Last update: 10-8-12   University of Wisconsin System
Intro-to-EPM and Query Writing
TERMINOLOGY & REFERENCE LINKS

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HCM	PeopleSoft Human Capital Management software
HRS	The production implementation of PeopleSoft's HCM software at the University of Wisconsin Human Resource System (HRS).
Data Warehouse	Generically, data from a live production system is copied on a regular basis to a data warehouse database, which is then used as the data source for query-writing purposes. For example, data from the live production HRS system is copied to the EPM data warehouse, where it is manipulated into "views" that are accessed by query-writing tools, such as Interactive Reporting (IR), PS Query, TOAD, and MS Access.
Data Dictionary	Documentation of the data elements (fields) in a database. The HRS data warehouse, EPM, data dictionary is a large spreadsheet that can be found at: https://uwservice.wisc.edu/administration/data-warehouse.php#dd
InfoAccess	InfoAccess is an Oracle database that serves as the data warehouse actively used for current and historical System Budget, Madison PeopleSoft Student Admin, and some other data. Data for those systems is updated on a regular basis. In addition, InfoAccess continues to store legacy HR/Payroll/Benefits data in a pre-HRS frozen state. This legacy data is used in many Query Library queries to meet historical reporting needs. InfoAccess information can be found at: http://www.doit.wisc.edu/infoaccess/
EPM	Enterprise Performance Management (EPM). Unfortunately the term 'EPM' has multiple definitions: 1. HRS data warehouse database 2. EPM on-line application within HRS where users can run pre-written PS Query reports and/or write and publish their own PS Query queries. 3. Although we generally use the term "IR Workspace", its official name is: "Oracle Enterprise Performance Management (EPM) Workspace". This is what you log into when you go to the Query Library IR Workspace.
Configuration Code/Descr	Within the EPM database, there are many code fields. For example, the DEPTID is a code field that has a corresponding description in the UW_DEPTID_DESCR field: DEPTID = A060100 UW_DEPTID_DESCR = DOIT/DIVISION OFFICE/DIVIS OFC The EPM website includes a large spreadsheet called "Configuration Values" that lists the code fields and all their valid values. This spreadsheet is located at: https://uwservice.wisc.edu/administration/data-warehouse.php#dd Although most config code descriptions are in the EPM views along with the code field, under some circumstances it is necessary for EPM query writers to retrieve config description data directly from a config table or from EPM table PSXLATITEM. The config table names start with PS_UW_P_ . Many config tables include an EFFDT and STATUS ("A"ctive/"I"nactive), which means there is the potential of having multiple rows for the same config code. In these cases, query writers must use subqueries or other programming techniques to retrieve the one correct row. Known issue: As code descriptions change or codes are inactivated, these changes are not consistently reflected in the EPM views that include the codes. For example, a changed description may be changed in some EPM views but not in others. In these cases, query writers may choose to get the description directly from the config table.

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PS Query	PS Query is the query-writing tool used within the PeopleSoft System. PS Query produces datasets that can be exported to EXCEL. PS Query accesses only PeopleSoft data (i.e., HRS, EPM, or PS Student Admin data). Thus, query needs that require access to legacy (pre-HRS) data that is found in Oracle database "InfoAccess" <u>cannot</u> be met with PS Query. The EPM Query Training guide provides step-by-step instructions for writing a basic query to retrieve EPM data using Peoplesoft's query writing tool PS Query. The training guide is found https://uwservice.wisc.edu/docs/publications/epm-uw-query-training.pdf
Query Library (QL)	Web-based repository of pre-written queries available for UW staff who work with human resource, payroll, benefits, time and labor, etc. data. The pre-written queries produce output in a variety of formats, including formatted reports that can be saved in PDF format if needed, pivot tables, and data/tables that can be exported to EXCEL. Query Library (QL) queries are created using the Interactive Reporting query writing tool. Logon to the Query Library IR Workspace via: https://bi2.fastar.wisconsin.edu/workspace/index.jsp **Note: The Query Library is OUTSIDE the PeopleSoft web application.**

Interactive Reporting (IR)	Business Intelligence (BI) query tool, formerly known as Brio, and then Hyperion, until Oracle acquired Hyperion and absorbed it into the Oracle Enterprise Performance Management (EPM) product family. The Interactive Reporting (IR) query tool allows access to data from any Oracle database, in addition to input files created in EXCEL, and other kinds of data. IR queries generally consist of multiple steps where output from one query step becomes the input to the next step and so on.
	
	Query Library queries are created using the IR query writing tool. Many Query Library queries access data from multiple data sources within each query. For example, data from EPM (HRS data warehouse), InfoAccess (legacy data warehouse), and ISIS (Madison Student Administration) may be accessed within a single IR query. Logon to the IR Workspace via:
	    https://bi2.fastar.wisconsin.edu/workspace/index.jsp
	For more information on Interactive Reporting, go to the following Help Desk KnowledgeBase (KB) article:
	    https://kb.wisc.edu/helpdesk/page.php?id=13738
	Other helpful Interactive Reporting KB documents available at:
	    https://kb.wisc.edu/helpdesk KnowledgeBase (KB) site.

IR Workspace	Technically, this is the "Oracle Enterprise Performance Management (EPM) Workspace". The Workspace includes a folder tree structure where users find the pre-written queries to execute, along with some associated documentation. Also, users who want to create their own IR queries may start with a blank bqy that is found in the IR Workspace. Logon to the IR Workspace via: https://bi2.fastar.wisconsin.edu/workspace/index.jsp
bqy	This is the extension part of the IR query name. For example, the IR query for the Query Library "Biweekly Payroll Edit Checksheet" is called: Biweekly Payroll Edit Checksheet.bqy An earlier version of Interactive Reporting (IR) was called Brio. During that period, the "bqy" extension meant Brio Query. The extension continues to be used…