

# University of Wisconsin System HRS

## Introduction to EPM and Query Writing

# Purpose of this Workshop

## Share Information

- How/what legacy data was converted to HRS and EPM
- How to locate and read EPM documentation
- EPM data warehouse structure
- Understanding EPM views and data

## Query Writing

- Writing IR queries from scratch
- Using IR query templates
- IR query writing tips
- Using Query Library
- Using PeopleSoft Query tool (PS Query)

# Environment Terms and Basic Info

- HCM: Human Capital Management
  - HRS Production environment
- EPM: Enterprise Performance Management
  - Data warehouse environment
    - Loaded from HRS/HCM nightly (Sunday thru Friday)
    - ~ 100 “flattened” data warehouse views

## PeopleSoft (PS) Web Applications

Login using campus credential

### HRS Application

- Add or Update HRS data
- View HRS Data
- Run Reports showing HRS data
- Run Queries (using PS Query Client) showing HRS data

Need auth for HRS Roles

URL: <https://hrs.wisconsin.edu/login>

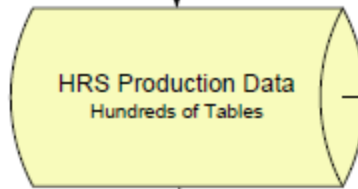
### EPM Application

- Run Reports showing EPM data
- Run Queries (using PS Query Client) showing EPM data
- Create and Modify Queries (using PS Query Client) showing EPM data

Need auth for EPM Roles

URL: <https://epm.wisconsin.edu/login>

Read, Add, Update



Read, Add, Update

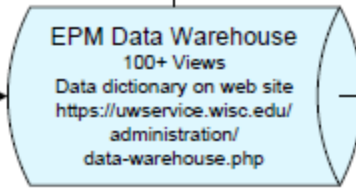
HRS Self-Service  
Portal applications

View HRS data  
Update HRS data

<https://my.wisc.edu>  
<https://my.wisconsin.edu>

CYPRESS  
Report  
Repository

Changes  
Copied  
Nightly  
Sunday  
thru Friday



Read Only

Read Only

## External Applications

### Query Tools

- MS Access, Toad, SQL Developer, etc.
- Installed on your machine

Need auth for EPM roles and ODBC Role

### Hyperion Interactive Reporting (IR) Workspace (web)

URL: <https://bi2.faster.wisconsin.edu/workspace/index.jsp>

Login using campus credentials

#### IR HTML Client

Run Published Queries

For Query Library:  
Need auth for IR EPM Roles  
For Sensitive queries, need  
Individual ODBC Role  
and EPM Roles

Need auth for campus IR  
folders with EPM queries

#### IR Web Client

Run and Create  
Personal Queries

Need Individual ODBC Role  
and EPM Roles

Need auth for campus  
IR folders with  
Blank EPM Query.bqy

### Hyperion Interactive Reporting (IR) Studio Client

Windows app installed on your machine

Run and Create Personal Queries

Need auth for EPM Roles and Individual ODBC Role



Thursday, June 06, 2013

# Query Access

## EPM Application

- EPM application login: Campus ID & password

## Hyperion Interactive Reporting (IR)

- IR Workspace login: Campus ID & password
- Query Library published sensitive queries:
  - ODBC login (“E” + Empl ID & EPM password)
- Query writing using blank bqy:
  - ODBC login (“E” + Empl ID & EPM password)

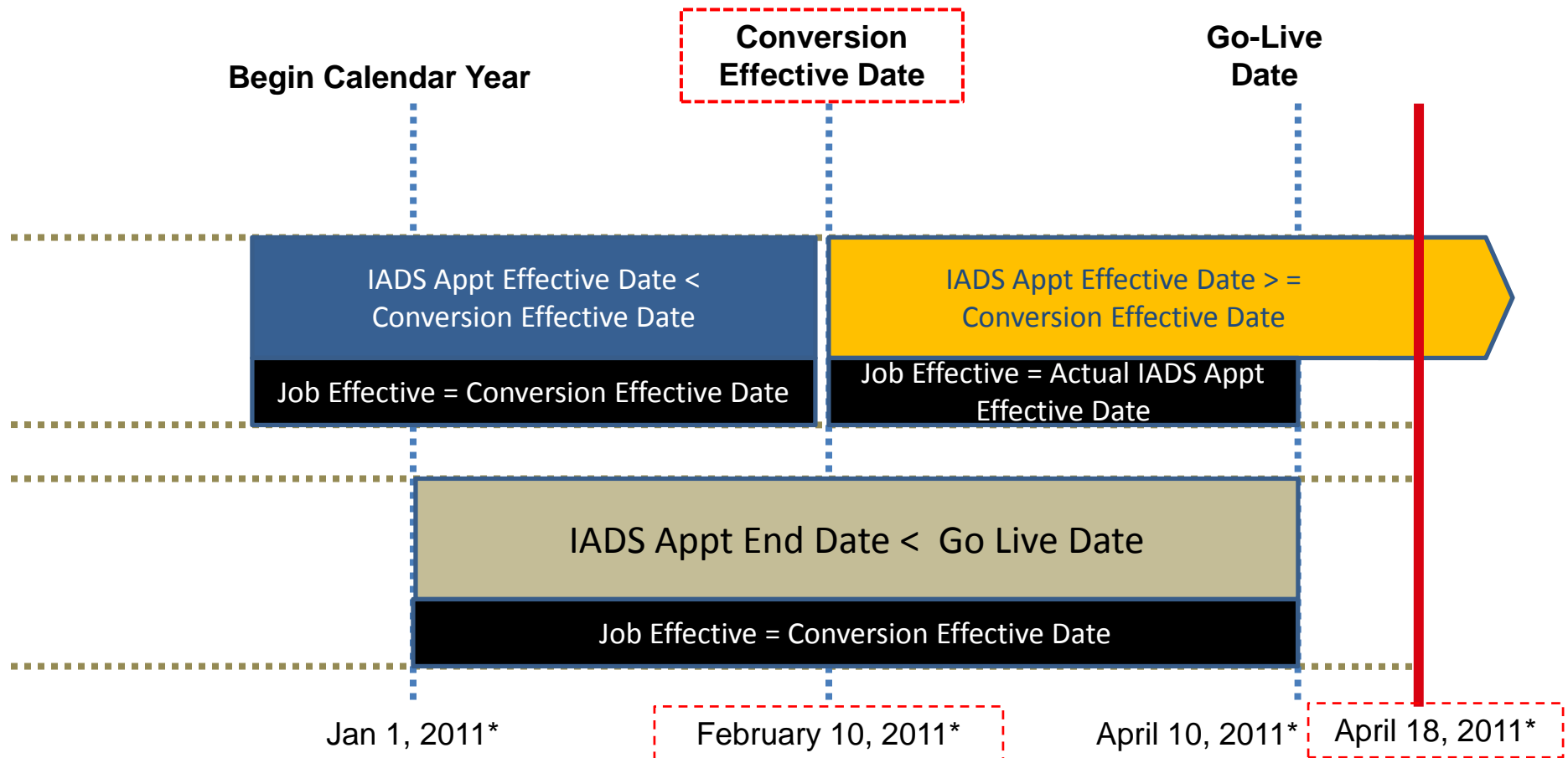
NOTE: EPM security role(s) are also required to access data when writing queries or running published queries.

# Conversion Scope: Employees and Jobs

## HRS & EPM

Category	Person Data	Job Data	Past Changes (Person/Job Data)
<b>Active Appts</b>	HCM and EPM (1 row with latest <u>eff date</u> )	HCM and EPM (1 row with latest <u>eff date</u> )	EPM
<b>Future Appts</b>	HCM and EPM	HCM and EPM	N/A
<b>Terminated but paid in 2011</b>	HCM and EPM	HCM and EPM (1 HIR & 1 TERM from appt data as of termination)	EPM
<b>Terminated on or after 4/12/06</b>	HCM and EPM	EPM (except Student Help)	EPM (except Student Help)
<b>Terminated before 4/12/06</b>	EPM (unless only Student Help)	EPM(except Student Help)	EPM(except Student Help)

# Job Effective Date Conversion



# Converted HR Data Overlaps

## NO CLEAN CUTOVER DATE

- Data extracted from IADS on 4/8/11
- Extracted data loaded to HRS with 2/10/11 date
- Data changes with effective dates 2/10/11 thru 4/8/11 can be found in IADS **\*\*AND\*\*** in HRS

*Note: This impacts historical reporting of changes in the correct effective date sequence*