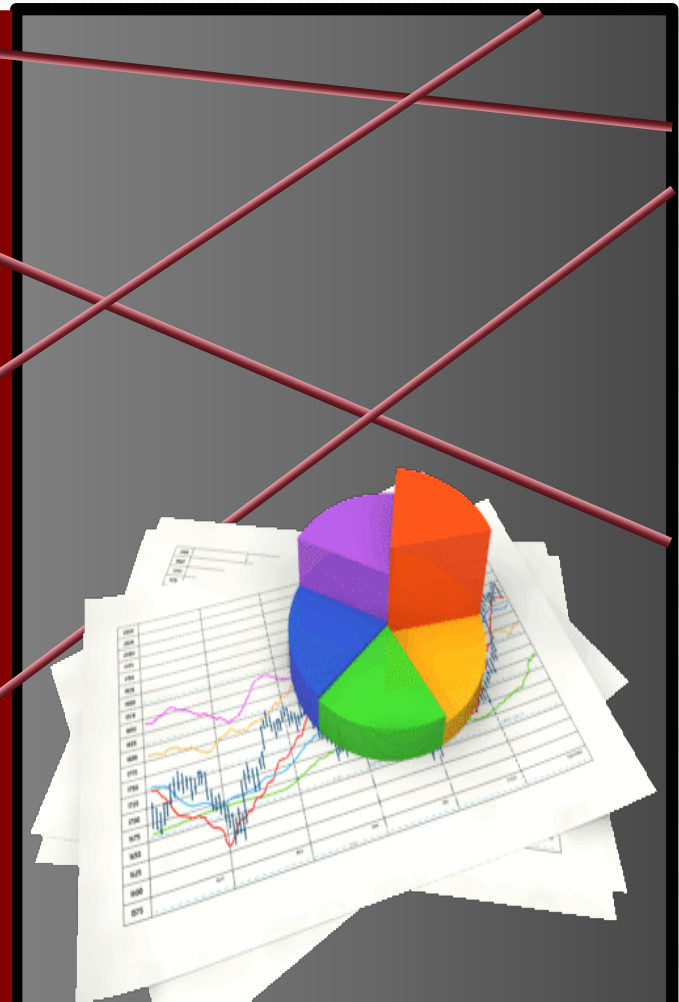
## THECB Mandate:

State of Texas law mandates that UHS universities submit a series of reports to the Texas Higher Education Board on a semester or annual basis.

The Texas Higher Education Data Reports fulfill provisions of the Higher Education Coordinating Act of 1965 as amended (codified as Subtitle B, Chapter 61, Texas Education Code, 1971). The public universities CBM Reporting and Procedures Manual provides detailed descriptions of data elements required for each report.

## THECB Accountability System:

The Texas Higher Education Accountability System is used to track performance on critical measures that exemplify the missions of higher institutions.



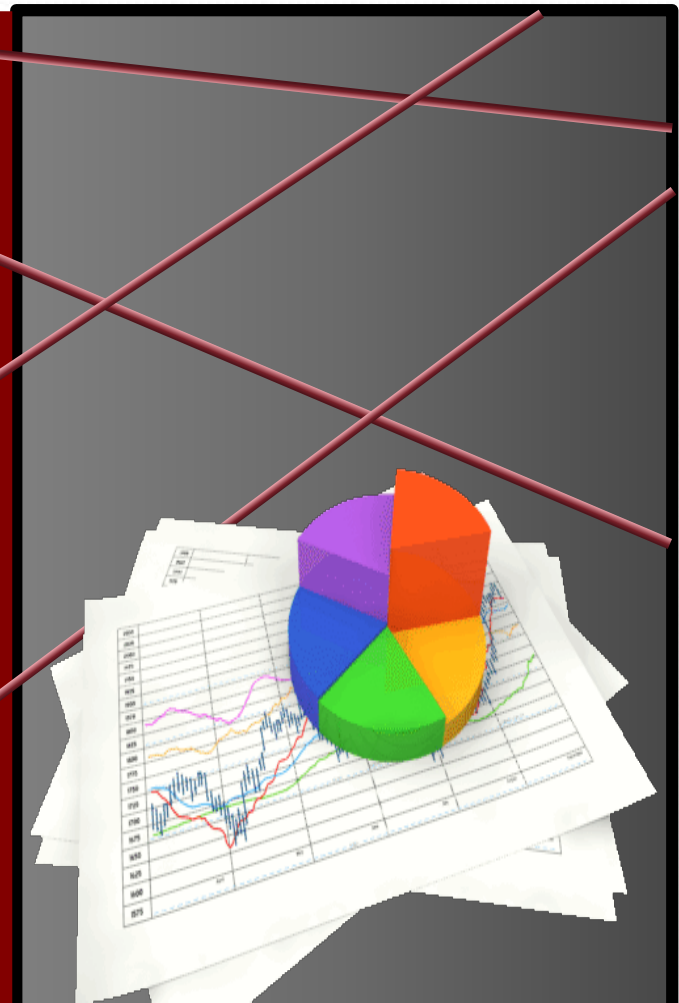


# CB Academic Reporting .....cont'd

## Friends with Benefits:

CB reporting work has its benefits. In addition to meeting the legal mandate of the State of Texas, submitting CB data provides another critical benefit → **MONEY** to the institution.

Data provided to THECB is used by the state in appropriating funds to institutions using formula funding models.





**“SHOW ME THE MONEY!!!”**

State appropriations are a substantial source of UHS funding. Below are UHS institutions funding figures published on THECB's "Online Resume for Legislators and Other Policymakers" for FY 2010:

- ❖ UHM – \$257m in State Appropriations
- ❖ UHD – \$48m in State Appropriations
- ❖ UHCL – \$43m in State Appropriations
- ❖ UHV – \$22m in State Appropriations



Below are comparative Funding Sources percentages published on THECB's "University Report Card" for FY 2008:

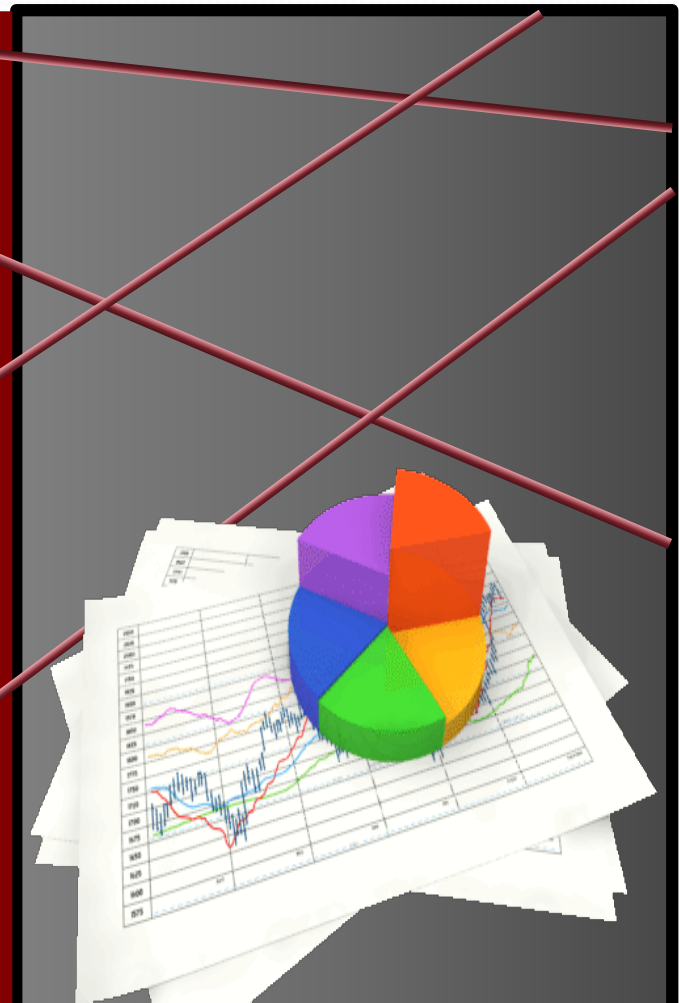
- ❖ UHM – 32% State Appropriations, 29% Tuition & Fees, 27% Institutional Funds, 12% Federal Funds
- ❖ UHD – 37% State Appropriations, 37% Tuition & Fees, 7% Institutional Funds, 19% Federal Funds
- ❖ UHCL – 44% State Appropriations, 38% Tuition & Fees, 12% Institutional Funds, 6% Federal Funds
- ❖ UHV – 47% State Appropriations, 25% Tuition & Fees, 23% Institutional Funds, 5% Federal Funds



# CB Academic Reporting .....cont'd

## CBM Academic report submissions processed in the custom Reporting module include:

- CB01 Student Report
- CB02 Texas Success Initiative Report
- CB03 Course Inventory Report
- CB04 Class Report
- CB06 End of Semester Report (*being retired, CBE1*)
- CB08 Faculty Report
- CB09 Graduation Report
- CBB Admissions Report
- CBN Student Number Change Report
- CBE1 Student End of Semester Report (*new*)
- CBS Student Schedule Report (*new*)

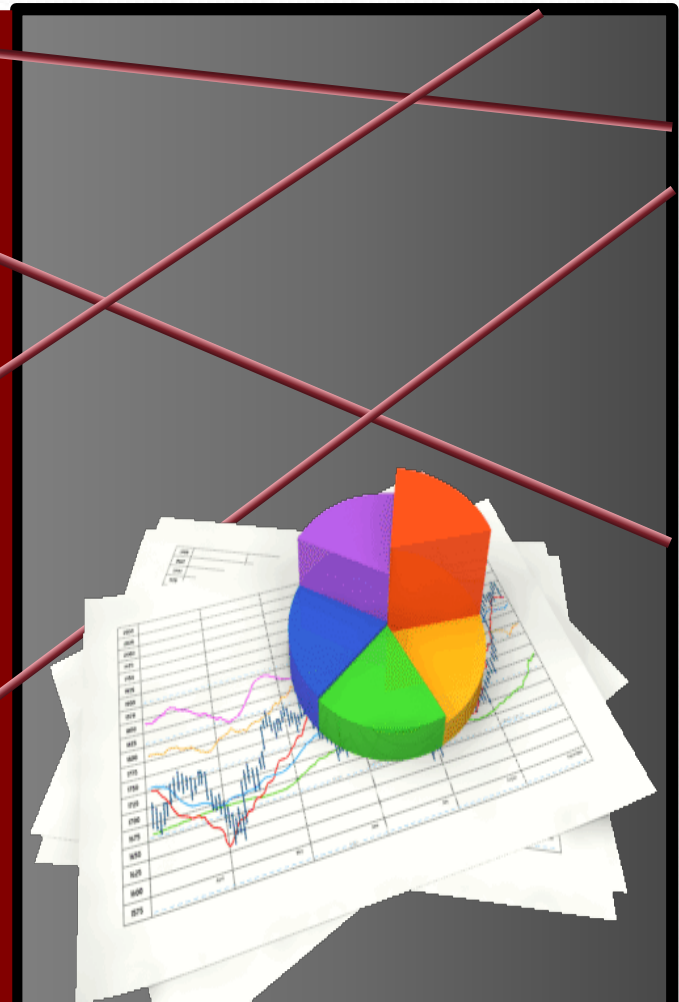




# CB Academic Reporting .....cont'd

## CBMoo1 - Student Report:

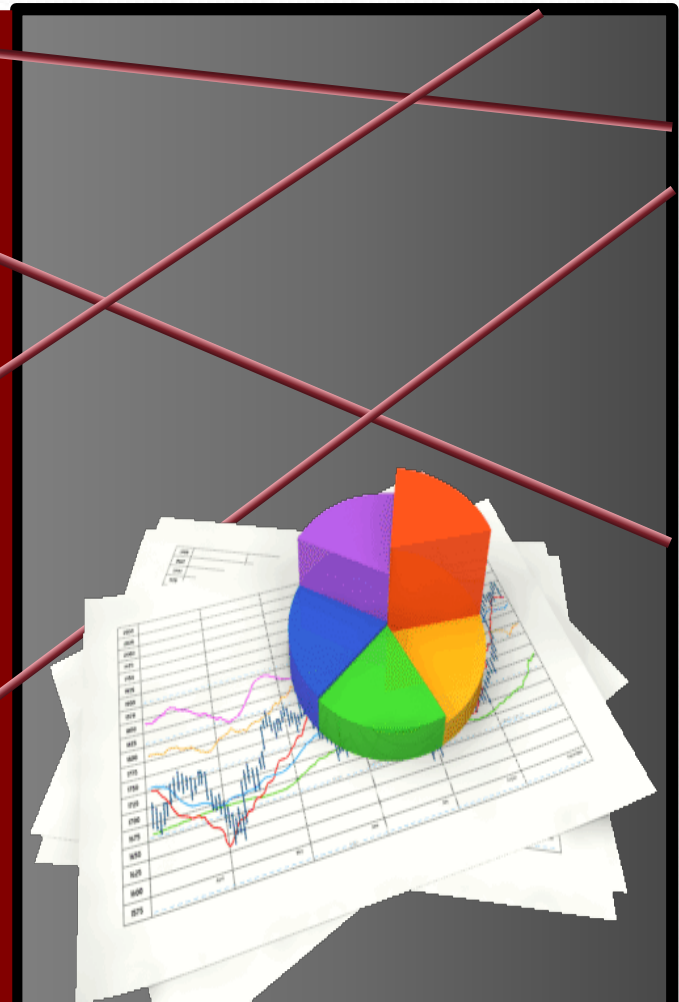
- This report reflects all students enrolled as of the official census date, which is the 12th class day for the Fall and Spring semesters and the 4th class day for each of the summer terms. Students who withdraw from a class on or before the official census date are not be included in this report. To be counted for state funding, the students must be registered as of the official census date and the institution must collect tuition and fees in full from the student (or have a valid accounts receivable on record) by the 20th class day during long sessions or the 15th class day during summer sessions.
- CBMoo1 is due:
  - Fall            October 15
  - Spring        March 15 (February 15 even year)
  - Summer      August 15



# CB Academic Reporting .....cont'd

## CBMoo2 - Texas Success Initiative Report:

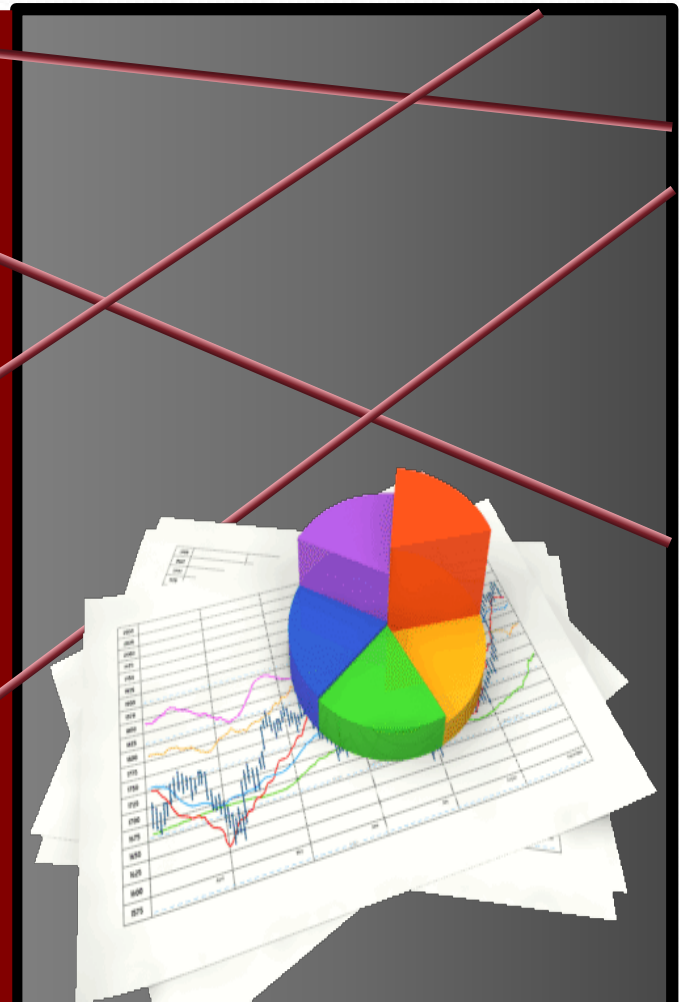
- The CBMoo2 Texas Success Initiative (TSI) Report includes end-of-semester information on all undergraduate students attempting credit hours as required for Texas Success Initiative (TSI) purposes, including transfer students who are registered for one or more Coordinating Board approved courses during the reporting period. CBMoo2 includes students in credit certificate programs, but excludes students in continuing education programs. The report does not include students who withdraw prior to or on the official census date.
- CBMoo2 is due:
  - Fall February 1 (*Fall data is submitted during Spring term*)
  - Spring June 15 (*Spring data is submitted during Summer term*)
  - Summer October 1 (*Summer data is submitted during Fall term*)



# CB Academic Reporting .....cont'd

## CBM003 - Course Inventory Report:

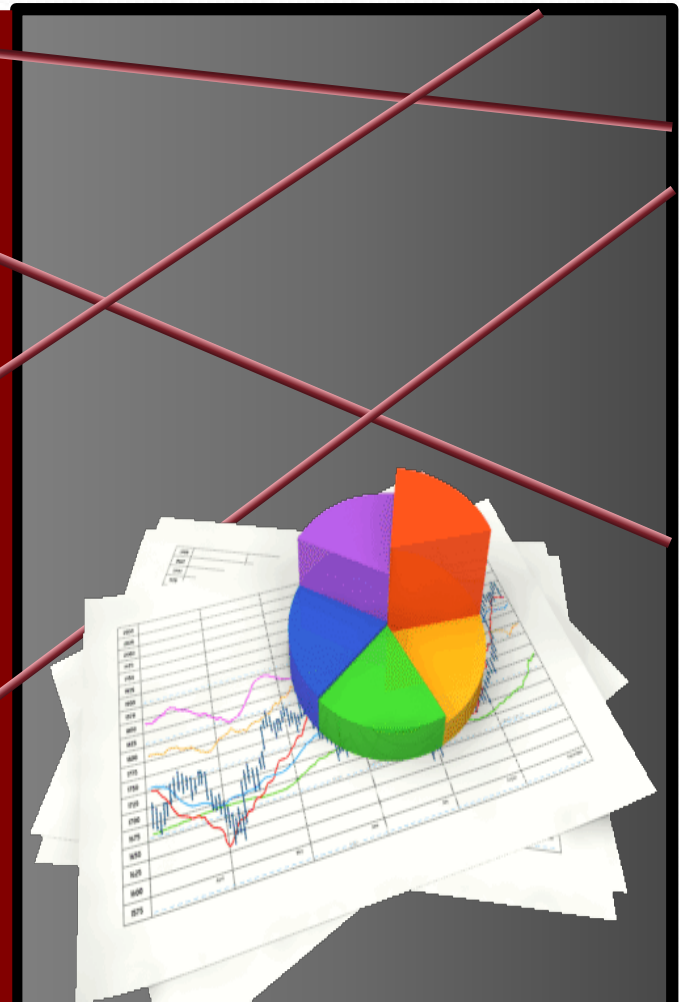
- The CBM003 Course Inventory Report includes a complete inventory of all courses approved to be taught by UHS institutions.
- To comply with the Section 61.052 of the Texas Education Code, the Texas Higher Education Coordinating Board has posted these approved course for all state institutions on their web site: University Courses
- The institution's inventory is valid for a complete academic year from September through August.
- CBM003 is due:
  - Fall                      May (with supplemental updates allowed each semester)



# CB Academic Reporting .....cont'd

## CBMoo4 - Class Report:

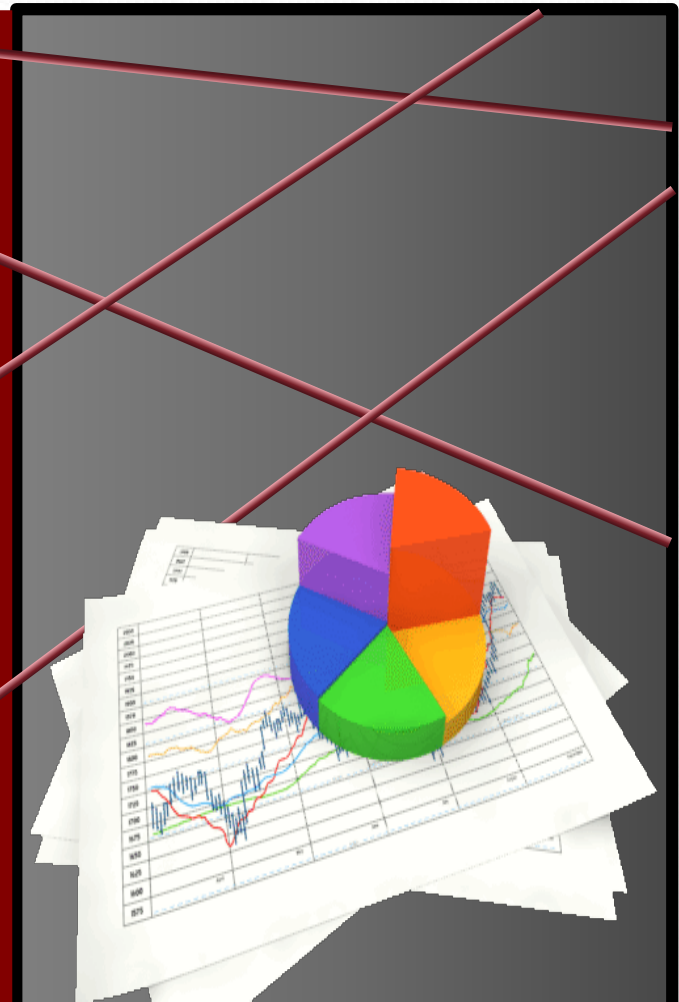
- The CBMoo4 Class Report reflects class enrollments as of the official census date (12th class day for the fall and spring semesters and the 4th class day for each of the summer terms). The report includes only those classes offered in Coordinating Board approved courses. Students who withdraw from a class on or before the official census date are not included in this report. To be counted for state funding, students must be registered for the class as of the official census date and the institution must collect tuition and fees in full from the student (or have a valid accounts receivable on record) by the 20th class day for long sessions or the 15th class day during summer sessions.
- CBMoo4 is due:
  - Fall            October 15
  - Spring        March 15 (February 15 even year)
  - Summer      August 15



# CB Academic Reporting .....*cont'd*

## CBMoo6 - End of Semester Report:

- The End of Semester Report reflects the official enrollment (those who have not withdrawn or dropped) for those classes reported on the CBMoo4 class report as of the final day of class for each semester in Coordinating Board approved courses. These final enrollment numbers only include those students originally reported in the class (on the 12th class day) in the CBMoo4 class report.
- CBMoo6 is being retired (replaced by CBE1)

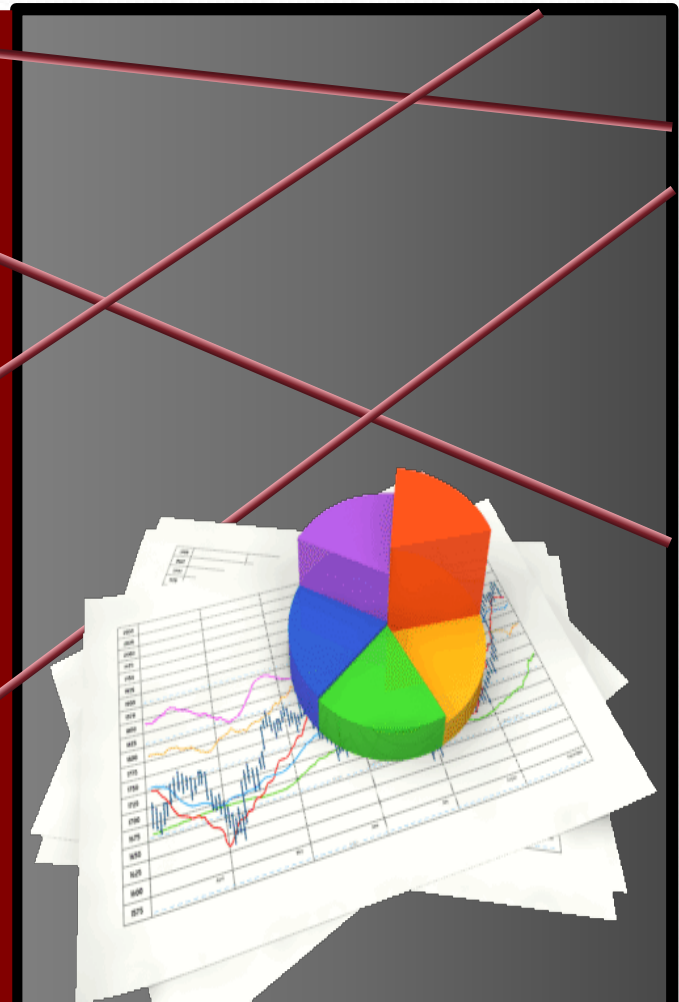




# CB Academic Reporting .....cont'd

## CBMoo8 - Faculty Report:

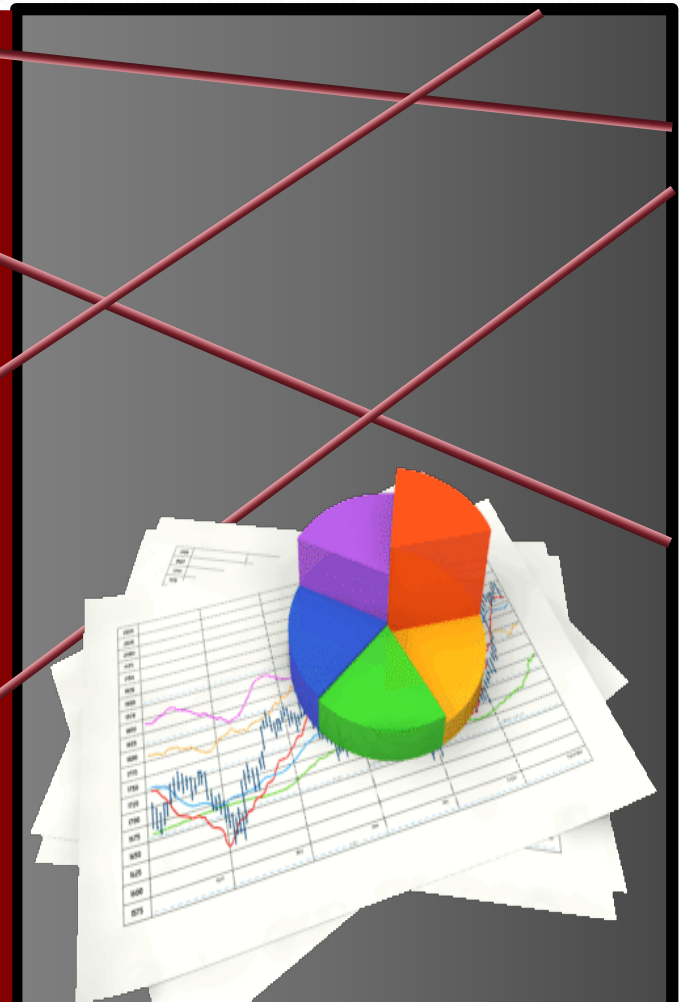
- The CBMoo8 Faculty Report includes data on the academic duties and services of each person who has any type of faculty appointment, regardless of their source of funds or their assignment. The report includes research faculty, librarians, and administrators (if they also have faculty titles) and faculty who may be on leave. All faculty, as well as teaching assistants, identified as "instructor of record" on the CBMoo4 class report must be included in this report.
- Previously a beginning of term report, the CB8 is now submitted at the end of the semester.
- CBMoo8 is due:
  - Fall February 1 (*Fall EOS data is submitted during Spring term*)
  - Spring June 15 (*Spring EOS data is submitted during Summer term*)
  - Summer October 1 (*Summer EOS data is submitted during Fall term*)



# CB Academic Reporting .....*cont'd*

## CBMo09 - Graduation Report:

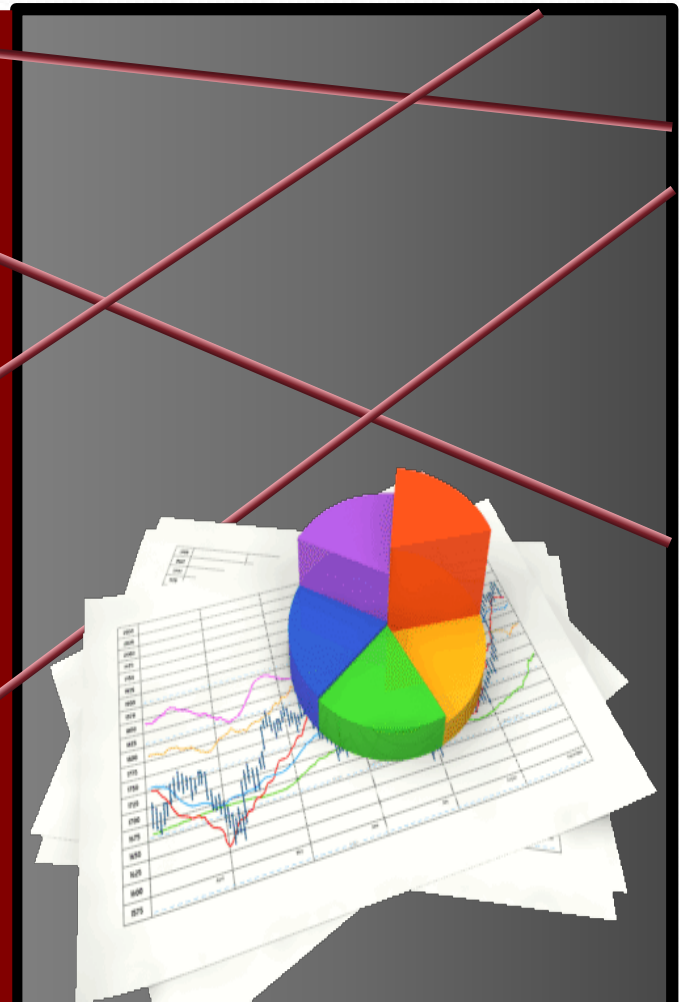
- The Graduation Report includes degrees conferred during the fiscal year immediately preceding the fall semester in which the report is submitted. Only degrees listed in the institution's Inventory of Approved Degree Programs are reported.
- CBMo09 is due:
  - October 1 of each year during Fall term



# CB Academic Reporting .....cont'd

## CBMooB - Admissions Report:

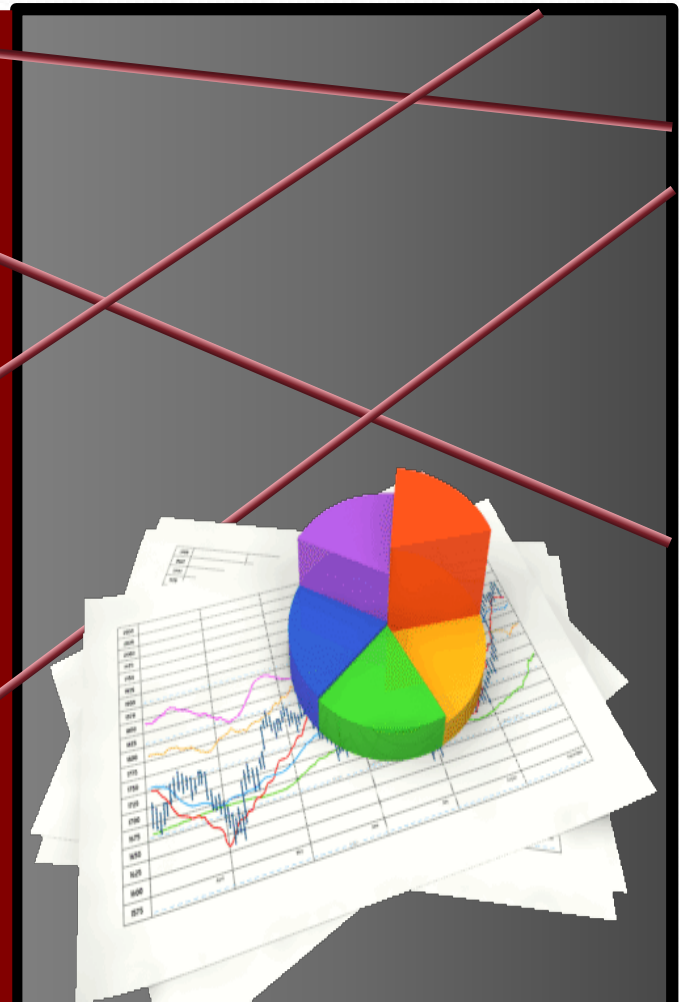
- The CBMooB Admissions Report provides data on applications, admissions, and the subsequent enrollment of students who are seeking a degree. Only complete applications are included. This report contains one record per student for undergraduate, graduate and professional student applications for summer and fall terms.
- This report collects data to meet the requirements of Sections 51.801-51.807 of the Texas Education Code mandated by HB 588 of the 75th Legislature, the Uniform Admissions Bill. This report replaces the Access and Equity 2000 Plan report (formerly Texas Plan report TXP-4) for universities.
- CBMooB is due:
  - October 15 each year during Fall term



# CB Academic Reporting .....cont'd

## CBMooN - Student Number Change :

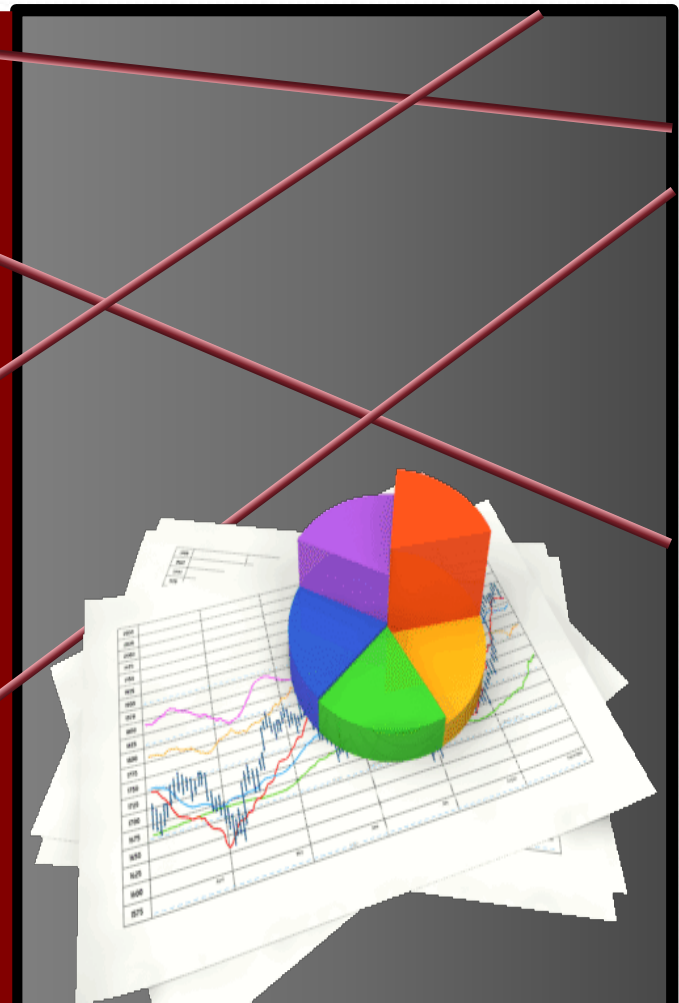
- The Texas Education Code sets an undergraduate funding limit for universities and health-related institutions equal to length of degree plus 45 semester credit hours. The academic semester credit hours attempted at community, technical, and state colleges affect this limit. In order for the Coordinating Board to maintain a database indicating the number of hours an eligible undergraduate student has accumulated toward the limit, student identifying numbers (social security numbers), birth dates, and gender must be as accurate as possible. Changes to these data elements must be reported on the CBMooN.
- CBMooN is due:
  - Any time



# CB Academic Reporting .....cont'd

## CBMoE1 – Student End of Semester Report:

- The Student End of Semester Report reflects students enrolled at the reporting institution as of the final day of each semester. If a student withdraws from a class on or before the census date, the semester credit hours from that class will not be included in this report (no record for the student is submitted if the student withdraws from the institution on or before census date). If a student withdraws from a class after the census date, that class enrollment will be reported so that the CBMoE1 record matches the individual course records on the CBMooS. This report includes all students registered for one or more Coordinating Board approved course(s) for resident credit at the reporting institution, whether the course is taught on-campus or off-campus.
- CBMooE1 is due:
  - Fall February 1 (*Fall EOS data is submitted during Spring term*)
  - Spring June 15 (*Spring EOS data is submitted during Summer term*)
  - Summer October 1 (*Summer EOS data is submitted during Fall term*)

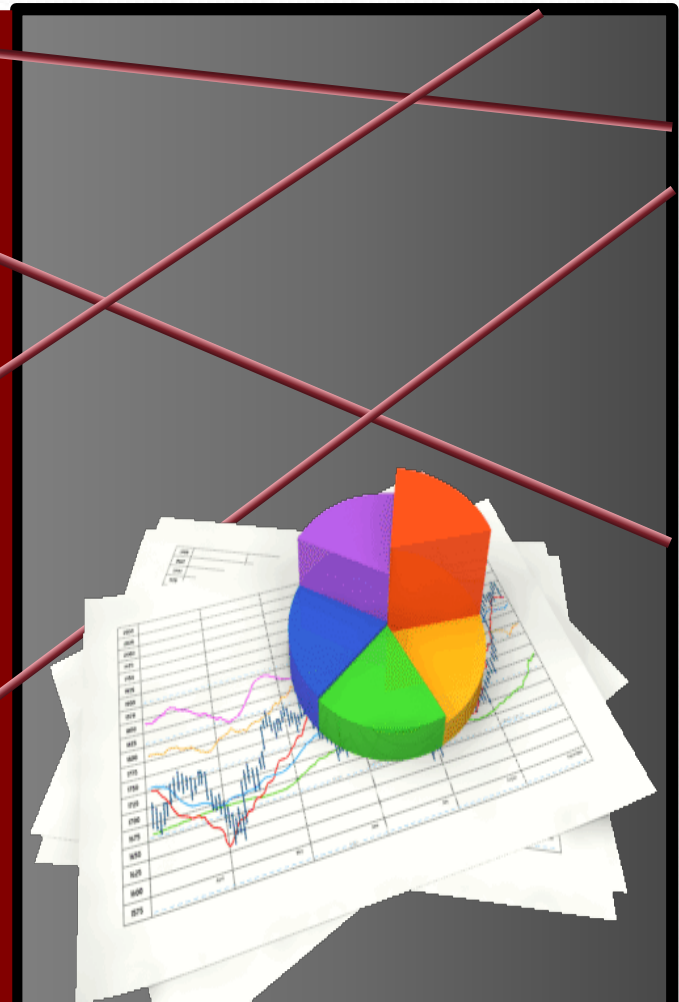




# CB Academic Reporting .....cont'd

## CBMooS – Student Schedule Report:

- The Student Schedule Report (CBMooS) reflects individual courses and grades, by student, as of the final day for each semester, and includes only Coordinating Board-approved courses for credit, whether the class is delivered on-campus or off-campus. Students who withdraw from a class on or before the official census date are not included in this report. There will be a semester credit hour check between the end of semester Student Report (CBMoE1) and the CBMooS.
- CBMooS is due:
  - Fall February 1 (*Fall EOS data is submitted during Spring term*)
  - Spring June 15 (*Spring EOS data is submitted during Summer term*)
  - Summer October 1 (*Summer EOS data is submitted during Fall term*)



# Life Cycle of a PeopleSoft CB Submission

•CB Extract Processes are run to extract data from source transactional tables (includes PE and smaller extracts).

•CB Load processes are run to load mass extracted data into demarcated tables, includes additional derivations.

•Audit and Summary reports are generated and evaluated. Findings may precipitate data clean up in source areas.

•CB Flat Files are generated

•Flat Files are FTP'd to the State

•CB Submissions are Certified by THECB.  
•Certified data is published, metrics analyses and Planning are performed.

**Extract**

**Load**

**Audit &  
Summary  
Reports**

**Flat File**

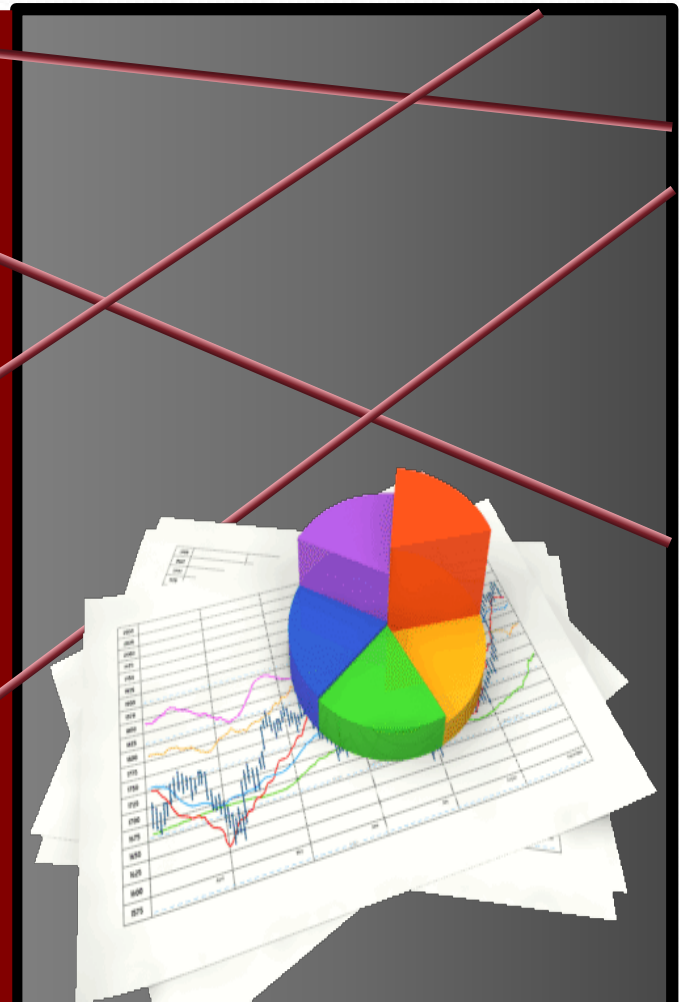
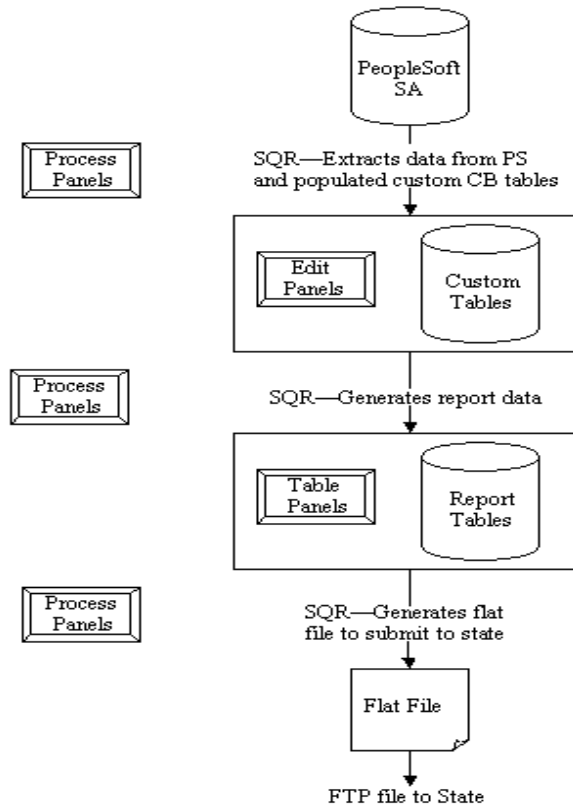
**FTP  
to State**

**Certification**



# CB Academic Reporting .....cont'd

- Summary Diagram of CB Processing



# CB Academic Reporting .....cont'd

## CB Academic Reporting Setup:

- Although CB Processing largely involves extracting data from source transactional tables, the CB Reporting module does contain setup. Below are quick snapshots of CB setup menu items.

The image displays three screenshots of the CB Academic Reporting Setup interface. The first screenshot shows the 'Setup' menu under 'UHS Reporting'. The second screenshot shows the 'CB08 Faculty Report' setup page. The third screenshot shows the 'CB09 Graduation' setup page, which contains a grid of configuration items:

<b>UHS Contacts</b>	<b>CB Degree Table</b> CB Degree Level specified in the State of Texas CBM Manual	<b>CB Degree Level</b> CB Degree Level translation from PS Education Level codes.
<b>CB Degree Certification</b> Degree Certification for CB Reporting.		
<b>Cap Hour Status Student Groups</b> Student Groups used to indicate various student Cap hour status.	<b>CB New Ethnic Origin Codes</b> New CB Ethnic Origin Codes for reporting.	<b>CB Instruction Type</b> All valid CB Instruction Type code from THECB manual.
<b>PS/CB Instruction Type</b> PS to CB Instruction Type translation		

# Example CB Processing: CBM01

## Running the Primary Extract (PE):

Favorites Main Menu > UHS Reporting > UHS CB Reporting > Processes > Data Extraction

**Data Extraction**

Run Control ID: PE [Report Manager](#) [Process Monitor](#) **Run**

Reporting Extract: 000 - Primary PS/UHCB Extract

Institution: 00765

Term: 1840  Summer 2011  Prior Term: 1830  Spring 2011

Census Session: 1  Prior Session: 1

Extract Session(s): 1

Census Date: 06/09/2011  Prior Census Date: 02/02/2011

**Lock the Extract**

**Lock**

**Save** **Return to Search** **Notify** **Add** **Update/Display**



# Example CB Processing: CBM01

## Running the CB01 Load:

Favorites | Main Menu > UHS Reporting > UHS CB Reporting > Processes > Reporting Table Load

### Report Table Load

Run Control ID: CB01

[Report Manager](#) [Process Monitor](#)

**Run**

Reporting Table Load: 001- Enrollments Data


Institution: 00765


Reporting Term: 1840


Census Date: 06/09/2011


### Lock the Load


**Lock**

 Save

 Return to Search

 Notify

 Add

 Update/Display

# Example CB Processing: CBM01

## Reviewing CB01 Load Page:

Favorites | Main Menu > UHS Reporting > UHS CB Reporting > Use > Students (001)

### Reporting Data 001

#### CBM001 Data

Find | View All First 1 of 1 Last

Institution: 00765 UH-Victoria Term: 1840 Summer 2011  
FICE Code: 013231 CB Record Code: 1

Last: [REDACTED] First: J [REDACTED] Middle: [REDACTED]  
Career: GRAD Plan: BADNMBA \*National ID: [REDACTED] EmpID: 0007757

4. Gender:	Male	18. Major (CIP):	52.0201.00 16	36. CEEB HS Code:	[REDACTED]
5. Classification:	6	19. Funding Code:	00	37. PEIMS HS ID:	[REDACTED]
6. Birthdate:	19770326	20. Tuition Exemption:	[REDACTED]	38. Ethnic Origin (Hispanic Status):	1
7. Tuition Status:	1	21. Coll Not Funded:	0	39a.White:	[REDACTED]
8. Residency:	101	22. Develop Not Funded:	0	39b.Black/African American:	[REDACTED]
9. Transfer Student:	[REDACTED]	23. Inter-Inst Not Funded:	0	39c.Asian:	[REDACTED]
10a.On Campus:	3	24. Coll State Funded:	0	39d.American Indian/Alaska Native:	[REDACTED]
10b.Off Campus:	0	25. Develop State Funded:	0	39e.International:	[REDACTED]
11. Doctoral Hrs Funded:	0	26. Ugrd Degree Program:	0	39f. Unknown/Unreported:	7
12. Ethnic Origin:	3	27. Ugrd Fund Limit:	0	39g.Native Hawaiian/Pacific Islander:	[REDACTED]
13. *Semester:	3	31. Dual Credit:	0		
14. Calendar Year:	2011	32. Restricted Prgm:	[REDACTED]		
15. Inter-Inst Funded:	0	33. Non-Degree:	0		
16. Flexible Entry:	[REDACTED]	34. Disclosure:	Disclose		
17. Remote Campus:	[REDACTED]	35. Grad SCH Senior:	0		

Process Name: UHCB01LD  
Last Updated User Name: 0088950

Process Date/Time: 10/18/11 7:35:35AM  
Manual Update Date/Time Stamp:

# Example CB Processing: CBM01

## Generate Audit Report:

Favorites | Main Menu > UHS Reporting > UHS CB Reporting > Processes > Audit Report Generation

Uhcb Audit

Run Control ID: CB01

[Report Manager](#) [Process Monitor](#)

[Run](#)

Audit Report:

001 - Enrollments Data

Institution:

00765

Reporting Term:

1840

[Save](#)

[Return to Search](#)

[Notify](#)

[Add](#)

[Update/Display](#)

# Example CB Processing: CBM01

## Review Audit Report (pdf output):

Date: 01-DEC-2011  
 Database: SA9SBX  
 Program: UHCBO1AU.SQR

AUDIT REPORT - CBM001 / Student Report  
 Institution: 00765 FICE: 013231  
 Reporting Term: 1840  
 Reporting Record Code: 1

National Emplid	Birth Date	10a	13	Major CIP	Last First	31	32	33	34	35	36	37	38	39
3	4 5 6	7 8 9	10b 11 12	14 15 16 17 18	19 20 21 22 23 24 25 26	27 28/29							a	b c d e f g
████████	F 6 ████████	1 178	0 0 3	3 0	52020100 00	0 0 0 0 0 0 0 0 0 0	████████	0	0	0	0 000000		1 1	
0955057			0	2011			████████							

QUESTIONABLE - #10a, Sum of 10a + 10b is less than 1 or greater than 22

Audit Summary	Normal Range	Questionable	Error Values
Item 1 Record Code	2338	0	0
Item 2 Institution Code	2338	0	0
Item 3 Student ID	2338	0	0
Item 4 Gender	2338	0	0
Item 5 Classification	2338	0	0
Item 6 Date of Birth	2338	0	0
Item 7 Tuition Status	2338	0	0
Item 8 Residence	2338	0	0
Item 9 Transfer/First Time	2338	0	0

# Example CB Processing: CBM01

## Generate Summary Report:

Favorites Main Menu > UHS Reporting > UHS CB Reporting > Processes > Summary Report Generation

Uhcb Summary

Run Control ID: CB01

[Report Manager](#) [Process Monitor](#)

Run

Summary Report: 001 - Enrollments Data

Institution: 00765

Reporting Term: 1840

Save

Return to Search

Notify

Add

Update/Display



# Example CB Processing: CBM01

## Review Summary Report (pdf output):

Date : 01-DEC-2011  
 Database: SAPRD  
 Program : UHCB01SU.SQR

001 / Student Report Summaries  
 Institution: 00765  
 Term: 1840

Gender		
Male	777	
Female	1561	
Total		2338

Age		
Under 17	1	
17	0	
18	5	
19-21	107	
22-24	366	
25-30	685	
31-35	421	
36-50	633	
51-64	118	
65 and over	2	
Average Age	32.45	
Total		2338

Residence		
Texas Counties	2184	
Other States	35	
Foreign Countries	119	
Total		2338

Ethnic Origin		
White	1031	
Black	427	
Hispanic	447	
Asian	287	
Indian	5	
International	116	
Unknown	25	
Total		2338

First-Time Enrolled	
White	86
Black	57
Hispanic	45
Asian	20
Indian	0
International	24
Unknown	4
Total	236

New Ethnic Origin		First-Time Enrolled
White	1281	113
Black	444	60
Hispanic	444	45
Asian	295	21
Indian	32	5
International	116	24
Unknown	28	4
Pacific Islander	7	1
Total	2647	273

# Example CB Processing: CBM01

Generate Flat File (dat file submitted to State, pdf file for Review):

Favorites | Main Menu > UHS Reporting > UHS CB Reporting > Processes > Flat File Generation

## Report Generation

Run Control ID: CB01

[Report Manager](#) [Process Monitor](#)

Run

State Report to Create: 001 - Enrollments Data

Institution: 00765

Reporting Term: 1840

Save

Return to Search

Notify

Add

Update/Display

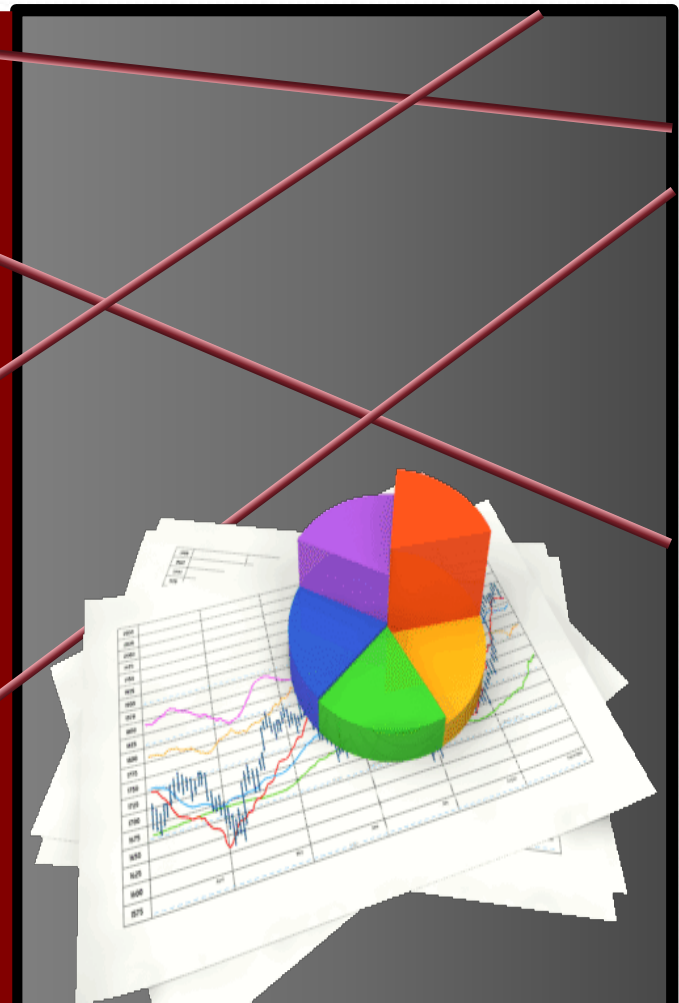
# CB Facilities Reporting and Facilities Maintenance



# CB Facilities Reporting .....*cont'd*

**CBM Facilities report submissions processed in the custom Reporting module include:**

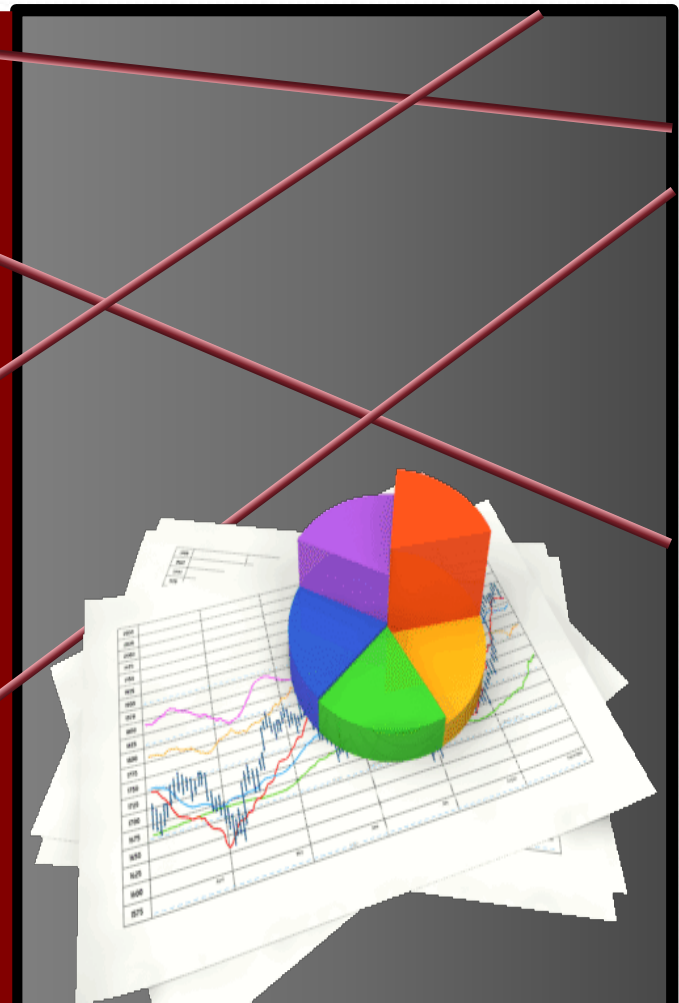
- CB05 Building and Room Report (Room Utilization)
- CB11 Facilities Room Inventory Report
- CB14 Facilities Building Inventory Report



# CB Facilities Reporting .....*cont'd*

## CBM005 - Building and Room Report (Room Utilization):

- The Building and Room Report reflects building and room assignments as of the twelfth class day of the fall semester only. Building and room usage is reported for all courses taught in the fall semester in buildings or rooms in the institutions' Facilities Building and Room Inventory Reports (CBM0011 and CBM0014). This data is used by the Texas Higher Education Coordinating Board to calculate classroom and class laboratory utilization efficiency (average weekly hours of use) for each state institution.
- CBM005 is due:
  - Fall            November 15

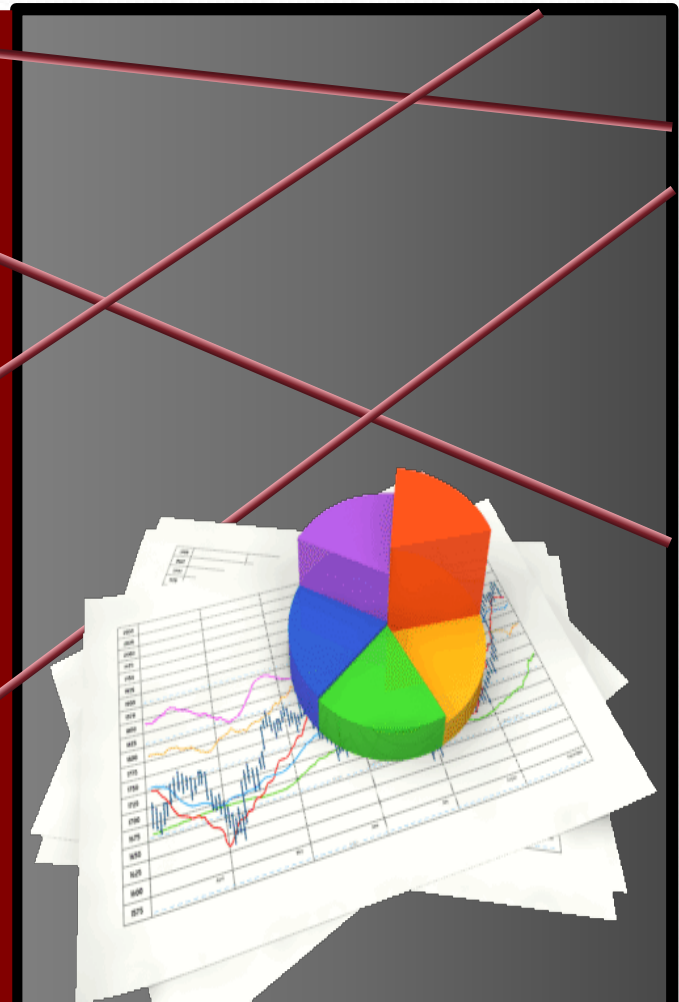




# CB Facilities Reporting .....*cont'd*

## CBM011 - Facilities Room Inventory Report:

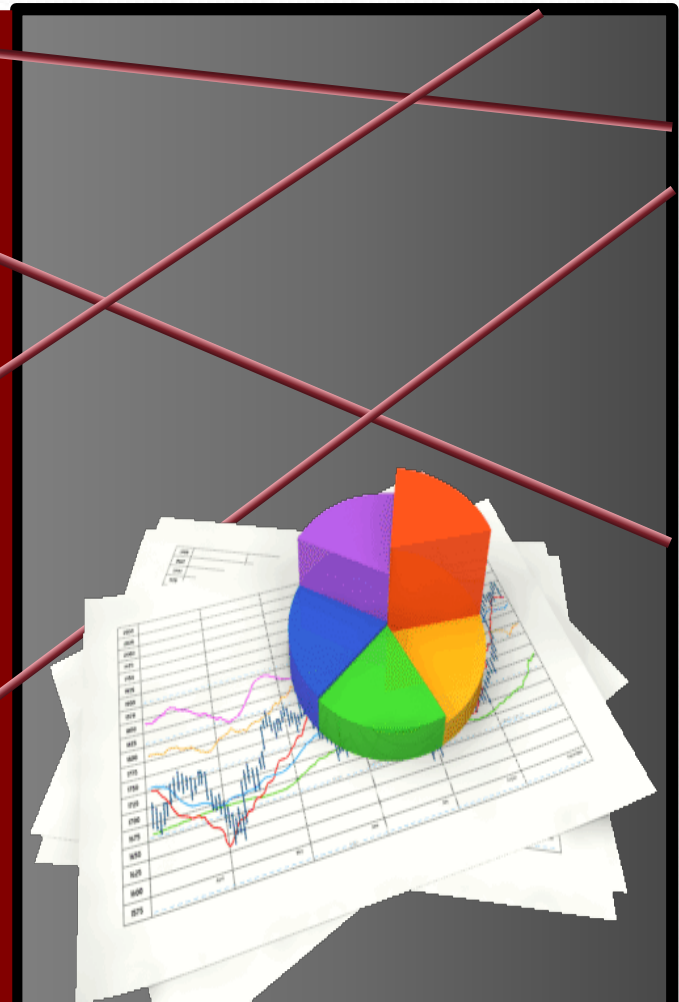
- The Facilities Room Inventory provides a list of all spaces within all campus buildings and the intended design function of each. Information to code rooms according to architectural features may best be obtained by a visual inspection of each room, but may also be obtained from "as-built" drawings. The evaluation of a room's functional use is based on the judgment of a departmental representative and/or facility planning or physical plant personnel who are familiar with the coding structure in the CBM Reporting Manual.
- A room's Space Use Code and Functional Category Code can change between inventories or audit dates. A room's Space Use Code does not change until its basic design function has changed. Space Use Code 060 can be used temporarily to reflect non-assigned space while it is undergoing a conversion by remodeling.
- CBM011 may be updated at any time between January and October, but must be certified by November 1 of each year.
- CBM011 is due:
  - January – October certified by Nov. 1



# CB Facilities Reporting .....*cont'd*

## CBM014 - Facilities Building Inventory Report:

- The Facilities Building Report includes all facilities under the jurisdiction or control of UHS, regardless of location. The report encompasses many different types of structures. For buildings not owned by the institution or shared with other tenants, only the portion of the building leased or controlled by the institution and its pro rata share of gross, assignable area and non-assignable area are included. CBM014 may be updated at any time between January and October, but must be certified by November 1 of each year.
- CBM014 is due:
  - January – October certified by Nov. 1



# CB Facilities Reporting .....cont'd

## CB Facilities Reporting Setup:

- CB Facilities Reporting relies on some setup that is maintained in the PeopleSoft Setup SACR menu. Facilities business owners are responsible for maintaining this data in SACR. Below are quick snapshots of the setup pages.

### Building Table

Favorites | Main Menu > Set Up SACR > Foundation Tables > Facilities > Building Table

### Building Table

Building: 545

		Find   View All		First	◀	1 of 1	▶	Last	
*Effective Date:	<input type="text" value="08/31/2009"/>	Status:	<input type="text" value="Inactive"/>					<input type="button" value="+"/>	<input type="button" value="-"/>
*Description:	<input type="text" value="SERC"/>								
*Short Description:	<input type="text" value="SERC"/>								

# CB Facilities Reporting .....cont'd

## CB Facilities Reporting Setup:











### UHS Building Table

Favorites Main Menu > Set Up SACR > Foundation Tables > Facilities > UHS Building Table


#### Building Table


SetID 00730 University of Houston


Find | View All First 1 of 1 Last


<b>Building:</b>	ATH	Harry Fouke Athletic	<b>Abbr.</b>	ATH	 	
<b>*Effective Date:</b>	<input type="text" value="08/31/1998"/> 	<b>*Status:</b>	<input type="text" value="Inactive"/> 		<b>Initial Occupancy Year:</b>	<input type="text" value="1963"/>
<b>Condition Code:</b>	<input type="text" value="3"/> 	Remodeling - B	<b>Actual Capital Investment:</b>	<input type="text" value="\$1,011,736.00"/>		
<b>Ownership Code:</b>	<input type="text" value="1"/> 	Owned in full by institution	<b>CB Building Code:</b>	<input type="text" value="0512"/>		
<b>Location Code:</b>	<input type="text" value="H0001"/> 	University of Houston	<b>Building Perimeter:</b>	<input type="text" value="992.000"/>		
<b>CB Location Code:</b>	<input type="text" value="1"/> 	On the main campus	<b>Gross Area (Sq Ft):</b>	<input type="text" value="25,039.000"/>		
<b>Building Type:</b>	<input type="text" value="3"/> 	Auxiliary Services	<b>Total Usable Area:</b>	<input type="text" value="22,287.000"/>		
<b>Construction Type:</b>	<input type="text" value="5"/> 	Reinforced Concrete Frames	<b>Total Assignable Area:</b>	<input type="text" value="17,129.000"/>		
<b>Number of Floors:</b>	<input type="text" value="1"/>		<b>Total Education &amp; General Area:</b>	<input type="text" value="16,865.000"/>		
<b>Number of Rooms:</b>	<input type="text" value="91"/>					

 Save


 Return to Search


 Previous in List


 Next in List

 Notify

 Add

 Update/Display

 Include History

 Correct History

# CB

## CB Facilities

SetID: 00730  
 Facility ID: 106107A TV 107A CB Status N  
 Effective Date: 05/05/2011 Status: Active Condition Code: 1 Satisfactory  
 Building: TV Room: 107A Capacity: Building Type: 1 General Purpose Building

### Room Data

CB Room:   
 CB Facility Type:  UtilMechSp UH Facility Type:  UtilMechSp

*CIP Code	Description	*CB Use Code	Description	*UH Department	Description	*Department Use Code	Description	Percentage
1 000000	GENERAL USE	03	Mechanical Areas	H0530	SPACE MGMT UNASSIGNED SPACE	03	Mechanical Areas	100.00

### Room Dimensions

Floor Number:  Usable Area: 321.030  
 Main Length:  Assignable Area: 0.000 [Calculate Square Footage](#)  
 Main Width:  Education & General Area: 0.000

*Alcove Number	Length	Width
<input type="text"/>	<input type="text"/>	<input type="text"/>




# CB Facilities Reporting .....cont'd

## CB Facilities Reporting Setup:







### UHS CB Reporting menu additional setup

Favorites | Main Menu > UHS Reporting > UHS CB Reporting

Main Menu > UHS Reporting > UHS CB Reporting > CB14 Buildings >


 Setup

Setup




 <a href="#">Contacts</a>	 <a href="#">UHS PPA CB BCD</a> Building Condition.	 <a href="#">UHS PPA CB BCS</a> Construction Codes.
 <a href="#">UHS PPA CB BO</a> Building Ownership Codes.	 <a href="#">UHS PPA CB BT</a> Building Type.	 <a href="#">Building Location</a> Building Location

Favorites | Main Menu > UHS Reporting > UHS CB Reporting > CB11 Rooms > Setup

Main Menu > UHS Reporting > UHS CB Reporting > CB11 Rooms >

 Setup

Setup

 <a href="#">UHS Contacts</a>	 <a href="#">UHS PPA CB Room Usage</a> UH / CB Room Usage Codes	 <a href="#">UHS PPA CB Facility CIP</a> CB Facility CIP codes for state facility reporting.
---	---	--

# Life Cycle of a PeopleSoft CB Submission

•CB Extract Processes are run to extract data from source transactional tables (includes PE and smaller extracts).

•CB Load processes are run to load mass extracted data into demarcated tables, includes additional derivations.

•Audit and Summary reports are generated and evaluated. Findings may precipitate data clean up in source areas.

•CB Flat Files are generated

•Flat Files are FTP'd to the State

•CB Submissions are Certified by THECB.  
•Certified data is published, metrics analyses and Planning are performed.

**Extract**

**Load**

**Audit &  
Summary  
Reports**

**Flat File**

**FTP  
to State**

**Certification**



# Federal Costing



# Federal Costing



The custom UHS Federal Costing Reporting functionality provides specific information the university needs to:

- **Prepare the Indirect Cost Proposal**
  - *Specifically the **Space Allocation Study** portion of the Indirect Cost Proposal Preparation Process*
- **Negotiate the Facilities and Administrative Rates**

## Department of Health and Human Services' (DHHS) Division of Cost Allocation (DCA):

The DCA is charged with the responsibility of reviewing and negotiating facility and administrative (**indirect**) cost rates. These indirect cost rates and cost allocation plans are used by institutions to **charge** Federal programs for administrative and facility costs associated with conducting Federal programs.

# Federal Costing



## OMB A-21 (Cost Principles for Educational Institutions for Grants, Contracts, and Other Agreements):

This document is the direction provided by the Federal Office of Management and Budget for the designation of direct and indirect costs. It defines allowable direct and indirect costs, specifies accounting procedures, and must be followed by all universities that accept federal grant and contract funding.

- It Provides cost principles for educational institutions defining allowable, allocable, and consistent treatment of costs.
- Core requirements:
  - **Allocable**
    - A cost incurred solely to advance the work of the project.
    - A cost that benefits both the project and other work of the institution must be distributed using reasonably approximated proportions.
  - **Allowable**
    - Compliant with terms/conditions of the award, sponsoring agency, A-21, and University policy.
  - **Consistent**
    - Is the cost consistently treated according to generally accepted accounting principles using the institutions policies and procedures?
    - Is the cost consistently incurred for the same purposes and treated consistently as either direct or F&A (overhead)?
  - **Reasonable**
    - If the nature of the goods/service and amount involved reflect the action that a prudent person would have taken under the circumstances.



# Federal Costing

## Federal Costing Reporting Setup:

UHS C Favorites Main Menu > UHS Reporting > UHS Federal Reporting > Fed Building Costing > Setup > UHS Cost Group Fed 07

Favorites Ma

UHS Cost C

Enter any infor

Find an Exis

Maximum num

Cost Identifica

Description:

Include His

Search

Search Res

View All

Cost Identifica

1

2

3

4

5

6

7

8

9

10

11

12

13

**Cost Identification:** 2

**07 Federal Building Functional Cost Grouping** Find | View All First 1 of 1 Last

\*Effective Date: 01/01/1901  Status: Active

Description: RESEARCH

Short Description: SPN RSRCH

Long Description: SPONSORED RESEARCH

Cost Type:  Direct Cost  In-Direct Cost  Joint Cost  Other Cost

Save

Return to Search

Previous in List

Next in List

Notify

Add

Update/Display

Include History

Correct His

# Federal Costing

## Running Federal Costing Process:

Favorites | Main Menu > UHS Reporting > UHS Federal Reporting > Fed Building Costing > Reports > Federal Building Costing

Uhcb Fedcost Rpt


Run Control ID: adhoc


[Report Manager](#) [Process Monitor](#)


Run


Institution:   University of Houston


As of Date:  

 Save

 Return to Search

 Notify

 Add

 Update/Display

# Federal Costing

## Federal Costing Process Output:

Favorites | Main Menu > PeopleTools > Process Scheduler > Process Monitor

Date : 01-DEC-2011  
 Database: SAPRD  
 Program : UHFED07U.SQR

FEDERAL 07 UH SPACE REPORT  
 A L L

Institution: 00730  
 As of Date: 28-OCT-2009

5 of 21

Building	Area	Direct	Indirect	Other	Total
A	27,041.000	9,833.700	17,207.300	0.000	27,041.000
ABC	286.000	286.000	0.000	0.000	286.000
ACT	5,093.000	5,093.000	0.000	0.000	5,093.000
ACTA	2,008.000	2,008.000	0.000	0.000	2,008.000
ADB	13,725.000	305.000	13,420.000	0.000	13,725.000
AGL	10,355.000	6,226.000	4,129.000	0.000	10,355.000
AH	80,185.400	68,645.620	10,735.380	804.400	80,185.400
ALUM	12,810.500	12,810.500	0.000	0.000	12,810.500
AMB	745.000	745.000	0.000	0.000	745.000
ARC	90,919.580	75,795.203	15,124.378	0.000	90,919.580
ATC	8,691.000	8,691.000	0.000	0.000	8,691.000
ATH2	168,057.780	155,575.515	12,482.265	0.000	168,057.780
BATC	4,756.000	4,756.000	0.000	0.000	4,756.000
BF	6,324.000	6,324.000	0.000	0.000	6,324.000
BFT	101.000	101.000	0.000	0.000	101.000
BG	546.000	546.000	0.000	0.000	546.000
BH	32,659.000	32,659.000	0.000	0.000	32,659.000
BKD	7,922.000	0.000	7,922.000	0.000	7,922.000
BL	46,675.040	37,966.370	8,708.670	0.000	46,675.040
C	25,275.900	22,326.400	2,949.500	0.000	25,275.900
CAM	19,995.800	18,640.800	1,355.000	0.000	19,995.800
CC	10,651.500	0.000	10,651.500	0.000	10,651.500
CCC	11,751.000	11,751.000	0.000	0.000	11,751.000
CGRS	178.000	178.000	0.000	0.000	178.000
CHC	273,335.500	267,314.400	5,531.600	0.000	273,335.500
COCM	1,141.000	1,141.000	0.000	0.000	1,141.000
COEL	2,698.000	2,698.000	0.000	0.000	2,698.000
COES	3,021.000	3,021.000	0.000	0.000	3,021.000
COIT	62.000	62.000	0.000	0.000	62.000
COM	22,347.590	21,318.490	1,029.100	0.000	22,347.590
CORL	898.000	898.000	0.000	0.000	898.000
CP	76,411.000	76,411.000	0.000	0.000	76,411.000

[uhfed07u 6330875 5.PDF](#)

**Summarizations across all Cost categories.**

# UHIR, Surveys, and Other Ad hoc Reporting



# UHIR, Surveys, and Other Ad hoc Reporting



## UHIR:

- Custom UHIR reporting tables are populated nightly via a Student Data load process and Admissions load process.
- Data is extracted from several source transactional tables and de-normalized (flattened) in the UHIR reporting tables for operational and ad hoc reporting.

## Surveys and Other Ad hoc Reporting:

- Both CB Reporting tables and Custom UHIR Reporting tables serve the broad user community needs for publication, operational, performance, trend analysis and ad hoc reporting .

# Data Validation Module





# Data Validation Module



## Flushing out “Bad Data”:

The Data Audit module was created with the goal of facilitating proactive correction of data anomalies to ensure the reporting of accurate and reliable data.

The functionality generates audit reports of data identified as needing review and/or correction that are emailed to business owners and other parties of interest.

Currently there is only one audit that is being actively used for data cleanup, it's being used by Student Records.

# Data Validation Module

## Data Validation Setup:

Define the Program

Define the Audit

Define the Processing Sequence

Define Report Distributions

Define Correction Page Setup

# Data Validation Module

Favorites | Main Menu > UHS Data Validation > Setup > Correction Page Setup

## Data Validation Setup:

Favorites | Main Menu > UHS Data Validation

### Report Distribution

Program SR1

Audit

*User ID	Description
1 0081899	Heavrin,Cassandra
2 0082681	Dhirani,Laura L
3 0092100	Nguyen,Julie T
4 0096165	Moreno,Susan E
5 0897289	Coleman,Marie A

Program SR1

Audit Courses w/o an Instructor (SSN) Assigned

*Field Name	Field Description	Visible
1 EMPLID	Instructor EmplID	<input checked="" type="checkbox"/>
2 UHIR_FIELD_CHAR1	Subject	<input checked="" type="checkbox"/>
3 UHIR_FIELD_CHAR2	Catalog No	<input checked="" type="checkbox"/>
4 UHIR_FIELD_CHAR3	Class No	<input checked="" type="checkbox"/>
5 UHIR_FIELD_CHAR4	Class Section	<input checked="" type="checkbox"/>
6 UHIR_FIELD_CHAR5	Academic Org	<input checked="" type="checkbox"/>
7 UHIR_FIELD_CHAR6	Course ID	<input checked="" type="checkbox"/>
8 UHIR_FIELD_CHAR7	Course Offer No	<input checked="" type="checkbox"/>
9 UHIR_FIELD_CHAR8	Session Code	<input checked="" type="checkbox"/>
10 UHIR_FIELD_CHAR9	National ID	<input checked="" type="checkbox"/>

Correction Flag

Menu

Bar

Menu Item Name

Component Item Name

Action

Keylist
1 <input type="text"/>

Save Return to Search Notify



# Data Validation Module

## Sample Audit:

Date: 01-DEC-2011  
Program: UHIRAUD2.SQR  
Data User: Coleman, Marie A  
Module: SR

**Student Administration Data Validation Stats**  
Institution: 00730  
Term: 1860

<u>Program</u>	<u>Data Audit Procedure</u>	<u>Errors</u>	<u>Overrides</u>	<u>Last Updated</u>
SR1	COURSE_NOSSN_ASSIGNED_INSTR	209	0	12/01/2011
SR1	FRESHMEN_WITH_ASSOC_DEGREES	0	0	12/01/2011

# Data Validation Module

[Favorites](#)
[Main Menu](#)

## Audit Override

**Program** SR1      **Institution** 00730      **Term** 1860

**Audit** Courses w/o an Instructor (SSN) Assigned

[Run Audit Process](#)

[Refresh](#)

[Clean up Instruction](#)

[Customize](#) | [Find](#) | [View 100](#) | |      First  Last

	Override	Instructor EmpID	Name	Subject	Catalog No	Class No	Class Section	Academic Org	Course ID	Course Offer No	Session Code	National ID
1	<input type="checkbox"/>			ACCT	8396	18346	02	H250ACC	010221	1	1	
2	<input type="checkbox"/>			ART	1301	10591	06	H460ART	011759	1	1	
3	<input type="checkbox"/>			ART	1360	20852	01	H460ART	011795	1	1	
4	<input type="checkbox"/>			ART	3370	19432	02	H460ART	012014	1	1	
5	<input type="checkbox"/>			ART	3374	19439	03	H460ART	012023	1	1	
6	<input type="checkbox"/>			BIOL	4398	18222	01	H470BCH	013512	1	1	
7	<input type="checkbox"/>			CHEE	6399	24396	16	H350CHE	014924	1	1	
8	<input type="checkbox"/>			CIVE	3331	11490	01	H350C_E	015472	1	1	
9	<input type="checkbox"/>			CIVE	3339	11494	01	H350C_E	015480	1	1	
10	<input type="checkbox"/>			CIVE	3339	11495	02	H350C_E	015480	1	1	
11	<input type="checkbox"/>			CIVE	6361	16445	01	H350C_E	015596	1	1	
12	<input type="checkbox"/>			COMD	7391	11584	01	H460CMD	016331	1	1	
13	<input type="checkbox"/>			COMD	7391	11585	02	H460CMD	016331	1	1	
14	<input type="checkbox"/>			COMD	7391	11586	03	H460CMD	016331	1	1	
15	<input type="checkbox"/>			COMD	7391	11587	04	H460CMD	016331	1	1	
16	<input type="checkbox"/>			COMD	7391	11588	05	H460CMD	016331	1	1	
17	<input type="checkbox"/>			COMD	7391	11589	06	H460CMD	016331	1	1	
18	<input type="checkbox"/>			COMD	7391	11590	07	H460CMD	016331	1	1	
19	<input type="checkbox"/>			COMD	7391	11591	08	H460CMD	016331	1	1	





THANK  
YOU