

Instructions for Completing the Human Resources Data Mart Access Request

Access to the HR Data Mart is based on either the user's Supervisor hierarchy in Oracle or a combination of Business Area, Organization, and Person Type.

Section A below provides instructions for setting up access that is based on the Supervisor hierarchy.

Section B below provides instructions for setting up access that is based on a combination of Business Area, Organization, and Person Type.

Section A: Access by Supervisor Role

Supervisor	Business Area	Organization	Person Type	Include/Exclude	Name to Include/Exclude
YES					

A “Yes” in the blue **Supervisor** box (see the illustration above) means that your access is based on the Supervisor hierarchy in Oracle. This grants you access to all of the data in the HR Data Mart for everyone who reports directly to you, as well as all HR data belonging to your indirect reports (i.e., everyone who reports to YOUR direct reports).

NOTE: If you select “Yes” in the blue box, you do not need to enter any other information in the ACCESS section of the form.

Section B: Access by Business Area / Organization / Person Type

Supervisor	Business Area	Organization	Person Type	Include/Exclude	Name to Include/Exclude

If you are not using the Supervisor hierarchy, ignore the **Supervisor** box and go directly to the Business Area / Organization / Person Type section. **NOTE:** You will need to complete a separate row for each type of access you are requesting.

Business Area

Select one of three options from the Business Area drop-down list.

- 1) **Personal Info** allows access to personal and employment information, but no salary information.
- 2) **Salary History** provides access to current and historical salary information, in addition to personal and employment information.
- 3) **Salary Summary** provides access to summarized salary information, in addition to current and historical salary information and personal and employment information.

NOTE: If you need access to "Personal Info," "Salary History," and "Salary Summary," you will need to complete a row for each of the three Business Areas.

Organization

You will see the business area information for the organization you identify in this field. You may input the organization name or organization code. **NOTE:** Inputting “Caltech” allows access to all organizations. If you are requesting access to more than one organization, such as TP03 and TP04, you will need to complete a row for each organization.

Person Type

This field identifies the type of “employee” for whom you are requesting access. You will see the business area information for the Person Type you select from this field. Select one value from the drop-down list. **NOTE:** “ALL” allows access to all Person Types. If you need more than one person type, such as Academic Non-Faculty and Staff, complete one row for each Person Type.

Include/Exclude; Name to Include/Exclude

This set of fields is used only in a specific instance where an individual needs to be blocked from or added to the list of people requested in the Access Request. For example, you may need to add (i.e., include) someone who is the correct Person Type, but is outside of the organization. These fields are used rarely, and in special instances only.

Human Resources Data Mart Access Request

Mail a hard copy of the completed form to Human Resources, MC 153-84: attention Carolann Icasiano

Add ☐ Change ☐ Delete ☐ Employee ☐ Temporary ☐ Student ☐ Consultant ☐ Other ☐

TO BE EFFECTIVE: Beginning Date: _____ Ending Date: _____

USER INFORMATION:

Name: Last: _____ First: _____ Middle: _____

Mail Code: _____ Email: _____ UID#: _____ Work Phone (Ext): _____

Department: _____ Supervisor: _____ Supv Phone (Ext): _____

ACCESS:

Emergency Contact (First Responders only)?			YES	Pay Elements Details (HR Dept only)?			YES
Supervisor	Business Area	Organization		Person Type	Include/Exclude	Name to Include/Exclude	
OR							
Supervisor	Business Area	Organization		Person Type	Include/Exclude	Name to Include/Exclude	
OR							
Supervisor	Business Area	Organization		Person Type	Include/Exclude	Name to Include/Exclude	
OR							
Supervisor	Business Area	Organization		Person Type	Include/Exclude	Name to Include/Exclude	
OR							
Supervisor	Business Area	Organization		Person Type	Include/Exclude	Name to Include/Exclude	
OR							
Supervisor	Business Area	Organization		Person Type	Include/Exclude	Name to Include/Exclude	
OR							
Supervisor	Business Area	Organization		Person Type	Include/Exclude	Name to Include/Exclude	

Confidentiality Agreement?	YES	FERPA?	YES	HR Data Mart Training?	YES
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NOTE: Your request must be approved.

Signed: _____ Dated: _____

 Organizational Approver

Signed: _____ Dated: _____

 Carolann Icasiano, Human Resources