

## QUICK REFERENCE GUIDE

Updated July 11, 2022

### Create a New Analysis in the EPM Data Warehouse

Sometimes an agency needs a report that is not covered in the existing reports or dashboards from the shared folders in the EPM Data Warehouse. You can create a new analysis using the *New* menu. Once you save the new analysis, it becomes a report that you can reuse.

**NOTE:** Expect trial and error as you explore the folders and fields when creating a new analysis. There are likely multiple ways to get the data you need.

This reference guide lists the steps to create a new analysis. It describes the tabs, fields, and processes that you use. The Appendix lists a table for choosing an operators and values in the New Filter window.

Steps to complete:

- Step 1: Access the new analysis page and select the Subject Area
- Step 2: Add data elements to the columns on the Criteria tab
- Step 3: Use the filters to add values to the data elements on the Criteria tab
- Step 4: Run the Results tab and save it as desired
- Step 5: Take action on the analysis on the Criteria tab
- Step 6: Find and reuse your saved report as needed

### Steps to Create a New Report in the EPM Data Warehouse

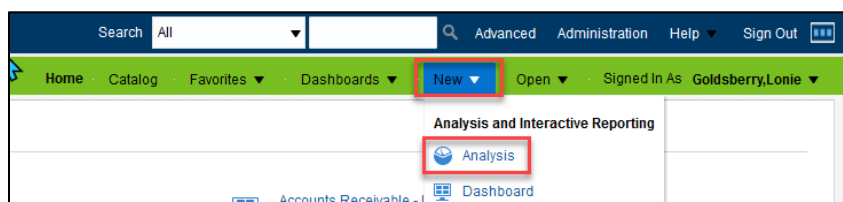
#### Step 1: Access a new analysis page and select the Subject Area

**Scenario:** You are an EPM Data Warehouse analyst. One of MMB’s financial directors wants a modified Managers Financial Report (MFR) to track the amount spent by Fund, FinDept ID, and Approp ID in the current Budget Period. She wants the description of the ChartFields data. She wants it displayed in an Excel spreadsheet and sent to her on a monthly basis.

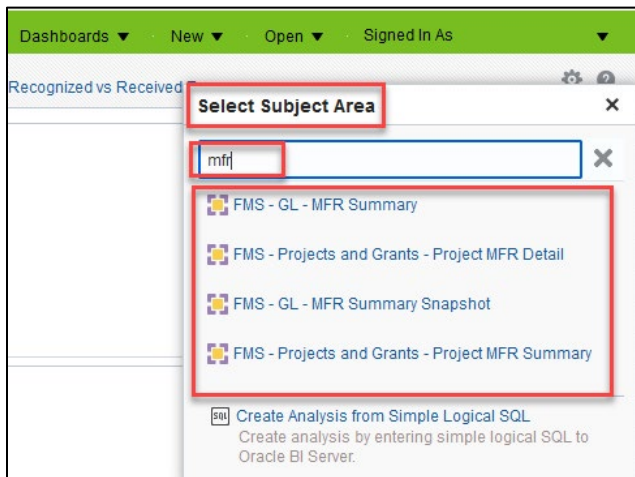
1. Follow this navigation to the EPM Data Warehouse.

Navigation Options	Navigation Path
<b>Navigation Collection</b>	Administrative Portal, Data Warehouse, Warehouse Reporting, EPM Data Warehouse.

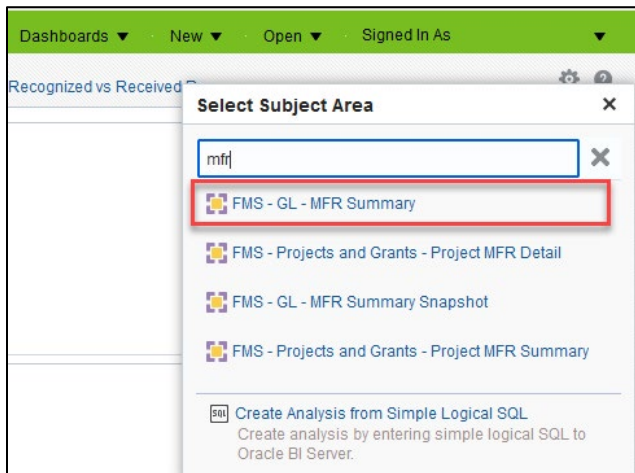
2. The *State of Minnesota Business Intelligence* page opens. Select **New** on the global menu. In the dropdown, select the “Analysis” option.



- The *Select Subject Area* list displays. Type “mfr” in the search box and then the enter key. Available subject areas appear below the search box.

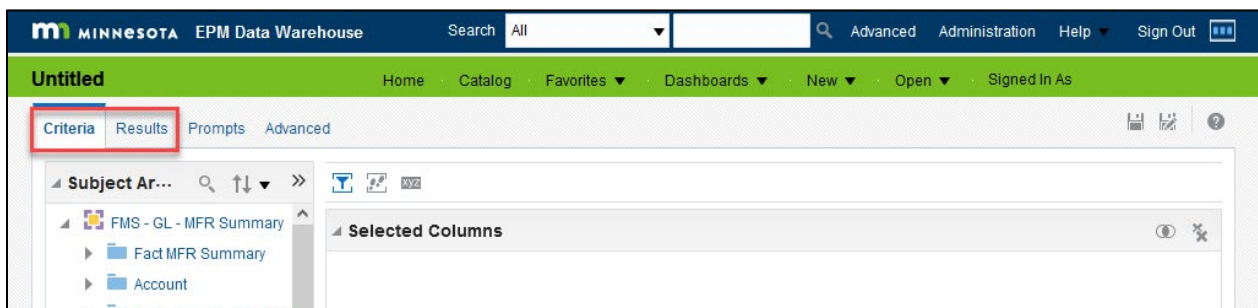


- The subject areas available to you depend upon your security access. Select the desired Subject Area.



## Step 2: Add data elements to the columns in the Criteria tab

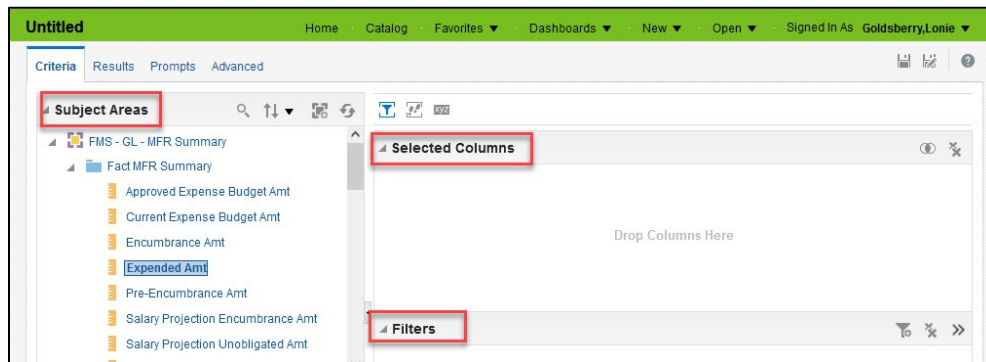
The EPM Data Warehouse displays an untitled and unsaved new analysis. Use the *Criteria* and *Results* tabs to add content to your analysis and review the results.



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Use the *Criteria* tab to double select or drag and drop the data elements from the *Subject Areas* into the *Selected Columns*. This tab is also where you select filters to limit the values for your new analysis. This tab has three main panes.

- **Subject Areas pane:** This pane lists the *Subject Area* you selected for your new analysis. Within the *Subject Area* are folders such as “Fact MFR Summary.” Within these folders are subfolders with data elements such as “Expended Amount.”
- **Selected Columns pane:** This is where you add the data elements to the columns from the folders in the selected subject area.
- **Filters pane:** This pane lists the *Filters* that you can add to the data elements you moved to the *Selected Columns*. Use filters to limit the data output by specifying the desired values.

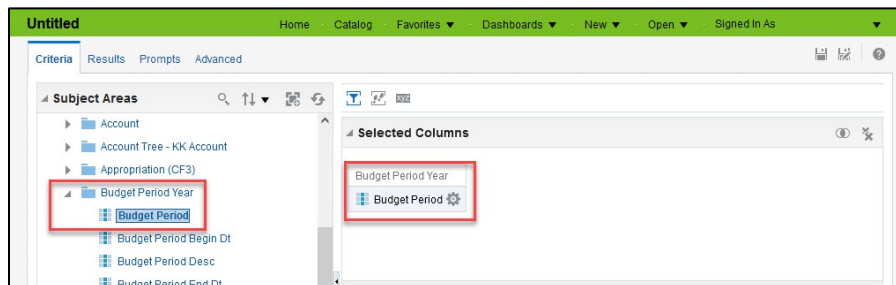


1. Determine which folder you wish to use from the *Subject Areas*. Determine the desired data elements from the *Subject Areas* folders. Determine the values for the data elements to use in the filters limit the output.

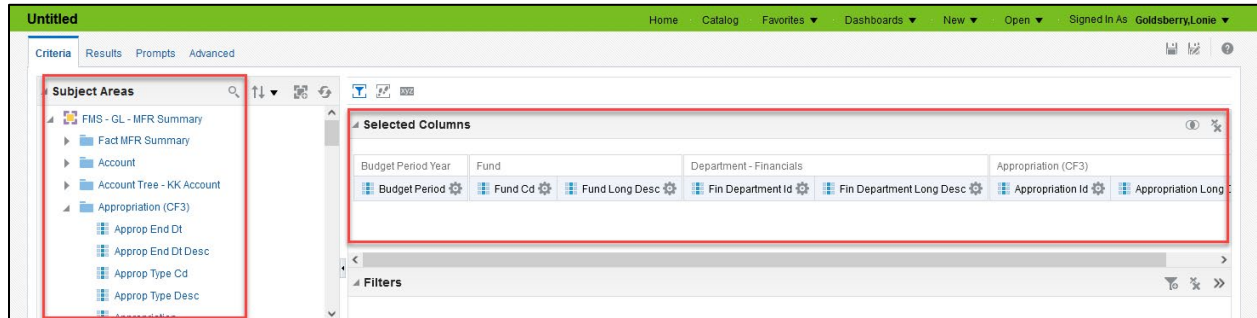
For our example, we’re creating a modified *Manager’s Financial Report* for the financial director using these subject areas, data elements, and values.

Subject Areas Folder	Data Element(s)	Value(s)
Budget Period Year	“Budget Period”	2022
Fund	“Fund” code and “Fund Long Description”	All values
Department Financials	“Fin Department ID” and “Long Description”	Begins with G10
Appropriation	“Appropriation ID” and “Long Description”	Begins with G10
Fact MFR Summary	“Expended Amount”	All values

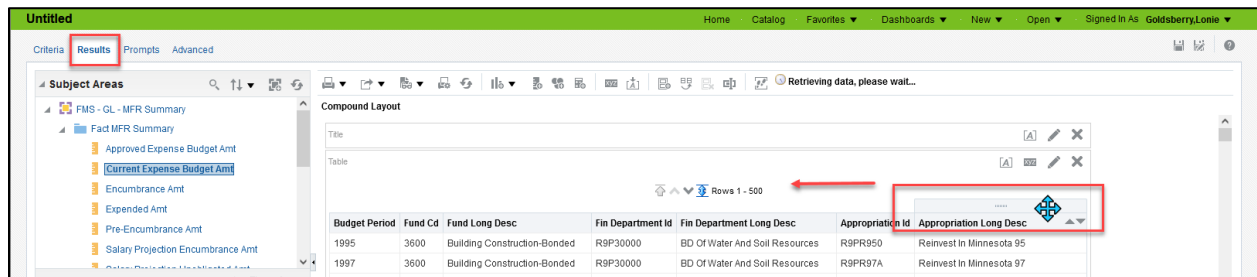
2. Open the folder from the *Subject Areas*. Select the first data element. Double select or drag and drop it into the *Selected Columns* pane. For example, expand the *Budget Period Year* folder and select the Budget Period Year data element.



3. Continue expanding folders, adding data elements into the *Selected Columns* pane.



4. Initially, your data will appear in the order you added the columns. To rearrange columns after, you need to do so from the Results tab. Hover the mouse over the column you want to move until the mouse tip becomes a crosshatch, and slide it to the desired location



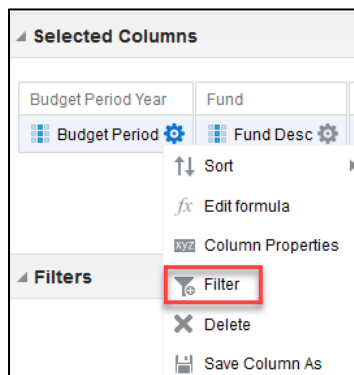
## Step 3: Use the filters to add values to the data elements in the Criteria tab

You add filters to the data elements in the *Selected Columns* pane. Use the filters in the column names to limit the data.

We want to limit the Budget Period to “2022,” and *FinDept IDs and the Approp IDs* for MMB to begin with “G10.”

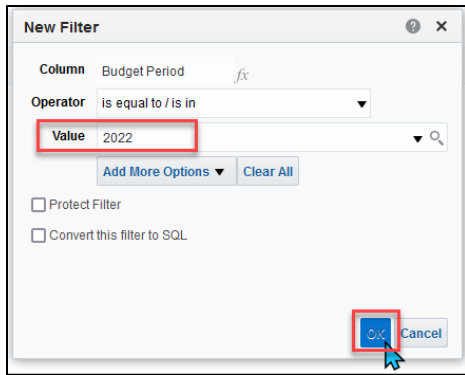
1. To add filters to the columns names in the *Select Columns* pane, hover over the column name. For example, hover over *Budget Period*. Select “Filter.”

**NOTE:** You can always change your mind and delete a filter in a data element from this menu.



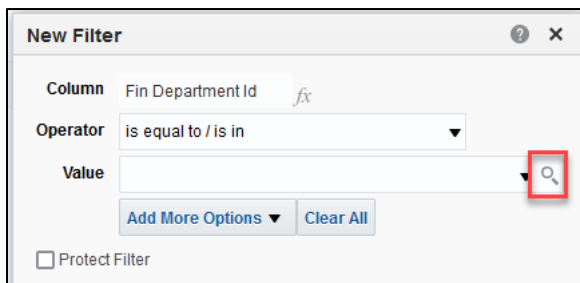
2. The EPM Data Warehouse opens the *New Filter* window. Open the *Value* field. The various options appear. In this case, it displays dates. Select “2022.” Then, press **OK**.

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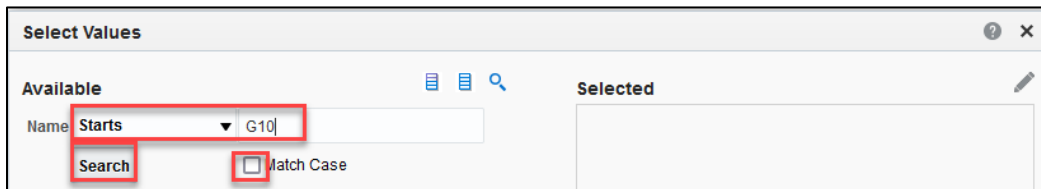


**NOTE:** View the *Appendix* to see the options on the *Operator* field in the *New Filter* pane.

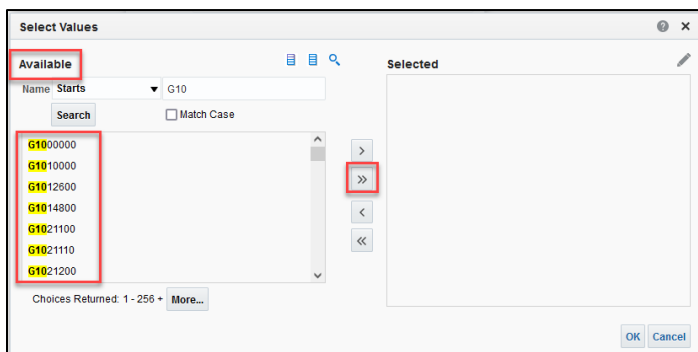
3. Use the same process to create other filters. Hover over the *Column* name. Select “Filter.” Select the values for MMB’s *FinDept IDs* and *Approp IDs* to start with “G10.”
4. If you’re not sure about the exact data element to select, open the *New Filter* page and select the **Search** icon.



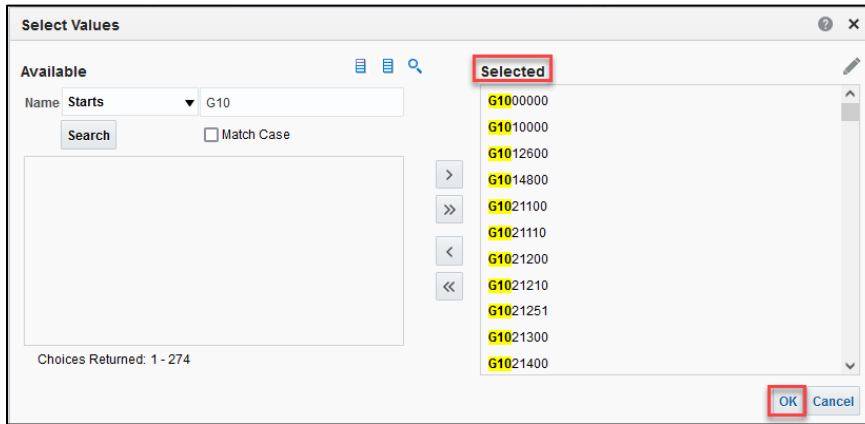
- a. The EPM Data Warehouse displays the *Select Values* pane. Enter the search criteria in the *Name* field. Deselect the *Match Case* box, if needed. Then, select the **Search** button. In this case, we’re looking for all *FinDept IDs* that start with “G10.”



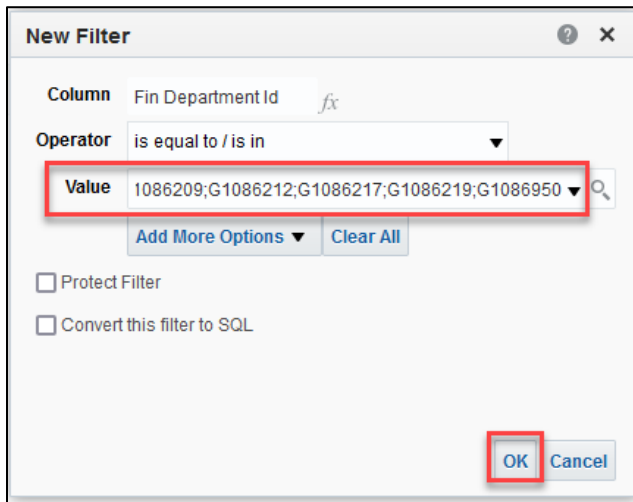
- b. The EPM Data Warehouse displays values in the *Available* pane. Select the desired values. In this case, we’ll choose the **Select All** icon.



- c. The EPM Data Warehouse moves the selected values to the *Selected* pane. Review them and press **OK**.

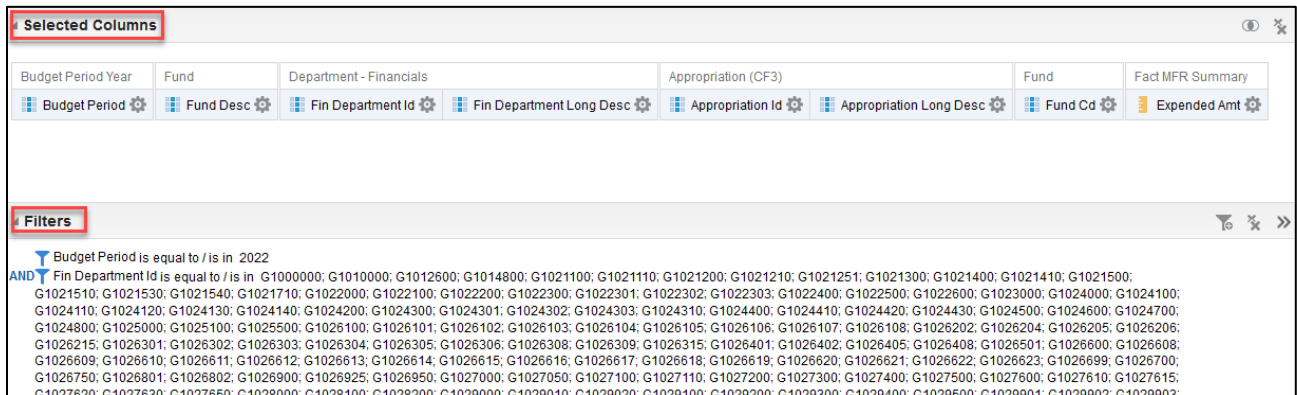


- d. The EPM Data Warehouse updates the *New Filter* page showing the selected values for the *FinDept ID*. Press **OK**.



- e. Follow the same process and create a new filter for the *Approp ID*.

5. On the *Filters* section, the EPM Data Warehouse lists all of the filters we added.



## Step 4: Run the analysis in the Results tab and save it as desired

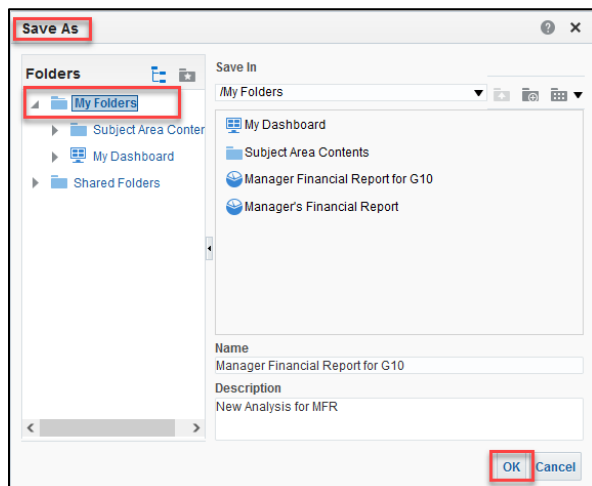
- Once you selected your columns and added filters, select the *Results* tab at the top of the analysis page. The EPM Data Warehouse will run the analysis. It may take a while for the results to appear. The *Compound Layout* pane shows the results of your analysis.

Budget Period	Fund Cd	Fund Desc	Fin Department Id	Fin Department Long Desc	Appropriation Id	Appropriation Long Desc	Expended Amt
2022	1000	General	G1031100	Payroll Services	G100001	Accounting Services	1,217,408.26
2022	1000	General	G1031200	Statewide Accounting	G100001	Accounting Services	2,238,790.39
2022	1000	General	G1031200	Statewide Accounting	G100139	Mandated Health Benefits Eval	0.00

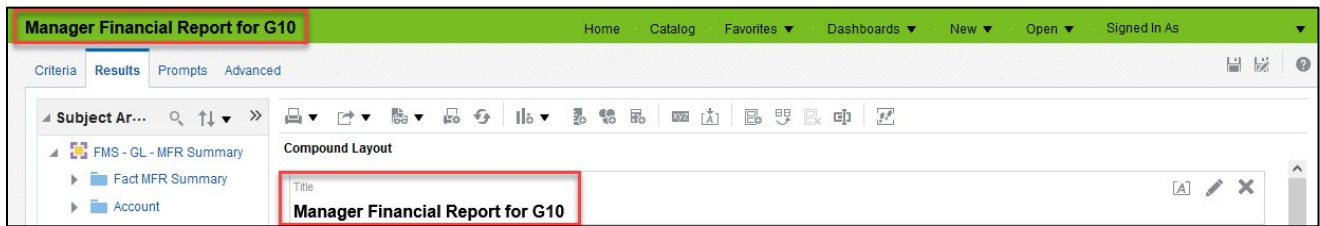
- View the results.
- To update the columns or filters, return to the *Criteria* tab. Rerun the analysis using the *Results* tab.
- Save the analysis as needed.

If you wish to keep this analysis, select the **Save** or **Save As** icon above at the top of the *Compound Layer* pane in the *Results* tab.

- In the *Save* window or *Save As* window, choose the location to save the analysis.
- Enter a name for this analysis. As an option, include a description. Select **OK**.
  - Save:** This icon allows you to save a new analysis. It will also save your current progress on a saved analysis. **IMPORTANT!** This will overwrite any previous work in a saved analysis. You cannot undo the save action or revert to a previous version of an analysis.
  - Save As:** This icon allows you to save a separate copy of your current analysis under a different file name or in a different location.
- We'll save the analysis in the *My Folders* section of the *Catalog*. You can also save it using the *Favorites* tab or in your *My Dashboard*.

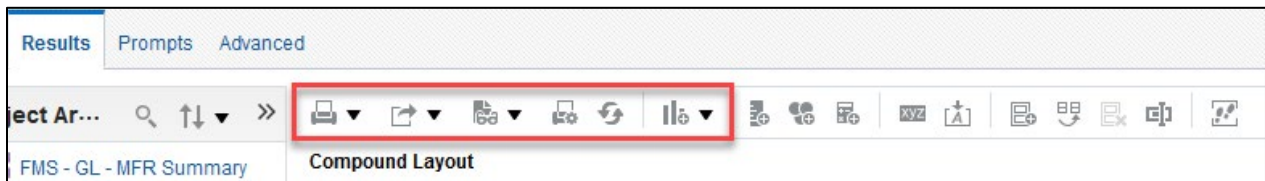


- d. The EPM Data Warehouse updates the name of the saved report on the left corner tab and on the *Title* field of the *Compound Layer*.

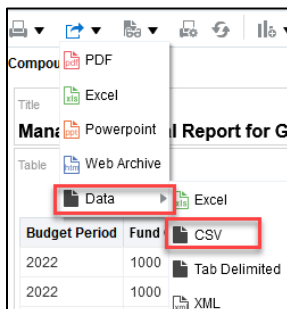


## Step 5: Take action on your report in the Results tab

1. You can take some actions on the *Results* page. Above the *Compound Layout* sections is a row of icons.



- a. **Print this analysis:** This icon looks like a printer. It allows you to print the report in “Printable PDF” or “Printable HTML” format.
  - b. **Export this analysis:** This icon looks like a box with an arrow pointing up. It allows you to save the report to your computer in the following file types: PDF, Excel, PowerPoint, Web Archive, or Data file.
  - c. **Show how the results will look on a dashboard:** This icon looks like a piece of paper with eyeglasses. It will show how report appears when displayed in a dashboard. It appears in a separate window.
  - d. **Print options:** This icon looks like printer with paper. It allows you to set page settings on your printer for printing the report.
  - e. **Refresh:** This icon looks like two arrows in a circle. It allows you to refresh the results of the current analysis.
  - f. **New view:** This icon looks like a piece of paper with a red plus sign. It allows you to show the results in other views such as a table, a pivot table, or a graph.
2. As desired, export your report.
    - a. Select the **Export this analysis** icon.
    - b. The EPM Data Warehouse opens a window with the export options.

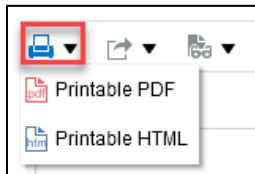




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We select “Data” and “CSV.” Select the best option for you.

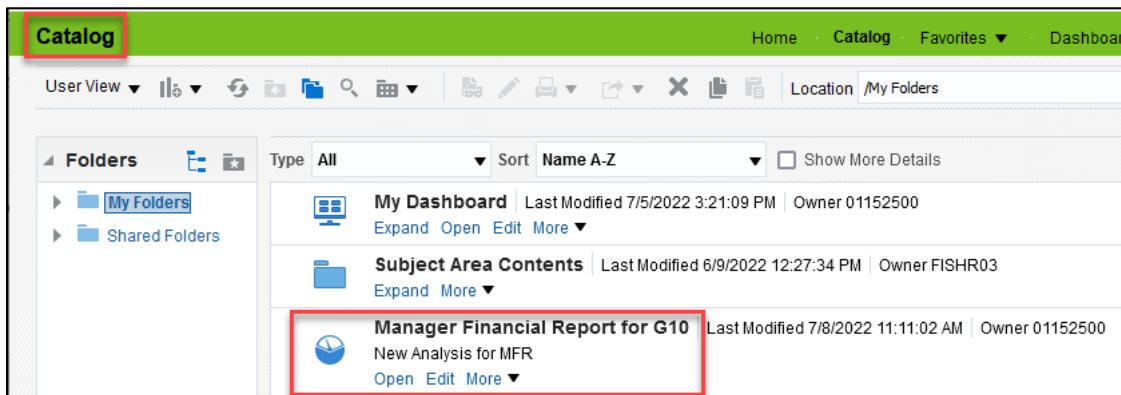
- c. The EPM Data Warehouse displays a file at the bottom of your page. Open it and review the data to make sure it answers the questions.
  - d. Save it in the exported file and update that file as needed.
3. If desired, print your report.
- a. Select the **Print** icon.



- b. The EPM Data Warehouse opens a window with the print options of “Printable PDF” and “Printable HTML.” Select an option. The report opens in a new browser tab or window that you can print according to the format selected.

## Step 6: Find and reuse your saved report

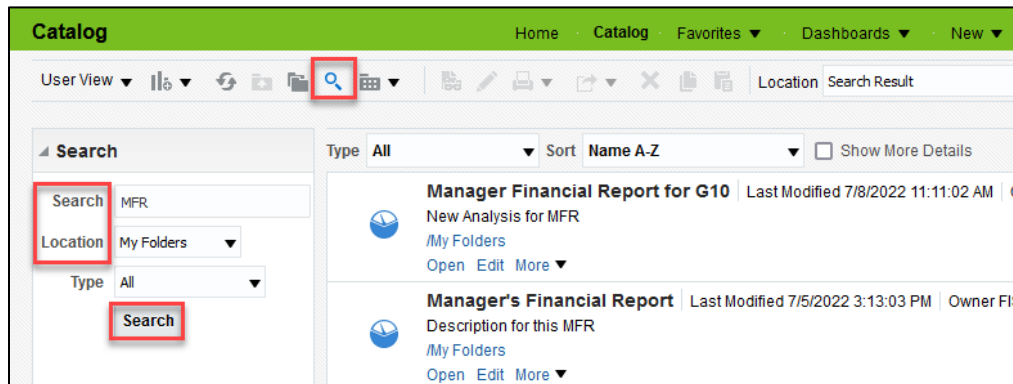
1. To reuse your saved report, go the place you saved your report in the EPM Data Warehouse (e.g., *My Folders*, *Dashboard*, *Favorites*). For example, we saved this report in the *Catalog*. On the global menu, select *Catalog*. The report appears in the middle pane.



2. Once you save a report, you can find it and reuse it. See the options below the report.
  - *Open*: Once you open the report, go to the bottom of the page and select the Refresh link to run it.
  - *Edit*: Once you select “edit,” you will open up the report on the Criteria tab. Update any options on the Criteria tab as needed. Select the Results tab to run it.
  - *More*: Find other actions such as print, export, copy, and delete.
3. If you can’t remember what you called the analysis that you saved in the *Catalog*, you can use the *Catalog Search*.
  - a. Select the **Search** icon (binoculars) from the *Catalog* menu.

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- b. The EPM Data Warehouse opens the *Catalog Search* window. Enter a term in the *Search* field and *Location*. Select **Search**. The options related to the search term appear in the right pane.



## Appendix

Use this table when choosing an operator and determining the required values in the New Filter window.

**Source:** Oracle Smart View for Office User's Guide, Oracle Help Center.

[https://docs.oracle.com/cd/E57185\\_01/SMVUG/ch16s08s04s01.html](https://docs.oracle.com/cd/E57185_01/SMVUG/ch16s08s04s01.html)

### Guidelines for Choosing an Operator in the EPM Data Warehouse

Operator	Guidelines
<b>is equal to / is in</b>	Valid for a column that contains text, numbers, or dates. Specify a single value or multiple values. Results include only records where the data in the column matches the value in the filter.
<b>is not equal to / is not in</b>	Valid for a column that contains text, numbers, or dates. Specify a single value or multiple values. Results include only records where the data in the column does not match the value in the filter.
<b>is less than</b>	Valid for a column that contains numbers or dates. Specify a single value. Results include only records where the data in the column is less than the value in the filter.
<b>is greater than</b>	Valid for a column that contains numbers or dates. Specify a single value or multiple values. Results include only records where the data in the column is greater than or the same as the value in the filter.
<b>is less than or equal to</b>	Valid for a column that contains numbers or dates. Specify a single value or multiple values. Results include only records where the data in the column is less than or the same as the value in the filter.
<b>is greater than or equal to</b>	Valid for a column that contains numbers or dates. Specify a single value or multiple values. Results include only records where the data in the column is greater than or the same as the value in the filter.
<b>is between</b>	Valid for a column that contains numbers or dates. Specify two values. Results include only records where the data in the column is between the two values in the filter.
<b>is null</b>	Valid for a column that contains text, numbers, or dates. Do not specify a value. The operator tests only for the absence of data in the column. Results include only records where there is no data in the column. Sometimes it might be useful to know whether any data is present. Using the is null operator is a way to test for that condition.
<b>is not null</b>	Valid for a column that contains text, numbers, or dates. Do not specify a value. The operator tests only for the presence of data in the column. Results include only records where there is data in the column.

Operator	Guidelines
<b>is ranked first</b>	Valid for a column that contains text or dates. Specify a single value. Results include only the first N records, where N is a whole number specified as the value in the filter. This operator is for ranked results.
<b>ranked last</b>	Valid for a column that contains text or dates. Specify a single value. Results include only the last N records, where N is a whole number specified as the value in the filter. This operator is for ranked results.
<b>contains all</b>	Valid for a column that contains text, numbers, or dates. Specify a single value or multiple values. Results include only records where the data in the column contains all of the values in the filter.
<b>does not contain</b>	Valid for a column that contains text, numbers, or dates. Specify a single value or multiple values. Results include only records where the data in the column does not contain any of the values in the filter.
<b>contains any</b>	Valid for a column that contains text, numbers, or dates. Specify a single value or multiple values. Results include only records where the data in the column contains at least one of the values in the filter.
<b>begins with</b>	Valid for a column that contains text, numbers, or dates. Specify a single value. Results include only records where the data in the column begins with the value in the filter.
<b>ends with</b>	Valid for a column that contains text, numbers, or dates. Specify a single value. Results include only records where the data in the column ends with the value in the filter.
<b>is LIKE (pattern match)</b>	Valid for a column that contains text. Specify a single value or multiple values. Requires the use of a percent sign character (%) as a wildcard character. You may specify up to two percent sign characters in the value. Results include only records where the data in the column matches the pattern value in the filter.
<b>is not LIKE (pattern match)</b>	Valid for a column that contains text. Specify a single value or multiple values. Requires the use of a percent sign character (%) as a wildcard character. You may specify up to two percent sign characters in the value. Results include only records where the data in the column does not match the pattern value in the filter.