SWIFT STATEWIDE INTEGRATED
FINANCIAL TOOLS

QUICK REFERENCE GUIDE

Build "My Dashboard" in the EPM Data Warehouse

A dashboard is a customized collection of reports that appear when a user accesses the *Dashboards* menu in the EPM Data Warehouse. It allows users to access reports in one place.

All users have a personal dashboard that they can build called "My Dashboard."

- No one else has access to an individual's My Dashboard.
- You can create, update, and save as many pages on your personal dashboard as you need.
- You can add and organize as many reports as you want to those pages in your dashboard.
- You control the data, display, and titles of the dashboard pages.
- You can remove reports and delete pages as needed.
- Once you add a report to My Dashboard, update it outside of the dashboard (such as in the Catalog). Then the EPM Data Warehouse will update the report in your dashboard and in the Catalog at the same time.
- When you open My Dashboard, it will display the most recent SWIFT data. You can tell by the time and date.

> **IMPORTANT.** To create a dashboard with useful reports, you must first create and save the needed reports in My Folders.

This guide provides a basic overview of the steps to create *My Dashboard* in the EPM Data Warehouse.

- It demonstrates how to add a dashboard page and reports to it using columns and sections.
- It describes how to edit the properties of the columns and sections as needed.
- It shows you to add Page Report Links to the reports on My Dashboard.
- It demonstrates how to edit My Dashboard including renaming the reports and showing the Section and Header Titles.
- It shows you how to update the dashboard page to add a name.
- It also describes how to add and delete pages.

Steps to complete:

- Step 1: Navigate to the EPM Data Warehouse
- Step 2: Open My Dashboard page
- Step 3: Add reports to My Dashboard page
- Step 4: Edit the pages in My Dashboard
- Step 5: Run and edit My Dashboard

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Steps to build "My Dashboard" in the EPM Data Warehouse
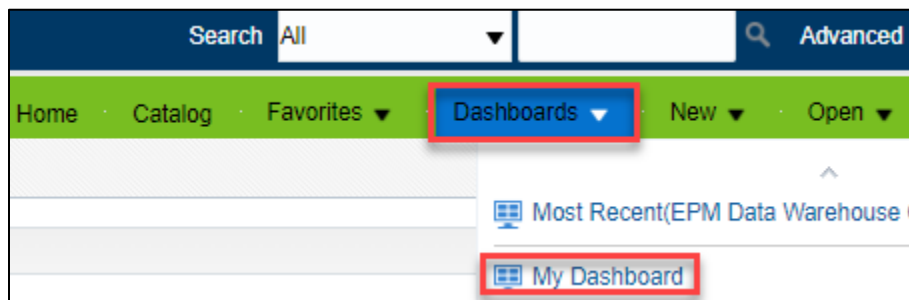
Step 1: Navigate to the EPM Data Warehouse

Follow this navigation to the EPM Data Warehouse.
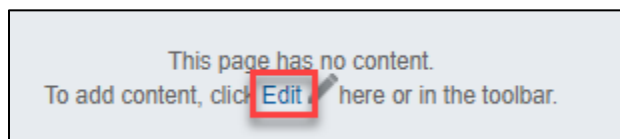
Navigation Options	Navigation Path
Navigation Collection	Administrative Portal, Data Warehouse, EPM Data Warehouse Reporting.

Step 2: Open My Dashboard page

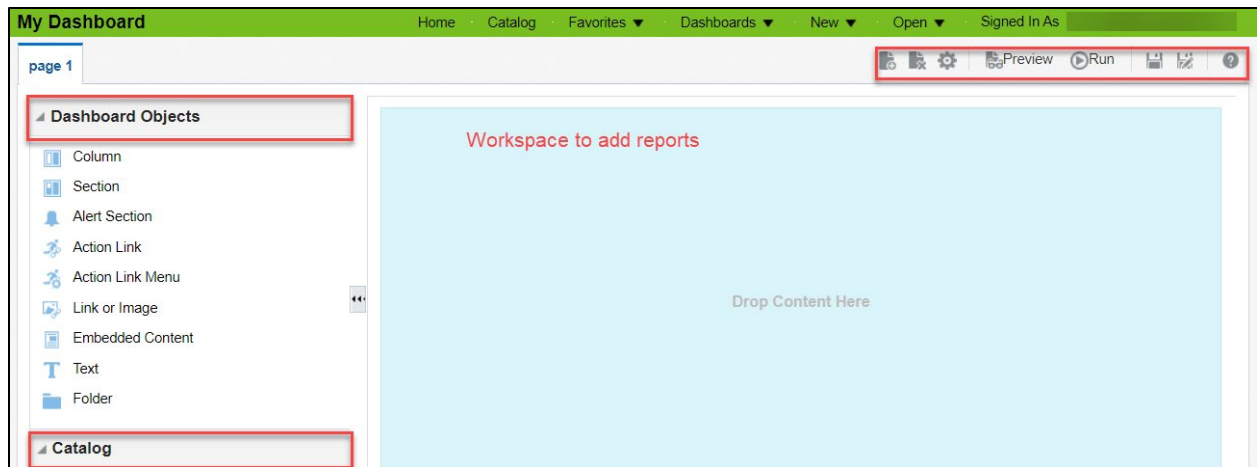1. The EPM Data Warehouse opens. On the global header, open *Dashboards*. Then, select "My Dashboard."

2. *My Dashboard* page opens. It says, "This page has no content." To add content, select the *Edit* link.
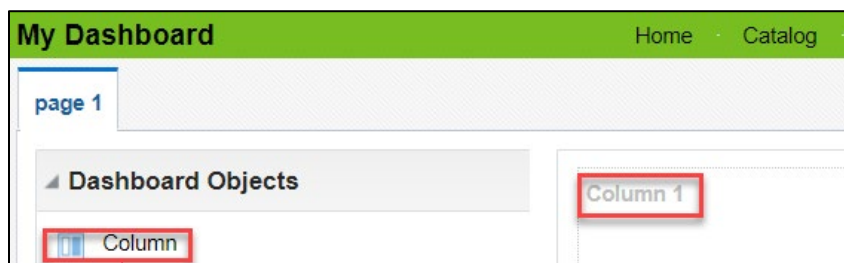

Step 3: Add reports to My Dashboard page

My Dashboard page appears. It has four main parts.

- **Top Right Icons:** Use the icons to add, delete, run, save, and preview the dashboard page.
- **Dashboard Objects**: Drag and drop objects such as columns and sections to the workspace.
- **Catalog:** Use the Catalog to find existing reports in the Catalog to add to the columns and sections in the workspace.
- **Workspace:** This pane holds and displays the reports you add to *My Dashboard* page.
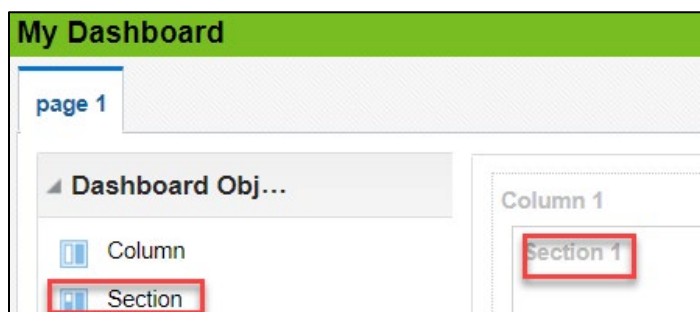
1. **Add a column to the Workspace.**

Use columns to align content on a dashboard. From the *Dashboard Objects* area, drag and drop the **Column** button to the workspace. You can add as many columns as you want. This guide creates one column.
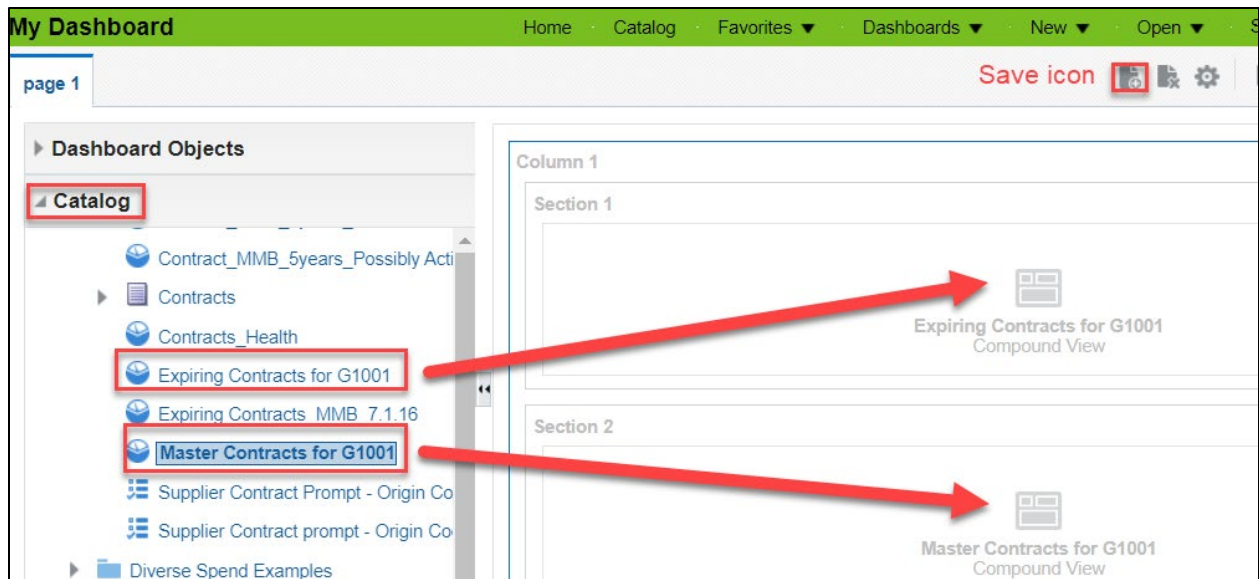

2. **Add a section to the newly created column.**

Use sections to hold the reports of a dashboard in a column. The EPM Data Warehouse aligns sections vertically by default. Add as many sections as you need into a column. From the *Dashboard Objects* section on the left menu, drag and drop the **Section** button inside of *Column 1*. This guide adds two sections and two reports in one column.

3. **Add reports to the new sections and save it.**

Using the Catalog menu on the left side, find the report you wish to add to a section.

    a. Drag and drop the reports from the Catalog into the correct section.
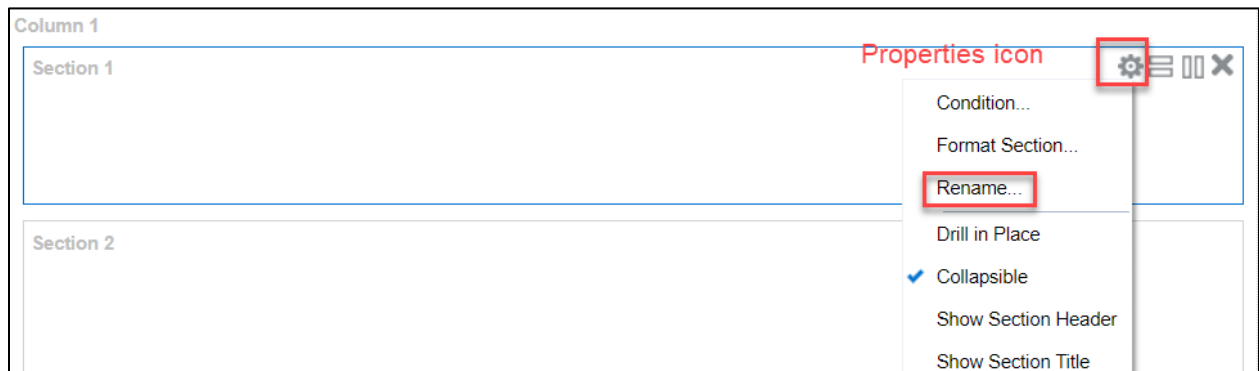   b. After you are done, select the **Save** icon at the top right menu.
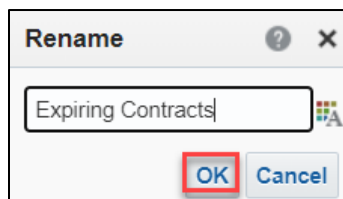
Step 4: Edit My Dashboard

1. Edit the properties of the columns and sections as needed.

As an option, you can edit the properties of the column and section objects to make the dashboard and reports easier to use and view.
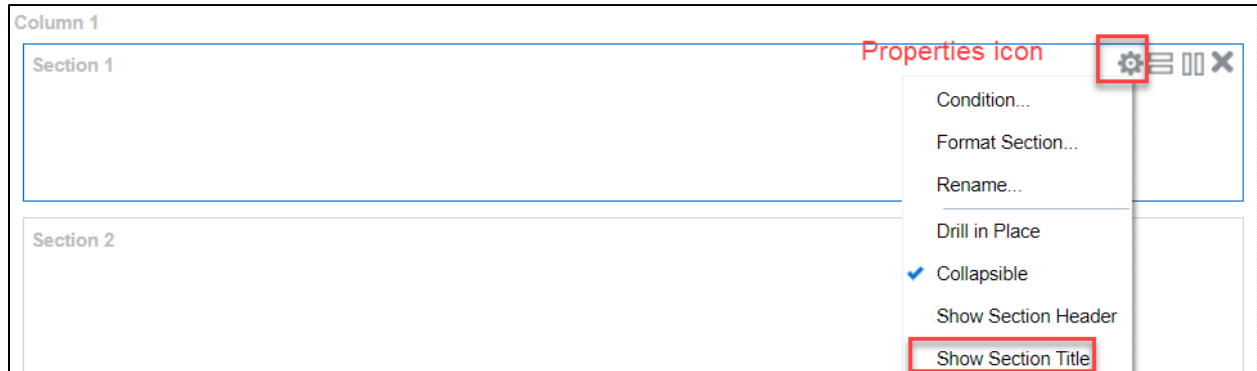
a. **Rename the sections.** Select the **Properties** icon on the top right of the section, which is the report. The EPM Data Warehouse displays the *Properties* menu on the right. Select "Rename."
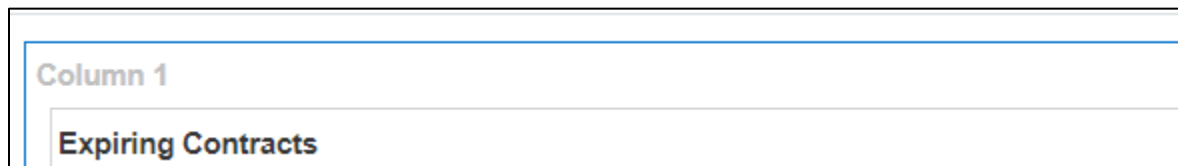

i. The *Rename* window appears. Enter the name of the report. Select **OK.**

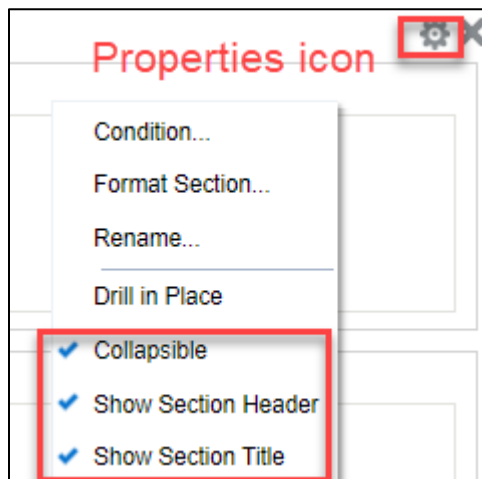ii. Update the properties on all other sections to rename them.

    b. **Show the Section Title**. Update the section to "Show the Section Title." This will make the display easier to use as you update and run *My Dashboard*.

        i. Select the **Properties** icon inside of the section.

        ii. Select "Show Section Title."

        iii. Update the section title of other sections.
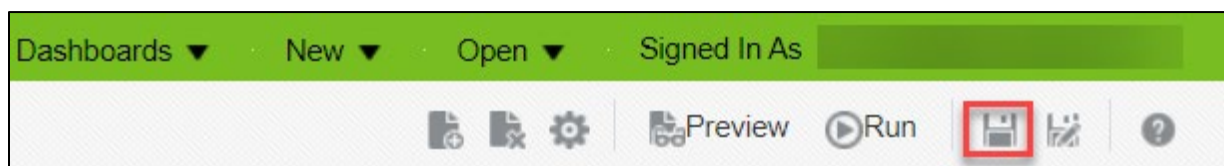

After you update the properties to show the name and section title, *My Dashboard* shows the report titles in bold.

    c. **Show Section Header.** Update the sections to "Show the Section Header." This will make the header display available when you run My Dashboard.
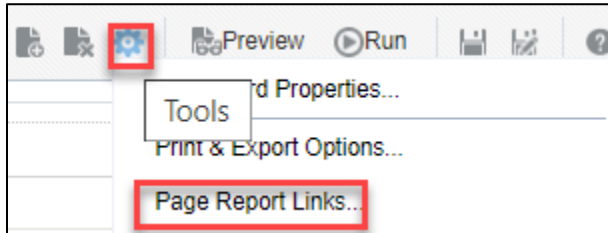

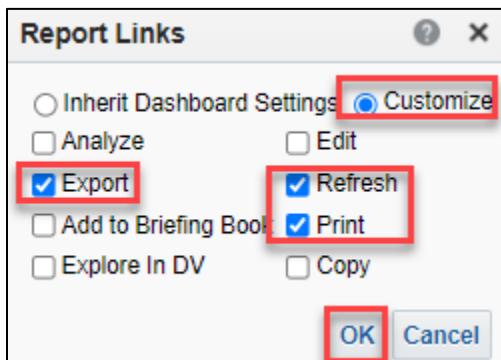   **d.** **Save your changes.** On the top right menu, select **Save**.

2. **Add Page Report Links to the reports on My Dashboard.**

Page report links allow you to act on the report directly from My Dashboard.

    a. Select the **Property Tools** icon on the right header of the dashboard page.

    b. Select the *Page Report Links* option.

    c. The EPM Data Warehouse opens the *Report Links* window.

        i. Check the radio button next to "Customize."
       ii. Then check the box next to the options you wish to be able to do on the reports in My Dashboard.
      iii. As a best practice, update your reports inside the Catalog, which is outside of the dashboard. Do not add "Analyze" or "Edit." Select "Export," "Refresh," and "Print." Then, select **OK**.

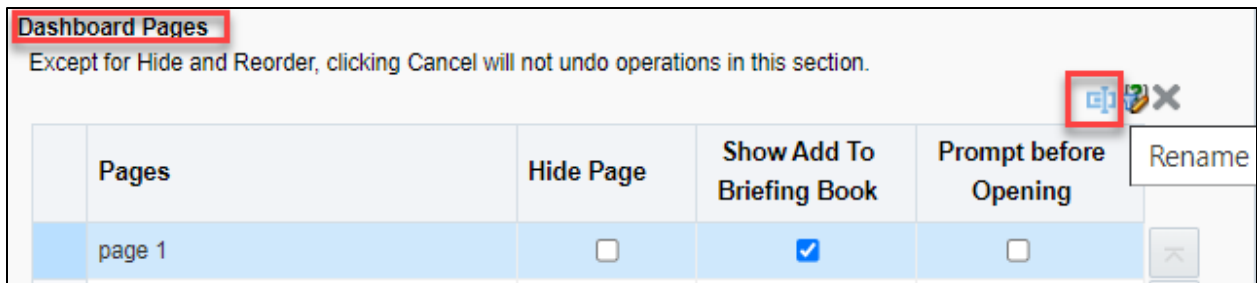   iv. **Save your changes.** On the top right menu, select **Save**.

3. **Change the name of a page in My Dashboard.**

My Dashboard defaults to "page 1" or "page 2" depending on the number of pages you add. You can add a name to a page.
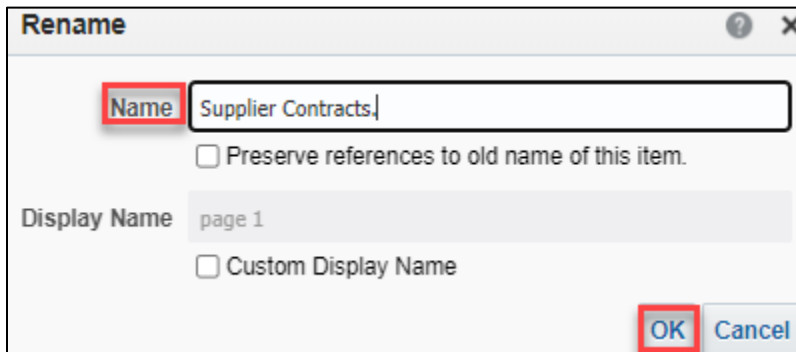
    a. Select the **Tools** icon on the top right of the page. In the **Tools** menu, select "Dashboard Properties."

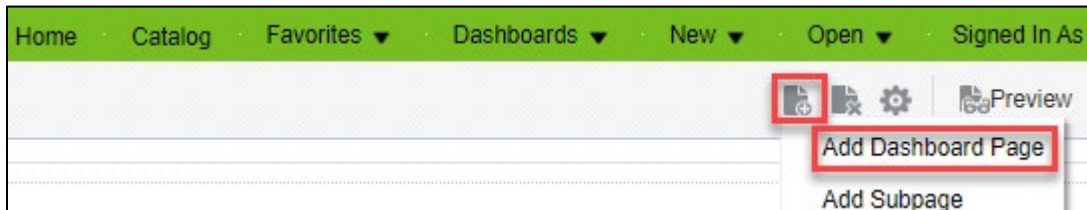   b. The *Dashboard Properties* window appears. Go to the *Pages* section. Select the **Rename** icon.

c. The *Rename* window appears inside the *Dashboard Properties* window. Add a name and select **OK**.

d. The page name is updated. Select **Save.**

4. **Add a page to My Dashboard**. As an option, you can add a new page to *My Dashboard* and populate it with reports.

a. On the top menu, select the **Add Dashboard Page** icon. Then, select the "Add Dashboard Page" option.

b. The Data Warehouse displays the *Add Dashboard Page* window. Add a *Page Name* and *Page Description* (if desired). Select **OK**.
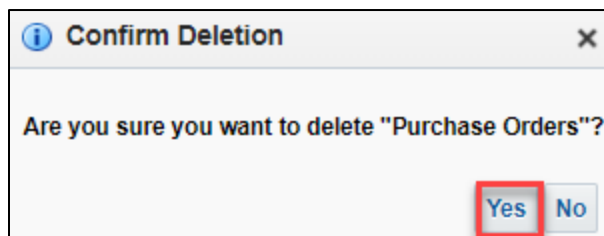
The EPM Data Warehouse displays the new page. Add columns, sections, reports and update that page as needed. Save your changes.

5. **Delete a page.**

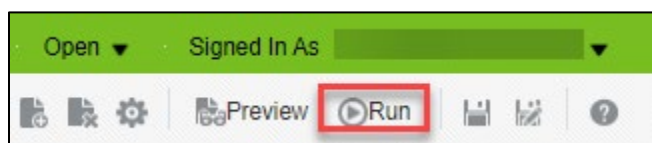a. If you wish to delete a page, select the **Delete Current Page** icon.

b. The Data Warehouse displays the *Confirm Deletion* window. Select **Yes**. Save changes.

Step 4: Run and edit My Dashboard

1. To see the reports on *My Dashboard*, select **Run** on the top menu.

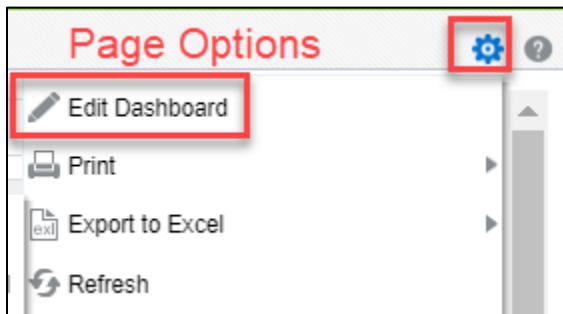2. The EPM Data Warehouse runs *My Dashboard* and displays the reports.

a. You can see that the section titles and section headers appear.

b. As an option, you can select the **Expand** and **Collapse** icons (arrows) to change the view of the display.

c. Look at the bottom of your reports to see the *Report Links* you added.

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   d. If you wish to return My Dashboard to update it, select the **Page Options** icon at the top right of the page. It will open a menu. Select "Edit Dashboard."

   e. Test the reports and layout to make sure they fit your needs. Make any desired changes to My Dashboard and make sure to save the changes you wish to keep.

 3. The next time you return to *My Dashboard* and the EPM Data Warehouse will display the reports with the most recent SWIFT data that was downloaded into the EPM Data Warehouse.