

KB – CAT Interactive Reporting and EPM

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Purpose and Overview

Interactive Reporting allows CAT users to create and/or run queries from existing tables, display and summarize results in reports, pivots and charts, and export the results to text, Excel, PDF, etc. CAT users are able write database queries to provide institutional budgeted salary data for analytical and decision making purposes. These tables are data views that exist in EPM but are able to be accessed through Interactive Reporting.

The EPM data views may also be accessed directly through the EPM data warehouse, which also allows users to create and/or run queries and export the results.

Helpful Links

- [Interactive Reporting Overview](#)
- [EPM Data Warehouse FAQ/Documentation](#) - Log in using your appropriate credentials. On the top menu bar, select 'HRS Administration'. On the left-hand side, under 'HRS & Related Applications' select 'EPM Data Warehouse home'. Select the 'FAQ/Documentation' tab.
- [EPM Data Dictionary](#) – Select the 'Data View Descriptions' tab to view a brief description of every view. Select the 'Data Dictionary' tab to view the description for each field within a view.
- [I/R Related KB Documents](#)
- [I/R Training Video](#)

Data Views

There are different views/tables CAT users can query data from, depending on what they are looking for. By looking up the table names below in the [EPM Data Dictionary](#) a user can find the specific names and definitions of the data points in each view.

The following views combine CAT (employee) and AAP (non-employee adjustment) data into one output:

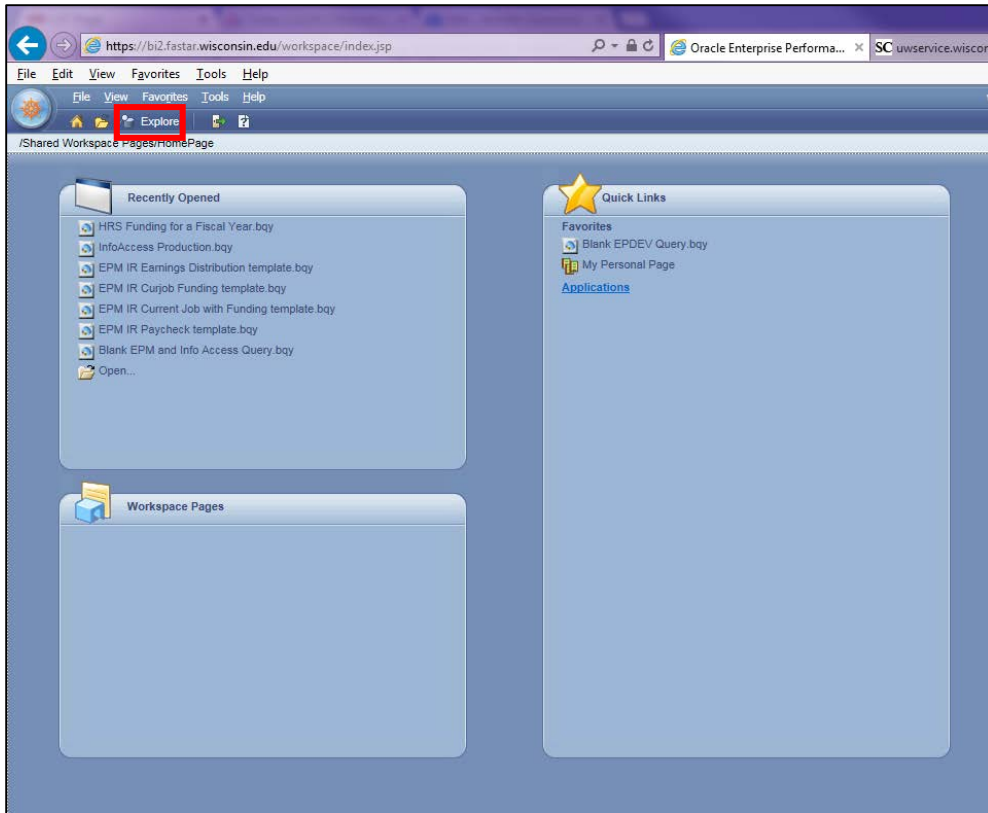
- **Current CAT All Funding View:** (PS_UW_CAT_CA_FD_VW) This view contains all employee job and funding data from the CAT Page and AAP stored within the EPM tables for the current fiscal year.
- **Current CAT All Rate and Funding View:** (PS_UW_CAT_CA_RF_VW) This view contains all employee job, compensation, and funding data from the CAT Page and AAP stored within the EPM tables for the current fiscal year.
- **Historical CAT All Rate and Funding View:** (PS_UW_CAT_HA_RF_VW) The view contains all employee job, compensation, and funding data from the CAT Page and AAP stored within the EPM tables for all prior fiscal years.

The following views are for either CAT (employee) or AAP (non-employee adjustment) data:

- **Current CAT Funding View:** (PS_UW_CAT_CR_FD_VW) This view contains all employee job and funding data from the CAT Page stored within the CAT EPM tables for the current fiscal year.
- **Current CAT Rate and Funding View:** (PS_UW_CAT_CR_RF_VW) This view contains all employee job, compensation, and funding data from the CAT Page stored within the CAT EPM tables for the current fiscal year.
- **Historical CAT Rate and Funding View:** (PS_UW_CAT_HS_RF_VW) The view contains all employee job, compensation, and funding data from the CAT Page stored within the CAT EPM tables for all prior fiscal years.
- **Current CAT Rate View:** (PS_UW_CAT_CR_RT_VW) This view contains all employee job and compensation data from the CAT Page stored within the CAT EPM tables for the current fiscal year.
- **AAP Vacant Positions View:** (PS_UW_CAT_ADJ_VAC) This view contains all vacant position data from the AAP for the current and all prior fiscal years.
- **AAP Other Budget Adjustments View:** (PS_UW_CAT_ADJ_BA) This view contains all other budget adjustment data from the AAP for the current and all prior fiscal years.

Access EPM Views Using Interactive Reporting

1. Use the **Webclient**.
 - a. Navigate to <https://bi2.fastar.wisconsin.edu/workspace/index.jsp>.
 - b. Click **“Explore”**.
 - c. Double-click **“UW-System-Wide”**.
 - d. Double-click **“Compensation Administration Tool”**.
 - e. Double-click on **XXXXXXX Query.bqy**.
 - f. Under the **“Elements”** section, double-click on **“Tables”**.
 - i. Enter your **E+Emplid** (ex. E00012345) and **password**.
 - g. The tables/views you have access to (including the CAT views) will be listed under **“Tables”**.

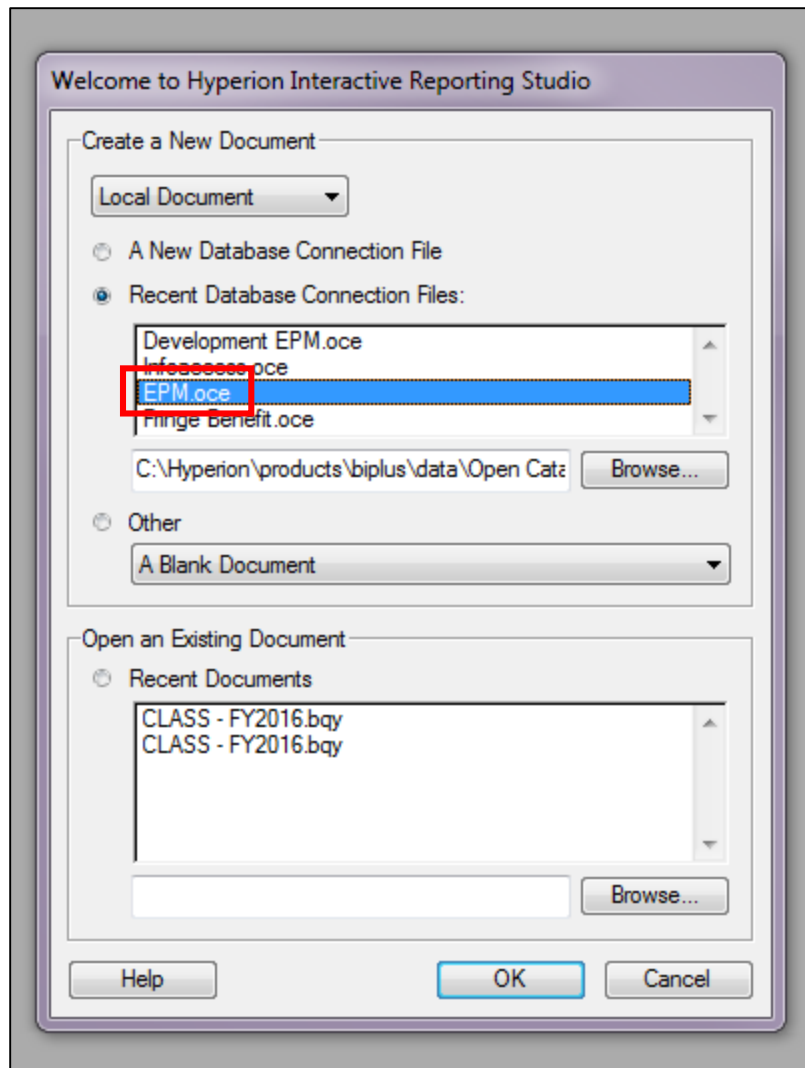


2. Use the **Studio Client**.

- a. Helpful Links: [Creating a Connecting to the I/R Studio](#)
- b. Double-click on the **Studio icon** on your desktop.

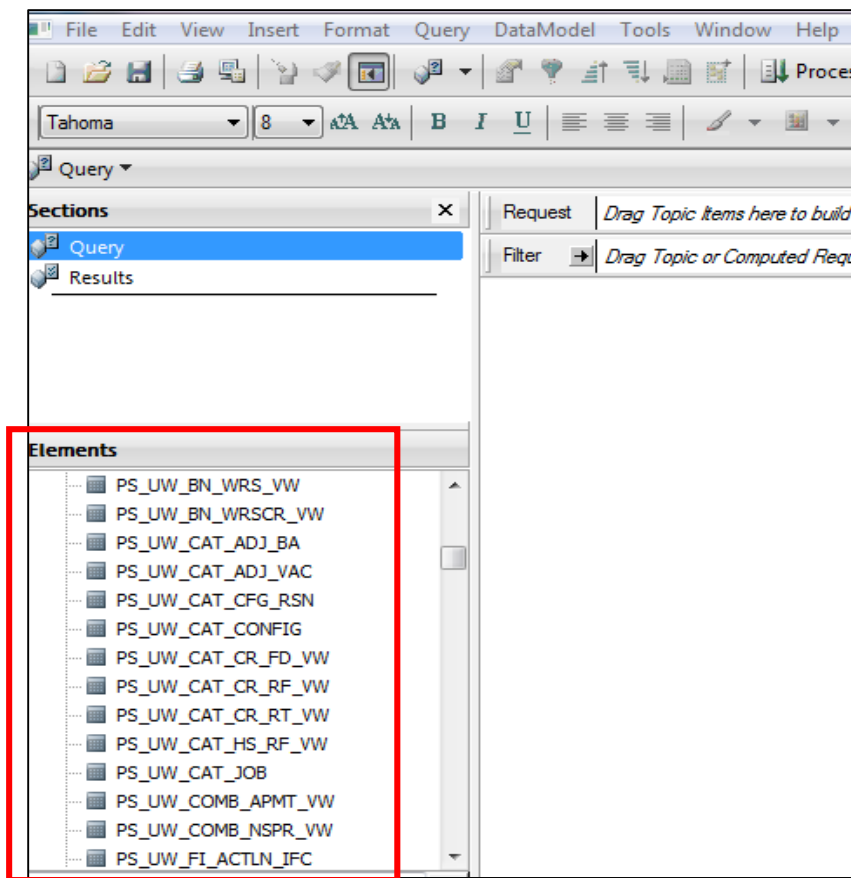
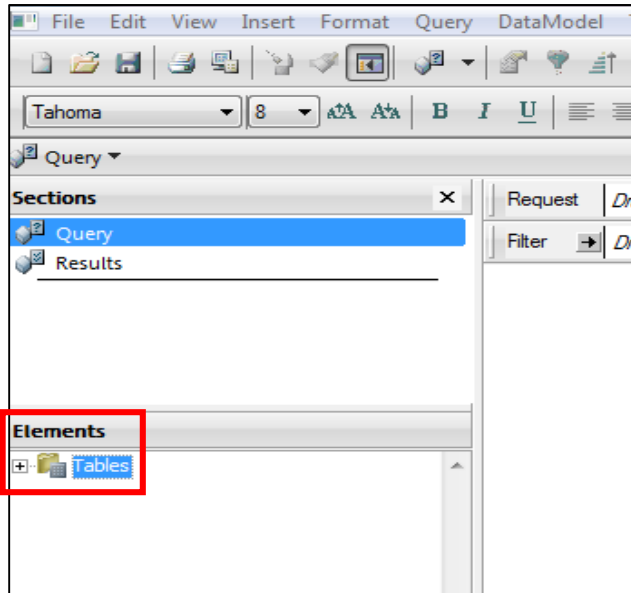


- c. Under “**Recent Database Connection Files**”, select “**EPM.oce**”.
- d. Click **OK**.



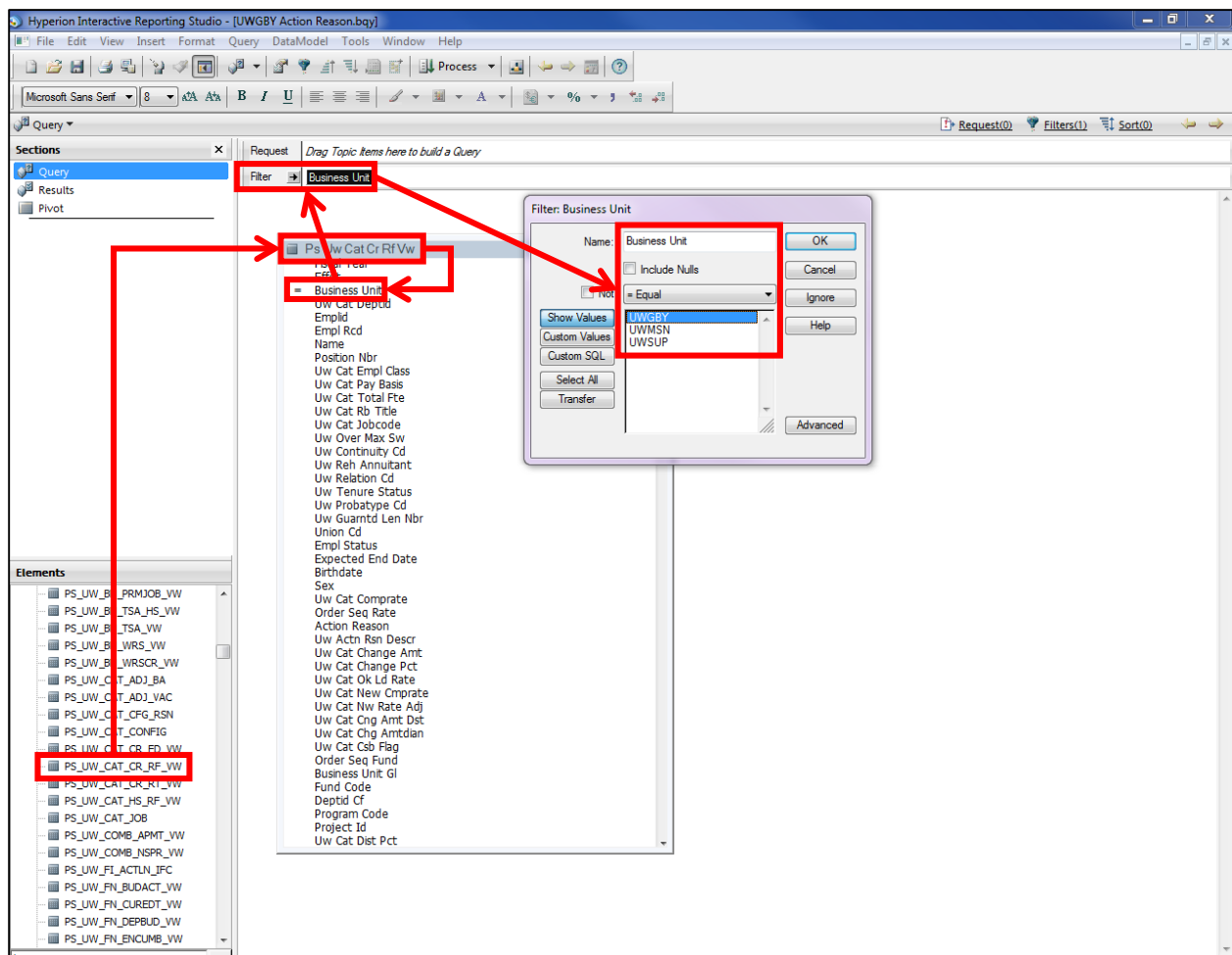
e. Enter your **E+Emplid** (ex. E00012345) and **password**.

- f. Under the “Elements” section, double-click on “**Tables**”. The tables/views you have access to (including the CAT views) should be listed.



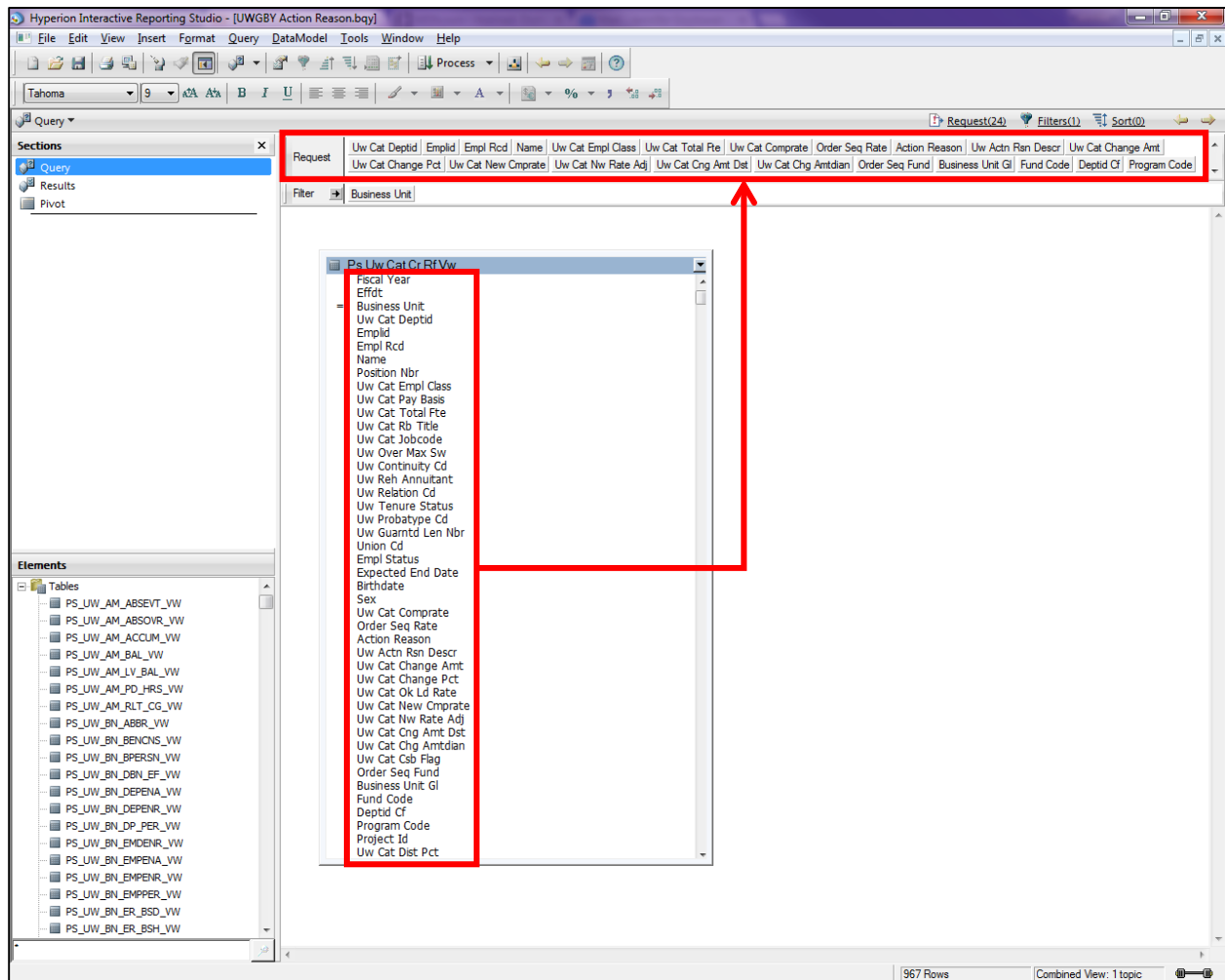
Run an Interactive Reporting Query

1. Helpful Links
 - a. [EPM Data Dictionary/Views Page](#) – Log in using your appropriate credentials. On the top menu bar, select 'HRS Administration'. On the left-hand side, under 'HRS & Related Applications' select 'EPM Data Warehouse home'. Select 'Data Dictionary/Views' tab.
 - b. [List of EPM Data Views](#) – Select the 'Data View Descriptions' tab once the file opens.
 - c. [EPM Data Dictionary](#) – Select the 'Data Dictionary' tab once the file opens.
2. Double-click on the Table you want to query.
3. Select the data points to be filtered by clicking and dragging them to the "Filter" row.
4. When prompted, select the data point to be filtered.



5. Select the data points to be queried by clicking and dragging them to the "Request" row.

6. Once all desired data points are selected, click "Process".



7. The results from the query should populate in the Results section.

Hyperion Interactive Reporting Studio - [UWGBY Action Reason.bqy]

File Edit View Insert Format Results Tools Window Help

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Results

Sections

Filter *Drag Report Columns here to create Filters* Sort *Drag Request Items here to sort them*

Results

Pivot

Elements

Query

- Uw Cat Deptid
- Emplid
- Empl Rod
- Name
- Uw Cat Empl Class
- Uw Cat Total Fte
- Uw Cat Comprate
- Order Seq Rate
- Action Reason
- Uw Actn Ran Descr
- Uw Cat Change Amt
- Uw Cat Change Pct
- Uw Cat New Comprate
- Uw Cat Nw Rate Adj
- Uw Cat Cng Amt Dst
- Uw Cat Chg Amtidn
- Order Seq Fund
- Business Unit GI
- Fund Code
- Deptid Cf
- Program Code
- Uw Cat Dist Pct
- Uw Cat Budget Fte
- Uw Cat Budget Amt

	Uw Cat Deptid	Emplid	Empl Rod	Name	Uw Cat Empl Class	Uw Cat Total Fte	Uw Cat Comprate	Order Seq Rate
1	D030200	00303874	0	SANDERS,DEBORAH A	CP	1	16.232	
2	D120100	00028926	0	KEENER,HOLLY A	CP	1	18.199	
3	D120100	00138177	0	SNYDER,JANIS C	CP	1	17.734	
4	D120100	00138177	0	SNYDER,JANIS C	CP	1	17.734	
5	D120100	00847430	0	GARCIA,AVERY G	CP	1	14.25	
6	D120100	00847430	0	GARCIA,AVERY G	CP	1	14.25	
7	D130100	00418446	0	FELMER,ANDREA M	CP	1	16.483	
8	D130100	00418446	0	FELMER,ANDREA M	CP	1	16.483	
9	D130300	00508642	0	SIEGMUND,JILL L	CP	1	21.077	
10	D130300	00508643	0	DOYLE,MICKY J	CP	1	16.379	
11	D130500	00430751	0	FEENEY,JOANN M	CP	0.8	15.217	
12	D131020	00532016	0	JOHNSON,RACHEL ER	CP	1	16.379	
13	D131020	00532016	0	JOHNSON,RACHEL ER	CP	1	16.379	
14	D131020	00608014	0	COLE,PATRICIA M	CJ	1	14.25	
15	D131030	00534335	0	DUPONT,MARY ANN	CP	1	16.379	
16	D131030	00844744	0	WILLIAMS,CRYSTAL	CP	1	16.45	
17	D131030	00844744	0	WILLIAMS,CRYSTAL	CP	1	16.45	
18	D131060	00584650	0	WELHOUSE,DIANE J	CP	0.8	15.217	
19	D140100	00219965	0	TOMASHEK-DITTER,BA	CP	1	29.572	
20	D141500	00136160	0	NELLIS,VICKI L	CP	0.9	18.83	
21	D141500	00136160	0	NELLIS,VICKI L	CP	0.9	18.83	
22	D141500	00136160	0	NELLIS,VICKI L	CP	0.9	18.83	
23	D141510	00482264	0	MEZGER-SCHULTZ,KIM	CP	0.95	15.791	
24	D141600	00765044	0	KLUGE,JAYNE M	CP	0.8	16.369	
25	D141610	00820496	0	SCHMELZER,LISA M	CP	1	15.411	
26	D141610	00820496	0	SCHMELZER,LISA M	CP	1	15.411	
27	D141610	00820496	0	SCHMELZER,LISA M	CP	1	15.411	
28	D143000	00804450	0	COX,CHRISTINE M	CP	1	15.411	
29	D143500	00460258	0	HAROLDSON,JEAN L	CP	1	16.668	
30	D143500	00566754	0	MOUA,NOU LONG	CP	1	18	
31	D143500	00847437	0	JONES,BETH N	CP	1	17.8	
32	D144000	00447157	0	DELSART,BONNIE J	CP	1	15.767	
33	D144000	00506427	0	KUEHNE,CAROL J	CP	1	14.25	
34	D144000	00506427	0	KUEHNE,CAROL J	CP	1	14.25	
35	D144000	00550305	0	MERTENS,KATHREEN	CP	1	16.379	
36	D180100	00022695	0	SLATTERY,LORE A	CP	1	19.93	
37	D180100	00022695	0	SLATTERY,LORE A	CP	1	19.93	
38	D180100	00399306	0	WILDENBERG,AMAND	CP	1	15.767	
39	D180100	00399306	0	WILDENBERG,AMAND	CP	1	15.767	

Uw Cat Deptid Emplid Empl Rod Name Uw Cat Empl Class Uw Cat Total Fte Uw Cat Comprate Order Seq Rate Action Reason Uw Actn Ran Descr Uw Cat Change Amt Uw Cat Change Pct Uw Cat New Comprate Uw Cat Nw Rate Adj Uw Cat Cng Amt Dst Uw Cat Chg Amtidn Order Seq Fund Business Unit GI Fund Code Deptid Cf Program Code Uw Cat Dist Pct Uw Cat Budget Fte Uw Cat Budget Amt

967 of 967 Rows 12/07/15 14:15:41

a. In the Results screen, data can also be filtered and/or sorted.

8. Data can also be organized in a pivot table.

a. On the tool bar, click "Insert" and select "New Pivot".

- b. Under “Elements”, click and drag the data points to “Row Labels”, “Column Labels” or “Facts” to create the table.

Hyperion Interactive Reporting Studio - [UWGBY Action Reason.bqy]

File Edit View Insert Format Pivot Tools Window Help

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Sections

- Query
- Results
- Pivot

Elements

- Uw Cat Deplid
- Empl Rod
- Name
- Uw Cat Empl Class
- Uw Cat Total Rte
- Uw Cat Comrate
- Action Reason
- Uw Cat Change Amt
- Uw Cat Change Pct
- Uw Cat New Comrate
- Uw Cat Nw Rate Adj
- Uw Cat Cng Amt Det
- Uw Cat Chg Amt/dian
- Order Seq Fund
- Fund Code
- Program Code
- Uw Cat Dist Pct
- Uw Cat Budget Amt

Row Labels: Uw Cat Deplid * Action Reason * Fund Code

Column Labels: Drag items here to create column labels

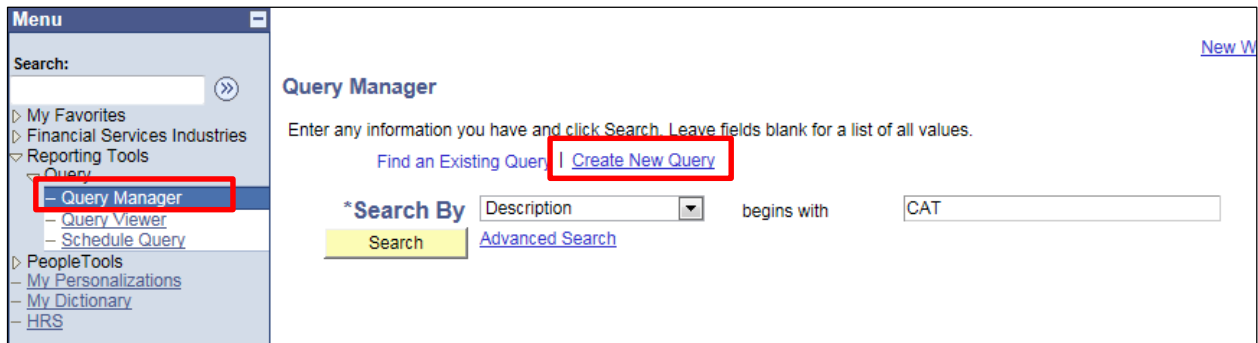
Facts: Uw Cat Budget Amt

Uw Cat Budget Amt			
D010100	019	102	441,295
	Total		441,295
D030200		128	0
	019	102	364,619
		128	239,409
		233	16,557
	Total		620,585
D030205		128	0
	019	102	34,340
		128	76,864
	Total		111,204
D030220		128	0
	Total		0
D030230		128	0
	019	128	34,340
	Total		34,340
D030310	019	102	78,780
		128	331,280
	Total		410,060
D030320		128	0
	Total		0
D030330		128	0
	019	128	48,480
	Total		48,480
D030340		128	0
	Total		0
D030370		128	0
	019	128	81,810
	Total		81,810
D030375		128	0
	Total		0
D030430		128	0
	019	102	155,523
		128	82,275

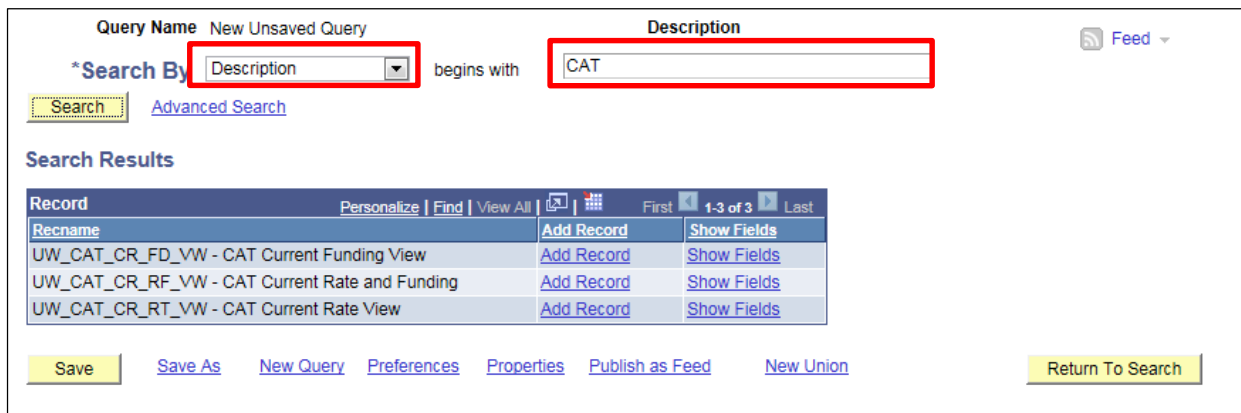
967 rows used 1x318

Access EPM Views and Run a Query Using the EPM Data Warehouse

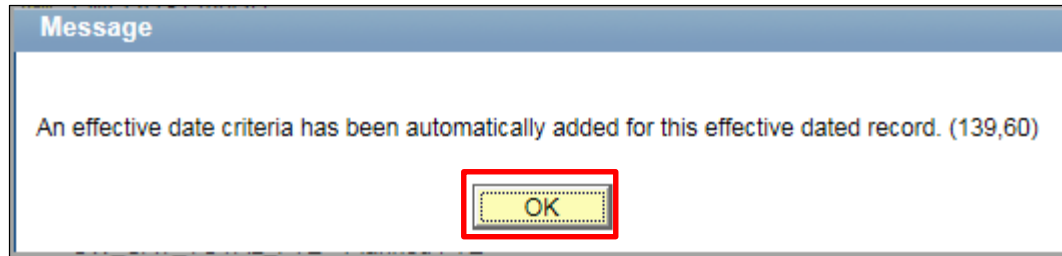
1. Log on to <https://www.epm.wisconsin.edu/login>.
2. Navigate to **Main Menu > Reporting Tools > Query > Query Manager**.
3. Query a CAT EPM view using the Current Rate and Funding View as an example.
 - a. Click the **Create New Query** tab.



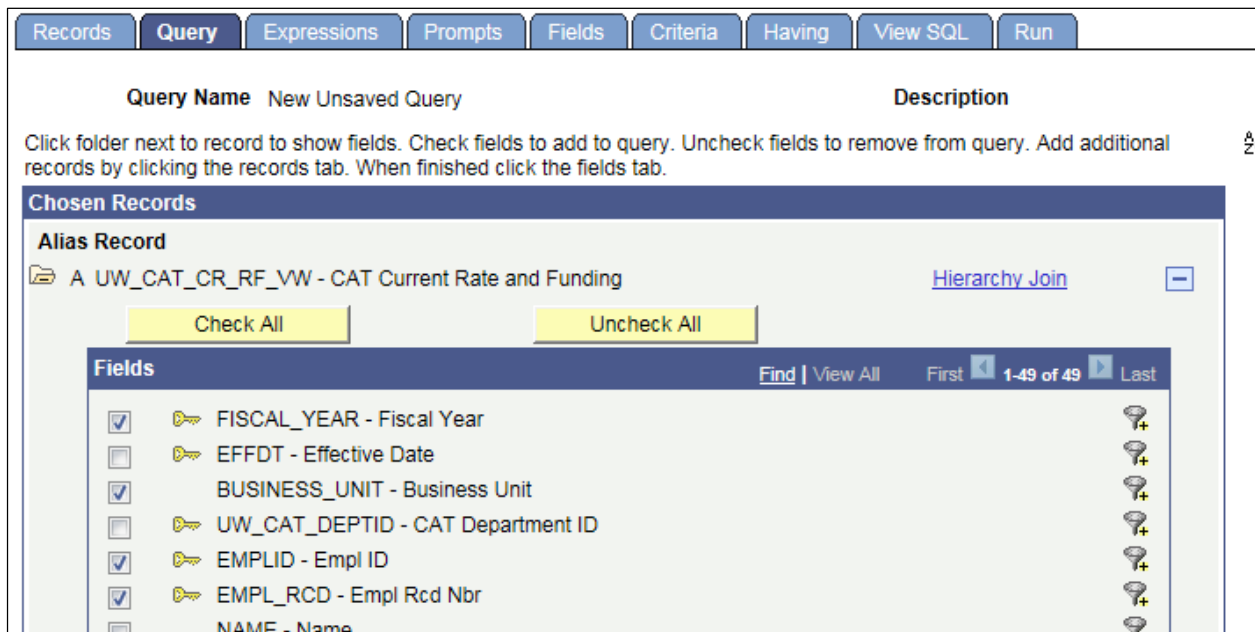
- b. Set the "Search By" box to **Description** and enter **CAT** in the "begins with" field.
- c. Click **Search**.
- d. Click the **Show Fields** button for a given view to see the list of fields within that view, prior to selecting the view for your query.



- e. Click **Add Record** for the Current Rate and Funding View row to use this view for building your query.
- f. A message will pop up informing the user that an effective date criteria has been automatically added. Click **OK**.



- g. Using the **Query** tab, check the box under **Fields** for each field desired to be in your query results set.



- h. Use the **Criteria** tab to enter any desired criteria.
- Click the **(-) button** to delete the prepopulated effective date criteria. No results will be returned if this criteria remains in your query.
 - Click the **Add Criteria** button to edit criteria properties.
 - After choosing any desired expressions, conditions, or constants, click **OK** to continue.

Edit Criteria Properties

Choose Expression 1 Type

Field
 Expression

Expression 1

Choose Record and Field

Record Alias.Fieldname:

***Condition Type:**

equal to

Choose Expression 2 Type

Field
 Expression
 Constant
 Prompt
 Subquery

Expression 2

Define Constant

Constant:

OK **Cancel**

- i. Click the **Run** tab.
- j. Click the **Download to Excel** link at the top of the results table.
- k. Click the file named "**download(#).xls**". The "#" will be the number of downloads processed during the current browser session. This file contains all records in the selected view and all fields selected for the query.