



UNC SYSTEM OFFICE NCAIR PRE-CONFERENCE WORKSHOP

**Sunday, March 22, 2026
Asheville, NC**

Wifi: Renaissance_Conference
pwd: Dobil

Agenda

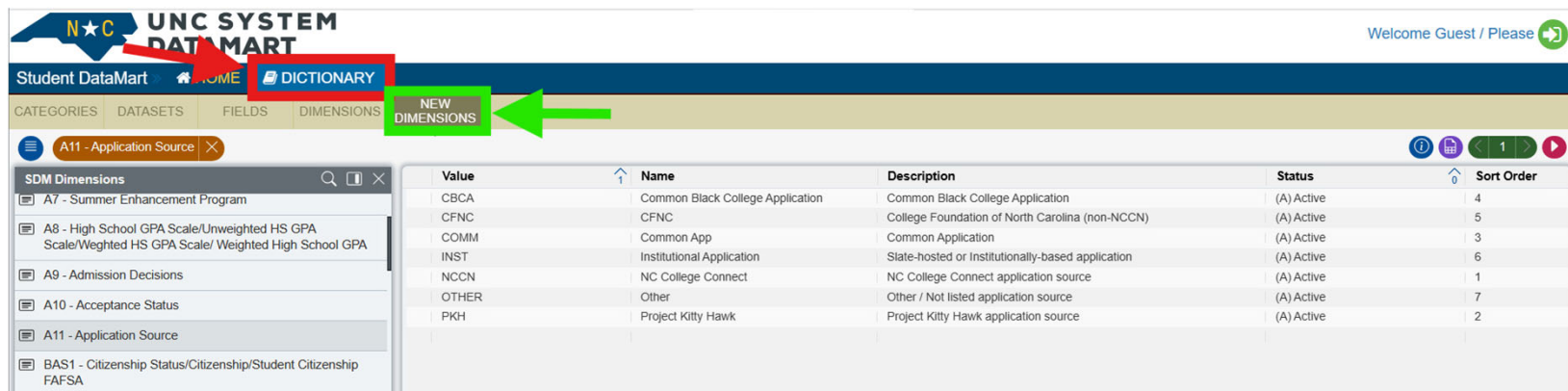
- UNCDM Updates
 - SDM
 - HRDM
 - FDM
- Enterprise Data Office Products and Projects
 - Insight
 - IPEDS
 - Post-Secondary Employment Outcomes (PSEO)
 - Unified Digital Transcript
- Updates on behalf of Strategy & Policy
- Data Governance
- Round table discussion



STUDENT DATA MART

Student Data Mart (SDM)

- <https://uncdm.northcarolina.edu/sdm/index.htm>
- [Resources](#) from November SDM Annual Meeting
- Recent and Upcoming Changes
 - SDM 7.1.0 Release
 - Snapshot Due Date Added to Refresh Email Notifications
 - [Dictionary](#) "NEW DIMENSIONS" tab ([user guide](#))



The screenshot shows the UNC System DataMart interface. The top navigation bar includes 'Student DataMart', 'HOME', and 'DICTIONARY'. Below this, a secondary navigation bar contains 'CATEGORIES', 'DATASETS', 'FIELDS', 'DIMENSIONS', and 'NEW DIMENSIONS'. The 'NEW DIMENSIONS' tab is highlighted in green, with a green arrow pointing to it. A red arrow points to the 'DICTIONARY' tab. The main content area displays a table of application sources with columns for Value, Name, Description, Status, and Sort Order. The table lists various application sources such as 'Common Black College Application', 'College Foundation of North Carolina (non-NCCN)', 'Common App', 'Institutional Application', 'NC College Connect', 'Other / Not listed application source', and 'Project Kitty Hawk'.

Value	Name	Description	Status	Sort Order
CBCA	Common Black College Application	Common Black College Application	(A) Active	4
CFNC	CFNC	College Foundation of North Carolina (non-NCCN)	(A) Active	5
COMM	Common App	Common Application	(A) Active	3
INST	Institutional Application	State-hosted or Institutionally-based application	(A) Active	6
NCCN	NC College Connect	NC College Connect application source	(A) Active	1
OTHER	Other	Other / Not listed application source	(A) Active	7
PKH	Project Kitty Hawk	Project Kitty Hawk application source	(A) Active	2

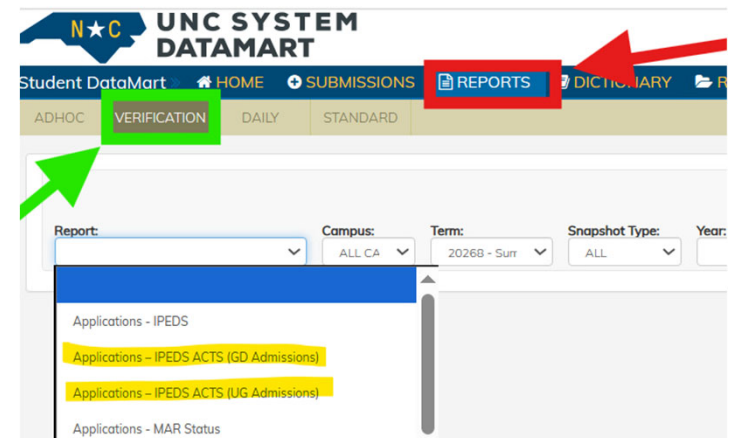
Student Data Mart (SDM)

- Recent and Upcoming Changes cont.
 - SA1 – SA Detail Code Classification: FEEO Inactivation
 - New DIM Values TOEFL added to T2 – Test Component Code
 - New DIM Values CLT added to T2 – Test Component Code and T1 – Test Code
 - New DIM Table: A11 - Application Source

A11 - Application Source			
Value	Name	Description	Status
CBCA	Common Black College Application	Common Black College Application	A
CFNC	CFNC	College Foundation of North Carolina (non-NCCN)	A
COMM	Common App	Common Application	A
INST	Institutional Application	Slate-hosted or Institutionally-based application	A
NCCN	NC College Connect	NC College Connect application source	A
OTHER	Other	Other / Not listed application source	A
PKH	Project Kitty Hawk	Project Kitty Hawk application source	A

Student Data Mart (SDM)

- Recent and Upcoming Changes Cont.
 - New Fields added to Application and Application Pre Datasets
 - APPLICATION_SOURCE
 - APPLICATION_SOURCE_CODE
 - APPLICATION_SOURCE_INST
 - APPLICATION_SOURCE_INST_CODE
 - New Verification Reports
 - Nursing Verification Report
 - Funding Verification Report Update
 - IPEDS ACTS Verification Reports
 - Applications – IPEDS ACTS (UG Admissions)
 - Applications – IPEDS ACTS (GD Admissions)
 - Completions – IPEDS ACTS (UG Completers)
 - Completions – IPEDS ACTS (GD Completers)





HR DATA MART

Human Resources Data Mart (HRDM)

- <https://uncdm.northcarolina.edu/uncdm/index.htm>

Upcoming Changes

- 5.9.0 Release (Summer 2026)
 - Empl_faculty_category values should now be assigned to all employees if they meet the IPEDS definitions of instruction, research, and/or public service.
 - We will use this field to determine research and public service staff starting in 2026.
 - Make sure you're working with HR offices to ensure that employees are properly coded by July 2026.
 - A new institutional field (empl_faculty_category_cd_inst) will be added to the employee feed and to basic_employee.
 - The open and last closed PDF datasets will be discontinued (hrdm_pdf_open_cmp_v and hr dm_pdf_last_closed_cmp_v) as hr dm_all_pdf_cmp_mv already allows monthly reporting.

Human Resources Data Mart (HRDM)

- 5.9.0 Release (Summer 2026): Cont.
 - Zip code, state, and country of residence will now be collected for employees.
 - The state and country dimension tables will be made available in the HRDM interface.
 - Ncas_budget_code will again be required in campus submissions and populated in relevant datasets.
 - Period_code will be added to all datasets for all time.
 - Record_modified_by and record_modified_date will be added to all datasets to give information as to when and by what process the dataset was last updated.

Human Resources Data Mart (HRDM)

- 5.9.0 Release (Summer 2026): Cont.
 - Verification report updates
 - The open and last closed PDF verification reports will be replaced with versions that are runnable by month.
- Release cycle changes
 - There will be two campus-impacting releases each year (likely one in January and one in July).
- Resources
 - HRDM SharePoint site:
<https://uncsystem.sharepoint.com/sites/HRDM-HumanResourcesDataMart>

Human Resources Data Mart (HRDM)

- HR Analytics Dashboards
 - A collection of dashboards on turnover rates, vacant positions, and workforce distribution.
 - Primarily accessible by CHROs, CFOs, and Chief Budget Officers.
 - Used by senior leadership and periodically included in materials for Board of Governors meetings.
 - If you or other members of your office need access, reach out to your CHRO, who will work with System Office to grant access.



FINANCE DATA MART

Finance Data Mart (FDM)

Recent and Upcoming Changes

- <https://uncdm.northcarolina.edu/fdm/index.htm>

2.7.0 Release went into production on 5/16/2025

- Chart of accounts changes to the account and program dimensions
- Full list available at [FDM 2.7.0.0 Release Guide](#)

Finance Data Mart (FDM)

- New Verification Reports
 - New FDM inquiry report for Fund – Allows users to query FDM funds for related hierarchy values.
 - New Institutional inquiry report for Fund – Allows users to query institutional funds for related hierarchy values.
 - New FDM inquiry report for Program - Allows users to query FDM programs for related hierarchy values.
 - New Institutional inquiry report for Program - Allows users to query institutional programs for related hierarchy values.
 - New FDM inquiry report for Department - Allows users to query FDM departments for related hierarchy values.
 - New Institutional inquiry report for Department - Allows users to query institutional departments for related hierarchy values.

Finance Data Mart (FDM)

2.7.1 Release went into production on 11/14/2025

New Ledger_Detail_Pre dataset

- Only populates if there are errors/data that have not migrated to the ledger detail dataset

New verification reports

- Monthly Revenue by Fund Type
- YTD Cash Activity: F&A, ITF, and Auxiliary Funds

Finance Data Mart (FDM)

Dashboards

- Financials - Fiscal Year Overview
 - Updated to default to FY2025
 - Stacked year by year view to see multiple years of data side-by-side
- Auxiliary Dashboard
 - Updated to default to FY2025
 - Mappings and filters updated for accuracy

Finance Data Mart (FDM)

Upcoming 2.8 Spring Release on 5/15/26

- Functionality to partially reopen datafeeds, similar to Completions in SDM
- Users will be able to select data feeds to re-run without having to reopen the entire snapshot
- Chart of account changes



INSIGHT

The Insight Analytics Platform

- AWS Redshift data warehouse + Tableau Server visualization platform
- Centrally managed by System Office for all constituent institutions
- Provides standardized, system-wide data dashboards
- Transitioned from HelioCampus to in-house management (May 2025)

Insight - AWS Migration & System Office Staffing

AWS Migration

- 10-month transition project 2024-25
- May 2025 Go Live
- Benefits to you:
 - Enhanced security
 - Scalability
 - Local control over development priorities

Staffing

- EDO - Dashboard development and maintenance
- Insight Ops Team - Platform management by combined EDO + IT effort
- Product Lead - Alice Fleck
- Tableau Specialist – TBD!

(Job Posting:

<https://northcarolina.csod.com/ux/ats/careersite/4/home/requisition/693?c=northcarolina>)

Insight – System Office vs Campus Responsibilities

System Office

- Develop, operated, and maintain platform Infrastructure
- Ensure platform performance, availability, and capacity, coordinate outages
- Establish and support the user community, delegate user administration to campuses
- Govern platform content, security, lifecycle management, and incident management
- Develop and maintain documentation
- Develop dashboard content for internal purposes and system-wide use

Institutions

- Administer access by institution users and groups
- Communicate data security standards and practices to users
- Administer institution-specific Redshift & Tableau data spaces and structure
- Develop dashboards and adhere to security and publishing standards
- Acquire and manage Tableau Desktop licenses for institution use
- Report incidents on discovery
- Request features or enhancements
- Participate in the user community, especially for testing and updates

Insight – Newly Developed/Remodeled Dashboards

New

- Workforce Change Dashboard
- Subsequent Enrollment and Declined Admissions
- Academic Program Planning Dashboard

Remodeled

- Data Catalog
- Oracle to Redshift Replication Dashboard

Insight – Dashboard Inventory and Update Schedule

Public

- Fact Sheets
- Public Degrees Dashboard
- Public Enrollment Dashboard
- Public Financial Aid Dashboard
- Public Freshmen Admissions and Performance Dashboard
- Public Transfer Students Dashboard
- Strategic Plan Dashboard

Available to All Insight Users

- Academic Program Planning
- Admissions
- Admissions Daily
- Auxiliary Dashboard
- Average Class Size
- Core Metric Drivers
- Course Success
- Enrollment
- Enrollment Allocation SCH Rates
- Enrollment Daily
- Enrollment Funding
- Financial Aid
- Financials - Fiscal Year Overview
- Graduation Retention
- HR Fact Book
- IPEDS Comparison Group Dashboard
- Subsequent Enrollment and Declined Admissions
- Transfer Courses
- UNC System IPEDS Financials
- Workforce Change

Insight – Upcoming Planned Work

- Users, Groups, and Sites for Campus Admins
- Core Performance Metrics with Drilldown
- Enrollment Forecasts
- Financial KPIs
- Nursing Pathways

Your suggestions for future consideration?

Insight – How and When to Contact Us

Insight Ticket

- insight@northcarolina.edu
- Create a ticket when you have a question about an Insight dashboard, Redshift dataset, access/permissions

Insight Request Form

- <https://app.smartsheet.com/b/form/a18351f91b2140adb751588792b7767b>
- Fill out the form when you have a suggestion to develop a new dashboard, dataset, or extract, or make changes to an existing one



IPEDS

IPEDS – Upcoming Deadlines

- Upcoming deadlines:
 - ACTS (Admissions and Consumer Transparency Supplement) is now due March 25 with some campuses receiving extensions until April 8.
 - Finance is due April 1.

IPEDES – Upcoming Changes

- Upcoming changes:
 - We will keep you updated this summer with any IPEDES changes for the 2026-2027 collection year and/or any coding changes we plan to make, especially in light of the new ACTS survey.
 - For Student Financial Aid:
 - We will discuss reporting as it relates to aid awarded vs. aid received.
 - We will start including institutional waivers as part of institutional aid numbers.
 - For Human Resources:
 - Empl_faculty_category_code will be used to report on research and public service staff starting in 2026.
 - Guidance on how to report using the new race/ethnicity categories established in the 2024 update to SPD-15 may be provided by NCES at the end of March.



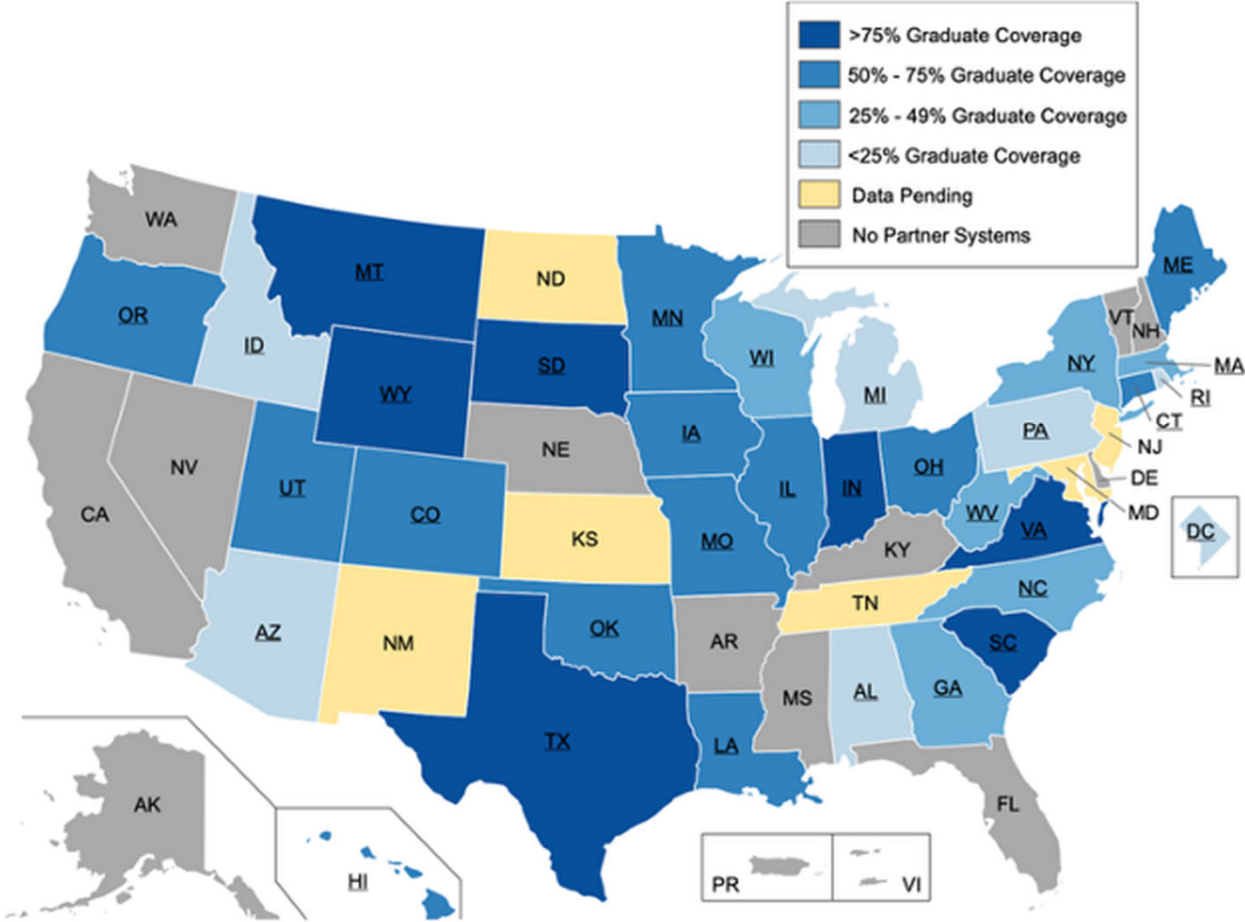
PSEO

What is PSEO?

- Postsecondary Employment Outcomes
- Led by Census
- Uses data from Labor-Employment Household Dynamics (LEHD) survey
 - Quarterly database covering 96% of employment in U.S.
 - Employment data is built from state UI wage records

PSEO Coverage

PSEO Coverage Map



What Does PSEO Provide?

- Aggregate data about UNC System graduates
- Splits by 1, 5, 10 years post-graduation, cohorts, 4-digit CIP code (undergrad) and 2-digit CIP code (graduate)
- Currently covers 2001-2021

1. Wages

2. Industries

3. Geography (In-state vs. Census region)

Data Type

Earnings
 Flows

State

North Carolina

Institution

All Partner Institutions in North Carolina

Degree Level

Baccalaureate

Graduation Cohort

All Cohorts

Compare Earnings by

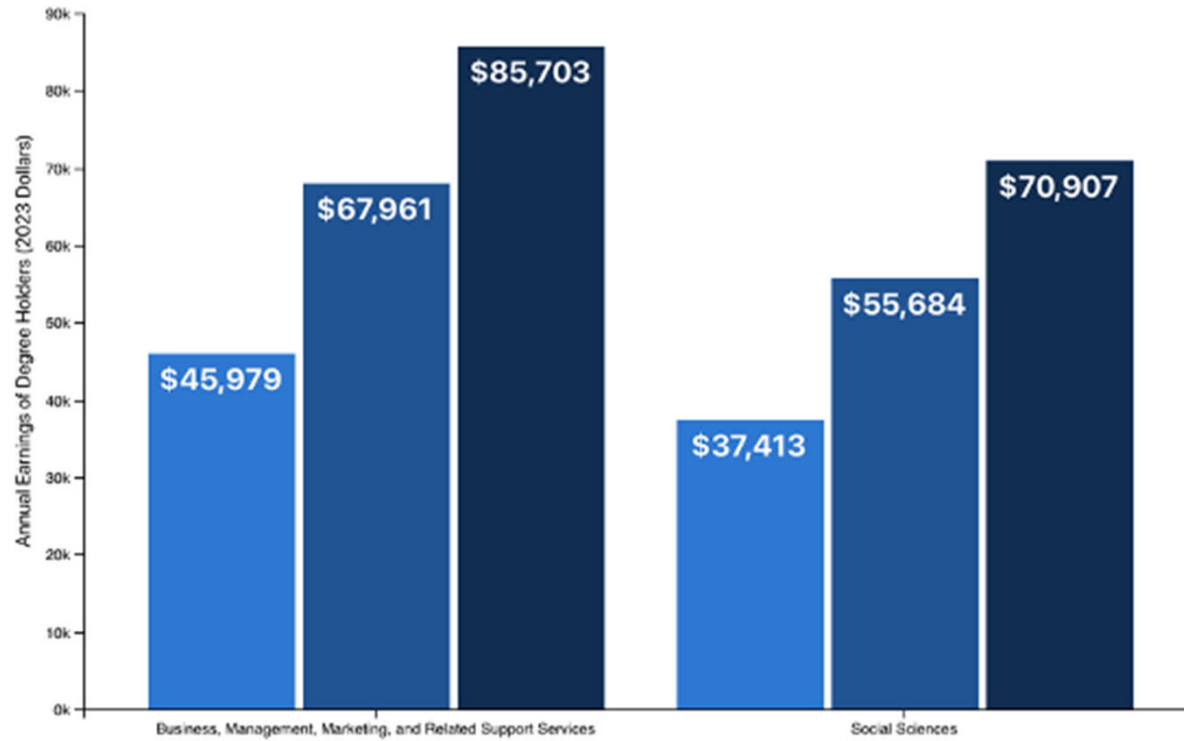
Time
 Percent

Earnings-percentile Filter

25
 50
 75

Legend

- 1 Years Postgrad
- 5 Years Postgrad
- 10 Years Postgrad



Program Specificity

General
 Detailed

Sort Program List by

Size
 Name

All Instructional Programs	Business, Management, Marketing, and Re...	Health Professions and Related Programs
Education	Social Sciences	Communication, Journalism, and Related P...
Engineering	Psychology	Biological and Biomedical Sciences
Visual and Performing Arts	Parks, Recreation, Leisure, Fitness, and Ki...	Computer and Information Sciences and S...

Data Type

Earnings Flows

State

North Carolina

Institution

All Partner Institutions in North Carolina

Degree Level

Baccalaureate

Graduation Cohort

All Cohorts

Destination Flows

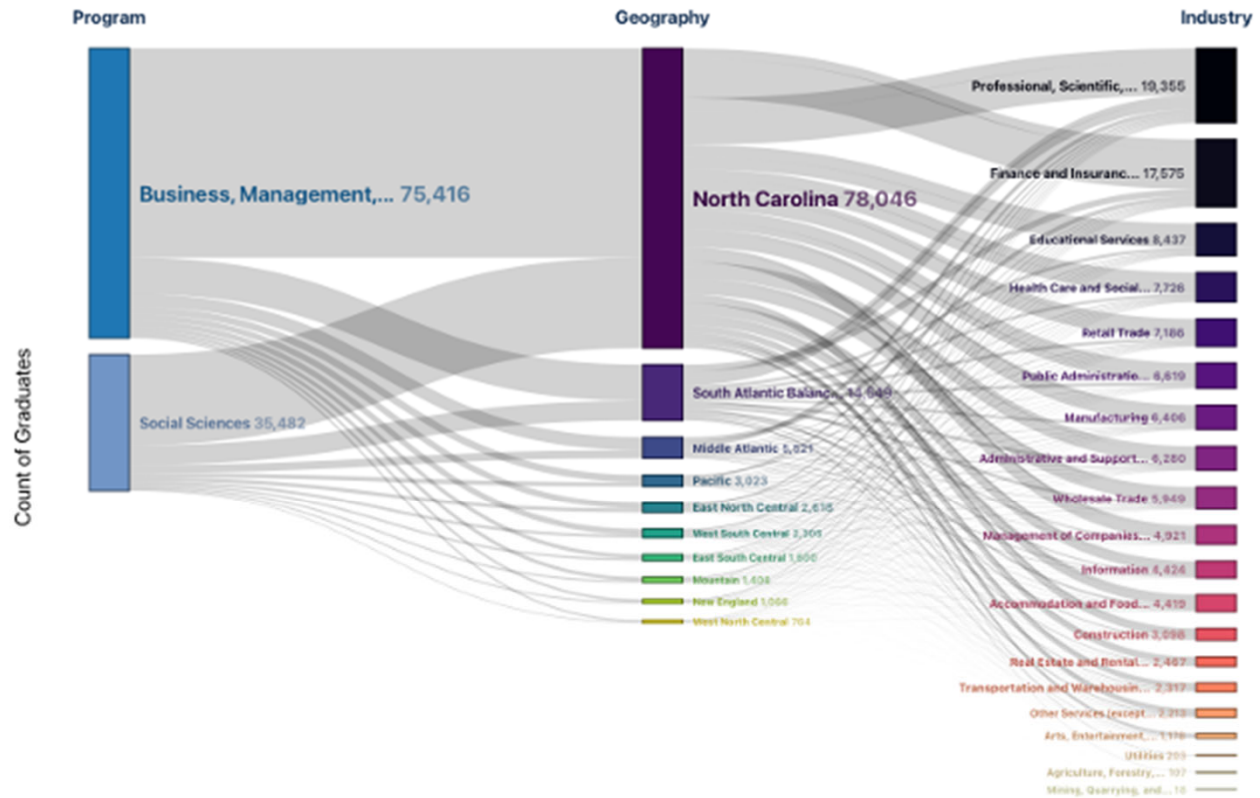
Industry Geo

Years-postgrad Filter

1 5 10

Display

Count % Share



PSEO Explorer

What is Included/Excluded in PSEO?

Includes

- All graduates (including certificates)
- Those with 3+ quarters of non-zero earnings
- Those with matched records

Does not include

- Non-completers
- Contractors, self-employed, etc. that are not covered by unemployment insurance
- Student-level data

PSEO Value to UNC System

- Provides context to student-level wage data from NC Commerce
- Biggest complaint from Deloitte ROI study was out-of-state workers
- Can provide geography and industry of workers
- All data is publicly available on website and is available for download

PSEO Resources

- [PSEO website](#)
- [PSEO Explorer](#)
- [Five minute YouTube video](#)
- [One hour YouTube video](#)
- [PSEO Coalition](#)
- [UNC System Office press release](#)

Don't forget about [NC Tower](#) for NC-specific employment outcomes



UNIFIED DIGITAL TRANSCRIPT

Unified Digital Transcript - Legislation

Section 7.11 of Session Law 2022-74

- Public schools of North Carolina should create interconnected and interoperable data systems to:
 - Facilitate communication
 - Transition student data between public education entities
 - Provide students access to their own data

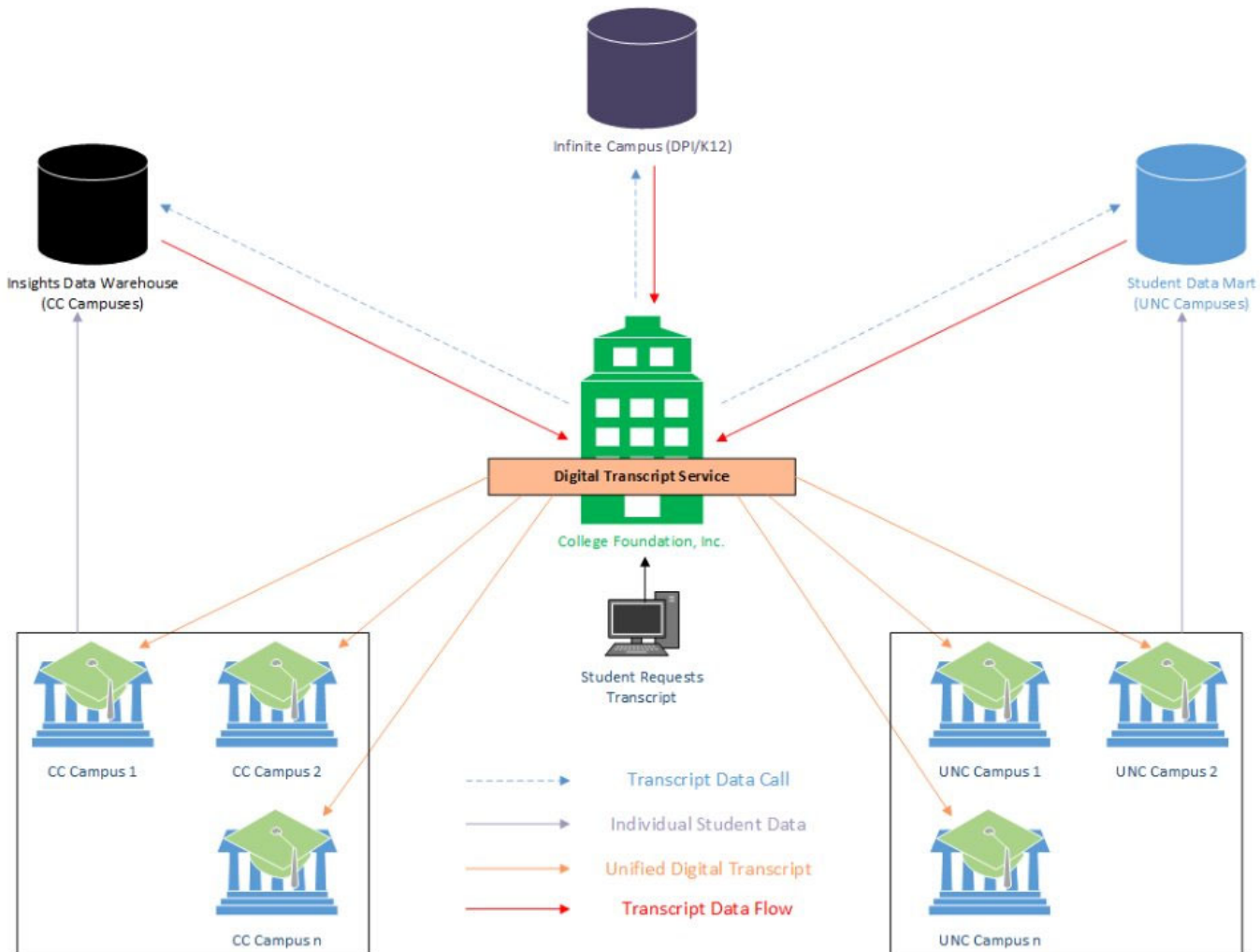
Section 8A.15 of Session Law 2023-134

- Common digital transcript for created for NC public schools that must be:
 - Available to all students
 - Secure and confidential
 - Compatible with current data systems
 - Free of cost to students enrolled or previously enrolled in a NC public education institution

Unified Digital Transcript – Agencies Involved



Unified Digital Transcript



Unified Digital Transcript

- Leverage Student Data Mart (SDM) infrastructure
- UNCISO will pass along data on behalf of institutions
- Most data elements required for a transcript were already included in SDM
- Several new data elements were added in Fall 2025
- New "Transcript Only" snapshot was added in Spring 2026
- Testing underway

Unified Digital Transcript

- Student submits transcript request to CFI
- CFI passes request to UNCSO
- Confirmation of existing student record in SDM
- Transcript Only snapshot runs only when there are pending transcript requests
- Errors are minimal but must be resolved
- Data passed from UNCSO to CFI via JSON file
- Data is not returned to CFI for transcripts with holds

UNC System Office - Project Status Summary

Executive Summary

- The team is currently in the QA testing phase, testing transcripts from each institution against the QA data
- During our QA testing phase, SDM will have their Prod deployment on 3/16 to fix transcript snapshot performance issues
- After our QA testing phase, the CFI team will have their User Interface built to start testing against the Production data in SDM
- Once Production testing is done, we will review the testing results with project sponsors and stakeholders as part of a 'go/no go' decision, after which, the product will remain in a 'production-ready' status until the rest of the Unified Digital Transcript project reaches a point where the other organizations can compile data for a transcript
- A placeholder was created for the addition of the NCSSM transcript data when this becomes available in early 2027

Upcoming Major Milestones	Status	Start Date	End Date
Joint Test Planning with CFI	Complete	12/1/2025	2/15/26
QA Test Phase	In Progress	3/9/2026	4/3/26
Production Test Phase	Upcoming	4/6/26	5/1/26
Production-ready product target	Upcoming	5/4/26	5/4/26

Unified Digital Transcript

CFI Project Status Highlights

Project Status		Green: On track; no immediate issues or risks. Yellow: Potential issues that need monitoring; some corrective actions may be needed. Red: Significant issues or delays; immediate action required.
Agency	Status	Notes
Overall	Yellow	
DPI	Yellow	Working on official list of required K-12 transcript data elements. No updates for JSON-formatted K-12 Infinite Campus transcripts.
NCCCSO	Red	Work with Ellucian continues for Insights DW. Work is being planned to address transcript data elements.
UNCSO	Green	SDM changes are on schedule.
CFI	Green	Work continues for JSON-formatted UDT, unofficial/printable PDF UDT and UI



STRATEGY & POLICY UPDATES

Performance Metrics

- All of this year's data is final except for E&R
 - Only 1 institution saw a change for 2025 metrics since preliminary
- Final E&R expected by mid-April
- Metrics to BoG after data are finalized
- Memos to Chancellors after approved by BoG

Strategic Plan Update

- Current strategic plan runs through 2027
- Planning process for the next Strategic Plan will begin in summer 2026
- Same five primary themes
 1. Access
 2. Student Success
 3. Affordability
 4. Economic Impact and Community Engagement
 5. Excellent and Diverse Institutions
- Taking recommendations for new metrics or changes to current metrics
 - Must be measurable, moveable, and fit into one of the five themes



DATA GOVERNANCE

External Slide Deck

[UNCSSO-DataGov-NCAIR2026.pptx](#)



ROUNDTABLE DISCUSSION

THANK YOU

