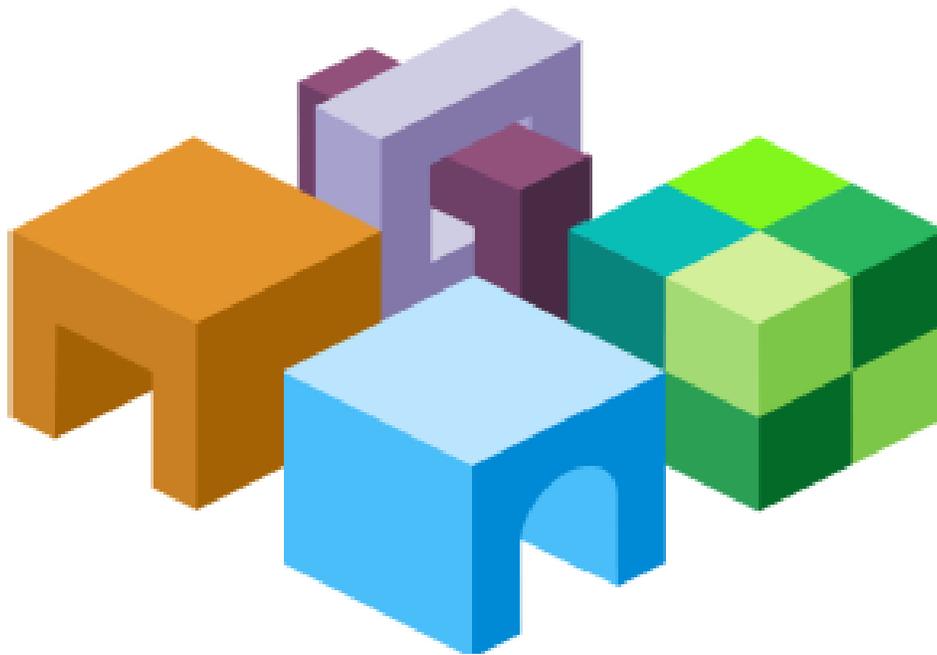


# Basic FPPS Datamart

Web-Based Query and Analysis



## Student Exercise Workbook

Hyperion version 11.1.2.1





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# Introduction

## About this Workbook

This workbook is designed as a step-by-step guide for classroom training as well as a useful reference using Microsoft's Internet Explorer Web Browser. It is designed to provide practical hands-on experience using the basic features and functions of the FPPS Datamart to create a variety of queries and reports.

By the end of the exercises, users will be able to:

- Login to the IBC Datamart Portal and Navigate the Hyperion Application
- Process and analyze pre-built queries
- Create ad hoc queries
- Create a variety of reporting styles, including tables, pivots, charts and reports
- Analyze data in the Pivot and Chart sections

## Exercises

The exercises in this workbook are designed for analysts of FPPS data and anyone else who queries databases and builds reports. Although intended for beginners, the exercises assume a familiarity with MS Windows basics.

Each exercise begins with a stated objective and then instructions on how to perform various tasks associated with the concept.

## Exercise 1: Navigate the Hyperion Client Interface

**Objective:** Access the IBC Datamart Portal and log in. Navigate to selected information and tools available. Log in to the FPPS Datamart. Open the standard report catalog and access a report. Access and use the On-line Help.

### Part A – Access the IBC Datamart Portal

1. Launch the I.E. Web Browser

- To access the IBC Datamart Portal enter the URL <https://dmartportal.nbc.gov>

2. The IBC Datamart Portal screen displays

The screenshot displays the IBC Datamart Portal interface. At the top, it indicates the user is not logged in and provides options to Register or Login. The page is titled "U.S. Department of the Interior" and "IBC Datamart Portal".

**Site Status:** A list of sites with their status: CCTS (green), EEO MD715 (green), Hyperion (green), ICS (green), IPA (green), and PCS (green). A note states: "Green indicates site is up. Red indicates site is down." Below this, it says: "Click applicable URL link above to login to an NBC Datamart application."

**Hyperion Access:** A link labeled "HERE" is provided to find out how to obtain Hyperion Access, or access data for Casuals, Debt Management, EEO, FEHB, or the FPPS Summary Reconciliation (formerly POD200) data.

**Hyperion Plug-In:** Instructions are provided to obtain step-by-step instructions on how to install the Hyperion v11 Plug-In, with a link labeled "HERE" for step-by-step instructions. Possible reasons for doing this are listed: being a new user, having your computer upgraded or re-imaged.

**Current File Data Dates:** A table shows the following data:

File Processed	Date Last Updated	PP Grp	Last PP Proc.
CASUAL PAY	12/15/12 - 01:57	6	N/A
COMBINED FILE	12/15/12 - 20:57	ALL	N/A
COMBINED FILE HISTORY	12/07/12 - 04:15	ALL	201225
DEBT MGMT	12/01/12 - 05:11	ALL	N/A
FPPS SECURITY	12/15/12 - 18:14	ALL	N/A
FPPS SUMMARY RECONCILIATION	12/06/12 - 17:30	1	201225
FPPS SUMMARY RECONCILIATION	12/05/12 - 17:31	2	201225
FPPS SUMMARY RECONCILIATION	12/05/12 - 17:33	3	201225
FPPS SUMMARY RECONCILIATION	12/06/12 - 17:32	4	201225

A "Show More" link is available below the table. A legend indicates: Update in Progress (orange square), File not Updated (red square), and File Updated (green square).

**Datamart Forms:** Instructions are provided to access the Datamart Forms, with links for: "IBC Datamart Special Request Form (IBC-DM-100)", "IBC Datamart User Access Request Form (IBC-DM-101)", and "Click HERE for your Agency Point of Contact (POC) list."

**Hyperion Login:** A large "Hyperion Login" button is visible.

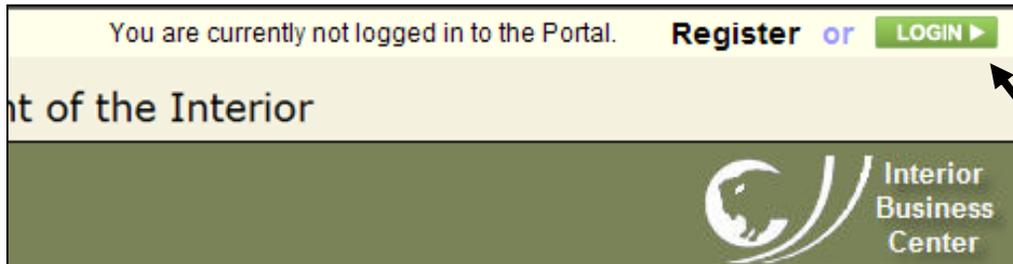
**Hours of Operation:** Information is provided for Database Availability Hours (Mon. - Fri., 5:00 AM - 7:00 PM; Sat., 5:00 AM - 4:00 PM) and Datamart Team Hours (Mon. - Fri., 6:00 AM - 4:00 PM).

**Helpful links:** Links are provided to find the Agency Pay Processing Group, look at what is compatible to use with Hyperion, and find out who are...

## Part B – Log in to the IBC Datamart Portal

### 1. Login to the Datamart Portal

- Place your mouse cursor on **LOGIN**

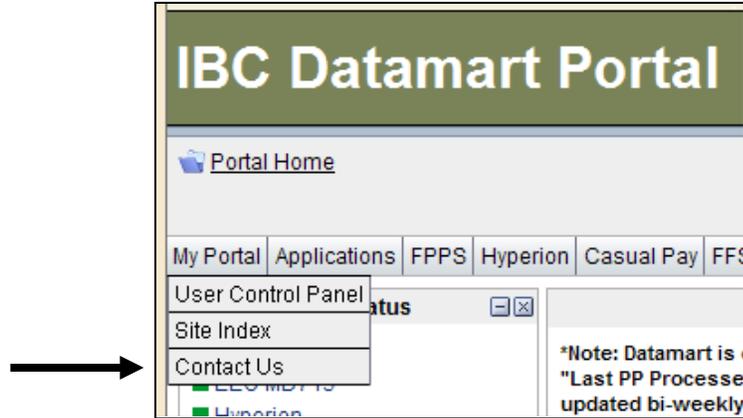


- The User ID and Password input fields display

- Enter your NASA FPPS Datamart **User ID** and **Password**
- Click the **LOG IN** button
- Notice the tab options located below the IBC Datamart Portal banner

## Part C – Navigating the IBC Datamart Portal

1. Move your mouse cursor across the different “tabs” to view the options available
2. Select the **My Portal** tab and click on **Contact Us**

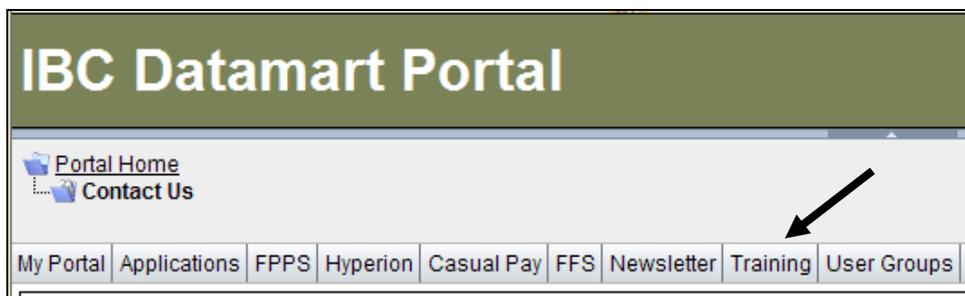


3. The **Contact Us** screen displays

- Click the drop-down arrow to view the different reasons

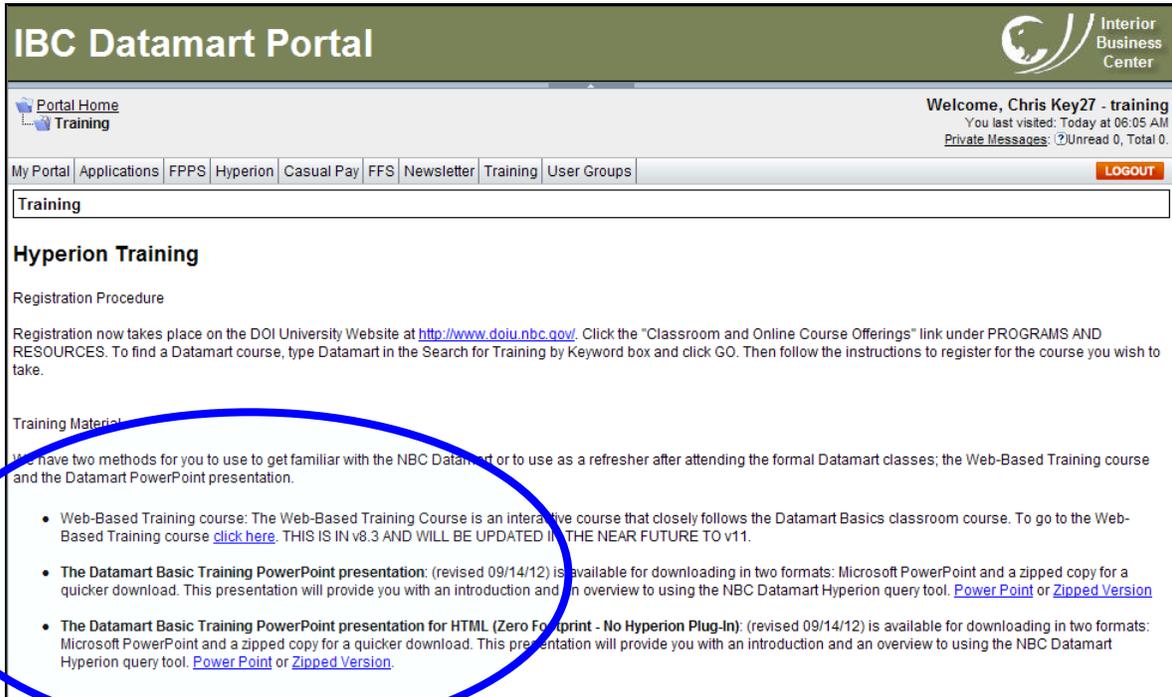
A screenshot of the "Contact Us" form. The page title is "Contact Us". The navigation menu includes "My Portal", "Applications", "FPPS", "Hyperion", "Casual Pay", "FFS", "Newsletter", "Training", and "User Groups". The "Contact Us" section has a "Reason For Contact:" label and a dropdown menu with the selected option "Would Like to have a custom Box created". A black arrow points to the dropdown arrow. Below the dropdown is an "Info:" label and a large text input area. At the bottom left of the input area, it says "1000 characters left". A "Submit" button is located at the bottom of the form.

- Select the **Training** tab

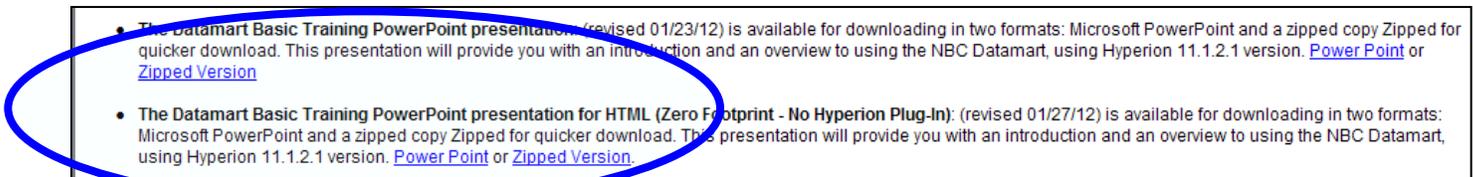


4. The **Hyperion Training** screen displays

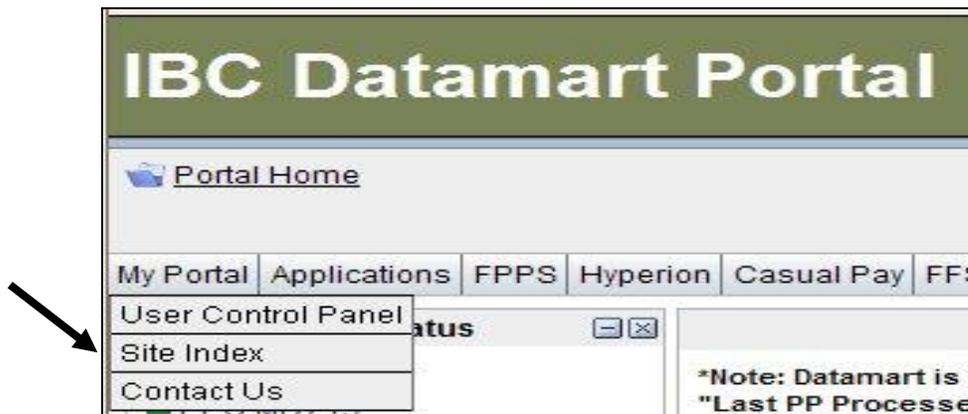
- Notice the User resources available



5. At the bottom of the **Hyperion Training** screen notice that there are Datamart PowerPoint presentations available

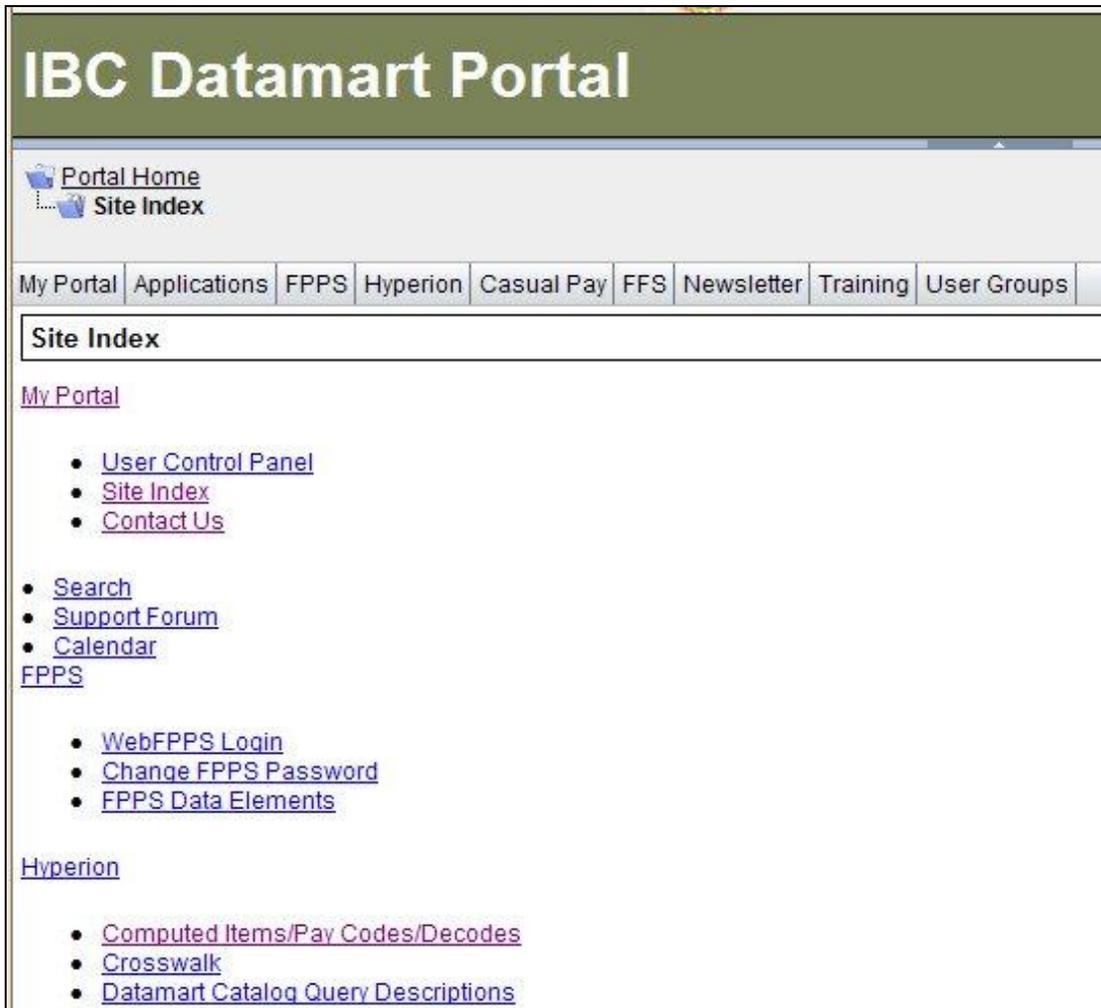


6. At the top of the screen, click on **My Portal** and select **Site Index**



7. The **IBC Portal Site Index** screen displays

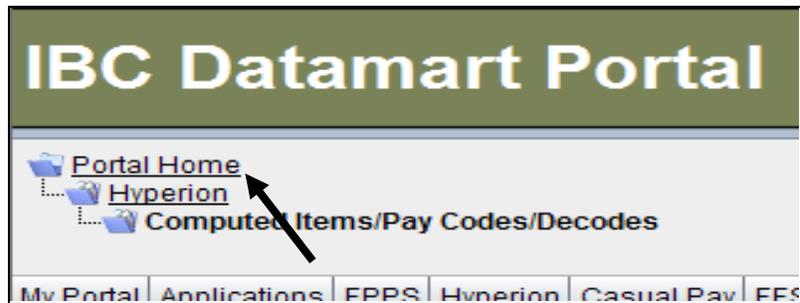
- Scroll down to view the various User resources available



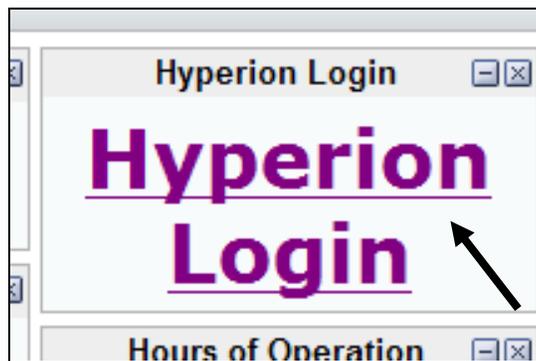
## Part D – Access the Datamart

### 1. Access the **FPPS Datamart Login** screen

- Click the **Portal Home** breadcrumb

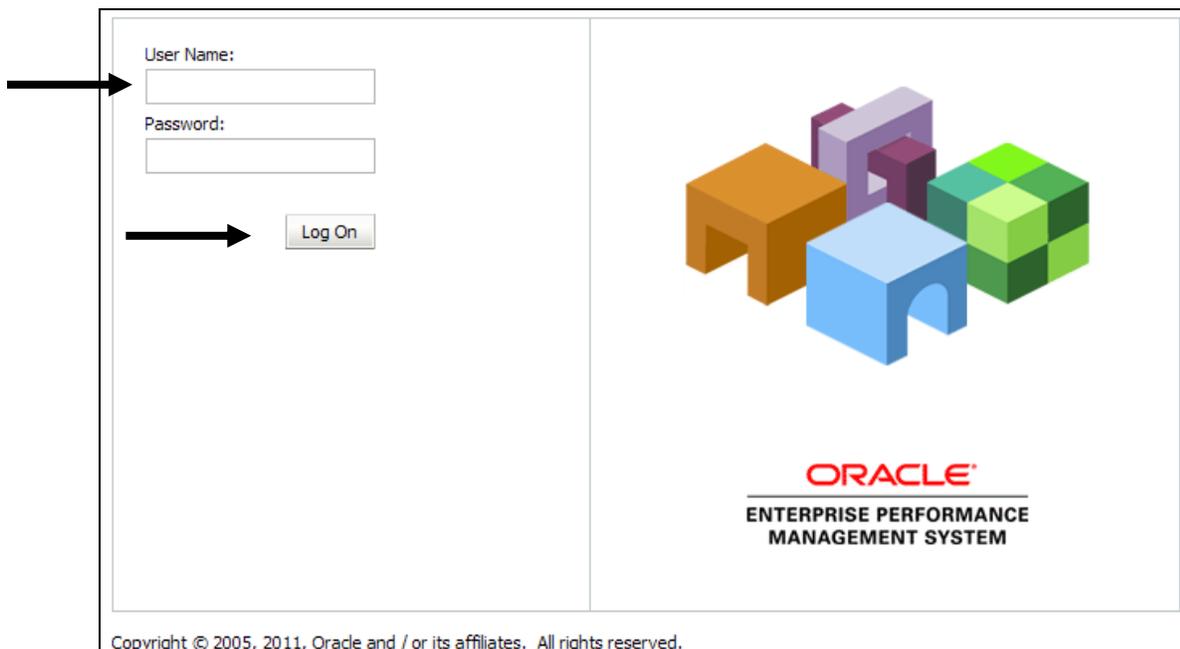


- Click on the **Hyperion Login** link



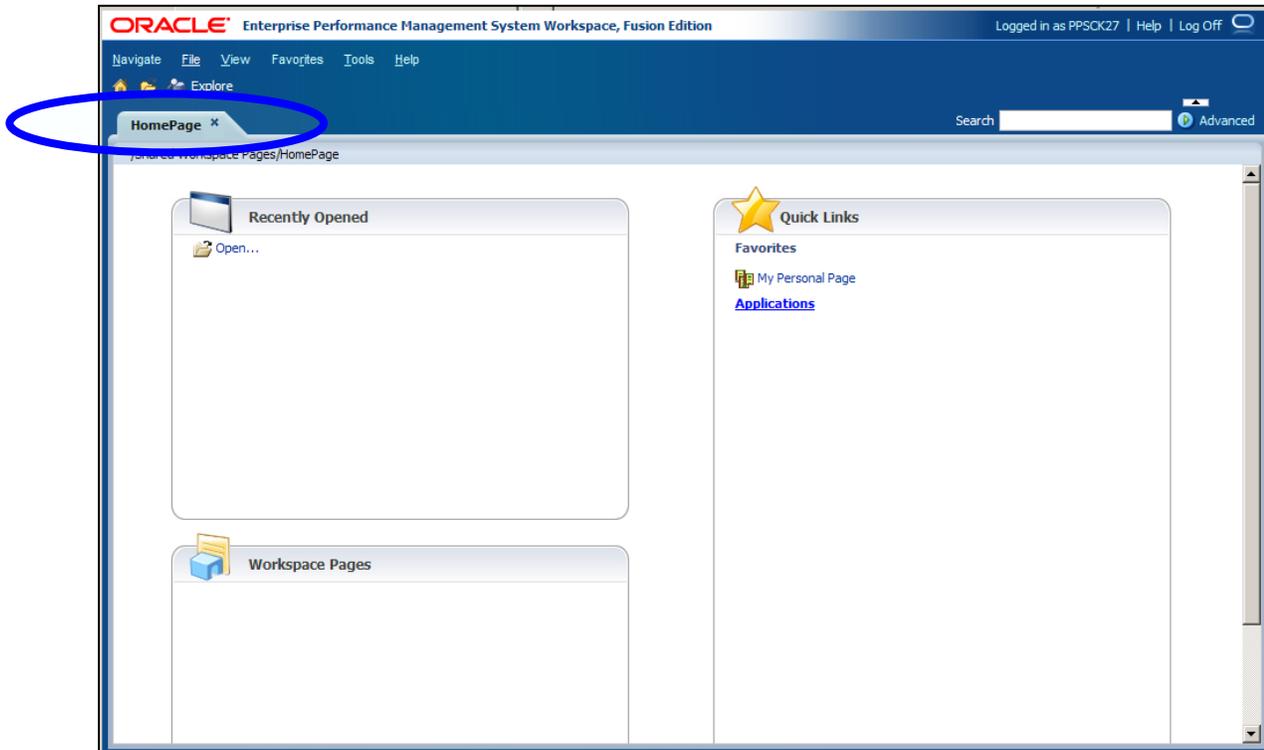
### 2. The **ORACLE Enterprise Performance Management System Workspace Log On** screen displays in a new window

- Enter your NASA FPPS Datamart **User Name** and **Password**
- Click the **Log On** button

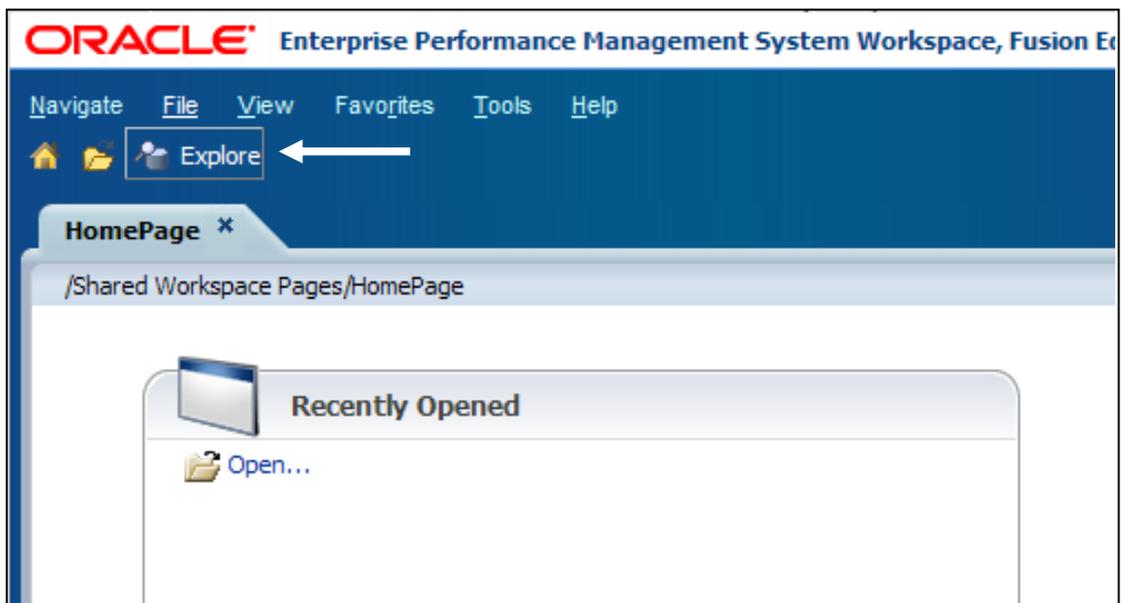
A screenshot of the Oracle Enterprise Performance Management System Workspace Log On screen. On the left side, there are two input fields: "User Name:" and "Password:". An arrow points to the "User Name:" field. Below the input fields is a "Log On" button, with an arrow pointing to it. On the right side, there is a graphic of four interlocking 3D blocks in orange, purple, blue, and green. Below the graphic, the text "ORACLE" is displayed in red, followed by "ENTERPRISE PERFORMANCE MANAGEMENT SYSTEM" in black. At the bottom of the screen, the copyright notice "Copyright © 2005, 2011, Oracle and / or its affiliates. All rights reserved." is visible.

## Part E – Navigating the Datamart

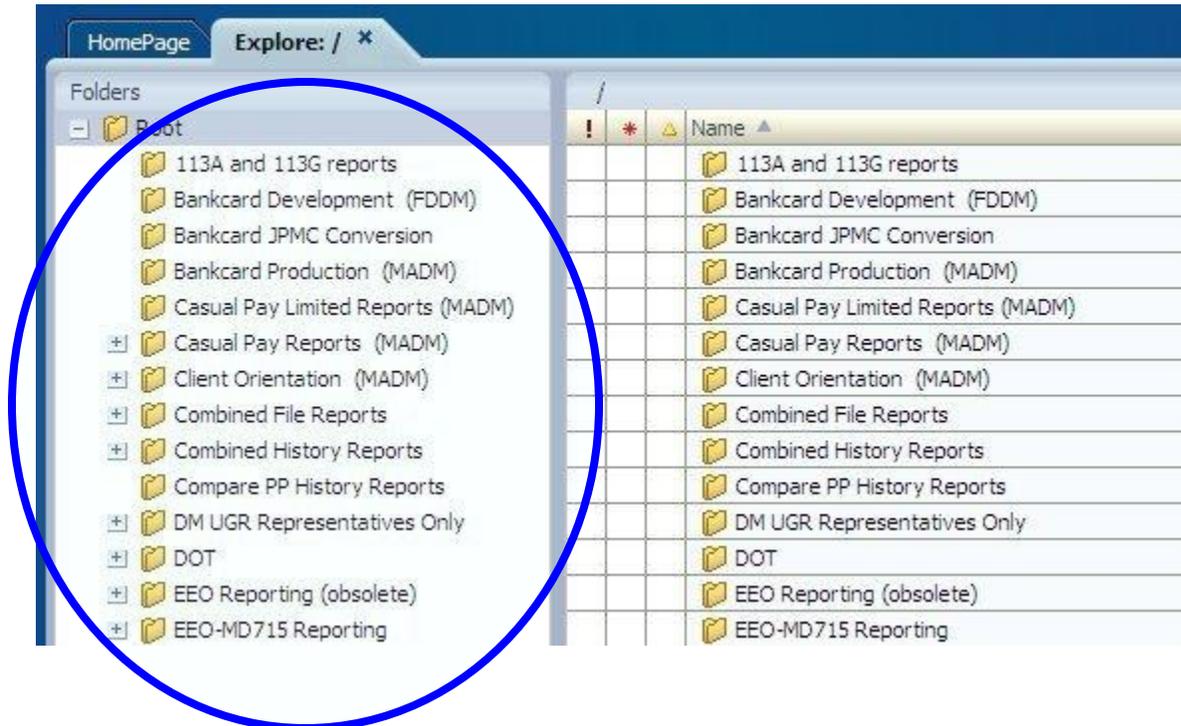
1. Notice that the Datamart (Hyperion) opens at the **HomePage**



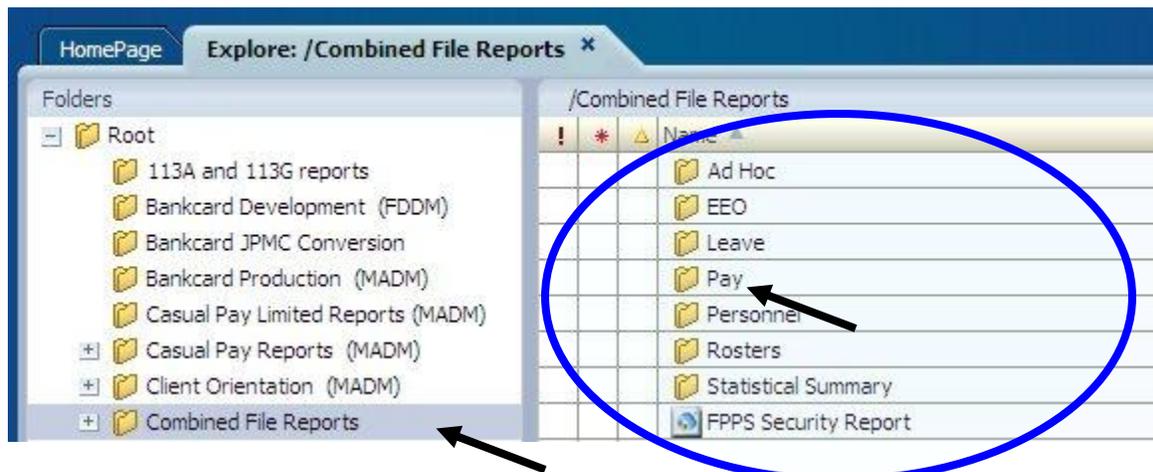
- To access the Datamart Standard Report catalog, click on **Explore**



2. The **Explore** screen opens and displays all folders you have access to in the Folders pane

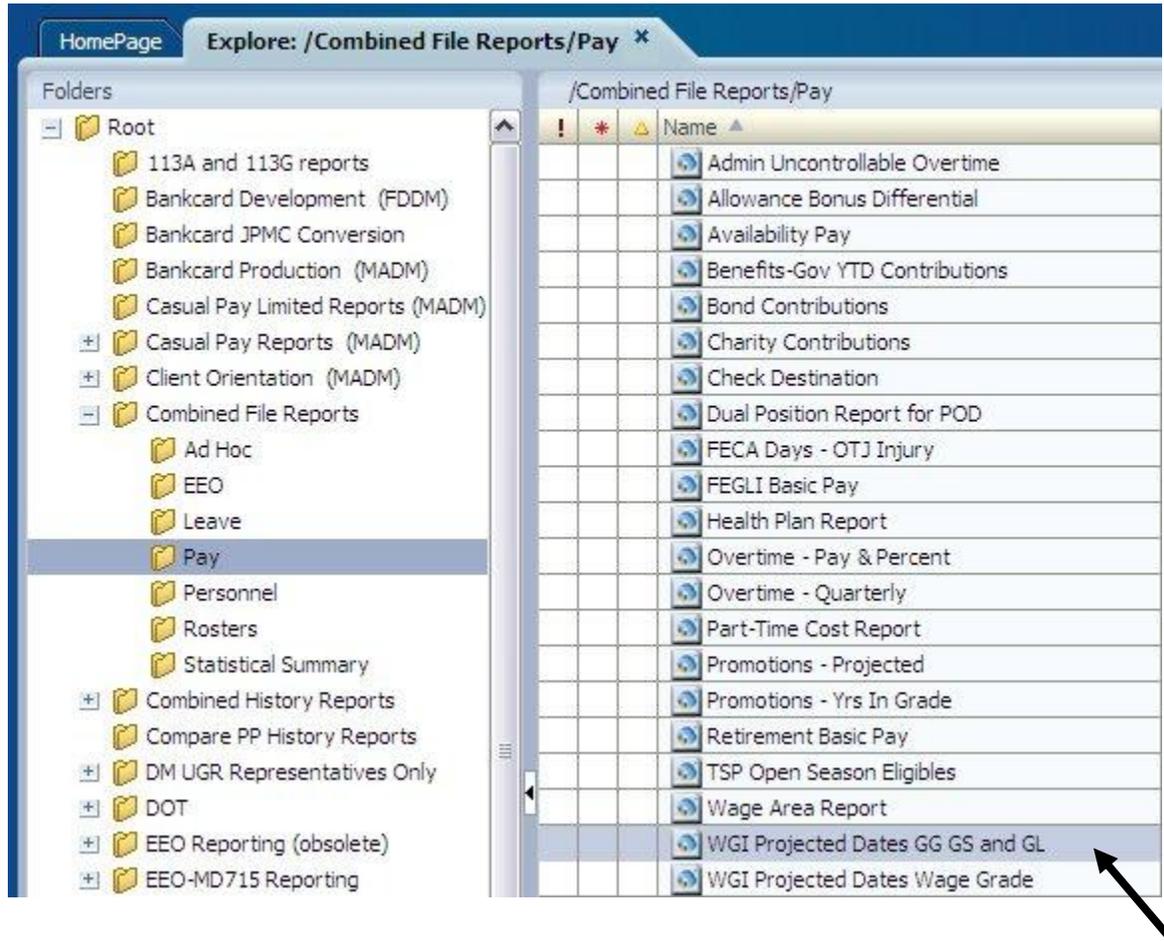


- To access a standard report, click once on the **Combined File Reports** folder

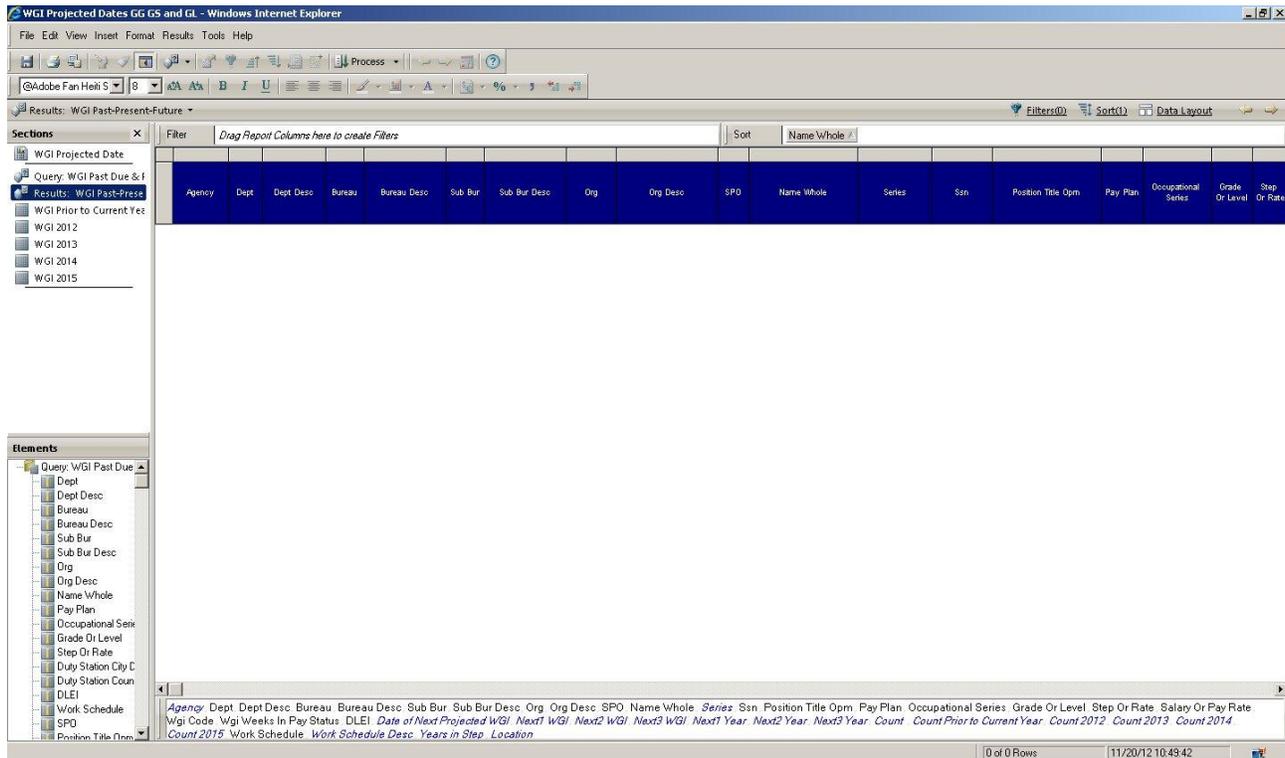


- The right side of the screen now displays any sub-folders and queries you have access to within the main Combined File Reports folder
- Double-click on the **Pay** folder to open it

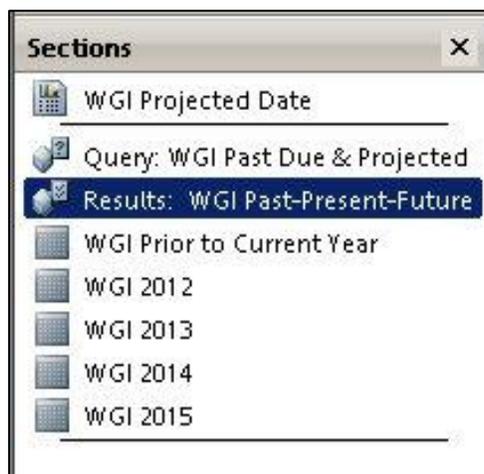
- Double-click on the query **WGI Projected Dates GG GS and GL** to open it



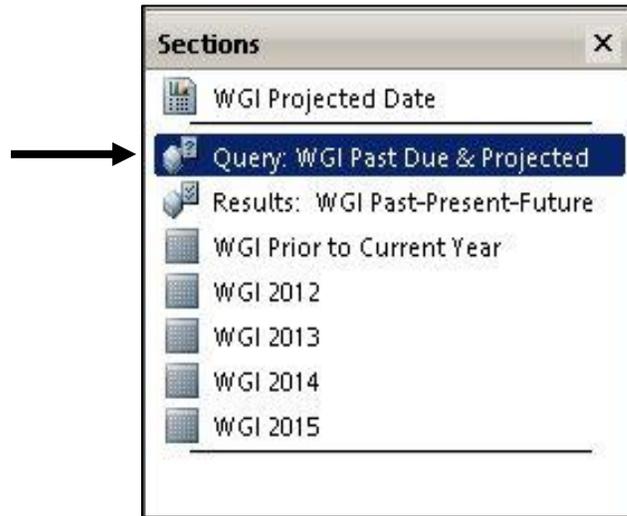
## 2. The **WGI Projected Dates GG GS and GL** query opens in the Results Section



- Refer to the Results Color Training Aid for additional information
- Resize the Sections pane by placing the mouse cursor to the right side, click and drag to fully display the text

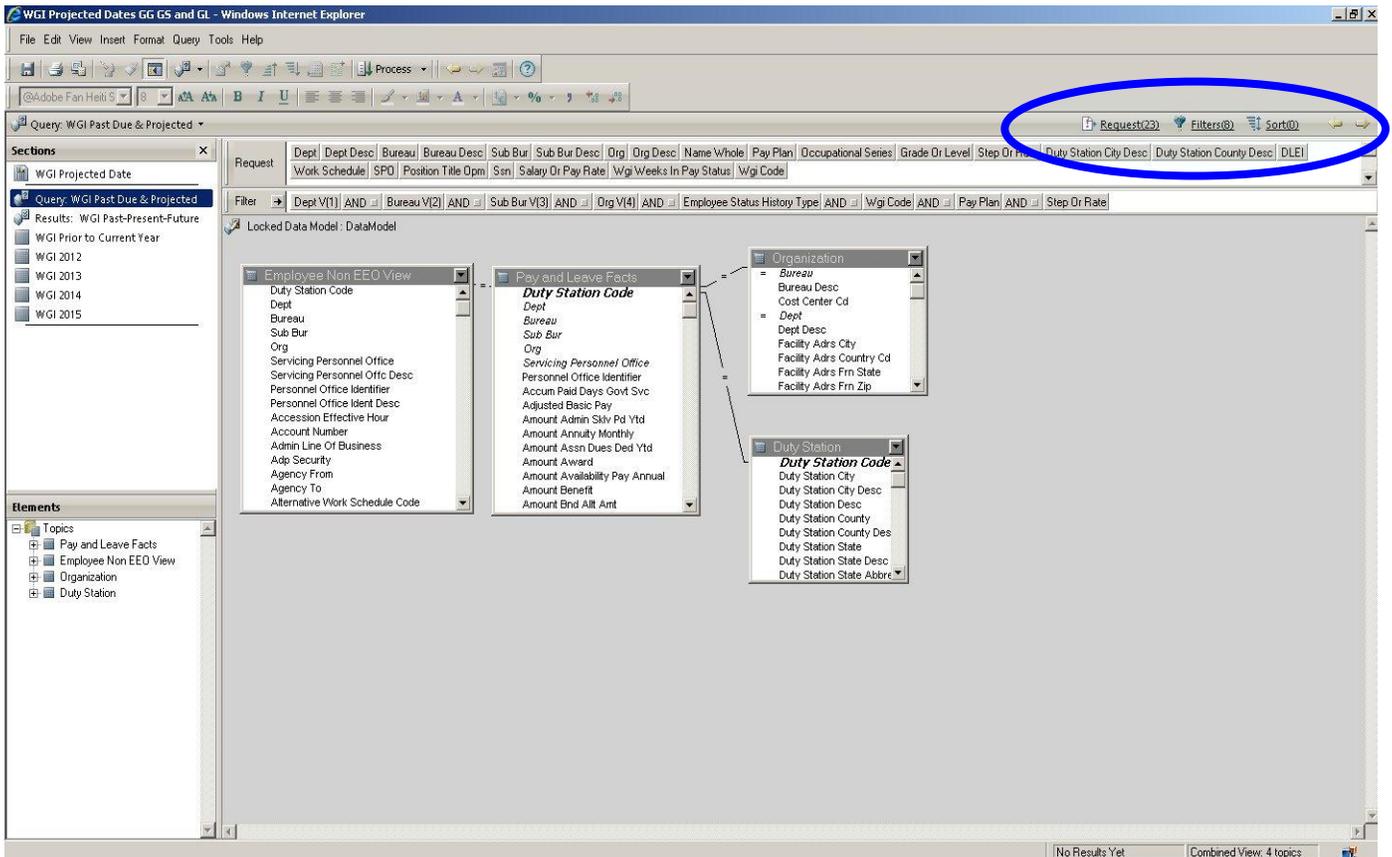


- In the **Sections** pane, click on **Query** to access the Query Section



#### 4. The **Query Section** displays

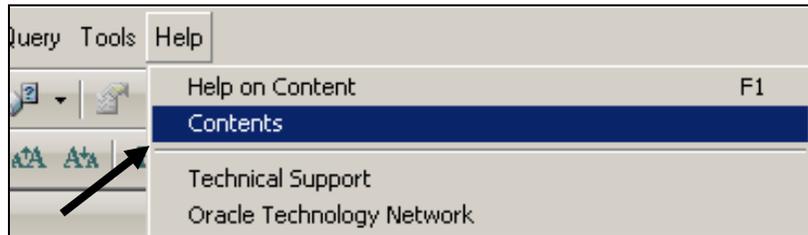
- Notice that this query has 23 Requests, 8 Filters, and 0 Sorts



- Refer to the Query Color Training Aid for additional information

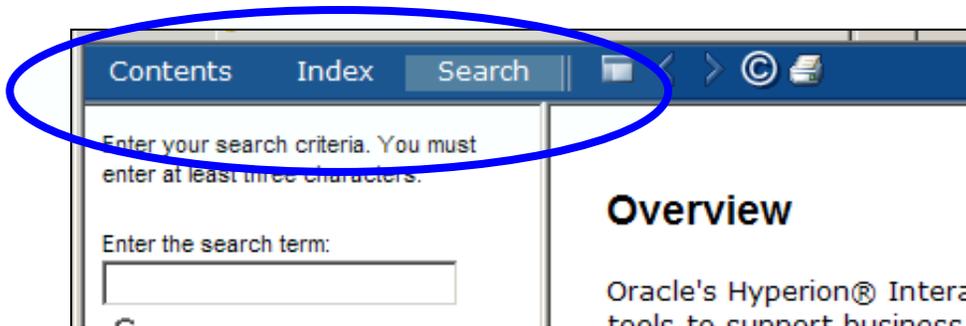
## Part F – Access Hyperion Help

1. From the Main Menu Bar, click on **Help** and select **Contents**

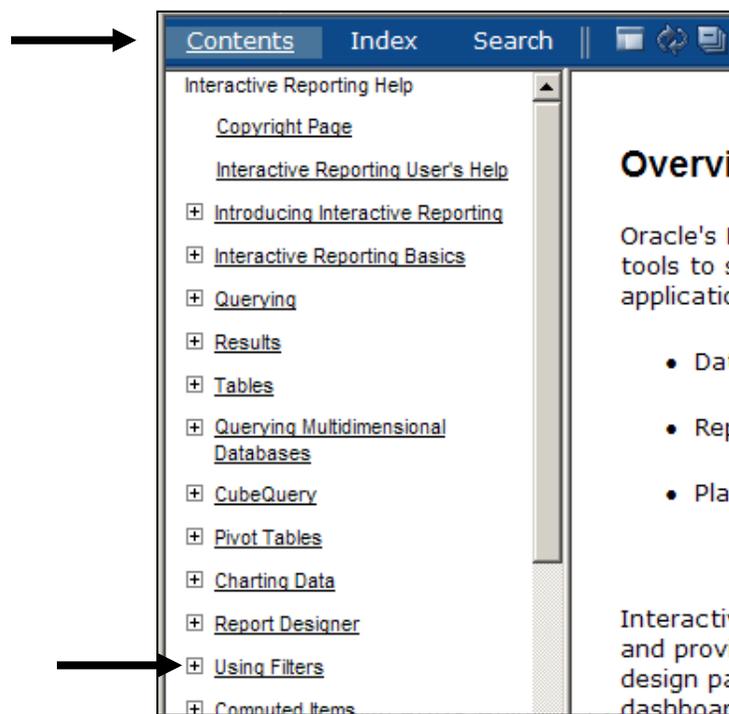


2. The **Hyperion Help** screen displays

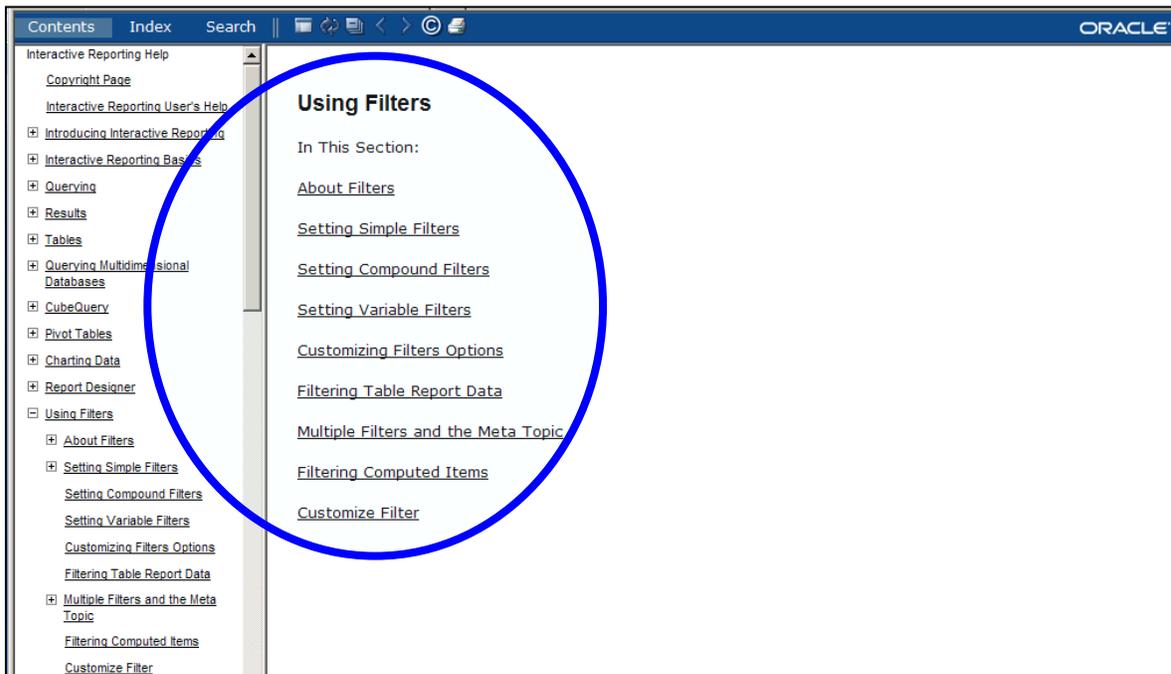
- Notice that there are 3 ways to use the help (Contents, Index, and Search), in addition, print capabilities are available



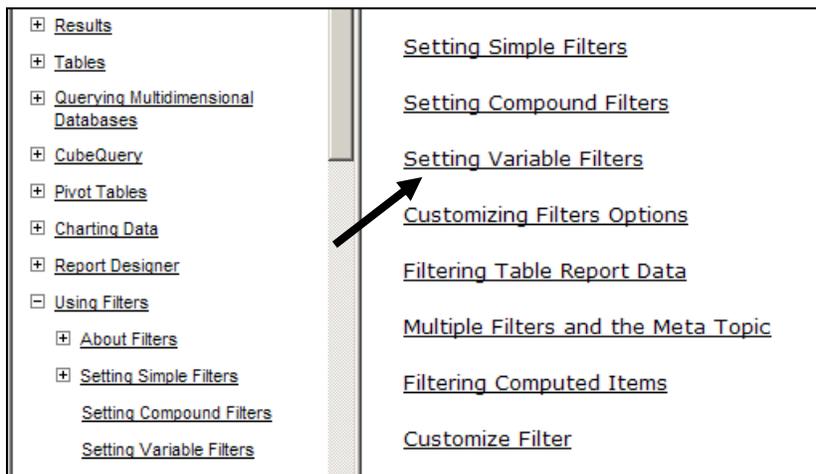
- Click on **Contents** and **Using Filters** to view the different help options



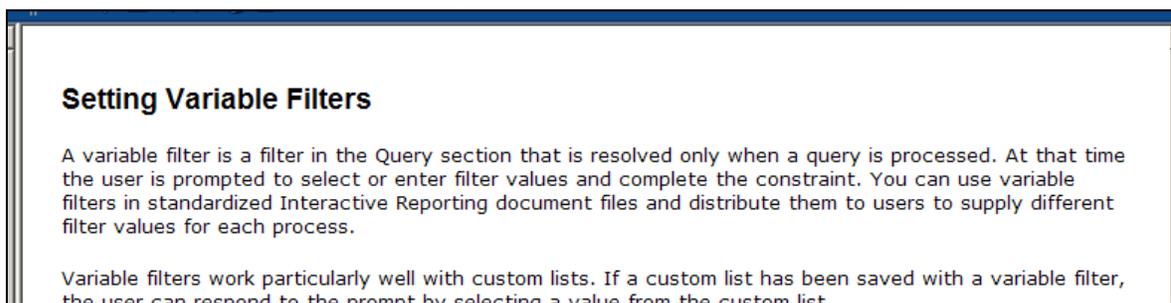
- Notice that the content area displays additional information on using filters



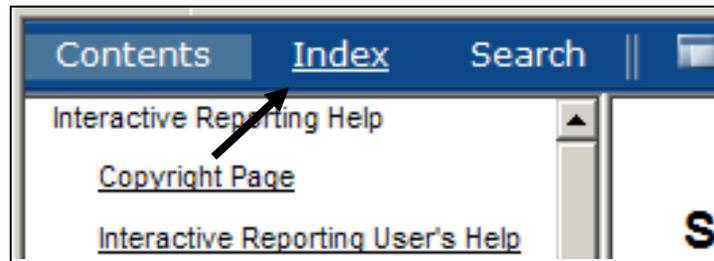
- Click on **Setting Variable Filters** link



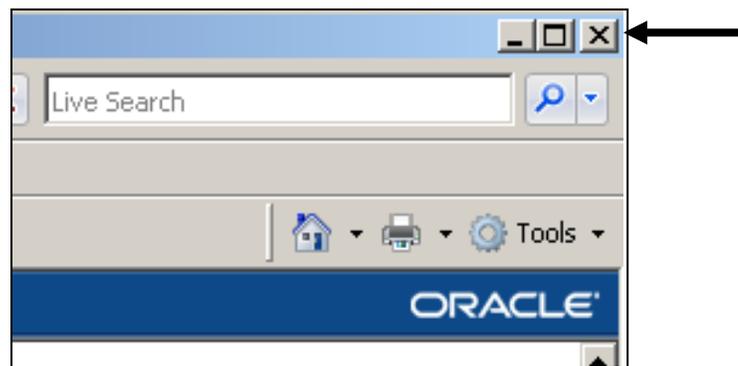
3. The Content pane now displays detailed information on setting variable filters



4. Click on **Index** and **Search** to view the features and options

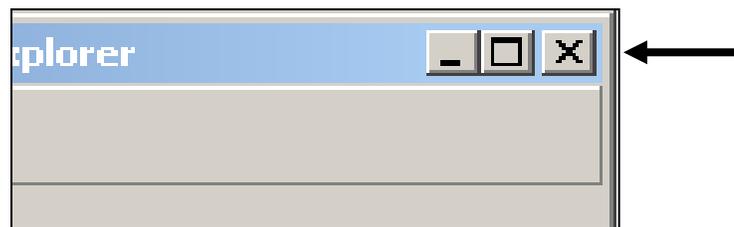


5. Close the Help window by clicking on the **X** at the upper right corner



## Part G – Exit and Log Out

1. Close the query by clicking on the **X**

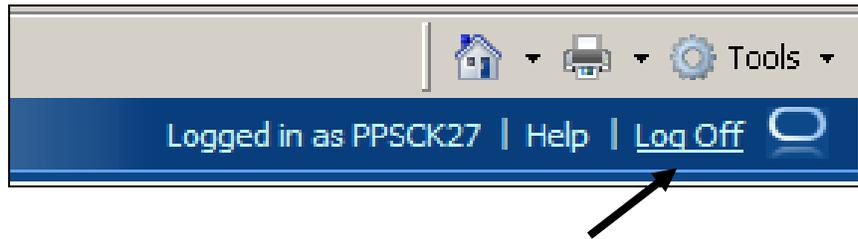


2. The **Save Changes** pop-up window opens

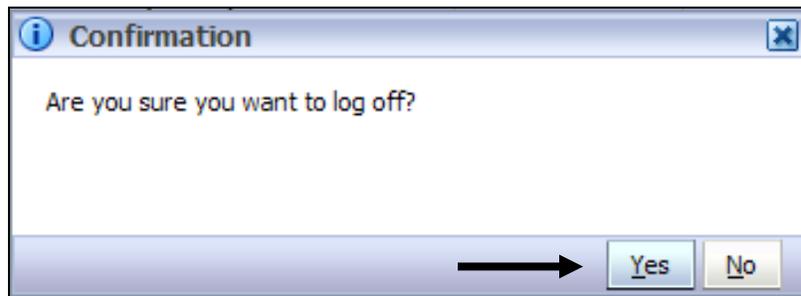
- Click the **No** button



3. Logout of the Datamart by clicking on **Log Off** at the upper right corner



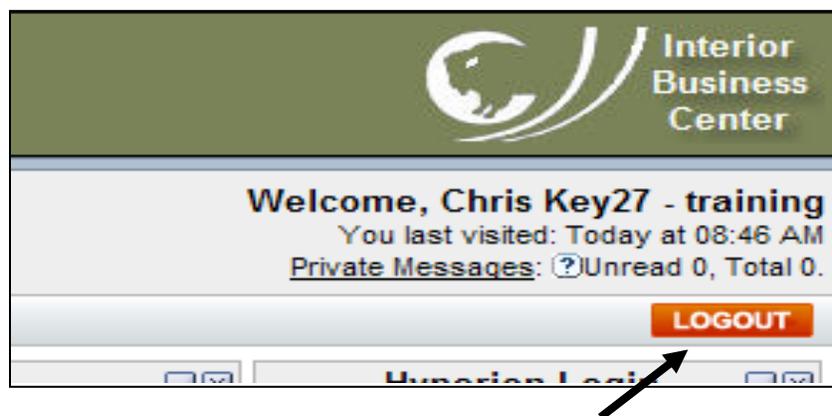
- Select the **Yes** button at the Confirmation pop-up window



- Close the Web browser

4. Logout of the Datamart Portal

- Click the **LOGOUT** button



5. Close the Web browser

End of Exercise

## Exercise 2: Access and Process a Standard Report

**Objective:** Login to the FPPS Datamart. Access the standard report catalog, select and process a standard report, review the results and save the document to a file.

### Part A – Access and Process a Standard Report

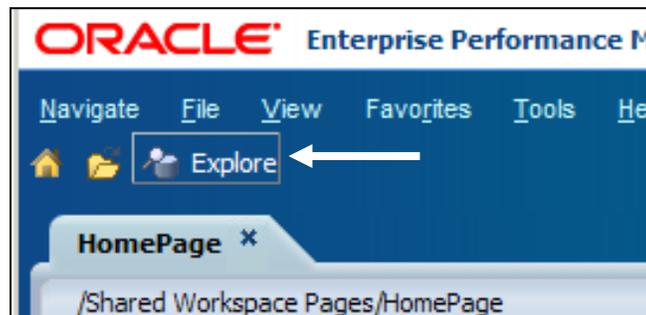
#### 1. Launch the I.E. Web Browser

- Access the IBC Datamart Portal at <https://dmartportal.nbc.gov>
- Click on the **Hyperion Login** link

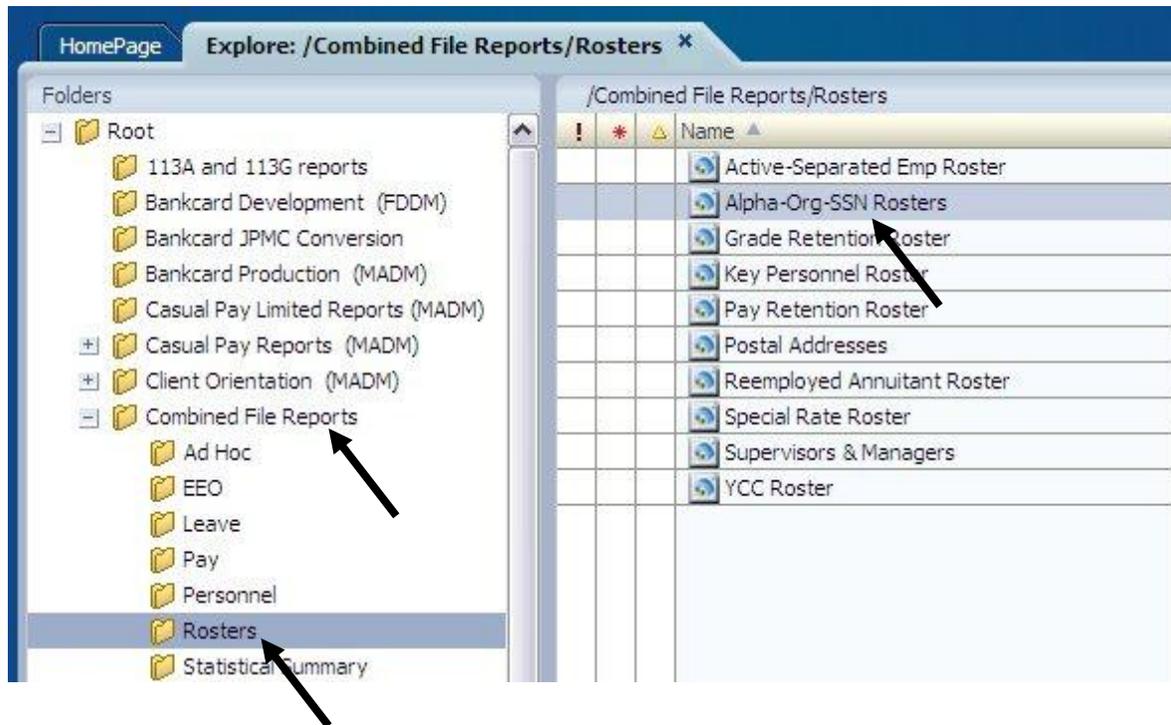


#### 2. The **ORACLE Enterprise Performance Management System Workspace Login** screen displays

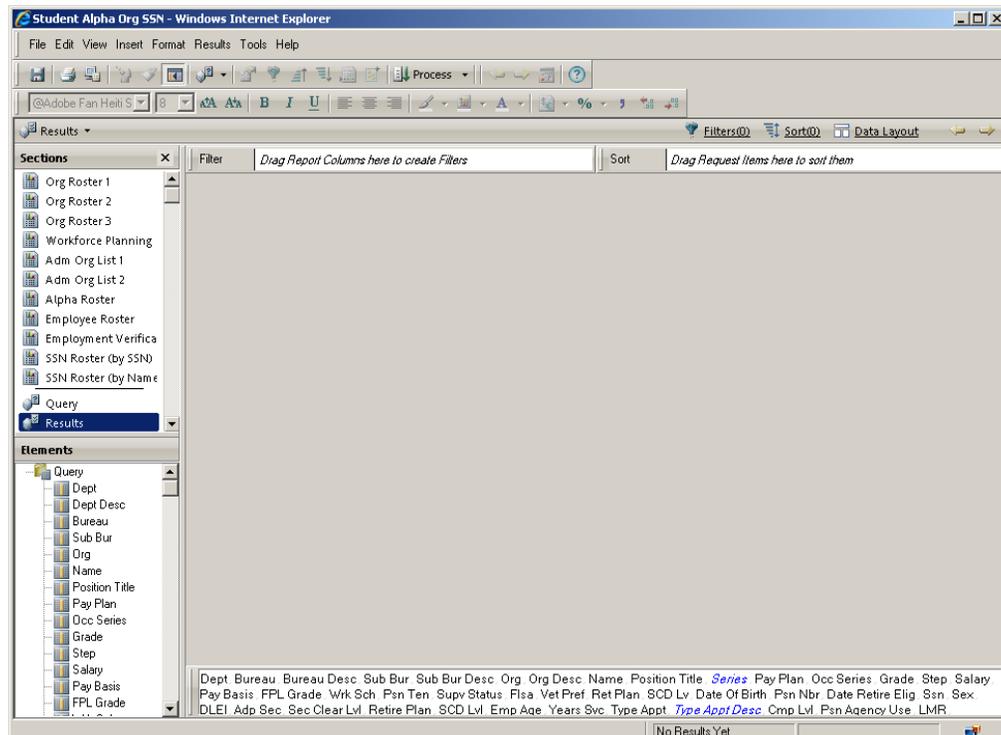
- Log in using your NASA FPPS Datamart **User Name** and **Password**
- Click the **Log On** button
- At the **HomePage**, click on **Explore** to access the Datamart Standard Report catalog



3. In the Folders pane, double click on the **Combined File Reports** folder to open it. Select the **Rosters** folder and then double click on the **Alpha-Org-SSN Rosters** query.

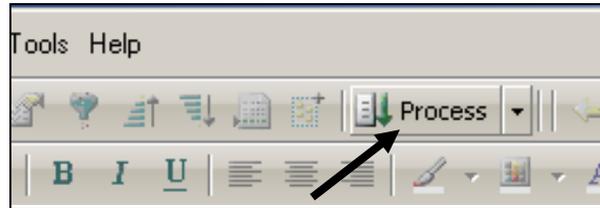


- The **Alpha-Org-SSN Rosters** query opens in the Results Section

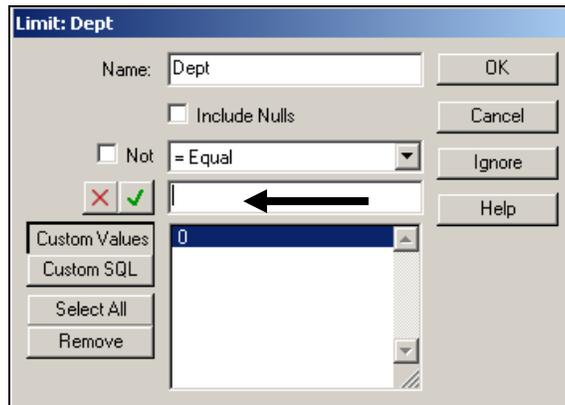


#### 4. Process the Query

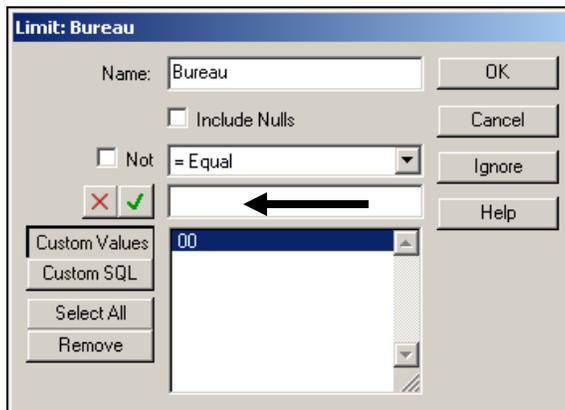
- Click on the **Process** button located on the Standard Toolbar



- The **Limit: Dept** variable filter windows opens
- Enter your NASA code of **NN** for **Dept** and click the **OK** button

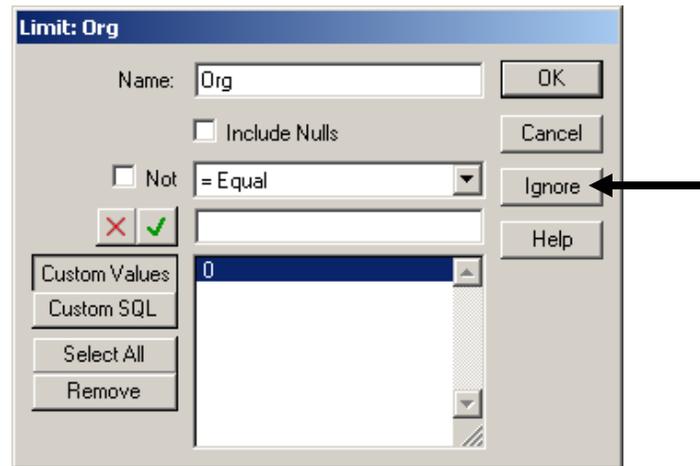


- The **Limit: Bureau** variable filter windows opens
- Enter your NASA code of **23** for **Bureau** and click the **OK** button



- The **Limit: Sub Bur** variable filter windows opens
- Enter your NASA code of **00** for **Sub Bur** and click the **OK** button

- The **Limit: Org** variable filter window opens
- Click the **Ignore** button



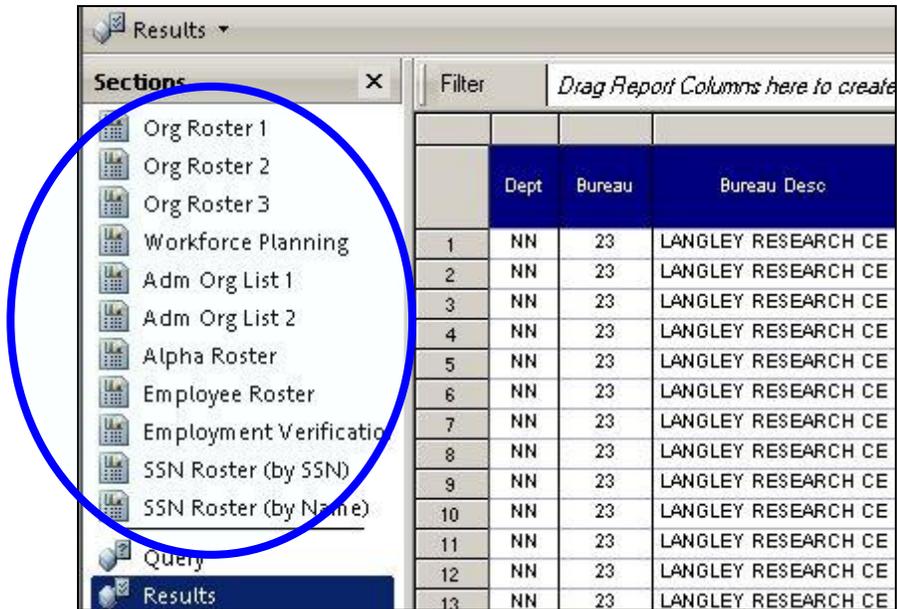
## 5. The Results Section displays with data

	Dept	Bureau	Bureau Desc	Sub Bur	Sub Bur Desc	Org	Org Desc	Name
1	IN	07	BUREAU 07	01	SUB-BUREAU 01	WEST002	ORGANIZATION WEST002	PLANTER, LIZABETH H
2	IN	07	BUREAU 07	01	SUB-BUREAU 01	WEST002	ORGANIZATION WEST002	BARNETT, RANDALL Y
3	IN	07	BUREAU 07	01	SUB-BUREAU 01	WEST002	ORGANIZATION WEST002	HAYWARD, VIVIAN M
4	IN	07	BUREAU 07	01	SUB-BUREAU 01	WEST003	ORGANIZATION WEST003	MURPHY, JOHANNA A
5	IN	07	BUREAU 07	01	SUB-BUREAU 01	WEST003	ORGANIZATION WEST003	WILLIAMS, MARILYN W
6	IN	07	BUREAU 07	01	SUB-BUREAU 01	WEST003	ORGANIZATION WEST003	FOSSON, WILLIAM L
7	IN	07	BUREAU 07	01	SUB-BUREAU 01	WEST003	ORGANIZATION WEST003	OLIVENCIA, ARLENE W
8	IN	07	BUREAU 07	01	SUB-BUREAU 01	WEST003	ORGANIZATION WEST003	MCKOY, GEORGIA J
9	IN	07	BUREAU 07	01	SUB-BUREAU 01	WEST003	ORGANIZATION WEST003	MCCULLOUGH, SHARMAINE
10	IN	07	BUREAU 07	01	SUB-BUREAU 01	WEST003	ORGANIZATION WEST003	SHERIDAN, MILTON
11	IN	07	BUREAU 07	01	SUB-BUREAU 01	WEST004	ORGANIZATION WEST004	THOMPSON, DEBRA H
12	IN	07	BUREAU 07	01	SUB-BUREAU 01	WEST004	ORGANIZATION WEST004	THORN, TODD J
13	IN	07	BUREAU 07	01	SUB-BUREAU 01	WEST004	ORGANIZATION WEST004	MARSHALL, MARIAM
14	IN	07	BUREAU 07	01	SUB-BUREAU 01	WEST004	ORGANIZATION WEST004	ROBERSON, MARY F
15	IN	07	BUREAU 07	01	SUB-BUREAU 01	WEST004	ORGANIZATION WEST004	CARR, RUTH L
16	IN	07	BUREAU 07	01	SUB-BUREAU 01	WEST004	ORGANIZATION WEST004	SAMYER, SUSAN B
17	IN	07	BUREAU 07	01	SUB-BUREAU 01	WEST004	ORGANIZATION WEST004	TYSON, JERRY LOU D
18	IN	07	BUREAU 07	01	SUB-BUREAU 01	WEST004	ORGANIZATION WEST004	VAZQUEZ, VIVIAN
19	IN	07	BUREAU 07	01	SUB-BUREAU 01	WEST004	ORGANIZATION WEST004	MELBARDIS, JAMES M
20	IN	07	BUREAU 07	01	SUB-BUREAU 01	WEST004	ORGANIZATION WEST004	MULLINAX, MELISSA H
21	IN	07	BUREAU 07	01	SUB-BUREAU 01	WEST005	ORGANIZATION WEST005	ARMET, RANEL S
22	IN	07	BUREAU 07	01	SUB-BUREAU 01	WEST005	ORGANIZATION WEST005	SAINTE AMAND, EYSA
23	IN	07	BUREAU 07	01	SUB-BUREAU 01	WEST005	ORGANIZATION WEST005	WEAVER, CHARLOTTE F
24	IN	07	BUREAU 07	01	SUB-BUREAU 01	WEST005	ORGANIZATION WEST005	DRESSIN, ANITA A
25	IN	07	BUREAU 07	01	SUB-BUREAU 01	WEST005	ORGANIZATION WEST005	SCOGGINS, DORIS A
26	IN	07	BUREAU 07	01	SUB-BUREAU 01	WEST006	ORGANIZATION WEST006	CARTER, RICHARD
27	IN	07	BUREAU 07	01	SUB-BUREAU 01	WEST006	ORGANIZATION WEST006	AGUIRRE, WANDA E

- Using the bottom scroll bar, scroll to the right to view the columns of information displayed
- Refer to the Results Color Training Aid for additional information

**Question:** How many rows of data were returned? \_\_\_\_\_ of \_\_\_\_\_

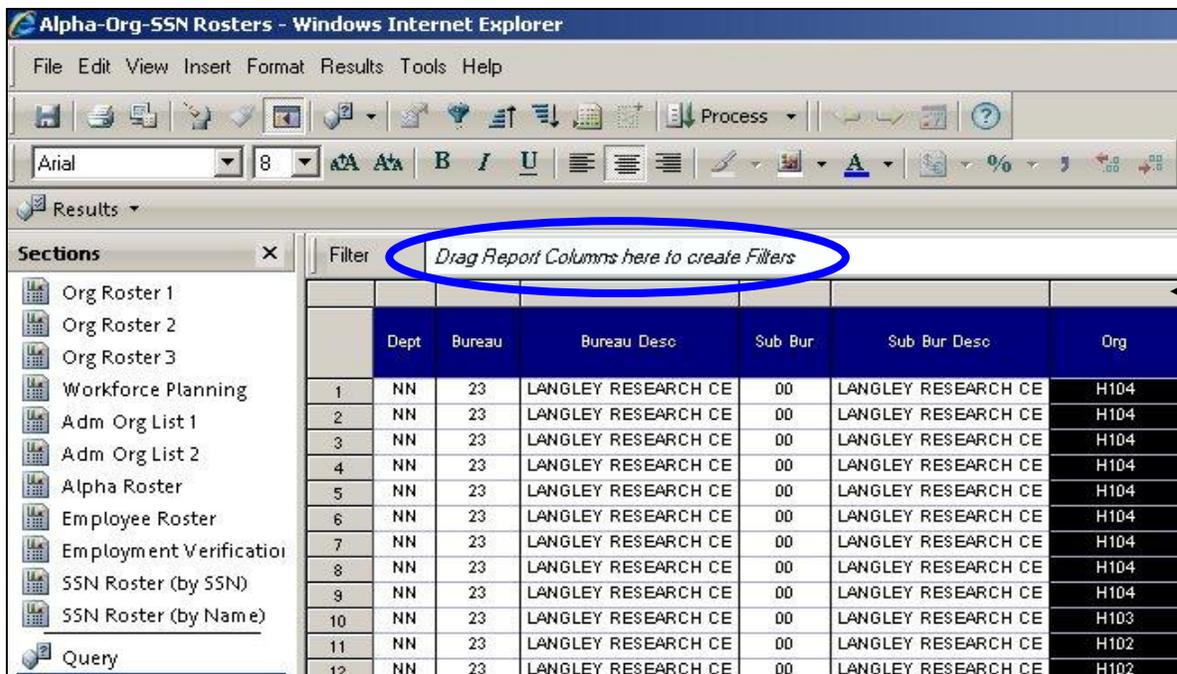
6. In the Sections Pane, notice that there are numerous Reports already built.



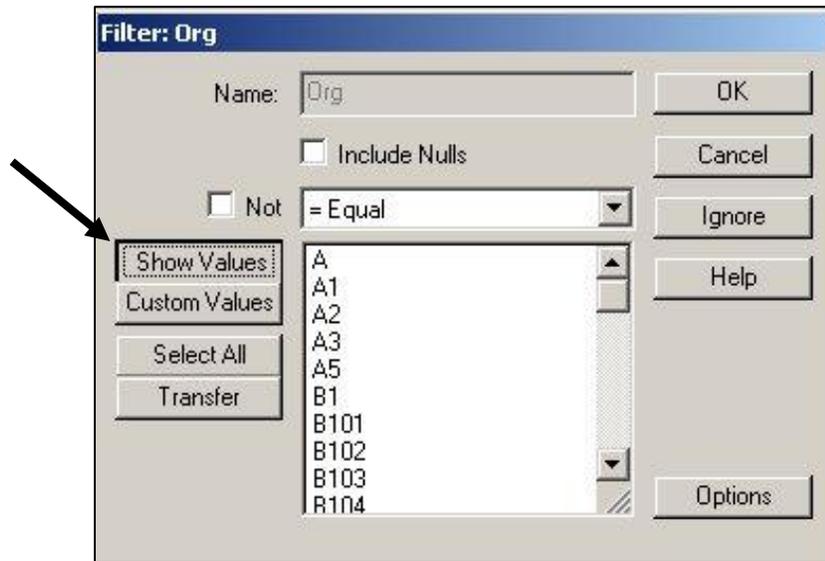
- Click on each of these reports and review the information displayed.

7. Click on **Results** to return to the **Results Section**

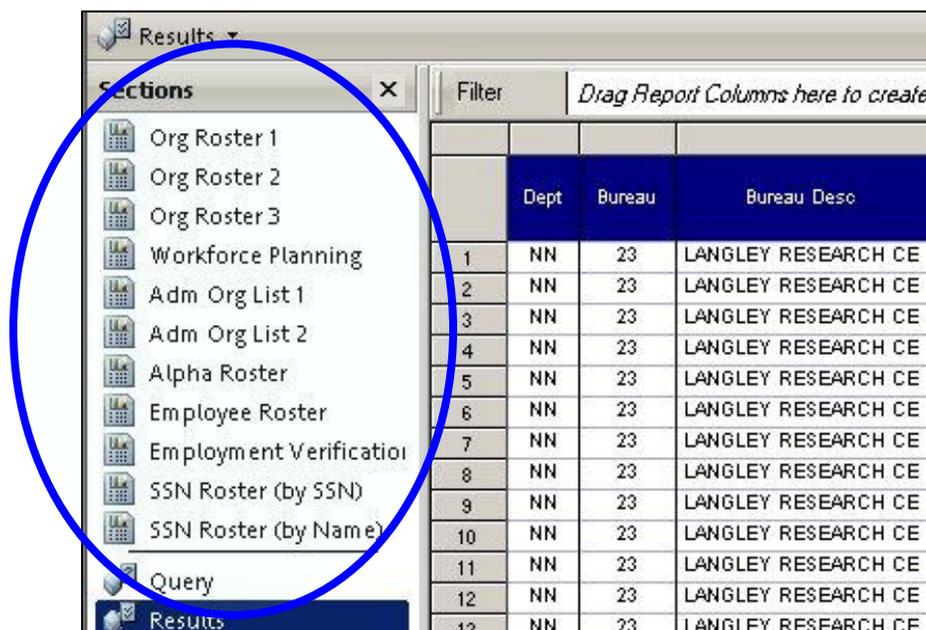
- Click the gray bar above the **Org** column to select it
- Drag the Org column by the gray bar and drop it into the **Filter** line



8. The **Filter: Org** window opens
  - Select the **Show Values** button
  - Click on a single Org Code to select it **OR** hold down the Ctrl key on your keyboard to select multiple Org Codes
  - Click the **OK** button

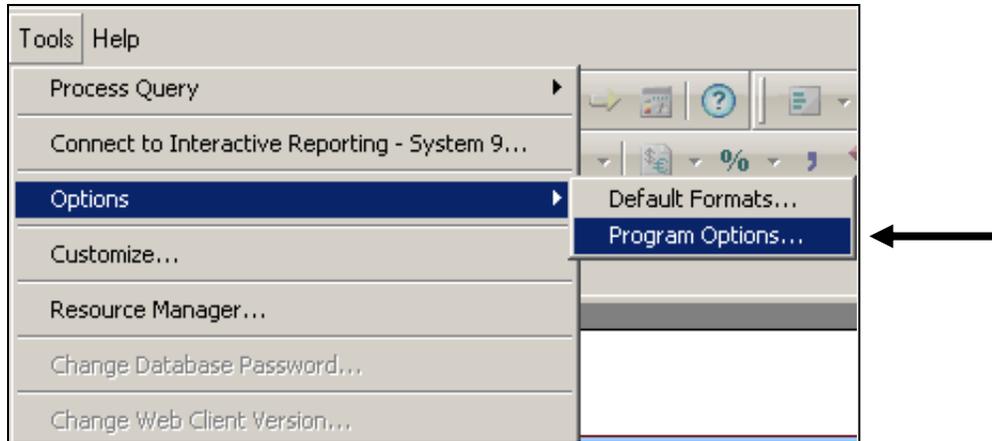


9. In the Sections Pane, select each of the reports and review the information again. Notice that the report is now filtered down to just the Orgs filtered in the Results section.

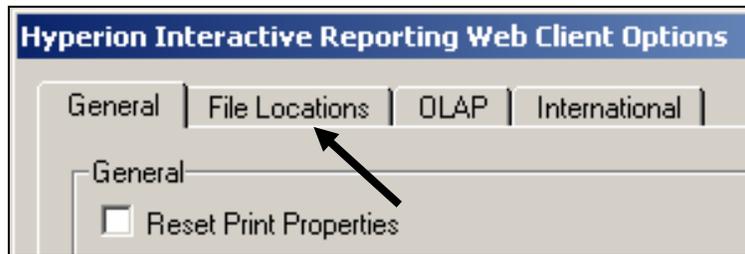


## Part B – Change Default Save Location

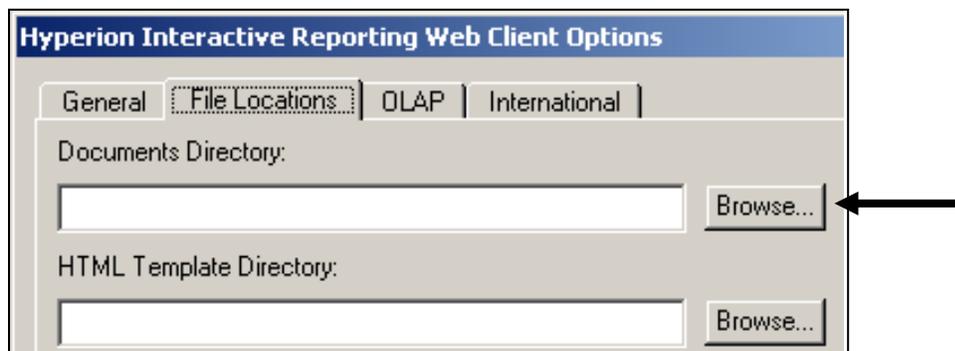
1. To change Default Save Location, locate and select from the Main Menu, **Tools...Options...Program Options**



- At the **Hyperion Interactive Reporting Web Client Options** window, click on the **File Locations** tab

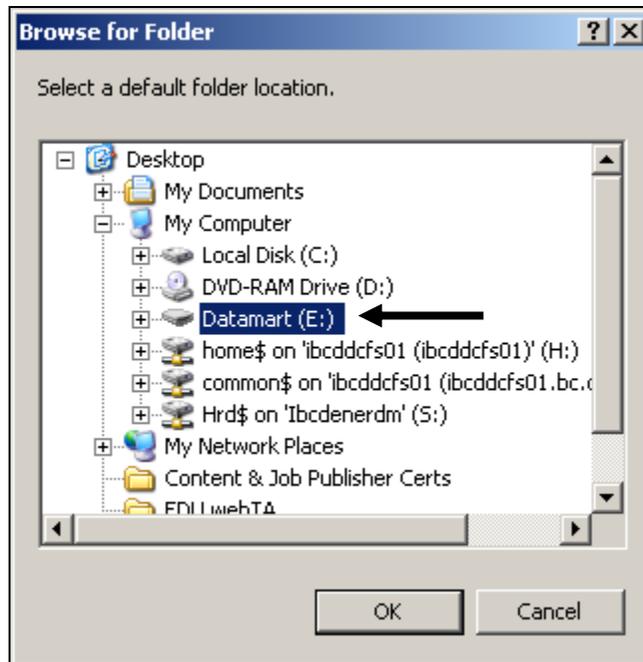


- Select the **Browse** button

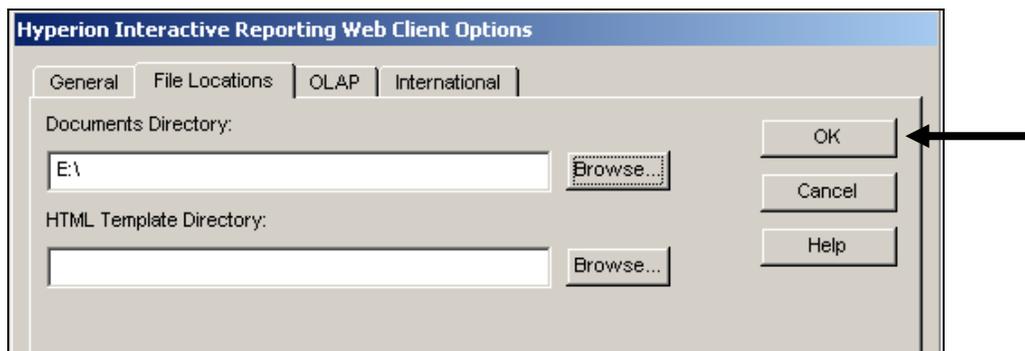


2. The **Browse for Folder** window opens

- Select your preferred default save location
- Click the **OK** button

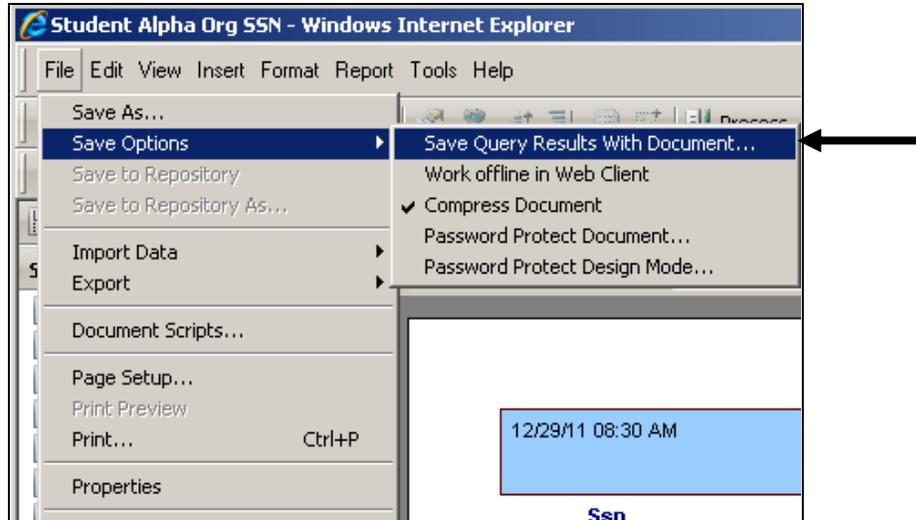


- At the **Hyperion Interactive Reporting Web Client Options** window, click the **OK** button

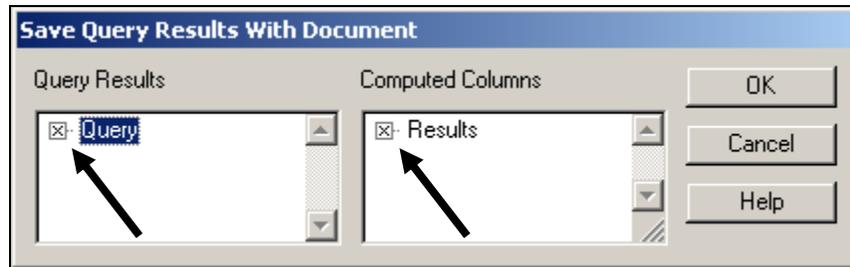


## Part C – Save the Document (with Results)

1. On the Main Menu bar, select **File**, click on **Save Options** and select **Save Query Results With Document...**



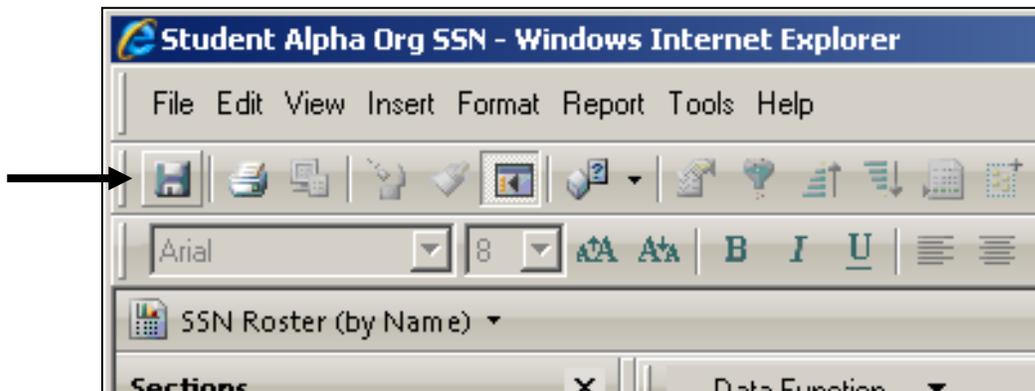
- Click in the check box next to **Query** to save the Query results and the check box next to **Results** to save results of the computed columns



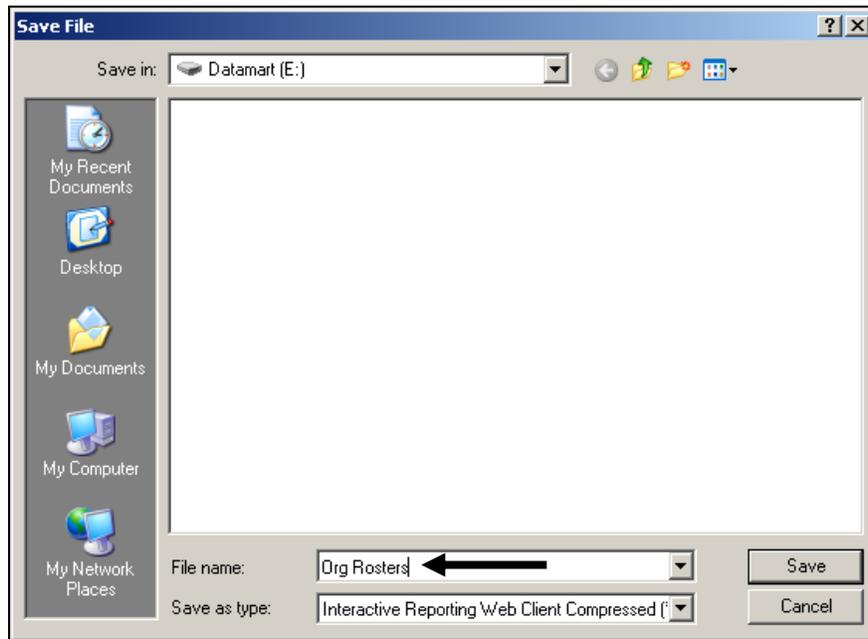
- Click the **OK** button

## 2. Save File

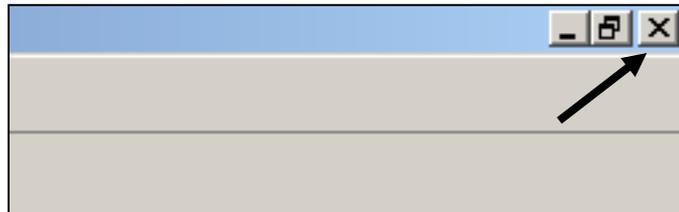
- On the Standard Toolbar, click the **Save** icon



- Change the file name to **Org Rosters** and click the **Save** button



- Click the **X** in the upper right corner to close the Org Rosters query.



## Part D – Access a Saved Document



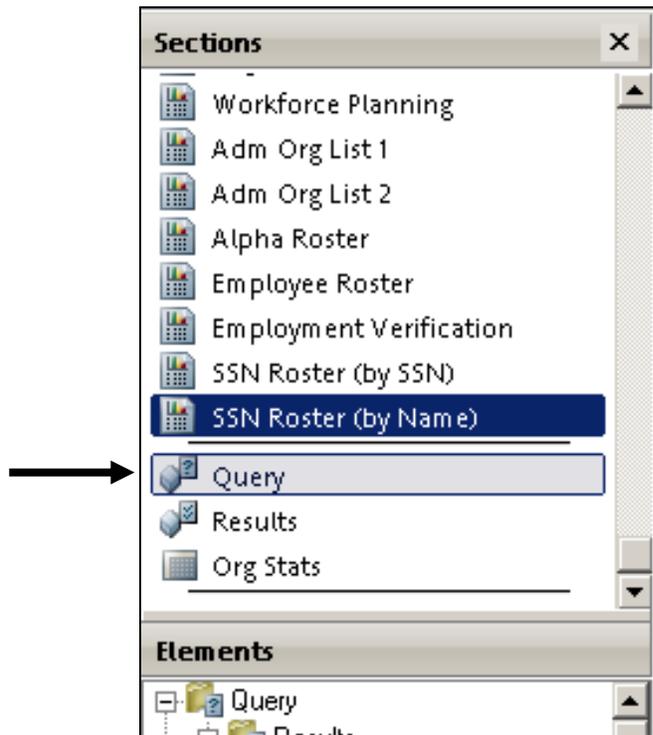
*The first time you open up a saved Hyperion query, you may have to assign Internet Explorer as the application to open all .bqy files. This is a one-time set up to establish the association between IE and .bqy files. If you are not prompted to make this association, then your computer has already been set up.*

### 1. Access Saved File:

- Navigate to locate your saved file and **double-click** on the **Org Rosters** file icon

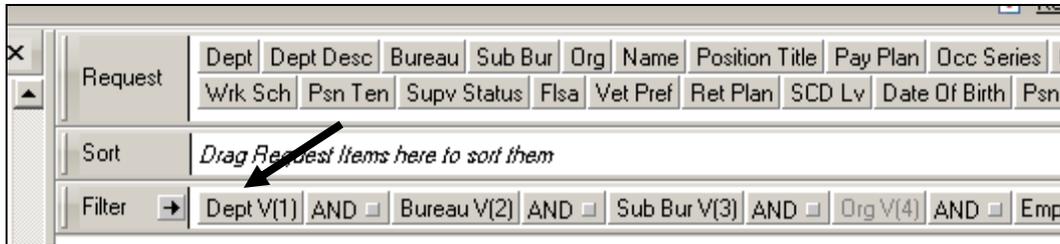
2. Press the **F11** function key to maximize the browser window

3. From the Sections Pane, click on **Query**



4. The **Query Section** displays

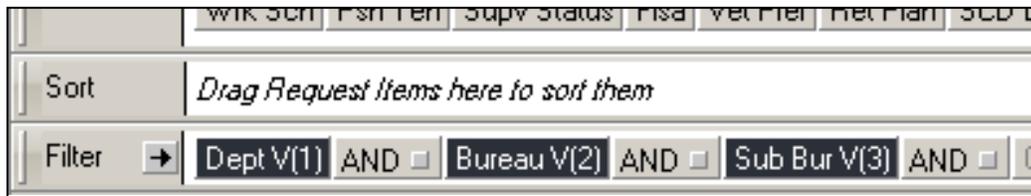
- At the Filter Line, place your mouse cursor on **Dept V(1)** to view the tool tip (=NN) of the current value



- View the tool tip for **Bureau V(2)**, and **Sub Bur V(3)**

### Part E – Change Variable Filters to Simple Filters and Process

1. At the Filter Line, hold down your Ctrl key on the keyboard and click to select the labels for **Dept V(1)**, **Bureau V(2)**, and **Sub Bur V(3)**



2. Click on the **right black arrow** to expand the Filter Line



3. Click on the **Var** button to toggle the Var feature off



4. Notice that the **V** is no longer displayed after Dept, Bureau, and Sub Bur. The only variable filter is now Org V(1).

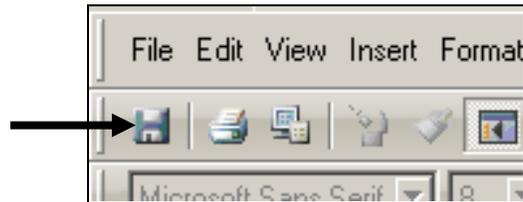


5. Select the **Org V(1)** label on the filter line and press the **Delete** button on your keyboard to remove it entirely.

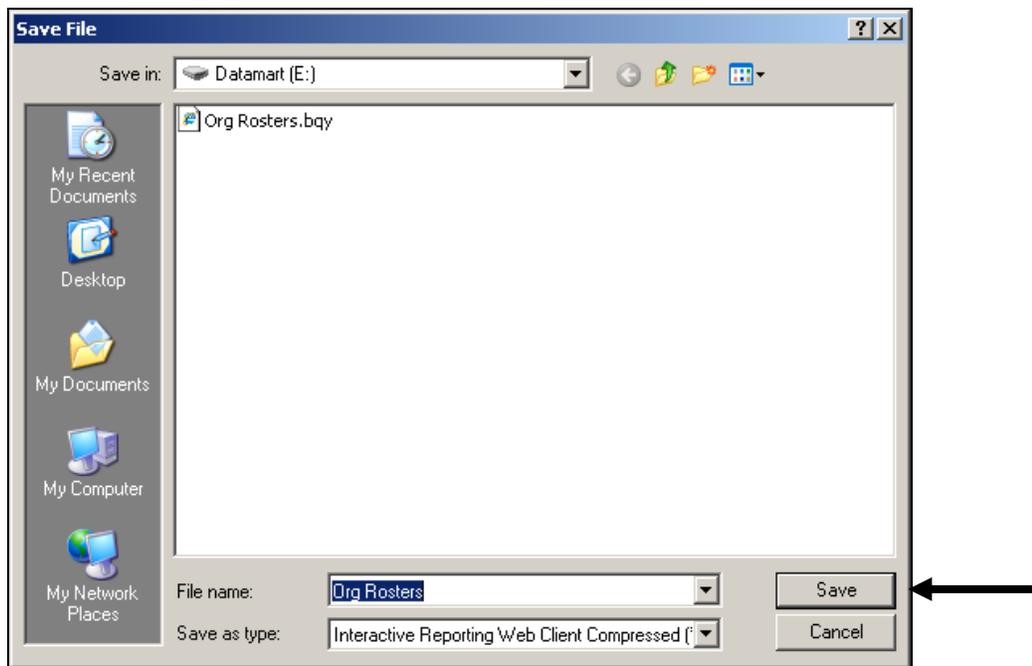
6. Click the **Process** button and review your results.

### 7. Save File

- On the Standard Toolbar, click the **Save** icon



- Click the **Save** button



- Click the **Yes** button to replace the existing Org Rosters file



- Close **all** open Internet Explorer windows by clicking on the **X** in upper right corner

End of Exercise

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### Exercise 3: Create an Ad Hoc Query from a Pre-built Data Model

**Objective:** Create an ad hoc query. Practice applying filters and sorts to the data. Save the document.

#### Part A - Access FPPS Datamart and Login

1. Launch the I.E. Web Browser

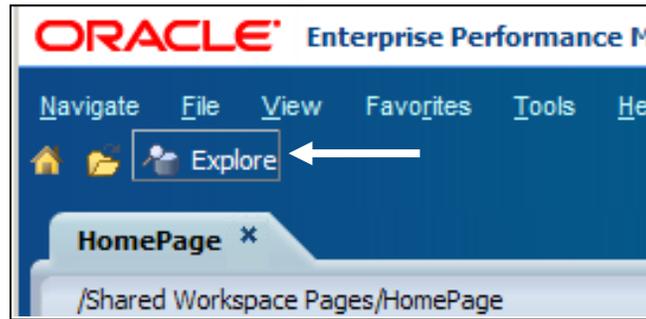
- Access the IBC Datamart Portal at <https://dmartportal.nbc.gov>
- Click on the **Hyperion Login** link



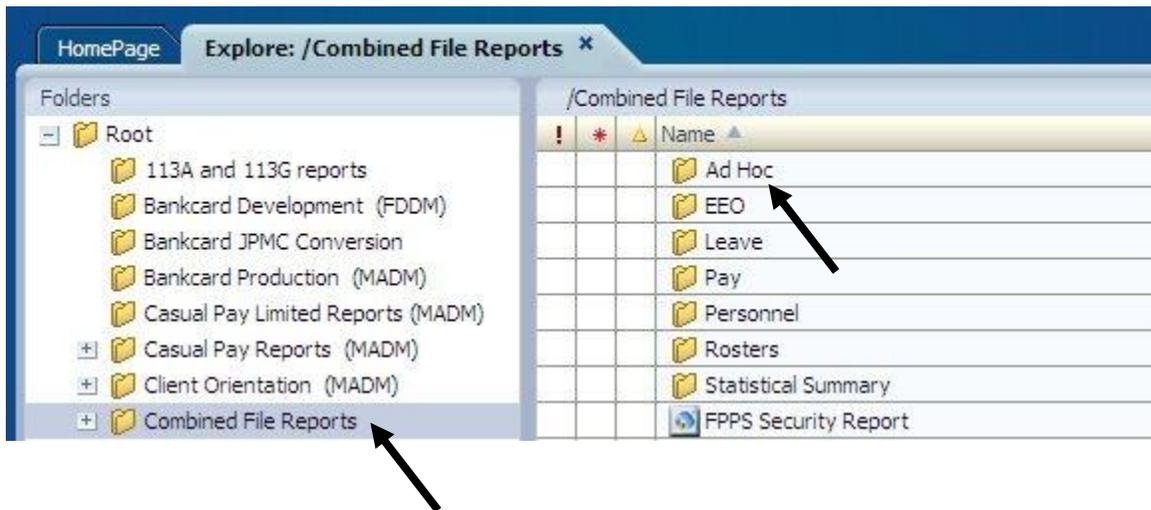
- Enter your **User Name** and **Password**
- Click the **Log On** button

A screenshot of the Oracle Enterprise Performance Management System login page. On the left side, there are two input fields: "User Name:" and "Password:". Below these fields is a "Log On" button. A black arrow points from the left side of the page towards the "Log On" button. On the right side of the page, there is a graphic consisting of several 3D blocks in orange, blue, green, and purple. Below the graphic is the Oracle logo and the text "ORACLE ENTERPRISE PERFORMANCE MANAGEMENT SYSTEM". At the bottom of the page, there is a copyright notice: "Copyright © 2005, 2011, Oracle and / or its affiliates. All rights reserved."

- At the **HomePage**, click on **Explore** to access the Datamart Standard Report catalog

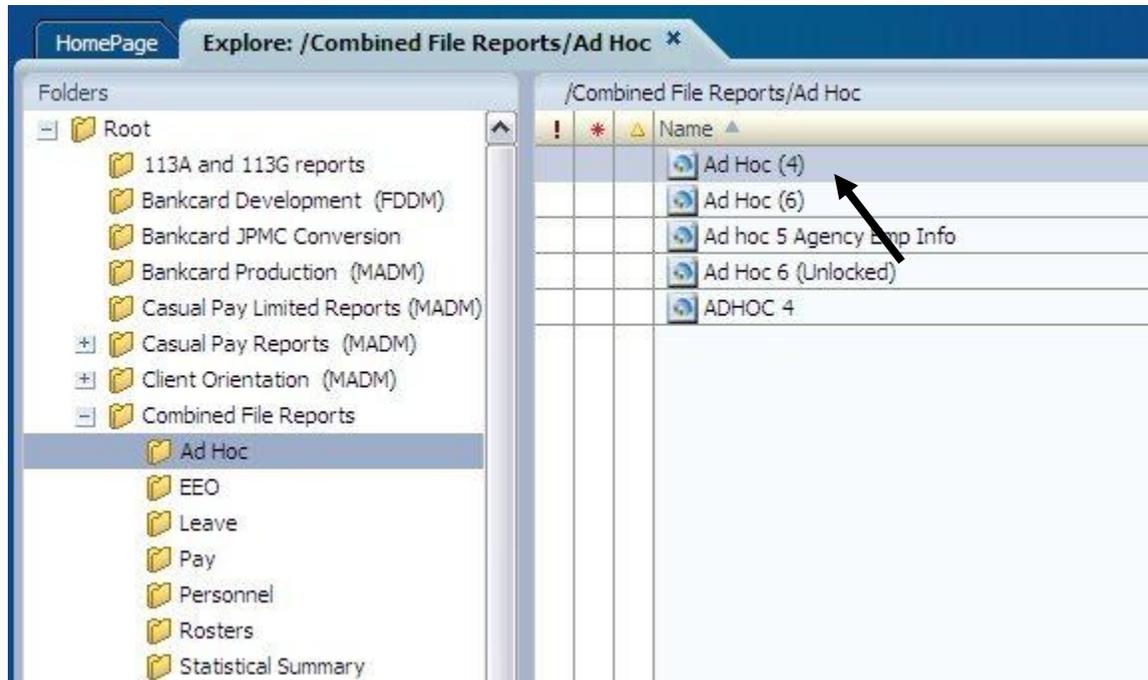


2. In the Folders pane, click on **Combined File Reports** and then double-click on the **Ad Hoc** folder



## Part B - Create a Query from an Ad Hoc

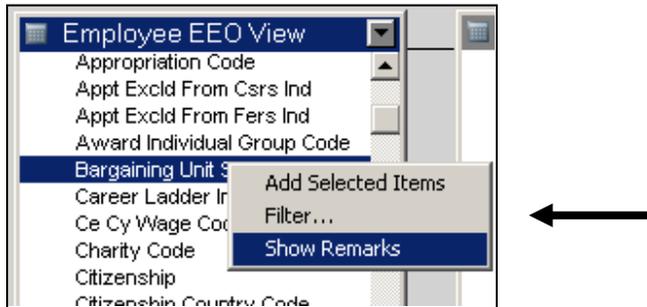
1. Double-click on the query **Ad Hoc (4)**



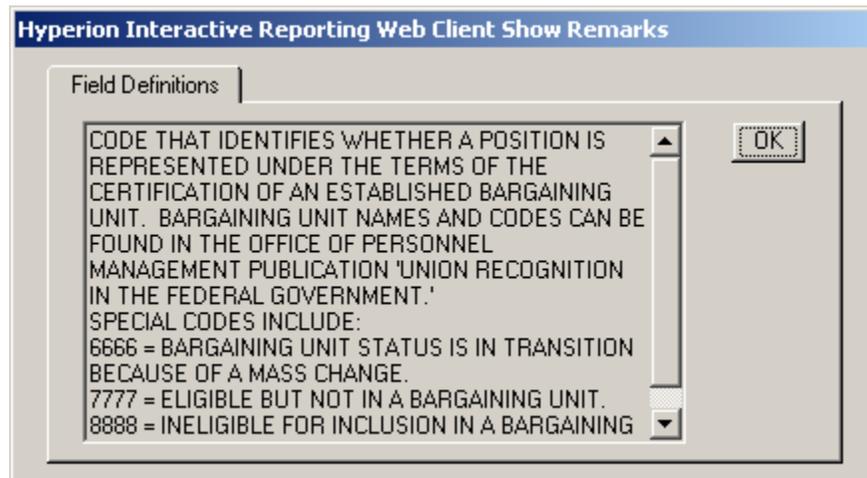
- The Hyperion application opens a new window with the Ad Hoc report displaying the Results Section
- Click on **Query** in the Section pane to view the Requests and Filters
- **Maximize** the window to full screen

2. Display **Show Remarks** on a field:

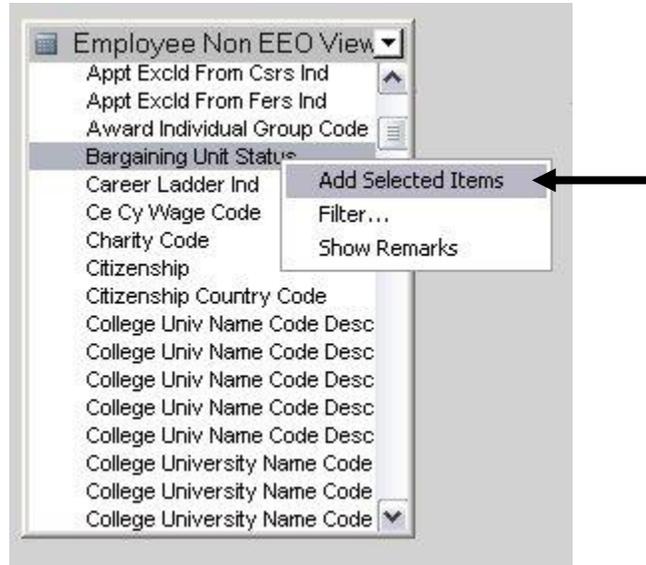
- Scroll down through the **Employee EEO View** table and click to select the **Bargaining Unit Status** field
- **Right click** and select **Show Remarks** to review the field definition



- Review the information and click the **OK** button when done



3. Add the **Bargaining Unit Status** field to the **Request** line
  - Select the **Bargaining Unit Status** field again
  - Right click and choose **Add Selected Items** (Note: You can also select the **Item** and **drag** it to the **Request Line**).



4. Using either selection method, add the following items to the Request Line:

**Employee Non EEO View**

FEGLI Code  
Telework Ind Code

**Pay and Leave Facts View**

Leave Annual Curr Bal  
Leave Sick Curr Bal  
Salary Or Pay Rate

**Duty Station**

Duty Station State Desc

## Part C - Process Query and Review Results

1. Click the **Process** button



*The pre-built queries available in Datamart have established variable filters (limits) that will require you, at a minimum, to provide criteria to filter your queries to your Department, Bureau, Subbureau and Org Codes. You may also choose to ignore or remove certain filters in order to retrieve all available values; however FPPS Security will override any query request for data that falls outside your FPPS data access profile.*

### 2. Limit Windows

- Enter the NASA values for Dept = **NN**, Bureau = **23**, and Sub Bur = **00** and click the **OK** button at each limit window
- In the **Limit: Org** window, click the **Ignore** button (to retrieve **all** org codes within your data access)

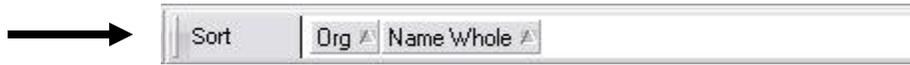


*Notice that the data is sorted in ascending order (by the org code). If no sort is set in the Query Section, the default sort is based on the Request Line items. Also notice the number of rows returned along with the date and time on the Status Bar (bottom right of the screen).*

**Question:** How many rows of data were returned? \_\_\_\_\_ of \_\_\_\_\_ Rows

### 3. Results Sort

- Locate and select the **Org** column, drag and drop it into the **Sort Line**
- Locate and select the **Name Whole** column, drag and drop it **after** Org into the Sort Line

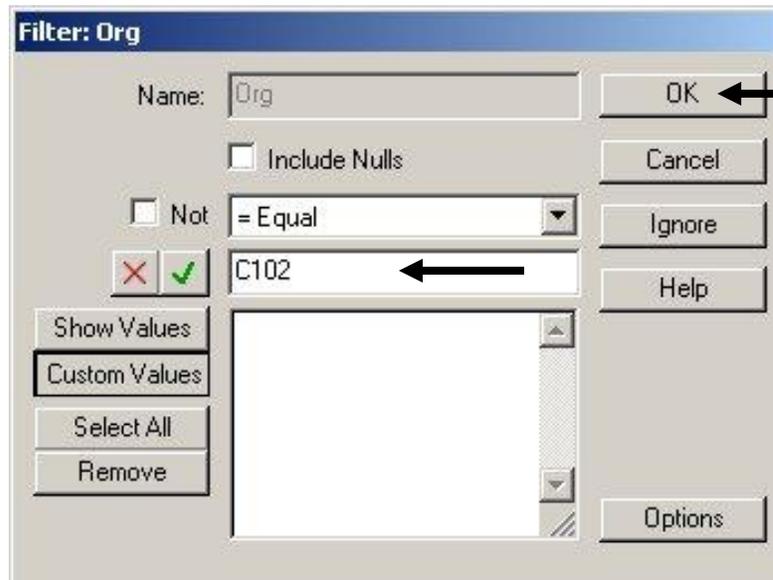


- Review the results (notice the Org data is sorted in alphanumeric order followed by Name Whole within each Org)

## Part D - Working with Operators and Local Filters

### 1. Results Screen (Equal operator)

- Double-click on any org value within the Org column to open the **Filter: Org** window
- Leave the operator = **Equal**
- Type a single Org code, for example **C102** in the Custom Values input field
- Click the **OK** button

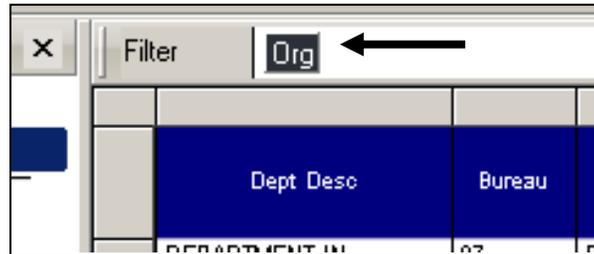


- Review the number of rows returned on the Status Bar

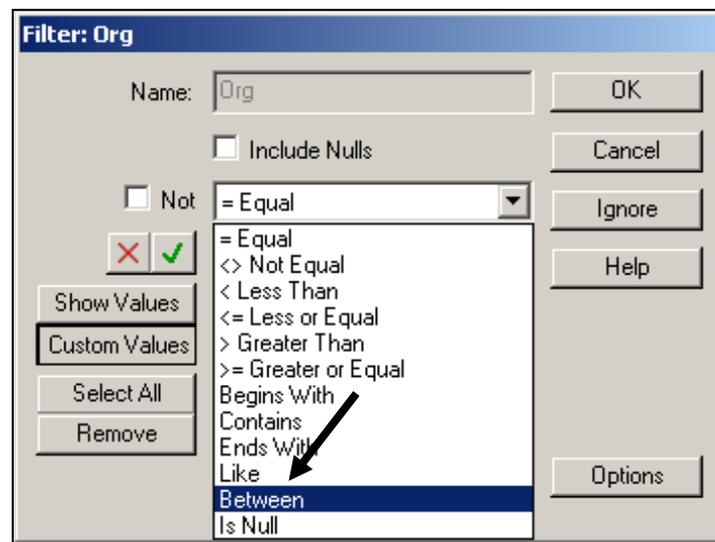
**Question:** How many rows of data were returned? \_\_\_\_\_ of \_\_\_\_\_ Rows

## 2. Results Screen (Between operator)

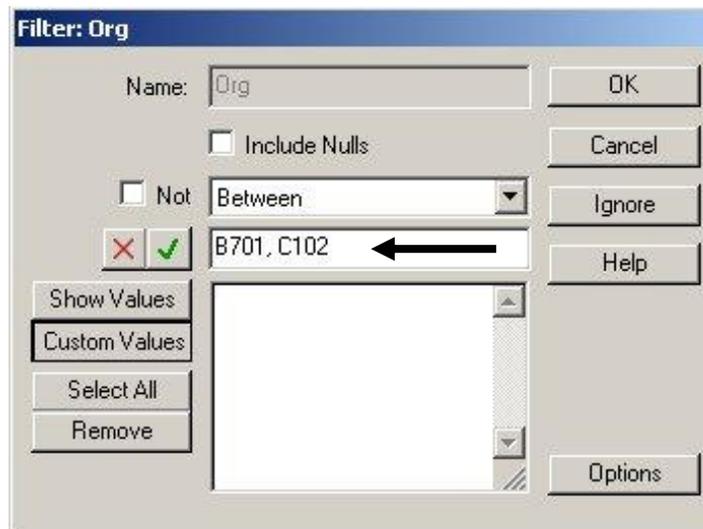
- Double-click on the **Org** label now visible in the Filter field to re-open the **Filter: Org** window



- Use the drop-down arrow to locate and select the **Between** operator



- Enter two different Org codes in a range: **B701, C102** (separated by a comma) in the Custom Values input field
- Click the **OK** button



**Question:** Now how many rows of data were returned? \_\_\_\_\_ of \_\_\_\_\_ Rows

### 3. Results Screen (Like operator)

- Double-click on **Org** on the Filter Line to open the **Filter: Org** window
- Use the drop-down arrow to locate and select the **Like** operator
- Enter **A%** in the Custom Values input field
- Click the **OK** button
- Review the information and number of rows returned

**Question:** Now how many rows of data were returned? \_\_\_\_\_ of \_\_\_\_\_ Rows

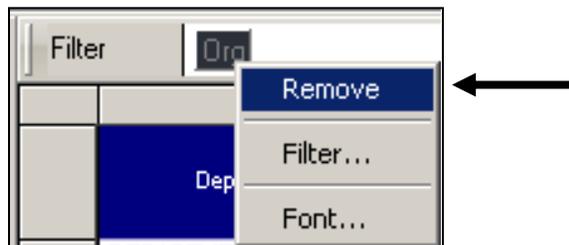
### 4. Results Screen (Contains operator)

- Double-click on **Org** on the Filter Line to open the **Filter: Org** window
- Use the drop-down arrow to locate and select the **Contains** operator
- Enter two (2) **underscores** and the last two characters of an org code, (example: **\_\_04**) in the Custom Values input field
- Click the **OK** button
- Review the information and number of rows returned

**Question:** Now how many rows of data were returned? \_\_\_\_\_ of \_\_\_\_\_ Rows

### 5. Remove Local Filter

- Select the **Org** label in the **Filter** Line
- **Right** click
- Select **Remove** from the speed menu



## 7. Remove existing Sort

- Select the **Org** label in the **Sort** line
- **Right** click
- Select **Remove** from the speed menu and click the **Sort Now** button
- Select the **Name Whole** label in the **Sort** line
- **Right** click
- Select **Remove** from the speed menu and click the **Sort Now** button

## 8. Place a descending sort on Leave Annual Curr Bal

- Drag **Leave Annual Curr Bal** column to the Sort Line
- **Double-click** the item to change to descending order
- Click the **Sort Now** button
- Review the information (notice the Annual Leave data is sorted in descending order)

### ON YOUR OWN:

Place a new filter on your data to only display those employees with a current Annual Leave Balance that would put them in a “Use or Lose” situation. Write down what you did to accomplish this:

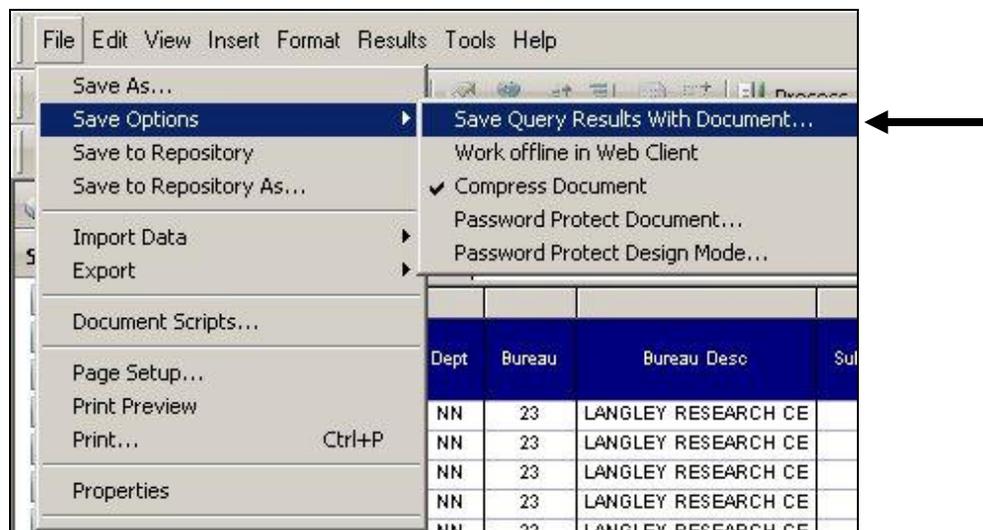
## 9. Change the Query Section Name

- Double-click on **Query** in the Sections Pane (left side of your screen)
- Change the section name to **Query - Annual Leave** in the **Section Label** window
- Click the **OK** button

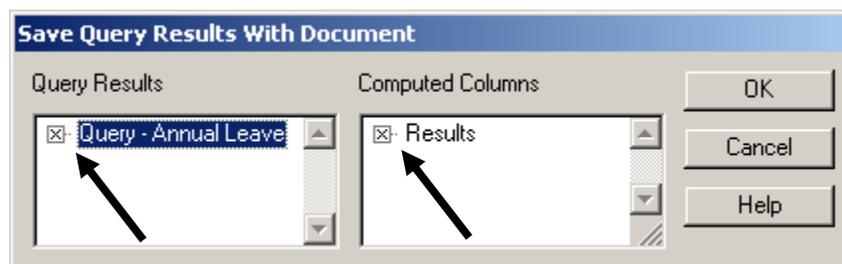


## 10. Save Options (Save Query Results With Document)

- On the Main Menu bar, select **File**, click on **Save Options** and select **Save Query Results With Document...**

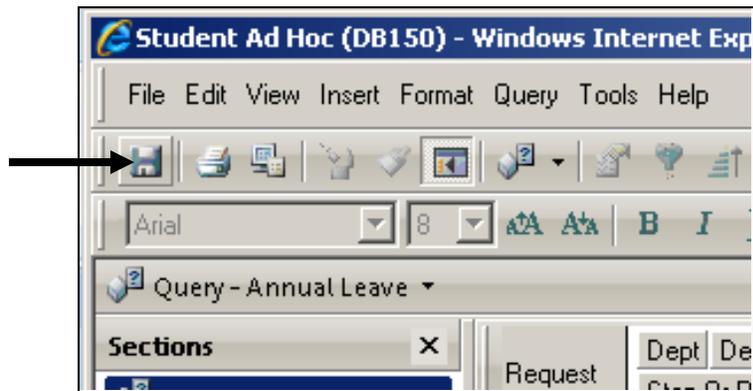


- Click in the box next to **Query - Annual Leave** to save the Query results **and** the box next to **Results** to save the computed columns
- Click the **OK** button



## 11. Save File

- On the Standard Toolbar, click the **Save** icon



## 12. Save the file name to **Leave**

- Click the **Save** button
- Close all open browser windows by clicking on the **X** in upper right corner.

End of Exercise

## Exercise 4: Access and Modify a Saved Query

**Objective:** Access a saved Query file. Retrieve additional data for your organization. Practice applying different filters and sorts to the data. Format your results.

### Part A – Access a Saved Document

#### 1. Launch the I.E. Web Browser

- Access the IBC Datamart Portal at <https://dmartportal.nbc.gov>
- Click on the **Hyperion Login** link



- Log in using your NASA FPPS Datamart **User Name** and **Password**
- Click the **Log On** button
- At the **HomePage**, click on **Explore** to access the Datamart Standard Report catalog
- **Minimize** (DON'T CLOSE DOWN) all browser windows so you can see your computer's Desktop
- From your default save location, locate and **double-click** on the **Leave.bqy** file icon

#### 2. Press the **F11** function key to maximize the browser window

## Part B – Add Additional Items to Request Line

1. Review the data saved within the **Results** section
2. In the Sections Pane, click on **Query – Annual Leave**



3. Add the following items to the **Request** line:

### Employee EEO View:

Ssn  
Work Schedule

### Pay and Leave Facts:

Date of Birth  
Employee Age  
*Leave Comp Avail Occ Total*  
Leave Credit Hrs Bal

## 4. Retrieve New Data

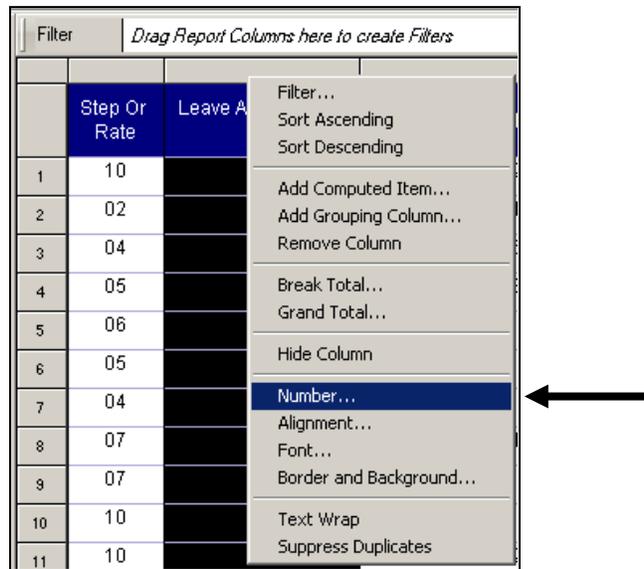
- **Turn off** the Variable filter feature on the Dept, Bur and Subbur fields in the Filter line and **delete** the Org filter completely
- Click the **Process** button
- Scroll to the right to review the newly added items

## Part C – Format Results

### 1. Format Numbers

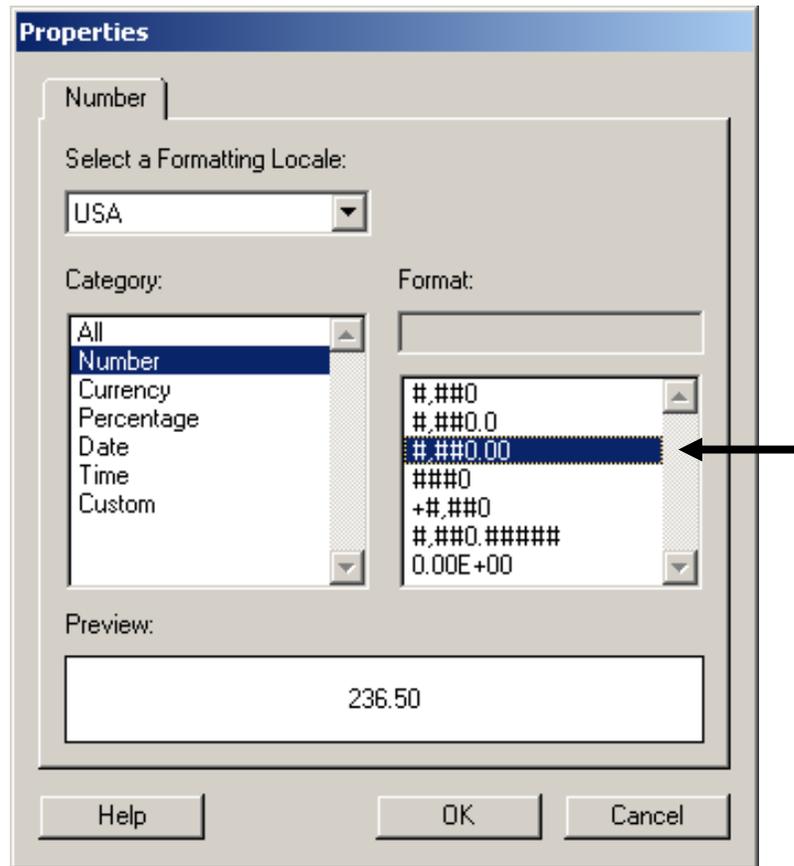
- Select the **Leave Annual Curr Bal** column (click on the gray bar **above** the column title)
- Right click and select **Number...**

	Step Or Rate	Leave A
1	10	
2	02	
3	04	
4	05	
5	06	
6	05	
7	04	
8	07	
9	07	
10	10	
11	10	



The screenshot shows a report table with a context menu open over the 'Leave A' column header. The menu options are: Filter..., Sort Ascending, Sort Descending, Add Computed Item..., Add Grouping Column..., Remove Column, Break Total..., Grand Total..., Hide Column, Number... (highlighted), Alignment..., Font..., Border and Background..., Text Wrap, and Suppress Duplicates. An arrow points to the 'Number...' option from the right.

- Select format **#,##0.00**, then click the **OK** button



- Review the results
- Repeat this same format on the following fields:
  - Leave Sick Curr Bal
  - Leave Comp Avail Occ Total
  - Leave Credit Hrs Bal

## 2. Format SSN:

- Select the **Ssn** column, right click and select **Number ...**
- Under **Category**, select **Custom**
- In **Format**, type **000-00-0000** (This will place zeros preceding SSN's where the leading numbers were zeros and dropped off as well as dashes in between the nine SSN digits)
- Click the **OK** button
- Review the results

### 3. Format Salary Or Pay Rate:

- Select the **Salary Or Pay Rate** column, right click and select **Number**
- Under **Category**, select **Currency**
- Select the **Format** that would display values without decimal places and place negative values within parenthesis **#,##0;(#,##0)**
- Click the **OK** button
- Review the results

### 4. Format Date Of Birth:

- Select the **Date Of Birth** column, right click and select **Number**
- Under **Category**, select **Date**
- In **Format**, select **mmmm dd, yyyy**
- Click the **OK** button
- Review the results

### 5. Justify Text:

- Select the **Date Of Birth** column again
- Click on the **Left Justify** button on the Formatting Toolbar
- Select the **Ssn** column
- Click on the **Center Justify** button on the Formatting Toolbar
- Review the results

### 6. Format Text:

- Format all data columns and labels to **size 10 font**

ON YOUR OWN: By applying different filters to your results data, answer the following questions. Write down what data fields and what operator(s) you used to filter your data:

- How many employees were born on or after 08/01/65: \_\_\_\_\_
- How many employees are over the age of 50: \_\_\_\_\_
- How many employees have an AL balance of more than 240 hours: \_\_\_\_\_
- How many employees are in Occupational Series 0303 AND at a Grade of 06 or higher: \_\_\_\_\_
- How many employees are in Duty Station City Brook Park, Ohio making a salary of 70000 dollars or higher: \_\_\_\_\_
- How many Accountants are there: \_\_\_\_\_
- How many Full Time employees are in Bargaining Unit 1408 with a Federal Employee Group Life Insurance (FEGLI) selection of C0: \_\_\_\_\_
- How many employees have an available Comp Time balance: \_\_\_\_\_
- How many employees are maxed out with their Credit Hours: \_\_\_\_\_
- How many GS-15s are there: \_\_\_\_\_

**2. Save File:**

- On the Standard Toolbar, click the **Save** icon
- Click the **Save** button
- Click the **Yes** button to replace the existing file

3. Close down all browser windows by clicking the **X** at the top right of the window.

End of Exercise

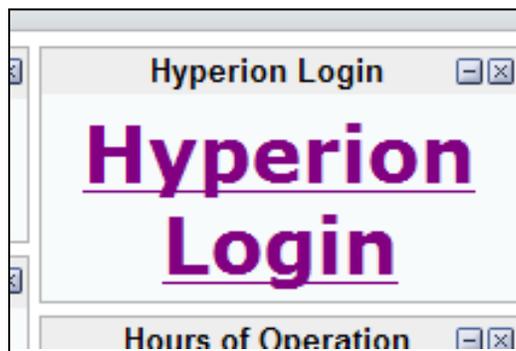
## Exercise 5: Create/Modify Pivots

**Objective:** Create and modify Pivots from the Results Section. Apply Data Functions.

### Part A – Access a Saved Document

#### 1. Launch the I.E. Web Browser

- Access the IBC Datamart Portal at <https://dmartportal.nbc.gov>
- Click on the **Hyperion Login** link

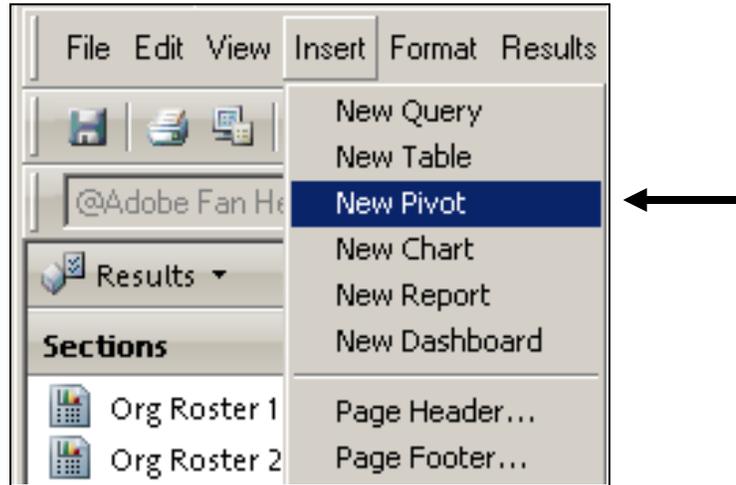


- Log in using your NASA FPPS Datamart **User Name** and **Password**
- Click the **Log On** button
- At the **HomePage**, click on **Explore** to access the Datamart Standard Report catalog
- **Minimize** (DON'T CLOSE DOWN) all browser windows so you can see your computer's Desktop
- From your default save location, locate and **double-click** on the **Org Rosters.bqy** file icon

#### 2. Press the **F11** function key to maximize the browser window

## Part B – Create a Pivot for Analysis

1. Click on **Insert** from the Main Menu bar and select **New Pivot**



- From the **Elements** Pane, drag and drop **Duty Station City Desc** and **Type Appt Desc** to the **Row Labels** Data Layout Pane in that order
- Drag and drop **Full Time Perm**, **Full Time Temp**, **Part Time Perm**, **Part Time Temp** and **Intermittent** to the **Facts** Data Layout Pane in that order
- To display the row labels, right click anywhere on the screen, select **Corner Labels, Row**
- Adjust the column width for readability

2. Display a Grand Total

- Click on the **horizontal gray bar** located above the **Duty Station City Desc** label to select the left most column of data

Duty Station State Desc	Type Appt Desc	Full Time Perm	Full Time Temp	Part Time Perm	Part Time Te	Intermittent
ALABAMA	CAREER (COMP SVC PERM)	6	0	0	0	0
CALIFORNIA	CAREER (COMP SVC PERM)	4	0	0	0	0
COLORADO	CAREER (COMP SVC PERM)	2	0	0	0	0
DELAWARE	NONPERMANENT (COMP SVC NONPERM)	0	1	0	0	0
DISTRICT OF COLUMBIA	CAREER-COND (COMP SVC PERM)	1	0	0	0	0
FLORIDA	CAREER (COMP SVC PERM)	5	0	0	0	0
IDAHO		0	0	1	0	0
MARYLAND	CAREER (COMP SVC PERM)	6	0	0	0	0
MISSISSIPPI	CAREER (COMP SVC PERM)	1	0	0	0	0
MISSOURI	CAREER (COMP SVC PERM)	1	0	0	0	0
NORTH CAROLINA	CAREER (COMP SVC PERM)	1	0	0	0	0
OHIO	CAREER (COMP SVC PERM)	2	0	0	0	0
OREGON	CAREER (COMP SVC PERM)	1	0	0	0	0

- Click on the **Grand Total** button located on the Standard Toolbar



- Scroll to the bottom to view the **Total**

Duty Station State Desc	Type Appt Desc	Full Time Perm	Full Time Temp	Part Time Perm	Part Time Temp	Intermittent
ALABAMA	CAREER (COMP SVC PERM)	6	0	0	0	0
CALIFORNIA	CAREER (COMP SVC PERM)	4	0	0	0	0
COLORADO	CAREER (COMP SVC PERM)	2	0	0	0	0
DELAWARE	NONPERMANENT (COMP SVC NONPERM)	0	1	0	0	0
DISTRICT OF COLUMBIA	CAREER-COND (COMP SVC PERM)	1	0	0	0	0
FLORIDA	CAREER (COMP SVC PERM)	5	0	0	0	0
IDAHO		0	0	1	0	0
MARYLAND	CAREER (COMP SVC PERM)	6	0	0	0	0
MISSISSIPPI	CAREER (COMP SVC PERM)	1	0	0	0	0
MISSOURI	CAREER (COMP SVC PERM)	1	0	0	0	0
NORTH CAROLINA	CAREER (COMP SVC PERM)	1	0	0	0	0
OHIO	CAREER (COMP SVC PERM)	2	0	0	0	0
OREGON	CAREER (COMP SVC PERM)	1	0	0	0	0
TEXAS	CAREER (COMP SVC PERM)	6	0	0	0	0
	CAREER (SES PERM)	1	0	0	0	0
VIRGINIA		23	0	6	0	0
	CAREER (COMP SVC PERM)	1,524	0	9	0	0
	CAREER (SES PERM)	32	0	0	0	0
	CAREER-COND (COMP SVC PERM)	118	0	0	0	0
	NONPERMANENT (COMP SVC NONPERM)	0	133	0	2	0
	SCHED A (EXC SVC NONPERM)	0	0	0	1	0
	SCHED A (EXC SVC PERM)	11	0	0	0	0
Total		1,745	134	16	3	0

### 3. Display Subtotals

- Click on the **horizontal gray bar** located above the **Type Appt Desc** label
- Click on the **Grand Total** button again
- Notice that the subtotals are by Duty Station City Desc

## Part C – Insert Multiple Pivots

1. Click on **Insert** from the Main Menu bar and select **New Pivot**

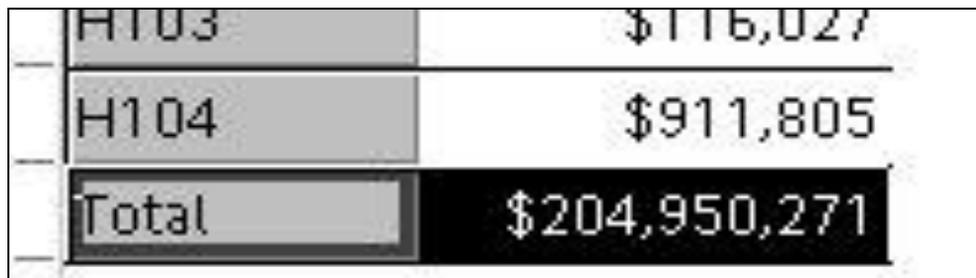
- From the **Elements** Pane, drag and drop **Org** to **Row Labels**
- Drag and drop **Salary** to **Facts**
- To display the row labels, right click anywhere on the screen, select **Corner Labels, Row**
- Adjust the column width for readability

2. Display a Grand Total

- Click on the **horizontal gray bar** located above the **Org** label
- Click on the **Grand Total** button located on the Standard Toolbar
- Scroll down to view the total

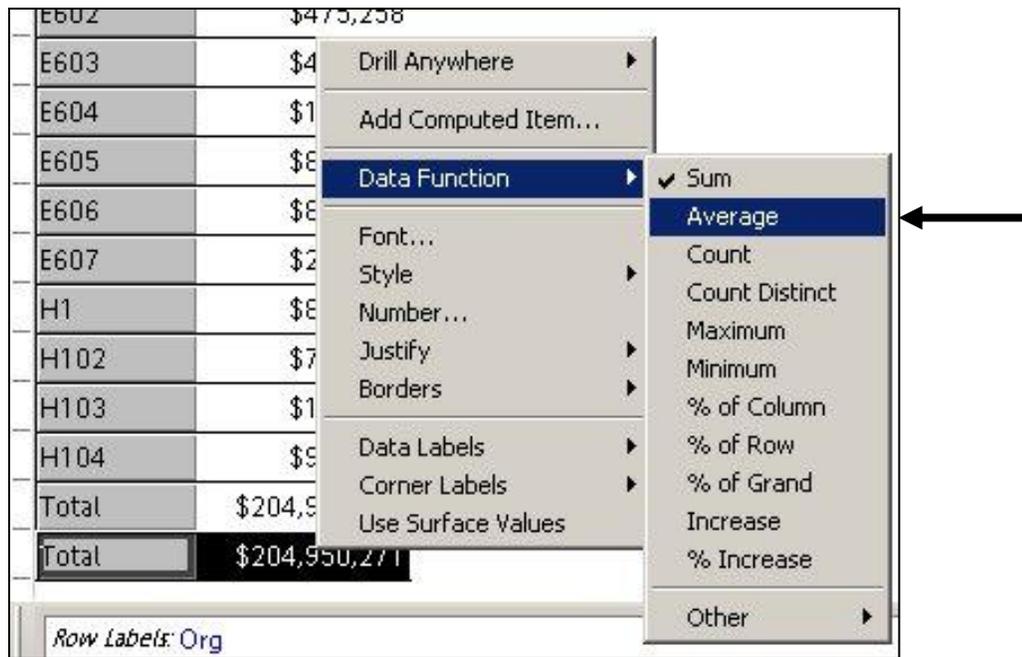
3. Change Data Function of a Row

- Click on the **horizontal gray bar** located above the **Org** label to select it
- Click on the **Grand Total** button **again** (you should now have two Totals)
- Hold down the **Alt** key and click directly on the second new **Total** label again (this selects the entire Total row)
- Release the **Alt** key



H103	\$116,027
H104	\$911,805
Total	\$204,950,271

- Right click and select **Data Function** and then click on **Average**



- Notice that the **Average** displays below the **Total**

H103	\$116,027
H104	\$911,805
Total	\$204,950,271
Average	\$107,982

#### 4. **Data Function:** Add Maximum and Minimum Salary Values

- Repeat Steps #2 and #3 above to add **Maximum** and **Minimum** salaries

Total	\$204,950,271
Average	\$107,982
Maximum	\$179,700
Minimum	\$22,851

## 5. Remove Data Function

- Click once on the **Minimum** label to select it
- Click on the **Remove** button located on the Standard Toolbar to delete the row
- Repeat this step for the **Maximum** and **Average** rows

## 6. Change Data Function of a Column

- From the **Elements** Pane, drag and drop **Salary** to **Facts** a second time
- To change the data function of this second Salary column, click inside the column directly over any salary data field to select the entire column
- Right click and select **Data Function, % of Grand**
- With the new column still selected, right click and select **Number**
- Select the category Percentage and choose the **0.00%** format
- Click **OK**
- Review your results

## Part E – Chart a Pivot

- Click on **Insert** from the Main Menu bar and select **New Pivot**
- From the **Elements** Pane, drag and drop **Sex** to **Row Labels**
- Drag and drop **Count** to **Facts**
- Click on the **horizontal gray bar** located above the **Sex** label
- Click on the **Grand Total** button located on the Standard Toolbar
- To display the row labels, right click anywhere on the screen, select **Corner Labels, Row**
- Click on **Insert** from the Main Menu bar and select **Chart This Pivot**
- **Save your file when done.**

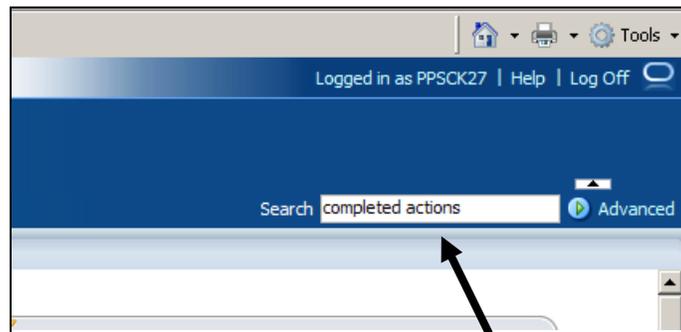
End of Exercise

## Exercise 6: Add a Table, Pivot, and Chart for Analysis

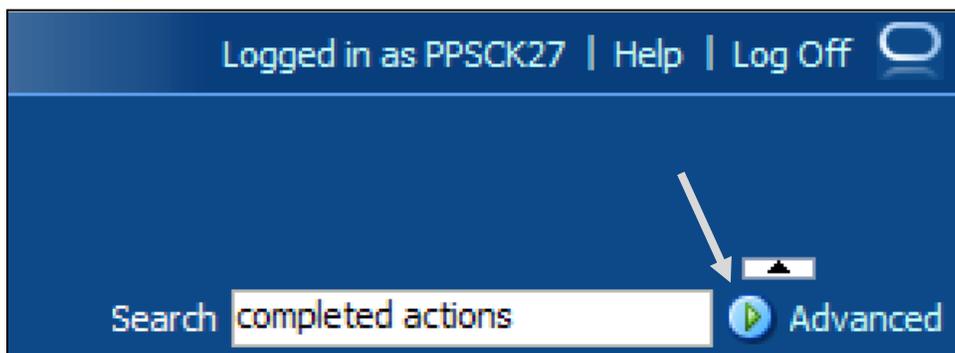
**Objective:** Add a Computed Item and Table Section from the Results Section of a Standard Report. Apply Local Filters. Create a Pivot and Chart from the Table.

### Part A – Search for and Access a Standard Report

1. Access the IBC Datamart Portal and click on **Hyperion Login** link
2. The **ORACLE Enterprise Performance Management System Workspace Login** screen displays in a new window
  - Log in using your **User Name** and **Password**
  - Click the **Log On** button
3. The **HomePage** displays
  - At the right side of the screen, enter “**completed actions**” in the Search box

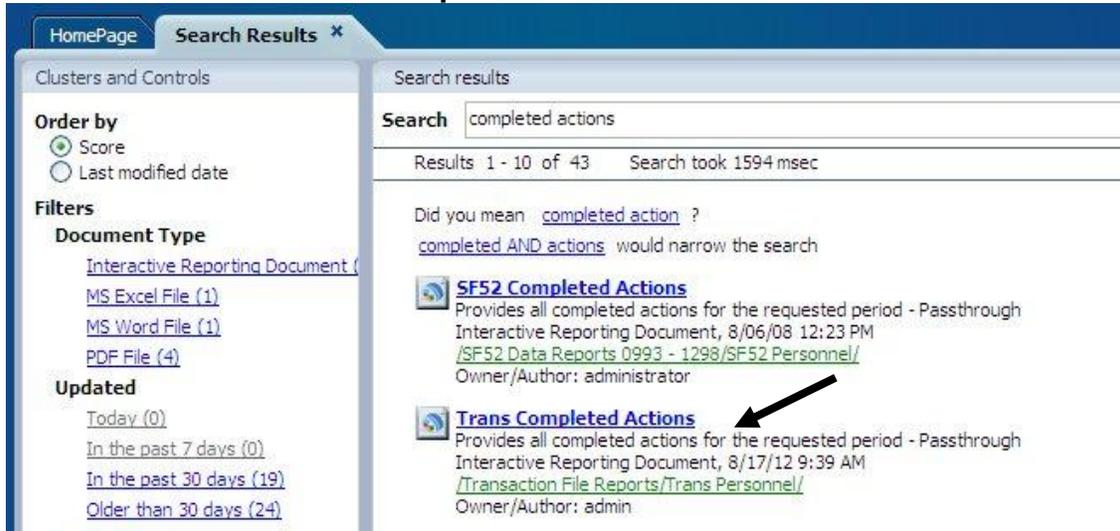


- Click on the **Search** button



4. The **Search Results** screen displays

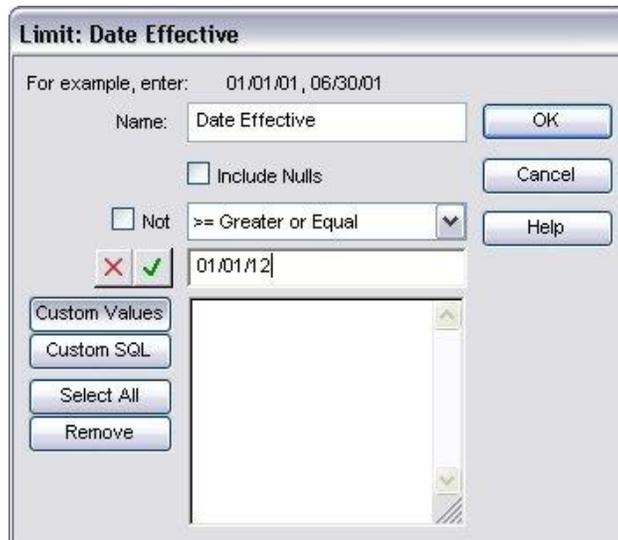
- Review the information displayed
- Click on the **Trans Completed Actions** link



## Part B – Process a Standard Report

1. **Process** the report using the following values:

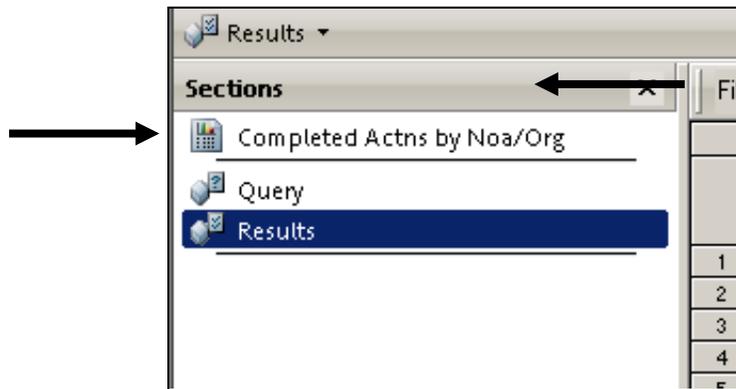
- **Filter: Dept** window: Type **NN**
- **Filter: Bur** window: Type **23**
- **Filter: Sub Bur** window: Type **00**
- **Filter: Org** window: Click the **Ignore** button
- **Filter: Date Effective** window: **01/01/12**



- **Filter: Noa 1** window: Click the **Ignore** button

## 2. The **Results Section** displays

- Review the displayed information
- In the Sections Pane, click on **Completed Actns by Noa/Org** report



## 3. **Completed Actions by Noa/Org Report** displays

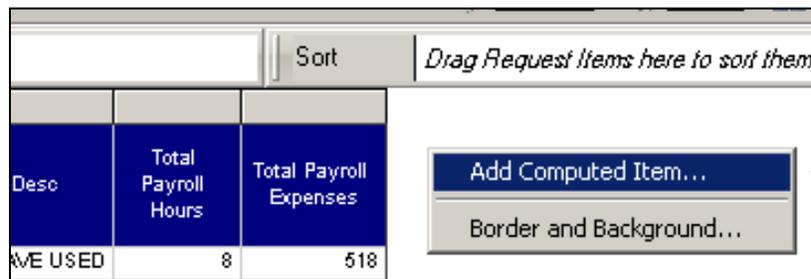
- From the Standard Toolbar, click the **Zoom** drop-down arrow and zoom to **Page Width** to fully display the Report
- Review the displayed information

## Part B – Add a Computed Item to the Results Section

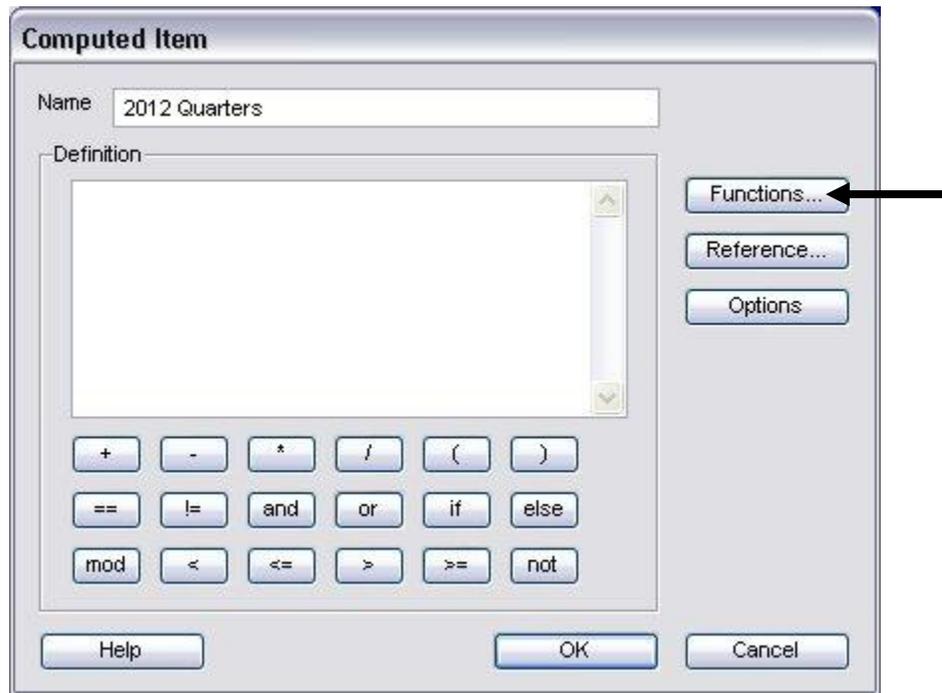
1. From the Sections Pane, click on **Results** to return to the Results section

2. Create a Computed Item

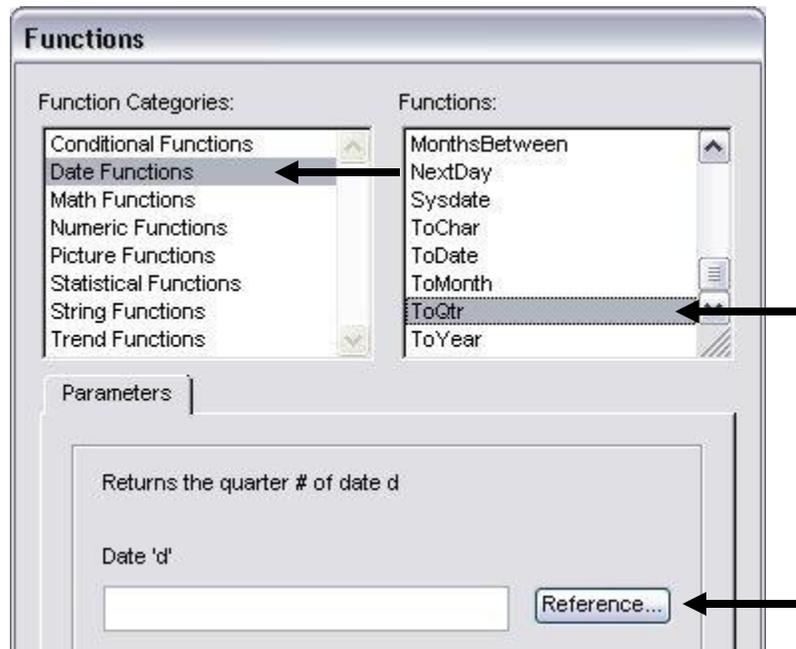
- Scroll to the right side of the screen to the end of your columns (white area)
- Click the right mouse button (to access the short-cut menu) and select **Add Computed Item**



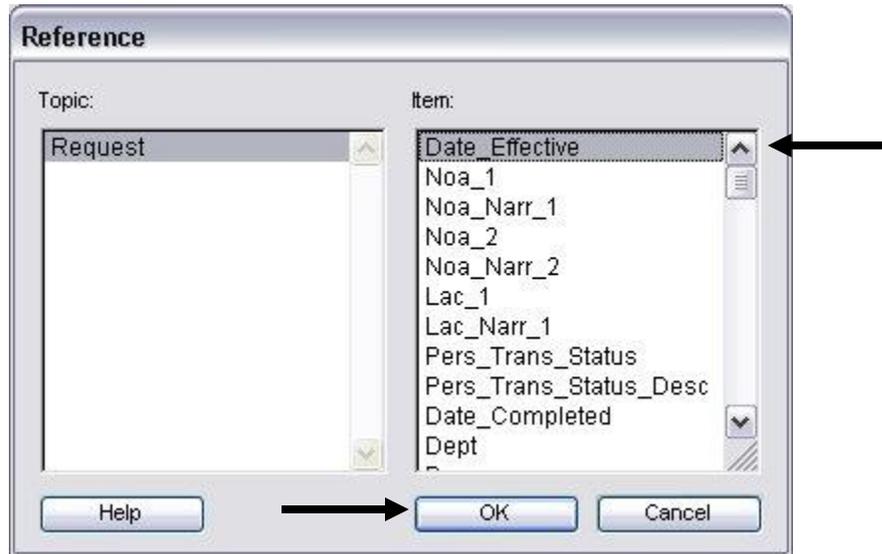
- In the Computed Item window, change the Name to **2012 Quarters**
- Select the **Functions** button



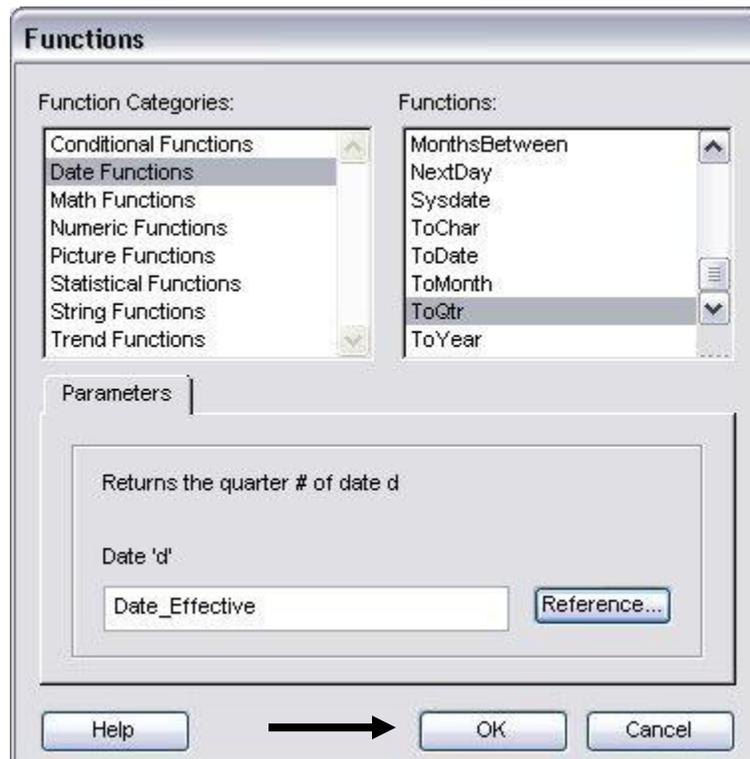
- Select the **Date Functions** category
- Select the **ToQtr** function
- Select the Reference **button**



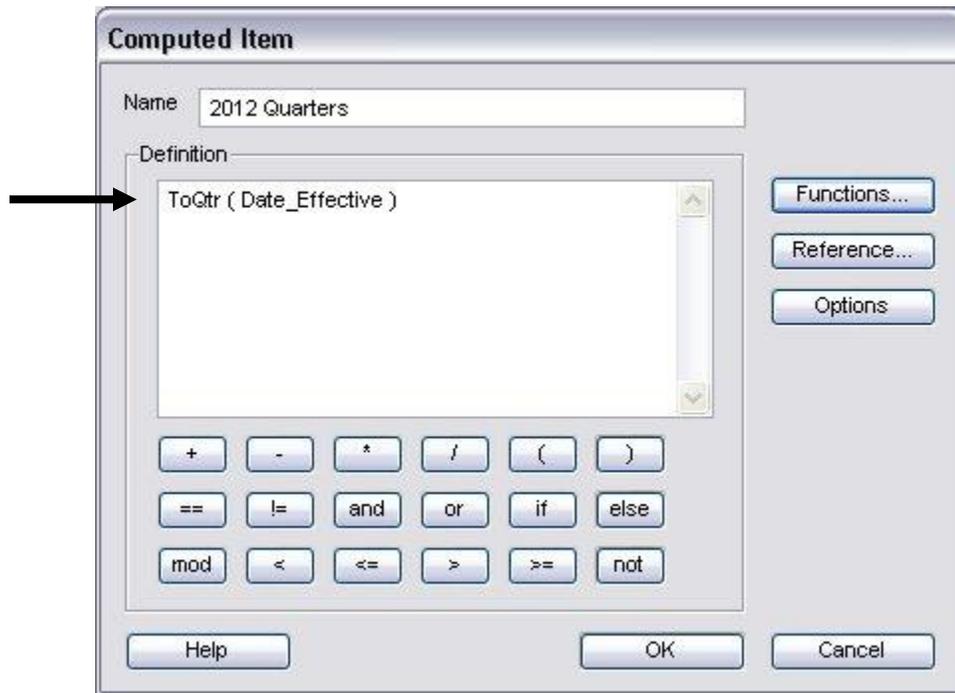
- Select the **Date\_Effective** field
- Click the **OK** button



- Select the **OK** button



- Review the new computed item formula
- Select the **OK** button



3. Review the new computed item column

Duty Station Desc	Count	2012 Quarters
HAMPTON, HAMPTON, VIRGINIA	1	Q4
HAMPTON, HAMPTON, VIRGINIA	1	Q1
HAMPTON, HAMPTON, VIRGINIA	1	Q1
HAMPTON, HAMPTON, VIRGINIA	1	Q2
HAMPTON, HAMPTON, VIRGINIA	1	Q4
HAMPTON, HAMPTON, VIRGINIA	1	Q1
HAMPTON, HAMPTON, VIRGINIA	1	Q2
	1	Q2
HAMPTON, HAMPTON, VIRGINIA	1	Q1
	1	Q2
HAMPTON, HAMPTON, VIRGINIA	1	Q2
HAMPTON, HAMPTON, VIRGINIA	1	Q1
HAMPTON, HAMPTON, VIRGINIA	1	Q1
HAMPTON, HAMPTON, VIRGINIA	1	Q1
HAMPTON, HAMPTON, VIRGINIA	1	Q1
HAMPTON, HAMPTON, VIRGINIA	1	Q3
HAMPTON, HAMPTON, VIRGINIA	1	Q1
HAMPTON, HAMPTON, VIRGINIA	1	Q3
HAMPTON, HAMPTON, VIRGINIA	1	Q1
HAMPTON, HAMPTON, VIRGINIA	1	Q1



## Part C – Insert a New Pivot Section

1. Click on **Insert** from the Main Menu bar and select **New Pivot**
  - From the **Elements** Pane, drag and drop **2012 Quarters**, **Noa1** and **Noa2** to the **Row Labels** of the Data Layout Pane
  - Drag and drop **Count** to the **Facts** of the Data Layout Pane
  - Adjust all the column widths to fully display the information
  - Display the Row Labels by clicking the right mouse button and select **Corner Labels** and click on **Row**
  - Select the 2012 Quarters column and add a **Grand Total** to the entire pivot
  - Select the **Noa 1** column and add a Sub Total to the pivot

How many completed transactions has your HR team processed in the following Quarters:

2012 Q1: \_\_\_\_\_

2012 Q2: \_\_\_\_\_

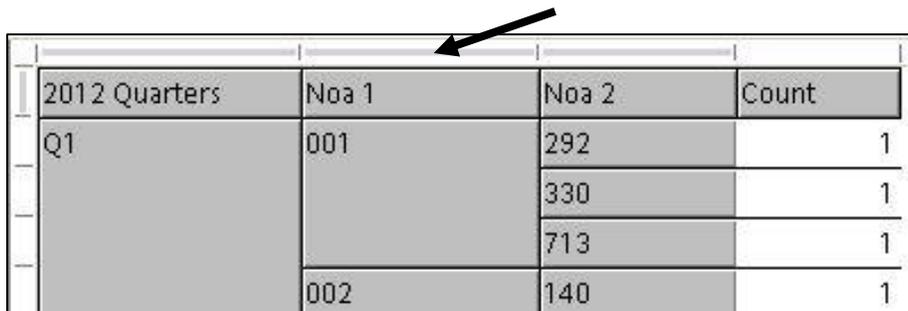
2012 Q3: \_\_\_\_\_

2012 Q4: \_\_\_\_\_

2012 Grand Total: \_\_\_\_\_

## Part D – Analyze Pivot Data

1. Drill Anywhere Feature
  - Select the **Noa 1** column by clicking on gray line **above** the Noa 1 label



2012 Quarters	Noa 1	Noa 2	Count
Q1	001	292	1
	001	330	1
	001	713	1
	002	140	1

- Right click the right mouse button to access the short-cut menu
- Select **Drill Anywhere** and click on **Noa Narr 1**



2. Adjust the column width to fully display the data

- Review the information displayed in the Pivot

2012 Quarters	Noa 1	Noa Narr 1	Noa 2	Count
Q1	001	CANCELLATION	292	1
			330	1
			713	1
	002	CORRECTION	140	1
			170	4
			702	1
			703	3
		790	1	

Provide the counts for the following:

Regular Within Range Increases completed in Q1? \_\_\_\_\_

Reassignment actions completed in Q2? \_\_\_\_\_

Rating Based Individual Cash Awards completed in Q3? \_\_\_\_\_

### 3. Drill Anywhere

- Click to select the label for **PROMOTION**
- **Right click** and select **Drill Anywhere - Name**

501	CONV TO CAREER COND APPT		8
703	PROMOTION		22
703	PROMOTION NTE 01-14		
	PROMOTION NTE 01-28		
	PROMOTION NTE 02-25		
	PROMOTION NTE 03-08		
	PROMOTION NTE 03-10		
	PROMOTION NTE 03-24		
	PROMOTION NTE 03-25		
	PROMOTION NTE 04-29		
	PROMOTION NTE 12-31		
721	REASSIGNMENT		

- Review/analyze your data
- Click on the label for any employee to select it
- **Right click** and select **Drill Up**

Noa 1	Noa Narr 1	Name	Count
702	PROMOTION	ALLEN, JOSHUA EUGENE	
		AMIOT, RICHARD W	
		ANDERSON, ANGELA M	
		ASTLER, DOUGLAS TYLER	
		BITTNER, DAVID MICHAEL	
		BODNAR, KARIN E	
		BROWN, NIKKI D	
		BROWN, RYAN D	
		BURY, KRISTEN M	
		BUSCH, DENISE R.	
		CAMPBELL, GREGORY LC	
		CAPELETY, MICHAEL W.	
		CAPELL, DONNA M.	

- Select any label within the **Noa Narr 1** column by clicking on it
- **Right click** and select **Drill Up** to return to your original pivot design

## Part E – Insert a New Table Section

1. Click on **Insert** from the Main Menu bar and select **New Table**



2. From the **Elements** Pane, select the following items, right-click the mouse and select **Add Column** or drag and drop each item to the outliner window at the bottom of the screen

- Noa 1
- Noa Narr 1
- Count
- 2012 Quarters

3. Review the information displayed in the Table

## Part F – Apply Filters and Formatting

1. Place a Filter on **Noa 1** to only display appointment actions (NOACs 100 through 199)

How many rows of data do you have? \_\_\_\_\_ of \_\_\_\_\_

3. Format the Table Section text

- Double-click on **Table** in the Sections Pane and rename it to **Table – Appointments**
- Click the **OK** button

## Part G – Create a Pivot

1. At the **Table-Appointments** section, click on **Insert** from the Main Menu bar and select **New Pivot**

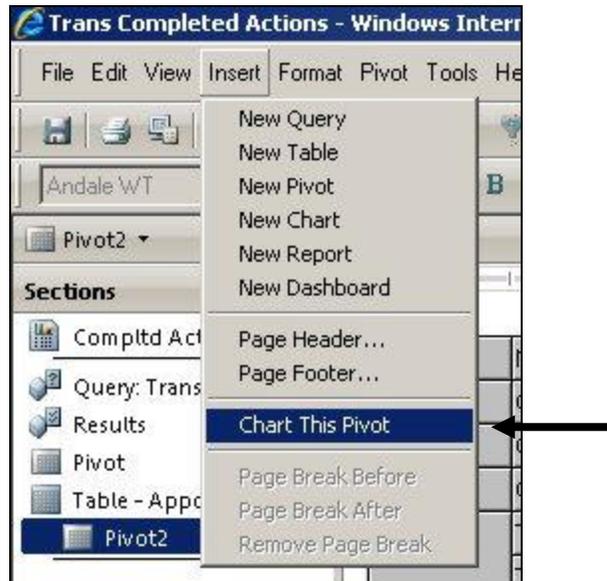


- From the **Elements** Pane, drag and drop **Noa 1**, and **Noa Narr 1**, to the **Row Labels** of the Data Layout Pane
- Drag and drop **Quarters 2012** to the **Column Labels** of the Data Layout Pane
- Drag and drop **Count** to the **Facts** of the Data Layout Pane
- Adjust all the column widths to fully display the information
- Display the Row Labels by clicking the right mouse button and selecting **Corner Labels – Row**
- Add a **Grand Total** to the Pivot
- Review your result

Noa 1	Noa Narr 1	Q1	Q2	Q3
		Count	Count	Count
001	CANCELLATION	3	3	4
002	CORRECTION	16	15	32
101	CAREER-COND APPT	2	2	5
108	TERM APPT NTE 01-16-14	1		
	TERM APPT NTE 02-12-14	1		
	TERM APPT NTE 03-26-16	1		

## Part H – Create a Chart from a Pivot

1. Click on **Insert** from the Main Menu bar and select **Chart This Pivot**



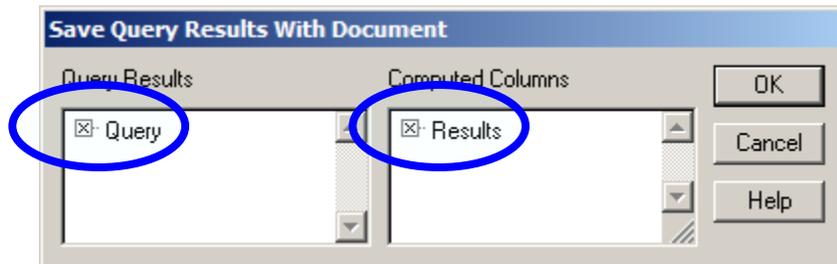
## Part H – Save the Document

1. Save Options:

- Click on **File** from the Hyperion Main Menu bar
- Select **Save Options**
- Click on **Save Query Results With Document**

2. Save with Results:

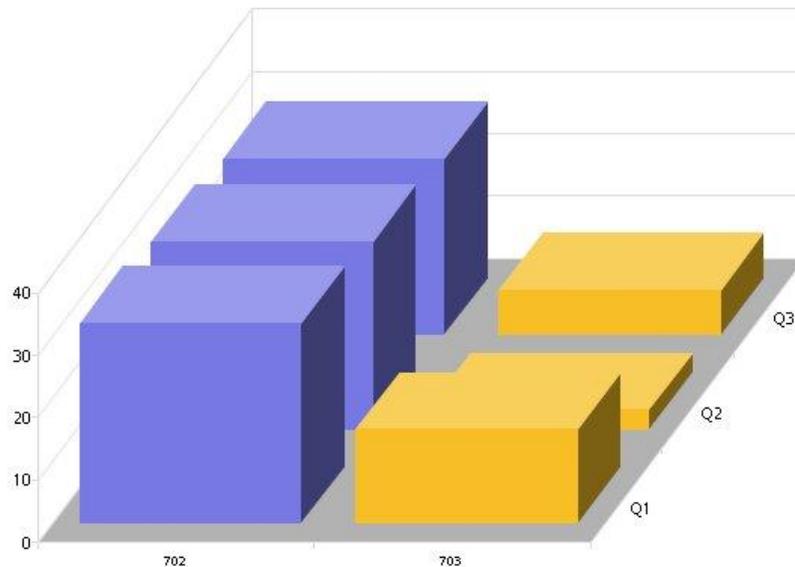
- Make sure that both boxes have an **X** in them



- Click the **OK** button
- Click on the **Save** icon from the Standard Toolbar
- Name the file **Completed Actions**

## ON YOUR OWN:

- Insert another Table section from the Results section
- Filter the data to only display Promotion actions
- Create a Pivot to display this information in a more readable format
- Chart the Pivot to display this information graphically as show below



3. Save and close the document

4. Log off and close the Browser

End of Exercise

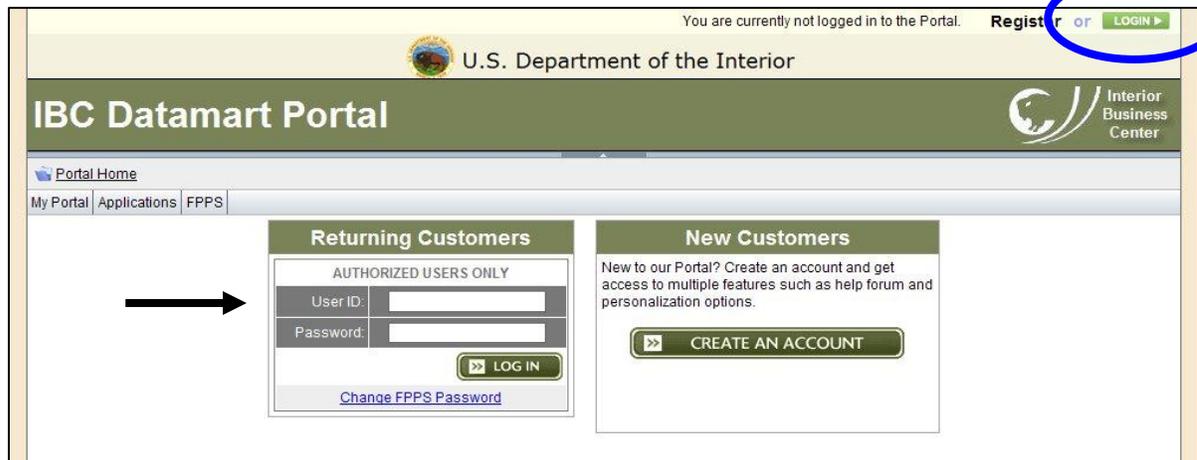


## Exercise 7: Create Charts for Analysis

**Objective:** Create and format Charts that display Education information for your organization. Review and analyze information.

### Part A - Create a Query

#### 1. Access and Logon to the Datamart Portal (<https://dmartportal.nbc.gov>)



- Enter your **User Name** and **Password**
  - Click the **Log On** button
2. Click the Hyperion Login link
- Enter your **User Name** and **Password**
  - Click the **Log On** button
3. The **HomePage** displays
- Click on **Explore** to access the Datamart Standard Report catalog
  - In the Folders pane, double-click on the **Combined History Reports** folder to expand it
  - Select the **History Ad Hoc** folder
  - Double-click on the **Ad Hoc (5)** file to access the query
4. **Build Request Line**
- Access the **Query Section** and add **Education Level** from the Employee History Non EEO View table to the Request Line.

## 5. Process Query

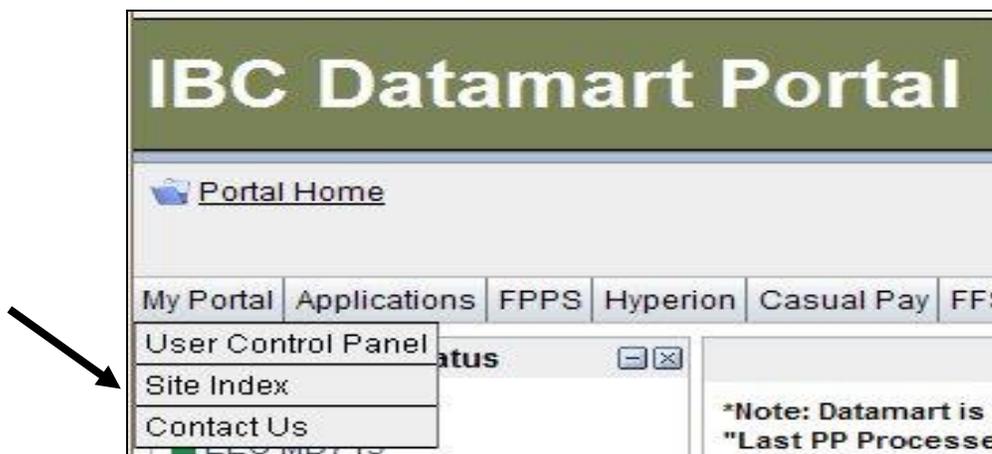
- Click the **Process** button and enter the following values in the limit Windows:
  - Pay Period: **201210** (YYYYPP)
  - Dept: **NN**
  - Bureau: **23**
  - Subbureau: **00**
  - Org: **Click Ignore**

## Part B – Create Decode Descriptions

### 1. Add a Decode Description to the Results Section

- Scroll to the right of the **Results** section, locate and review the Education Level data
- Right click and select **Add Computed Item**
- In the Computed Item window, replace the default column name 'Computed' with '**Education**'

### 2. Access the **Datamart Portal** window (locate it on the bottom bar of your computer) and log into the Portal itself place your mouse cursor on **My Portal** and select **Site Index**



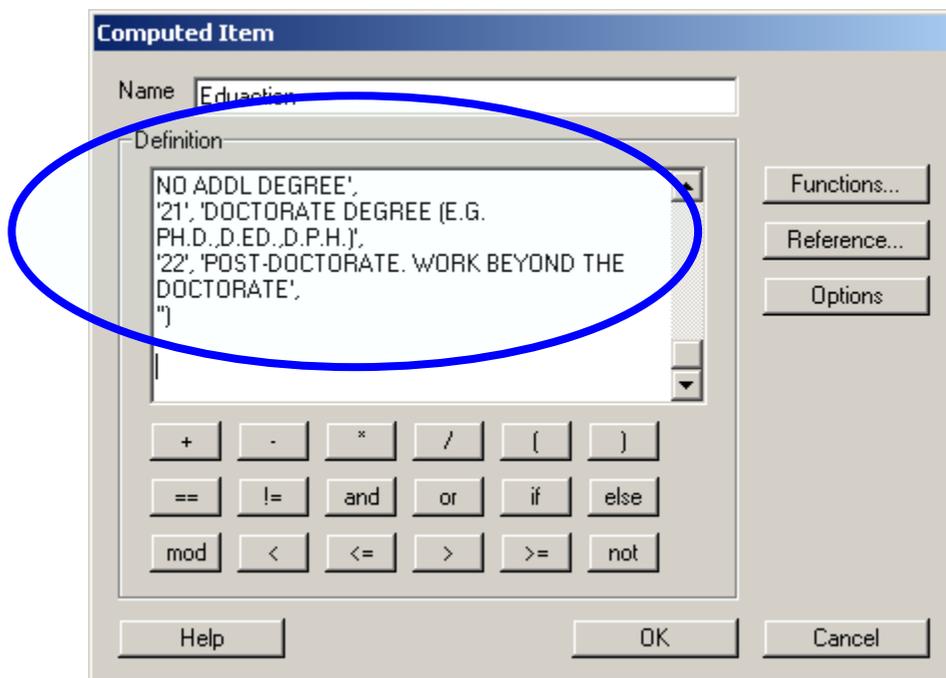
4. Select the link to **Computed Items/Pay Codes/Decode Description**

- Scroll down and click on the **Education Level** hyperlink
- From the **Main Menu**, select **Edit** and click **Select All** (to select the entire decode statement)
- Click **Edit** again and select **Copy** to copy the decode statement into the windows memory clipboard
- Close the Decode Description window

5. Using the Windows task bar at the bottom of your screen, click on the window which will return you to the **Results Section** and your Computed Item

6. Click inside the **Definition** window of the Computed Item

- Paste the **Education Level Decode Description** into the Definition window by placing the cursor in the Definition window, then right click and select **Paste** (or **Ctrl+V**)
- The Definition window looks like this:



- Click **OK** to close the Computed Item window
- Review the **Education** column results

## Part C - Chart Section

### 1. Create a Chart

- From the Main Menubar, click on **Insert** and select **New Chart** (the default is Vertical Bar, leave as is)
- Select **Count** in the Elements Pane, access the speed menu and click **Add to Fact (Stack)**
- Drag and drop **Education Level** into the **X Axis** Pane of the Data Layout

### 2. Create a Table and Chart

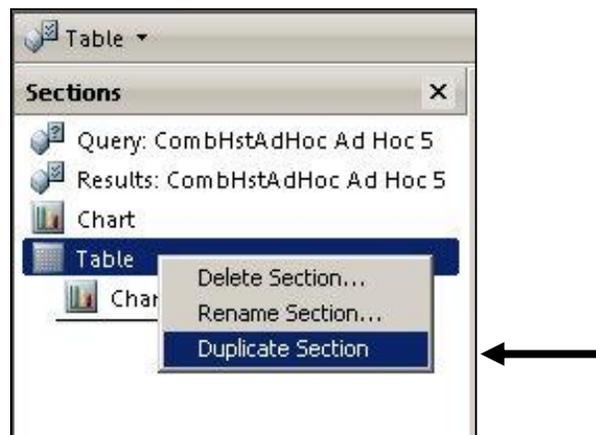
- From the Results Section, insert a **New Table**
- Drag **Org**, **Org Desc**, **Education Level**, **Education Desc**, and **Count** to the **Data Layout** Pane
- Filter the **Education Level** field to only display employees with an FPPS code indicating an Education Level of **Bachelor's Degree or higher AND** filter the Org field to only display **4** different Org Codes (you choose).

Write down what you did to accomplish these filters:

- From this new Table section, Insert a **New Chart**
- Create a Horizontal Bar chart for analysis that displays information on these four Org Codes for employees with a Bachelor's degree or higher by placing **Count** in the **Fact (Stack)**, **Education Desc** in the **X Axis** and **Org** in **Depth**

### 3. Copy and Modify Table

- Select the **Table** in the Sections Pane
- Right-click and select **Duplicate Section**



- Change the Filter on **Org** to 4 different Org Codes
- Insert a **New Chart**
- Create a Horizontal Bar chart for analysis that displays information on these four new Org Codes for employees with a Bachelor's degree or higher by placing **Count** in the **Fact (Stack)**, **Education Desc** in the **X Axis** and **Org** in **Depth**

### **On Your Own**

Insert Pivot sections in to any area you wish to display your Education data in a more readable format with Grand Totals and Sub Totals.

### **Save File**

- Insure that you save the **Query Results With Document**
- On the Standard Toolbar, click the **Save** icon
- Change the file name to **Education Level**
- Click **Save**

Close the Browser

End of Exercise



## Exercise 8: Computed Items and Exporting Documents

**Objective:** Add Computed Items. Apply formatting features. Export as Adobe Acrobat file format (PDF).

### Part A – Access and Process a Standard Report

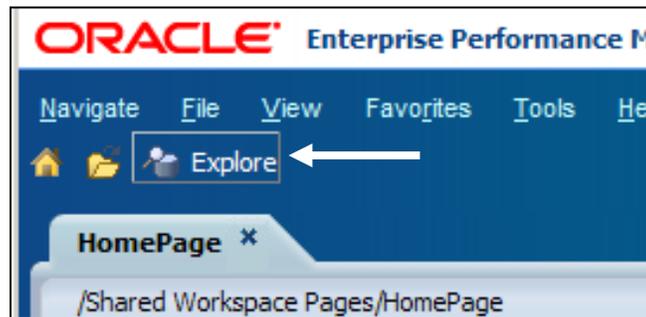
1. Launch the I.E. Web Browser

- Access the IBC Datamart Portal at <https://dmartportal.nbc.gov>
- Click on the **Hyperion Login** link



2. The **ORACLE Enterprise Performance Management System Workspace Login** screen displays

- Log in using your NASA FPPS Datamart **User Name** and **Password**
- Click the **Log On** button
- At the **HomePage**, click on **Explore** to access the Datamart Standard Report catalog



3. In the Folders pane, double click on the **Combined File Reports** folder to open it. Select the **Personnel** folder and then double click on the **Retirement Information** query.

## Part A – Create Computed Items

1. In the **Query Section** add the following items to the Request line:

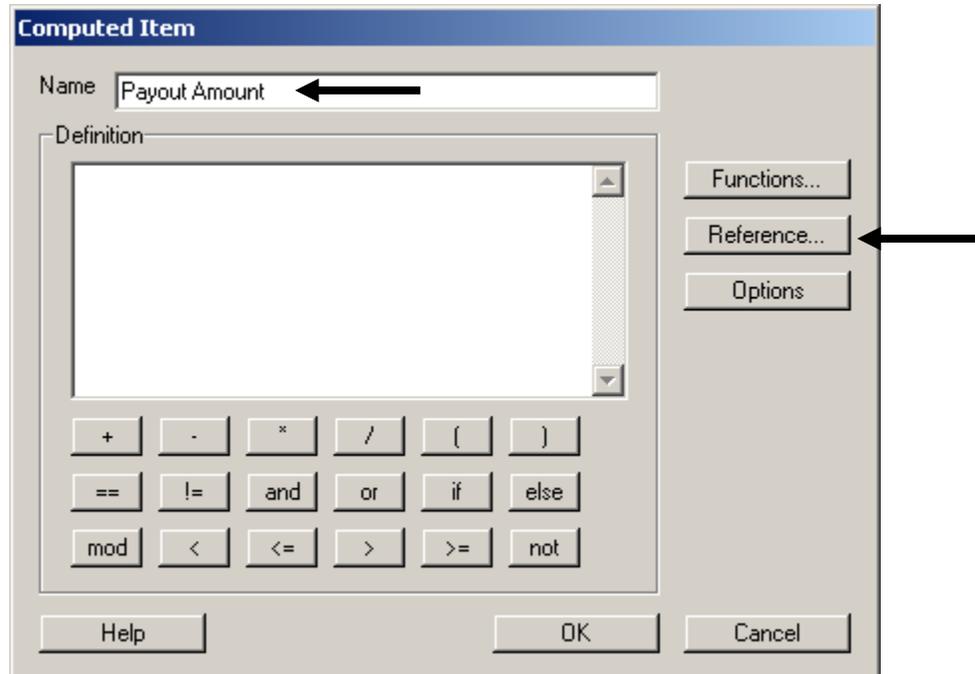
- **Base Rate**
- **Leave Annual Curr Bal**

2. **Process** the query using your NASA codes for Dept, Bur, etc., however select **Ignore** for Org

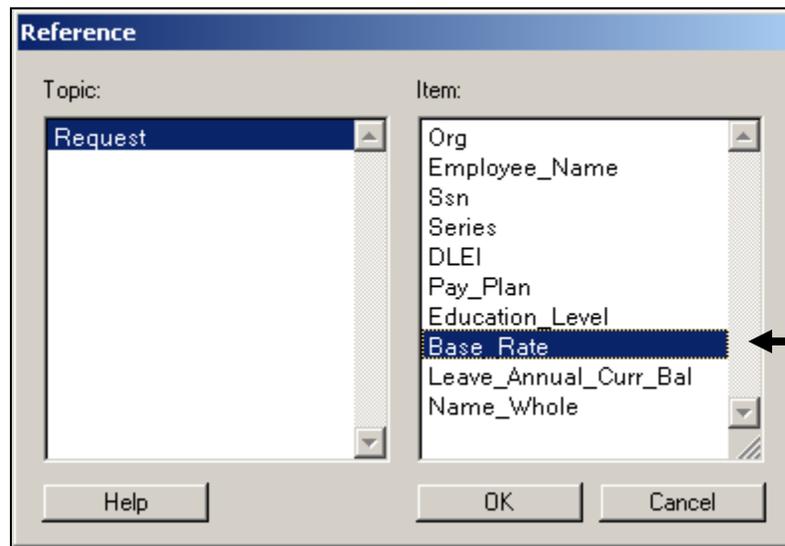
- Review the information displayed in all the available Reports and Pivots

3. Return to the **Results: Retirement Projections** section and add a Computed Item that multiplies the Base Rate and the Leave Annual Curr Bal fields together to display the payout amount each employee would receive

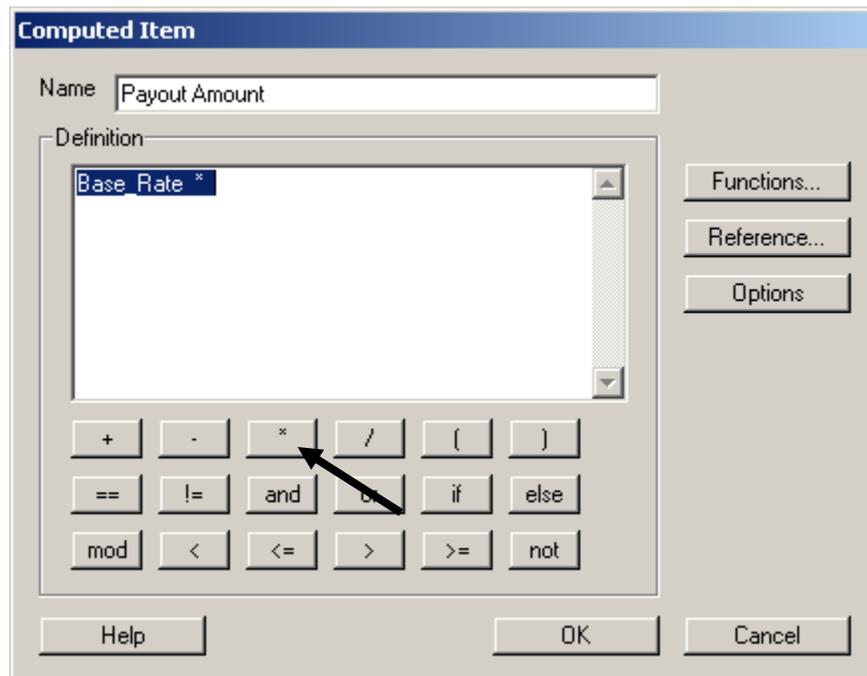
- Right click to access the short-cut menu and select **Add Computed Item**
- Change the name to **Payout Amount** and click on the **Reference** button



- Select **Base Rate** and click the **OK** button

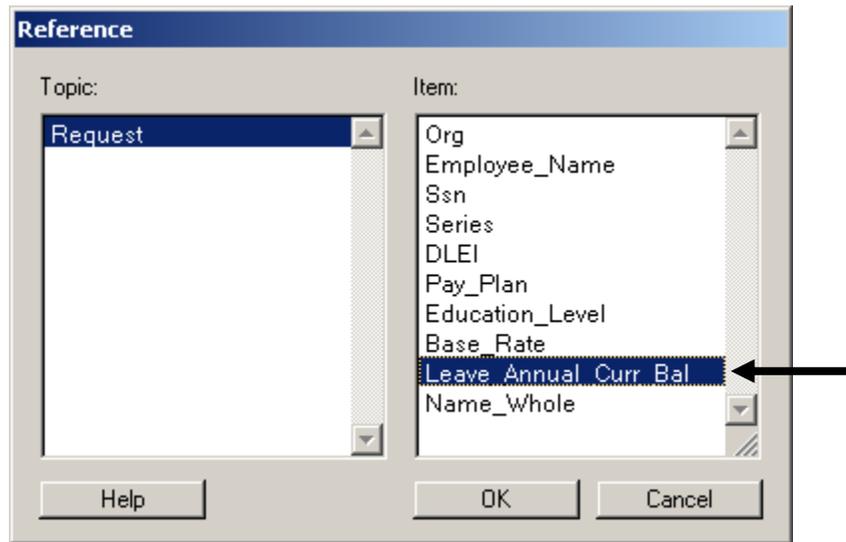


- Select the **asterisk** button ( \* ) to indicate you want to multiply

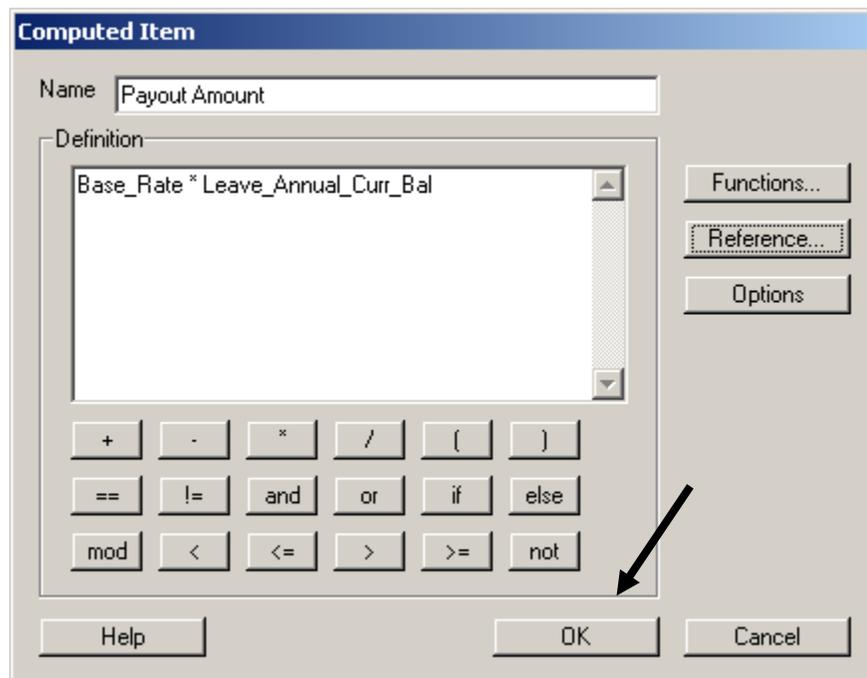


- Click to the right side of the asterisk
- Click the **Reference** button to select another data item

- Select **Leave Annual Curr Bal** and click the **OK** button



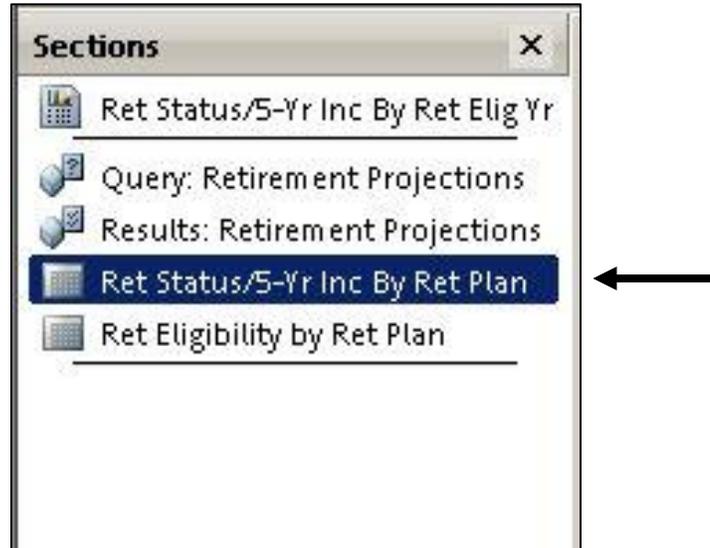
- Click **OK** to review results of the computed item



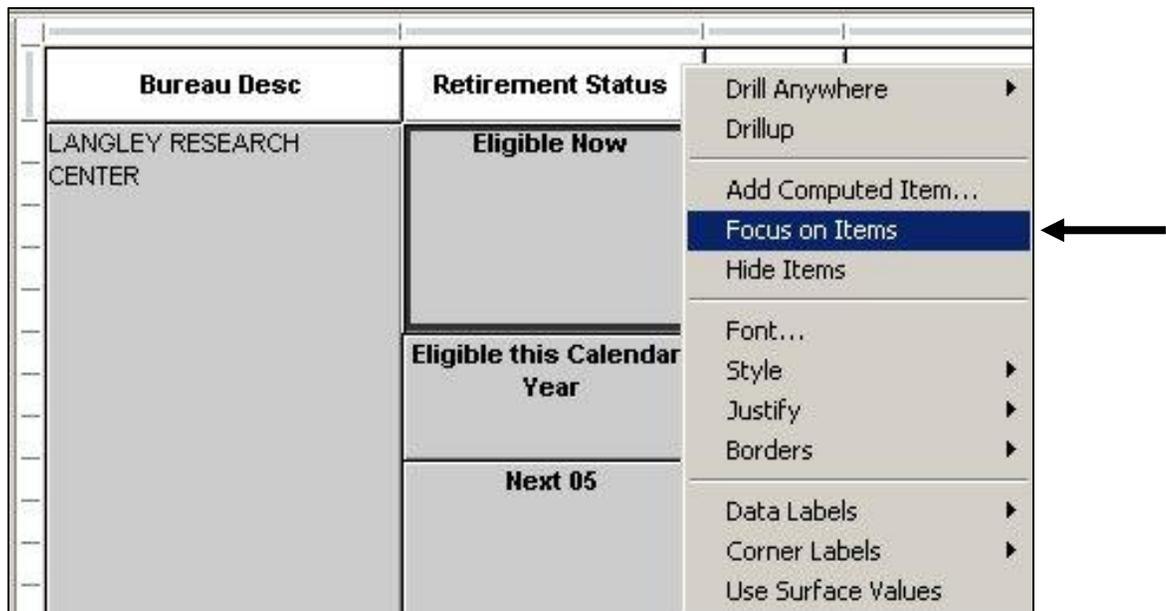
- Format **Payout Amount** column to display currency with two decimal places
- Place an ascending sort on **Payout Amount**

## Part B – Focus on Items

1. Select the **Ret Status/5-Yr Inc By Ret Plan** Pivot section

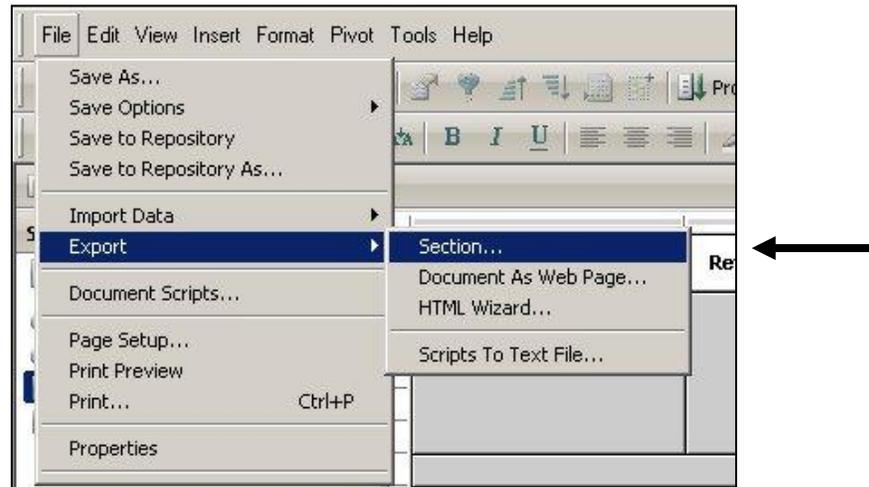


2. Add **Payout Amount** from the Elements Pane to **Facts** and adjust column to fit
3. Select the **Eligible Now** label
  - **Right click** with mouse
  - Select **Focus on Items**

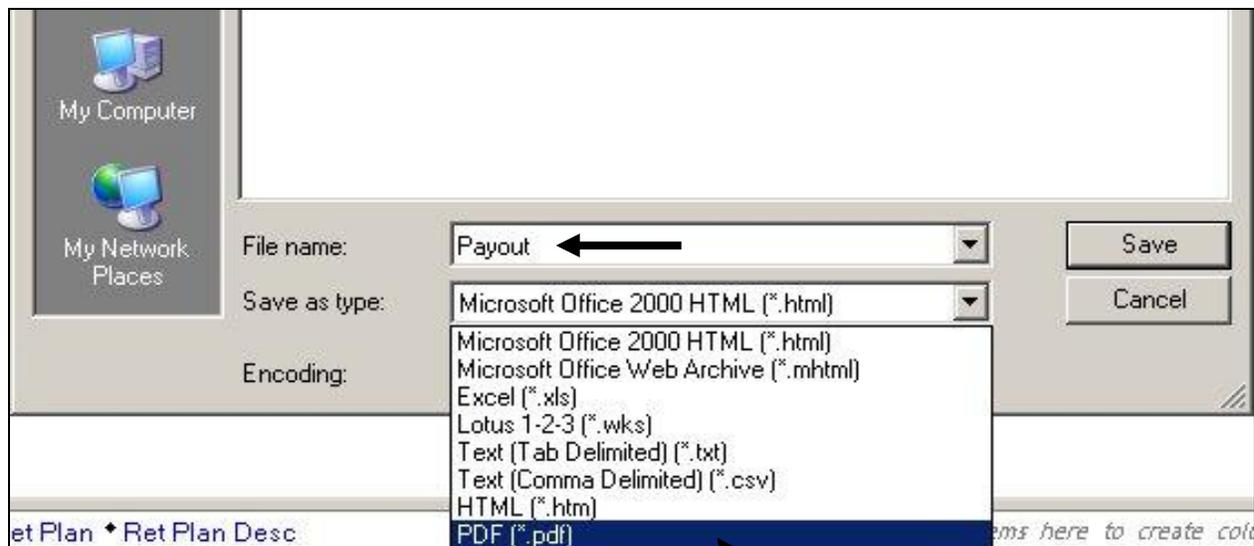


## Part C – Export Document

1. From the Main menu bar click on **File**, select **Export** and choose **Section...**



- Change the file name to **Payout** and the “Save as type”, as **PDF (\*.pdf)**
- Click the **Save** button



2. Minimize your windows to see the Desktop
3. Access the **Payout.pdf** on the Desktop to view the exported PDF file.
4. Close the PDF file by clicking on the **X** in the upper right corner
5. Save the query document with the file name of **Payout.bqy**

6. Click the **LOGOUT** button for the Datamart Portal and close the Browsers

End of Exercise



## Exercise 9: Create a Report

**Objective:** Create and format a Report that displays Employee Leave information for your organization. Review and analyze information.

### Part A – Find and Save NASA Logo

1. Use Google and find a **small** NASA logo graphic to save as an image file to your computer for use later in exercise.

### Part B – Access Datamart Portal and Hyperion

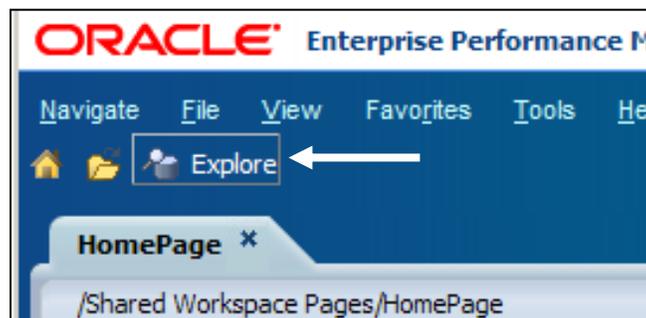
1. Launch the **I.E.** Web Browser

- Access the IBC Datamart Portal at <https://dmartportal.nbc.gov>
- Click on the **Hyperion Login** link



2. The **ORACLE Enterprise Performance Management System Workspace Login** screen displays

- Log in using your NASA FPPS Datamart **User Name** and **Password**
- Click the **Log On** button
- At the **HomePage**, click on **Explore** to access the Datamart Standard Report catalog



## Part C - Access a Saved File

- Minimize all browser windows (Do not close them down)
- Navigate to locate your saved **Leave.bqy** file and **double-click** to open it
- Maximize the window when opened

## Part D - Report Section

### 1. Create Report (Annual Leave):

- Select **Insert** from the Main Menu bar and click on **New Report**
- Select **Report** from the Main Menu bar and click on **Section Boundaries**
- From the Elements Pane, drag and drop **Org** into **Report Group 1**
- From the Elements Pane, drag and drop **Org Desc** into **Report Group 1** *after Org*
- Add **Name Whole** and **Series** to **Table Dimensions**
- Add **Leave Annual Curr Bal**, **Leave Sick Curr Bal**, **Leave Comp Avail Occ Total**, and **Leave Credit Hrs Bal** to **Table Facts**
- Rename the report section "**Report - Annual Leave by Org**"

### 2. Format Report:

- From the Standard Toolbar, click the drop-down arrow on the **Zoom** button and select **Page Width**
- Select **Report** from the Main Menu bar and place the cursor on **Headers and Footers** and in the bottom section (**Page**), click **Show Both**
- Format all the Leave columns to display two (2) decimal places
- Place an ascending sort on the **Org** field for Group 1
- Format and sort the table columns any way you wish

### 3. Headers and Footers:

- Open the **Graphics** folder in the Elements Pane (left side of screen)
- Drag and drop a **Text Label** into the **right** side of the **Page Header** area
- Change the Text Label text to the words “**Center Total:**”
- From the Elements Pane, drag and drop the **Count** field into the **Page Header** after the words “**Center Total:**”
- Change the font size of each of these items to **14**
- Repeat this process to create a count within the **Report Group 1 Header** area with a text label of **Org Total:**
- From the Graphics folder in the Elements Pane, drag and drop **Picture** onto the **left** of the **Page Header** area
- At the **Select Image** window, navigate to the PC location where you saved your small NASA logo and select the **NASA logo (graphic image)**
- Add a Text Label and change the text to **Employee Leave Data** to the center of the **Page Header** area
- Delete the page number in the Page Header. From the **Fields** folder in the Elements Pane, add **Date** in the upper right corner
- Delete the page number in the Page Footer and from the **Fields** folder in the Elements Pane, add **Page X of Y** to the center of the footer and change the font size to **14** and **bold**
- Scroll to the end of your report to “update” the Page X of Y counter
- Turn off Section Boundaries by selecting **Report** from the Main Menu bar and click on **Section Boundaries** again to uncheck
- Review your results

### 4. Save Your File

End of Exercise