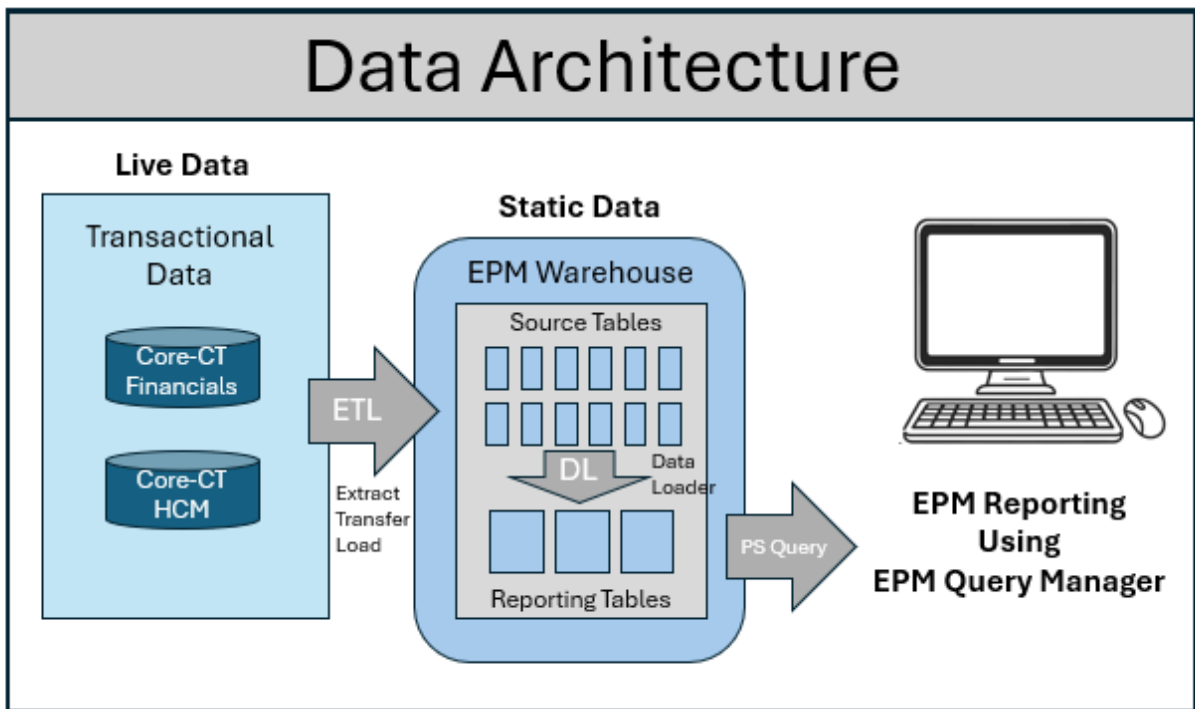




## Enterprise Performance Management (EPM)

Enterprise Performance Management (EPM) is the data repository for Core-CT. Data is stored in reporting tables to facilitate the extraction of precise information that can be used to analyze agency performance against standard measures. PeopleSoft (PS) Query in CORE-CT is an end user reporting tool which allows you to specify and extract the precise information that you want to retrieve from Core-CT and use it for a multitude of purposes. Once you set up a query, you have many options to format, output, and save the query. Please note that the information you extract from Core-CT EPM is data refreshed from the Human Capital Management (HCM) and Financials system as of close of business, the previous day. EPM is a static warehouse environment. The data is read only.

### Enterprise Performance Management (EPM)





## Private versus Public Queries

EPM users can have one or two development roles. One role allows development of public queries, which are queries that are available to all users that share HCM or FN roles who have access to EPM. The second role only allows the user to create private queries (i.e., queries that only the user can see or use). To manage and maintain queries more securely, agencies are limited to a number of public query users; larger agencies may have up to three. If a user with private access develops a query that the agency agrees should be made public, the query creator can send the query to a user in their agency who has public query access for them to post to the public domain.

A user with private query access is able to see and use other public queries but is not able to change and save them as public queries. They may change and save as private any query they are using. This allows users across the State to benefit from other users' abilities to create queries.

Note: EPM users can see and use public queries only if they possess the FN or HCM roles that support the tables in the queries. A user's security in EPM mirrors their security in HCM and Financials: the tables and data you can see in EPM represent the information and department data you can see on HCM and FN on-line pages.

## Query Naming Standards

- Core-CT Delivered
  - CT\_CORE\_MODULE\_FUNCTION\_NAME
- Agency Public
  - CT\_AGENCYACRONYM\_MODULE\_FUNCTION\_NAME
- Private Query
  - USER INITIALS\_MODULE\_FUNCTION\_NAME



## **Financials / HCM EPM Folders**

To the extent possible, all public queries deployed by the Core-CT Team are organized in folders. Access the folder name that correlates to the module.

- PO Purchasing Reporting Table
- AP Accounts Payable Reporting Table
- AR / BI Accounts Receivable / Billing Reporting Table
- GL General Ledger Reporting Table
- AM Asset Management Reporting Table
- PC Projects Reporting Table
- IN Inventory Reporting Table
- CO Customer Contracts Reporting Table
- PCARD P-Card
- HR Human Resources
- TL Time and Labor

## **Management/Supervisor EPM Information**

### **EPM Ad-Hoc Reporting Tools**

PS/Query – tool to run and/or create ad-hoc queries through the web browser, results can be downloaded to Excel, HTML, CSV/text files. Microsoft Excel – tool to format results of query data; can create graphs, pivot tables, formulas, etc.

EPM allows users to write structured query language (SQL) queries without having to know SQL. Data in EPM is designed specifically for Ad-Hoc reporting and is convenient because:

- Data is easier to find
- No technical background is required to use
- Queries require little to no joining of tables
- Query Tool enables easy downloads to Excel
- Mistakes can be made without repercussion

### **The Data Dictionary:**

- Provides you with information about the fields that make up the Enterprise Performance Management (EPM) Reporting Tables
- The data dictionary is a spreadsheet containing all the tables that exist in Core-CT EPM and the fields that make up those tables
- Enables you to look up and review descriptions of fields that you may be unfamiliar with in Core-CT



- The Data Dictionary contains the following information for each reporting table:
  - Field – the data field name (e.g. DEPTID or VENDOR\_ID)
  - Label – the name of the field as it appears on the page (Department or Vendor ID)
  - Description – a brief description of the field
  - Pre-defined values are listed for certain fields (e.g. CT\_SID)

### **Private vs. Public Queries:**

Private Queries – only the User ID that created the query can open, run, modify, or delete the query

Public Queries – any user with access to the records used by the query can open, run, modify, or delete the query

### **EPM Output**

- HTML – The results can be downloaded to Excel or as a comma separated value (CSV) file. CSV files need to be imported into Excel before they can be analyzed.
- Excel – You are given the option of opening the results through the browser or saving the file and opening it with Excel.
- Schedule – The options for output are HTM, PDF, TXT, or XLS. If the output is too large for Excel, choose TXT, CSV formatted file.

### **The steps involved in creating a query include:**

1. Selecting records
  2. Adding fields
  3. Editing field properties
  4. Editing query properties
  5. Creating joins (Optional)
  6. Defining selection criteria
- If your query doesn't return results:
    - Check your criteria for conflicts
    - Verify the validity of table joins
    - Check role and department level security

### **Summary versus Detail Query**

The secret to developing summary vs. detailed queries is to display the fewest fields possible and establish all result limiting criteria in the background. To set criteria in the background, access the field by the query tab and do not check the box for the field.



The inverse of this process would be to modify a summary query to a detail query. To accomplish this, display as many detail fields as needed and display the limiting criteria.

### **Aggregate Functions**

- Sum – Adds the numerical values from each row and displays the total
- Count – Counts the number of rows
- Min – Checks the value from each row and returns the lowest one
- Max – Checks the value from each row and returns the highest one
- Average – Adds the values from each row and divides the result by the number of rows

### **Expressions**

Expressions are calculations the Query Manager tool performs to provide values not available by default. These fields can be used for outputs as well as for defining criteria. Expressions allow the creation of calculations in a Query. Calculations are rarely stored in a relational database. Calculations are typically processed when a query is run. To create a user-defined calculation (expression) in a query, you need to know the SQL specific syntax for the expression.

### **Standard Expressions**

- Numerical calculations using one or more fields
- Concatenate – Combine more than one field to display as one field
- Substring – Display only part of a field
- Literal Expressions – Used as placeholders
- Decode – If, then logic. If the result of the first search is false then the second value will be returned

### **Reasons to use Expressions:**

- To perform calculations not provided by the Peoplesoft Query Tool.
- As columns in the query output
- As comparison values in selection criteria
- To use SQL commands
- To change the display of the data in your output (e.g. concatenate)

### **Analyzing Data**

EPM provides data. When you create a query, you are generally looking to do one of two things: find a specific piece of information or draw conclusions from a larger data set. A simple query might give you specific information. To analyze a larger data set, you will need to use a separate tool. Generally, that tool will be MS Excel, but can be any spreadsheet software.



In order to use Excel effectively as an analysis tool, you should understand the following Excel features and functions.

| Features                   | Functions   | Other                        |
|----------------------------|-------------|------------------------------|
| Pivot Tables               | COUNT       | Named Ranges                 |
| Sub Totals                 | COUNTA      | Nested functions             |
| Sorting columns            | COUNTIF     | Conditional Formatting       |
| Filtering columns          | CONCATENATE | Text to Columns              |
| Groups and Outlining       | IF          | Absolute Cell Reference (F4) |
| Import External Data (CSV) | SUM         | Rounding Numbers             |
| Transpose                  | SUMIF       | Percentages                  |
| Format cells               | VLOOKUP     | Brackets in Formulas         |
| Graphing                   |             |                              |

### Website Reference

The Core-CT Website hosts a list of job aids / documentation as resources / reference.