

QUICK REFERENCE GUIDE

Updated July 11, 2022

Add a Dashboard Prompt to a Dashboard

After you create a dashboard to store reports, you can return to it and add a dashboard prompt.

A prompt allows you to filter which data values are returned in a report. Dashboard prompts limit the display of the reports in the dashboard to the values of the dashboard prompt. They add flexibility to the user to customize the data in the reports.

With EPM Data Warehouse advanced security roles, you can save dashboard prompts in an agency-specific dashboard or a Statewide shared dashboard. Then, these dashboard prompts are available for anyone to use who have permissions for that dashboard.

IMPORTANT! For a dashboard prompt to work in the reports and dashboard, you must use the same Subject Area in the dashboard, the reports in the dashboard, and the dashboard prompt. You can only add data elements and filters from that Subject Area to a dashboard prompt.

Scenario: This guide will create a dashboard prompt to use in My Dashboard.

- It will use Minnesota Management and Budget's Business Unit of G1001.
- It will use the SCM-PROC-Supplier Contract Header Subject area for the dashboard, desired reports, and the dashboard prompt.
- It prompts the Origin Code of 514 on three existing supplier reports.

This guide lists the steps to create a dashboard prompt and add it to the reports in an existing dashboard such as My Dashboard.

Steps to complete:

- Step 1: Navigate to the EPM Data Warehouse and check that all desired reports in the dashboard page are in the same Subject Area
- Step 2: Make sure the desired reports use the "is prompted" operator for the data set
- Step 3: Create and save a new dashboard prompt
- Step 4: Add the newly created dashboard prompt to a dashboard, save it, and run it

Steps to Add a Dashboard Prompt to a Dashboard

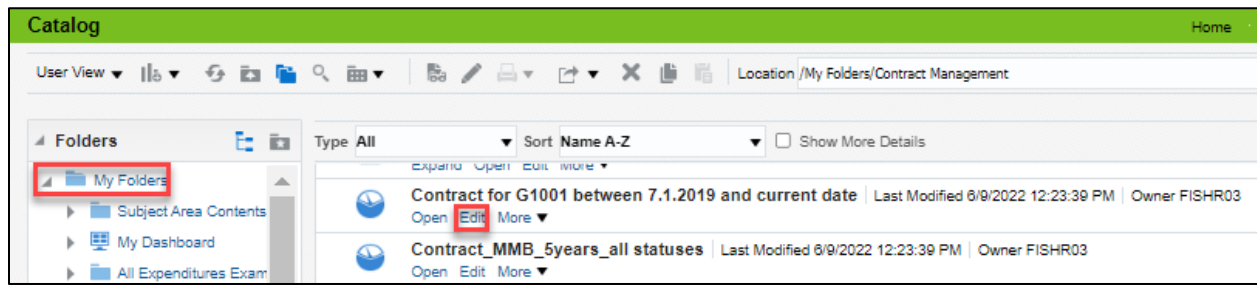
Step 1: Navigate to the EPM Data Warehouse and check that all desired reports in the dashboard page are in the same Subject Area

You must use the same Subject Area in the reports you want prompted in your dashboard.

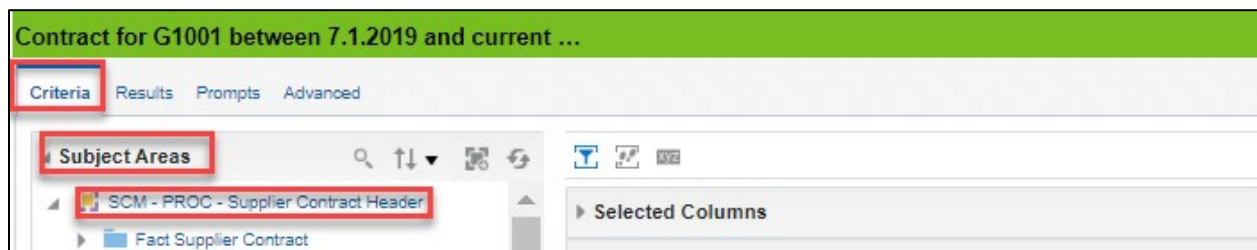
1. Follow this navigation to the report in the EPM Data Warehouse.

Navigation Options	Navigation Path
Navigation Collection	Administrative Portal, Data Warehouse, Data Warehouse, Catalog, My Folders

2. Find and open the existing report that is in a dashboard that you want prompted.
 - a. Select the *Edit* link below the report name.

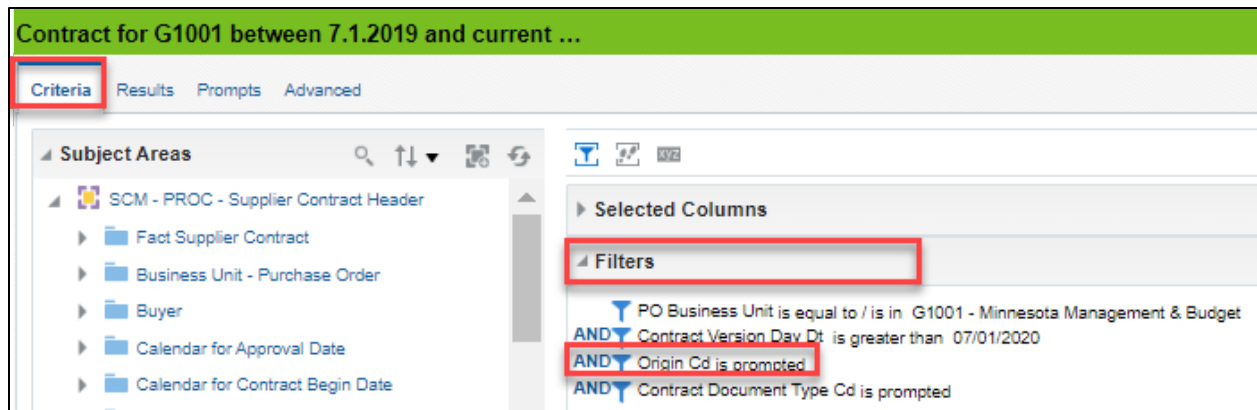


2. The EPM Data Warehouse opens the report. Review the *Subject Area*.
 - a. Select the *Criteria* tab at the top left of the report.
 - b. In the left menu, notice the *Subject Area* for the report. In this example, the report was created using “SCM-PROC – Supplier Contract Header.”
 - c. Check the *Subject Area* in all the reports from the dashboard.

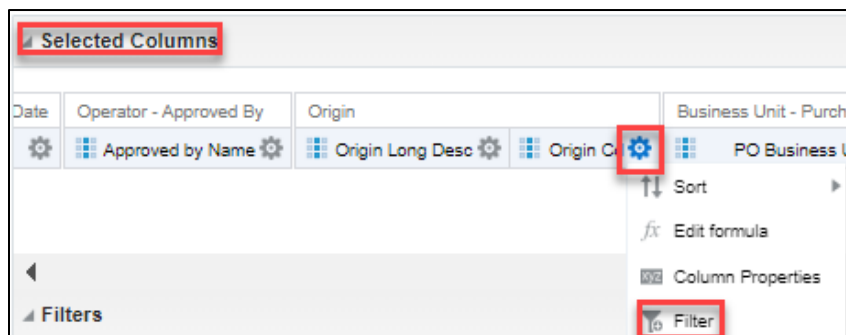


Step 2: Make sure the desired reports use the “is prompted” operator for the data set

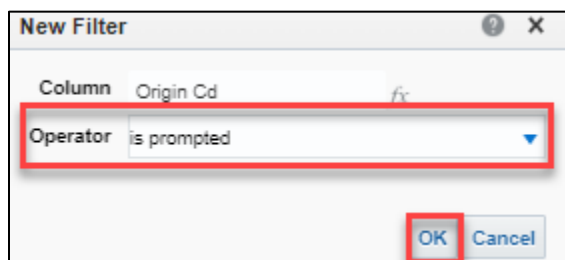
1. On the report, review the *Filters* pane. It lists the columns of the data elements for this report such as *Origin Code*. For example, we want to create a prompt that lists *Origin Code*. The *Origin Code* should say “is prompted.”



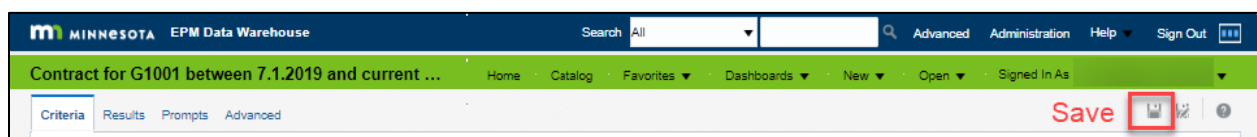
2. If the needed data set is not prompted, go to the *Selected Columns* pane. It is located above the *Filters* pane.
 - a. In the *Selected Columns* pane, find the data element, such as *Origin*. Open the **Menu** icon for that column. The **Menu** icon looks like a gear.
 - b. Select the *Filter* option.



- c. The EPM Data Warehouse opens the *New Filter* window. In the *Operator* section, select “is prompted.” Then, press **OK** at the bottom of the pane.

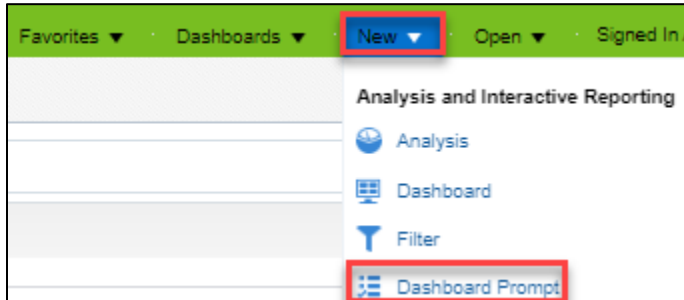


- d. The *Filters* pane should display the “is prompted” value for that column.
 - e. Make sure the needed data sets in all desired reports are filtered and use the “is prompted” operator.
 - f. At the top of the *Selected Columns* pane, save the report to retain the updated values.

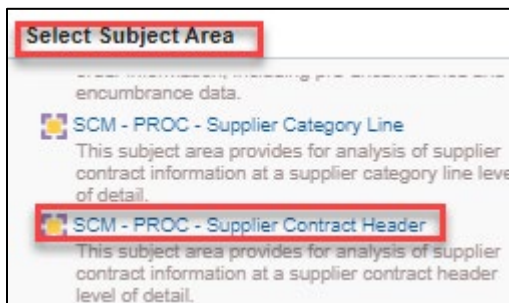


Step 3: Create and save a new dashboard prompt

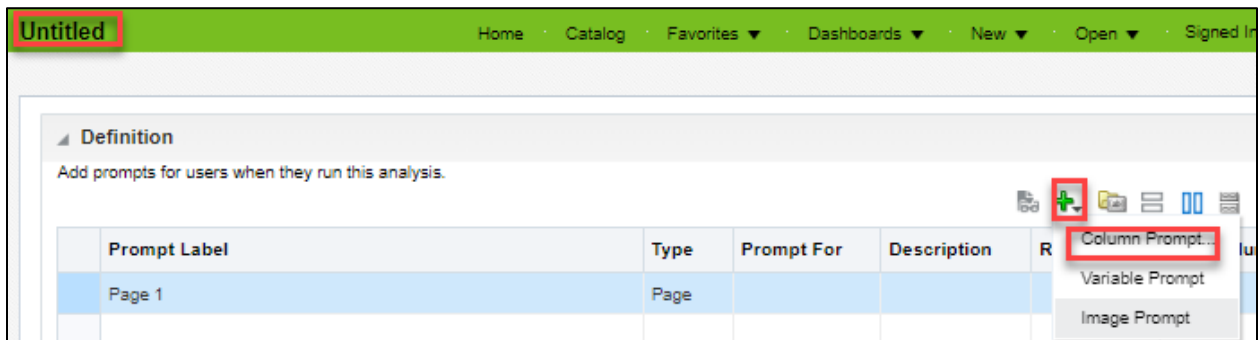
1. Create a new dashboard prompt. On the header, select the *New* tab and choose “Dashboard Prompt.”



2. On the *Select Subject Area* menu, choose the correct Subject Area. For this example, we’ll select “SCM-PROC – Supplier Contract Header.”

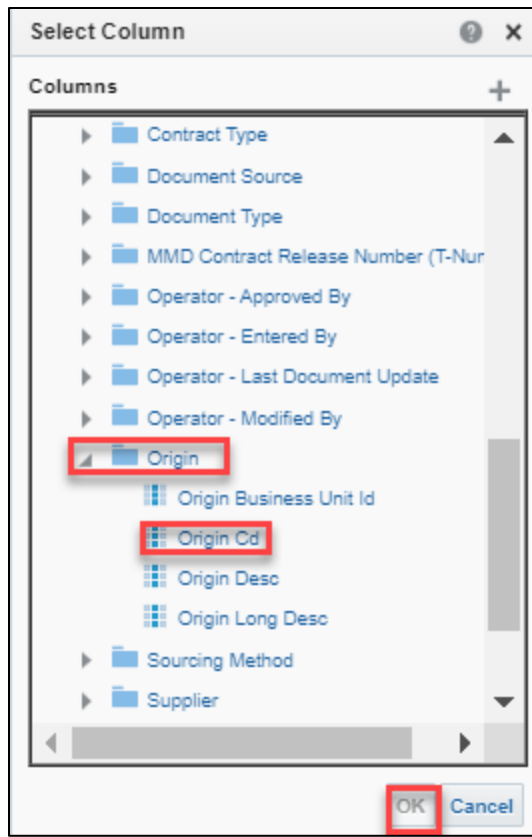


3. The EPM Data Warehouse opens an untitled prompt page. Add a prompt by selecting the **New Prompt** icon, which is a green plus sign. Then, choose *Column Prompt*. *Column* is the most commonly used dashboard prompt.



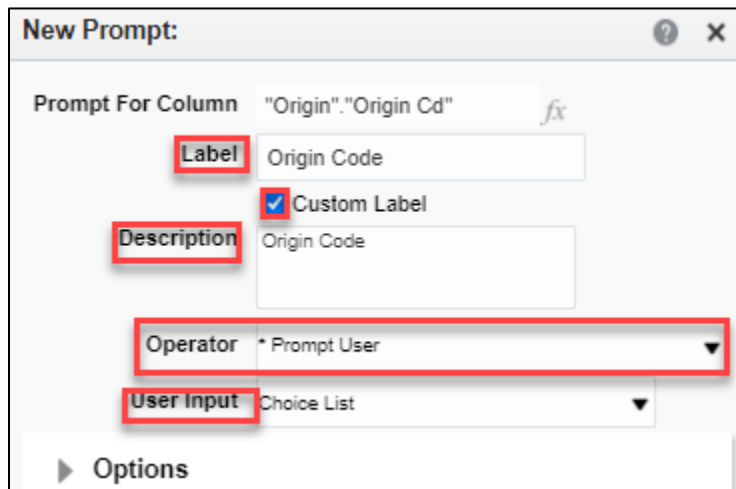
4. The EPM Data Warehouse opens the *Select Column* window. Select the correct column to prompt.

In this example, go down the page to the *Origin* folder and open it. Then, select the “Origin Code” data field. Then, select **OK** at the bottom of the window.



5. SWIFT displays the *New Prompt* window. Fill in the fields.
 - a. If you want to change the label of the new prompt, check *Custom Text* box and the *Label* field will open. Update it as desired.
 - b. As an option, you can add a *Description* of the dashboard prompt.
 - c. In the *Operator* field, select the "Prompt User."
 - d. Select the *User Input* you wish to create.

The *User Input* describes what kind of data and display you wish to use when running the prompt. For this example, select the "Choice List" default section.



Fields on the User Input section.

Field Name	Field Description
Check Boxes	Provides a list of all prompt values where a small, selectable box displays before each value item. Use this option for a prompt that contains a smaller set of data.
Choice List	Provides a collapsed list of all prompt values. Use this option when there is a long list of values when you want the ability to search for a specific value. You can set it up to accept only one prompt value or multiple prompt values.
List Box	Provides a list of all prompt values. Use this option for a prompt that contains a large set of data.
Radio Button	Provides a list of all prompt values where a Radio button is displayed before each prompt value. Use this option when there is a short list of values, and you want to select only one prompt value.

- e. To limit the values in your dashboard prompt, open the *Options* section.

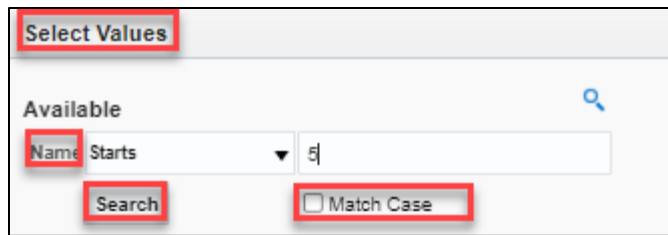
The fields you see depend upon your *User Input* selection. We want the “514” value in the *Origin Code* for G1001.

- i. On the *Default selection*, choose “Specific Values.”
- ii. Then, press the **Select Values** icon, which is a light gray plus sign.

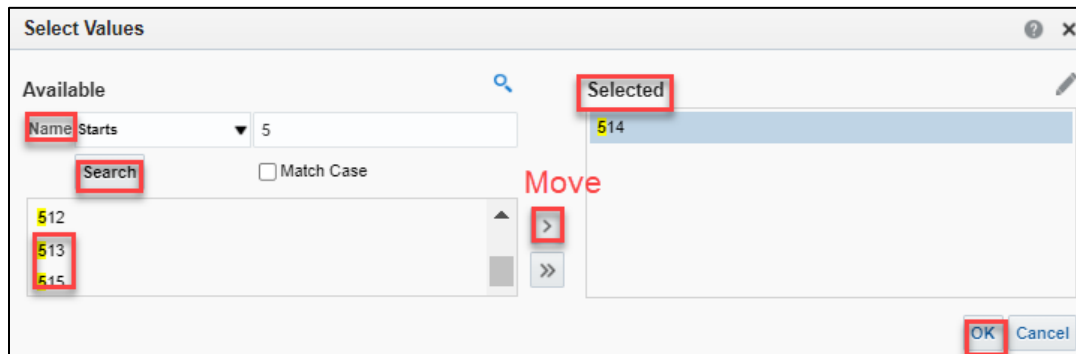
- iii. The *Select Values* window opens.

1. To expand search options, uncheck the **Match Case** box.
2. Chose an operator such as “Starts” or “Contains.”
3. Add a value in the *Name* field. For example, use “5” in the *Starts* field because G1001’s Origin Codes start with “5.”
4. Then, select **Search**.

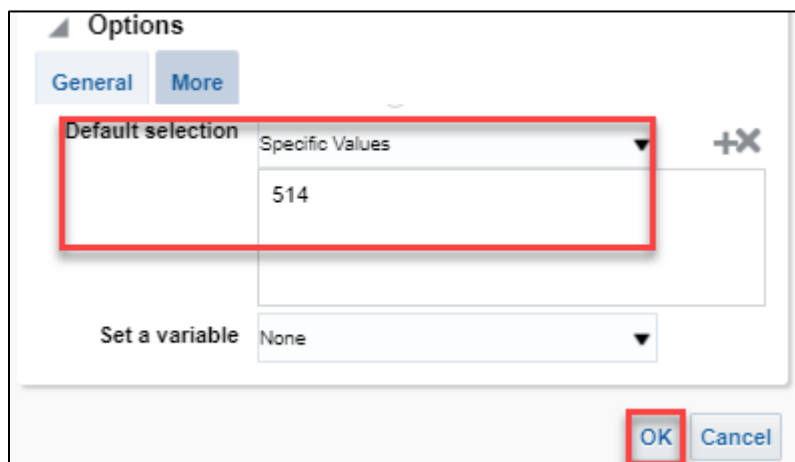
SWIFT STATEWIDE INTEGRATED FINANCIAL TOOLS



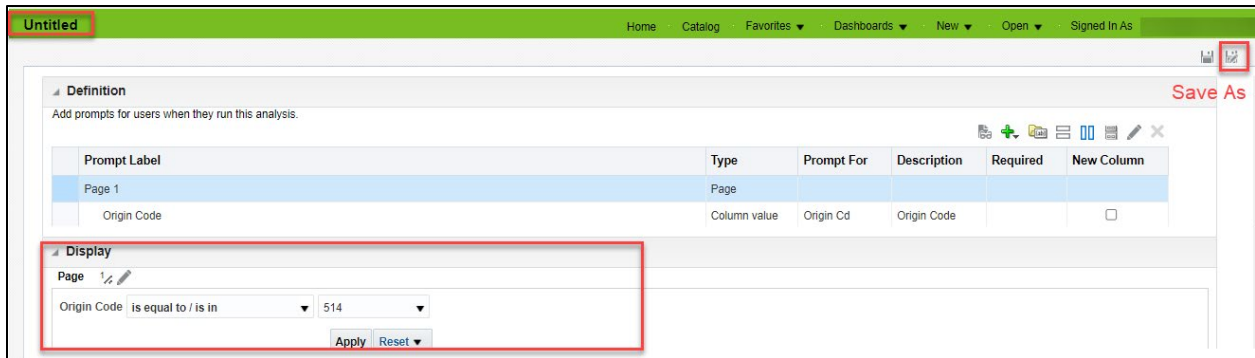
- iv. The *Available* pane populates with all the values that match your search selection. Highlight the individual values you want on the dashboard prompt. *Column Values* pane.
- v. Then select the **Move** icon in the middle of the page until all the values are moved to the *Selected* pane.
- vi. Once the desired values are on the *Selected* pane, press **OK**.



- vii. The EPM Data Warehouse returns to the *New Prompt* window with the updated *Options* section. Select **OK**.

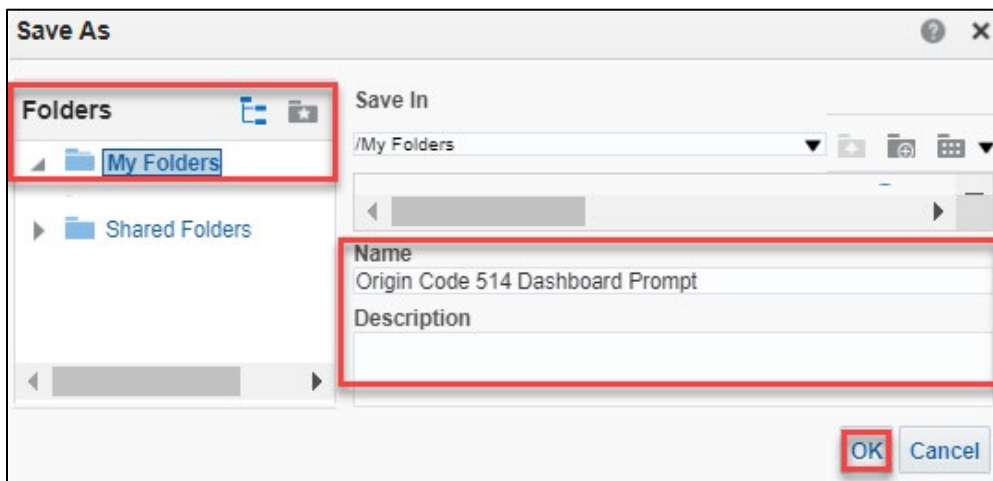


- viii. The updated, untitled prompt page appears. It includes the updated *Default Selection* area with the new *Specific Values*. Save the dashboard prompt. On the top right of the *Definition* pane, select the **Save as** icon.



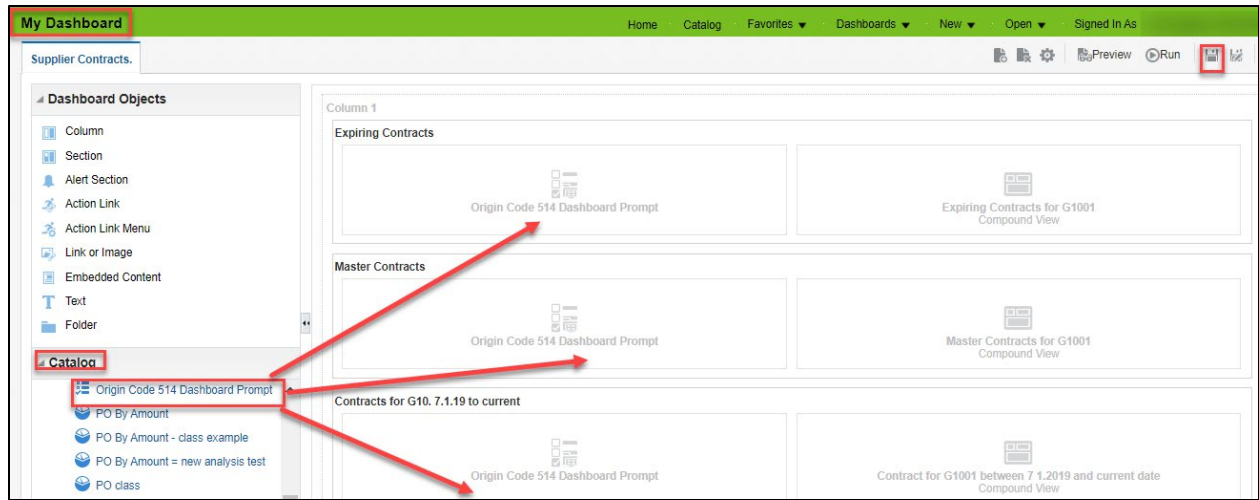
- ix. The *Save As* window appears. Select a folder such as *My Folder*. In the *Save In* section, add a *Name*. Consider adding “Dashboard Prompt” to the name. As an option, add a description. Then, select **OK**.

NOTE: Unless you have roles for shared folders and dashboards, you will likely need to save the prompt in the *My Folders* section. Select **OK**. The dashboard prompt will appear in the *Catalog*.



Step 4: Add the newly created dashboard prompt to a dashboard, save it, and run it

1. From the global menu, open the *Catalog* menu and navigate to the folder you save your dashboards. You will likely find it in *My Folders*, *My Dashboard*.
2. Find the dashboard to add a prompt and select the *Edit* link below it. A dashboard icon looks like a computer monitor with four documents inside.
3. The EPM Data Warehouse opens the dashboard.
 - a. On the left menu, open the *Catalog* folder and find the saved dashboard prompt.
 - b. Drag and drop it inside the *Section* of a *Column* pane into the desired report or reports.



4. Save and run this dashboard.
 - a. At the top of the page, select the **Save** icon to save the updated dashboard.
 - b. Then select **Run**.



5. The EPM Data Warehouse updates the report(s) on the dashboard using the values from the dashboard prompt. You can see the dashboard prompt on the left side. You can update the dashboard prompt if desired using the menu icon, which is a down arrow.

