

Use the EPM Data Warehouse Data Dictionary for SWIFT Reports

The EPM Data Warehouse Data Dictionary is a search tool to help agencies find data fields for EPM Data Warehouse reports. It lists the data field within each view, tells the type and length of data, and may give a brief description of a data fields. It ties the data field to the SWIFT module and field name. It is updated when new data tables are added to the EPM Data Warehouse.

Expect to find the results by trial and error as you search subject areas, folders, and data fields.

There are likely multiple ways to get the data you need. You may need to try several rounds and different search variables to get what you need.

This Quick Reference Guide lists the steps to find a data field using the EPM Data Warehouse Data Dictionary Detailed search option for SWIFT reports.

- This guide also shows you how to use a data field you located in the Data Dictionary in a new analysis.
- There are three EPM Data Warehouse Data Dictionary tabs with different search options for SWIFT reports. There is an appendix at the end of this guide that provides more information about these tabs and the hover over text descriptions in the EPM Data Warehouse Data Dictionary.
 - Appendix A: Hover Over Text in a New Analysis
 - Appendix B: EPM Data Warehouse Data Dictionary Tab
 - Appendix C: EPM Data Warehouse Data Dictionary Detailed Tab
 - Appendix D: EPM Data Warehouse Data Dictionary Detailed All Columns Tab

Steps to use the EPM Data Warehouse Data Dictionary

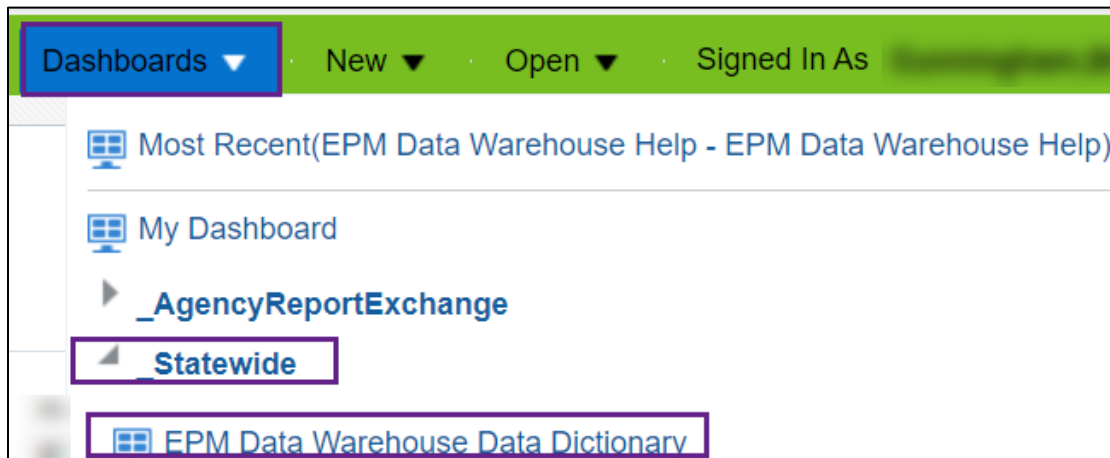
Step 1: Navigate to the EPM Data Warehouse Data Dictionary

Scenario: A supervisor from Minnesota Management and Budget wants a list of current purchase orders related to the agency's annual plan. You know that annual plan is a document type in the Purchase Order module. You are not sure where the data field of annual plan document type is located in the EPM Data Warehouse or how to find it for a new analysis. Use the EPM Data Warehouse Data Dictionary to find the location of this data field in the EPM Data Warehouse.

This example focuses on the EPM Data Warehouse Data Dictionary Detailed tab.

1. Navigate to the **EPM Data Warehouse** and open the **Dashboards** menu. Open M_Statewide and select the **EPM Data Warehouse Data Dictionary**.

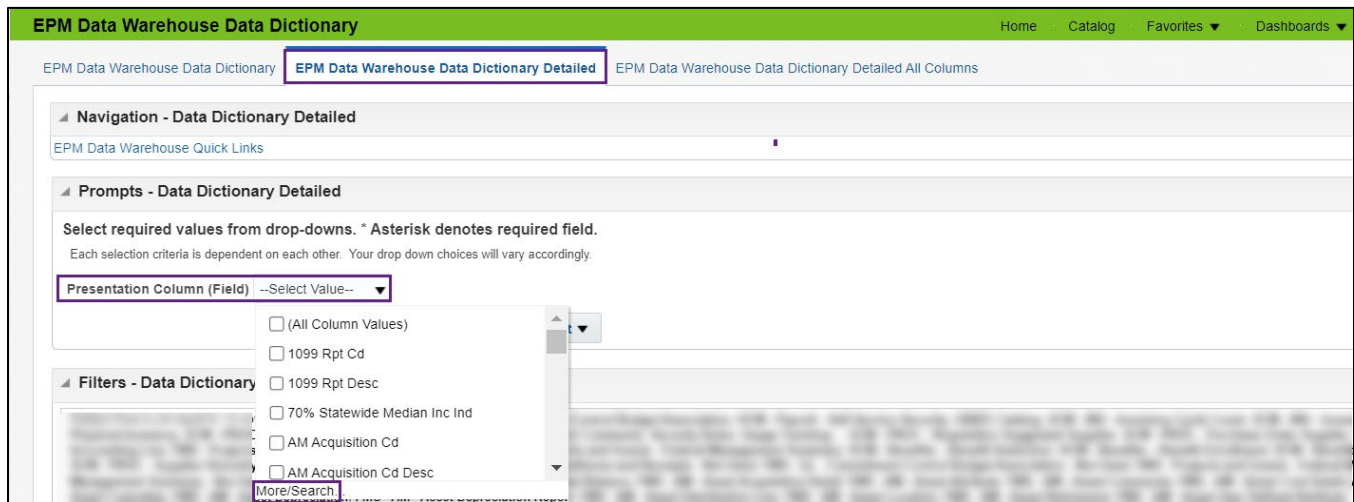
Navigation Options	Navigation Path
Navigation Collection	Administrative Portal, Data Warehouse, Data Warehouse, Dashboards menu, _Statewide, EPM Data Warehouse Data Dictionary.



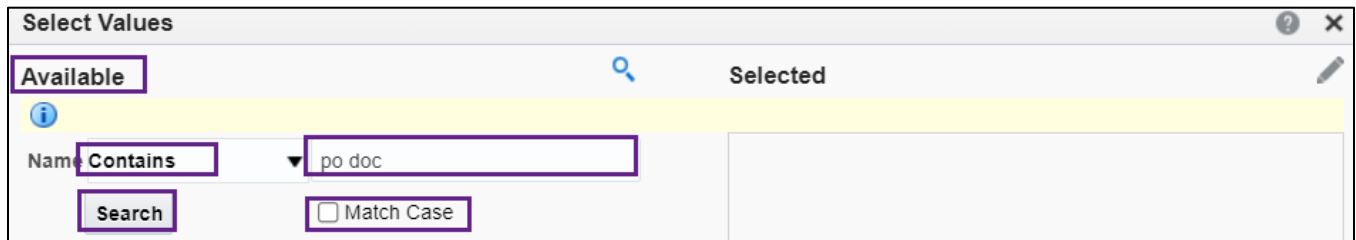
2. The EPM Data Warehouse Data Dictionary displays.

Step 2: Open the EPM Data Warehouse Data Dictionary Detailed tab and enter your search criteria in the Prompts

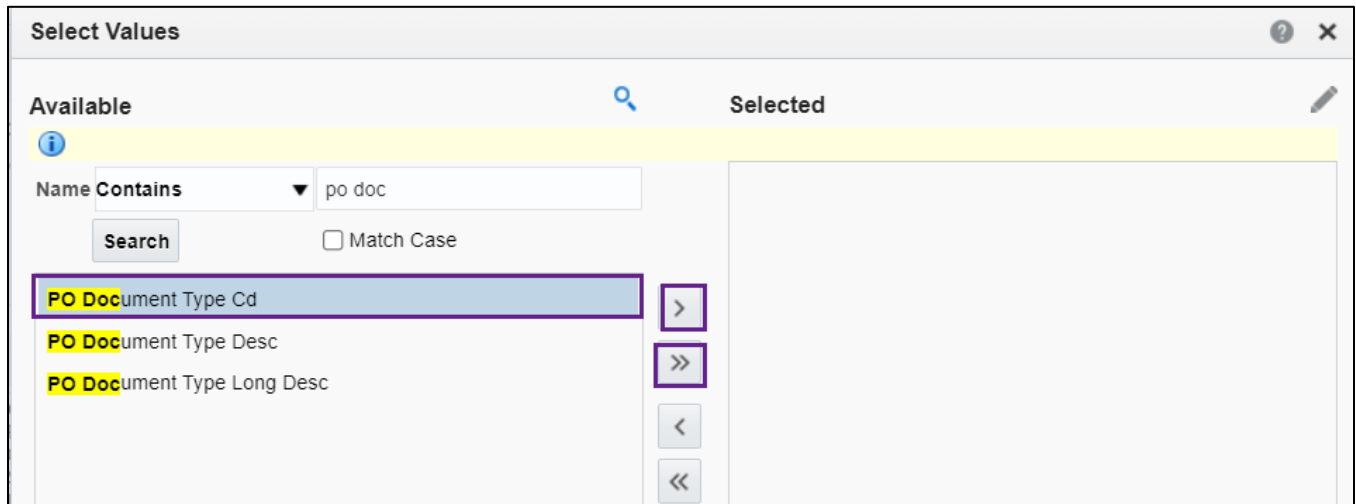
1. Select the **EPM Data Warehouse Data Dictionary Detailed** tab.
2. In the **Prompts** section, open the **More/Search** link at the bottom of the Presentation Column (Field) menu field.



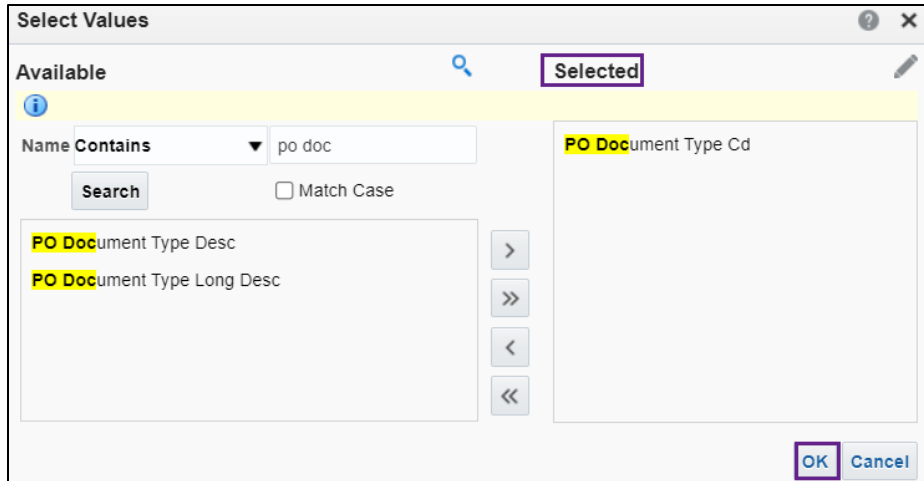
3. The EPM Data Warehouse Data Dictionary opens the **Select Values** window.
 - a. Enter a search value in the **Name** field. In this case, we need the PO Document Type. We'll search for "PO Doc" for the purchase order module.
 - b. In the name field, "Starts" defaults. If that operator does not yield desired results, try using "Contains."
 - c. Deselect the **Match Case** box to expand search options.
 - d. Select the **Search** button.



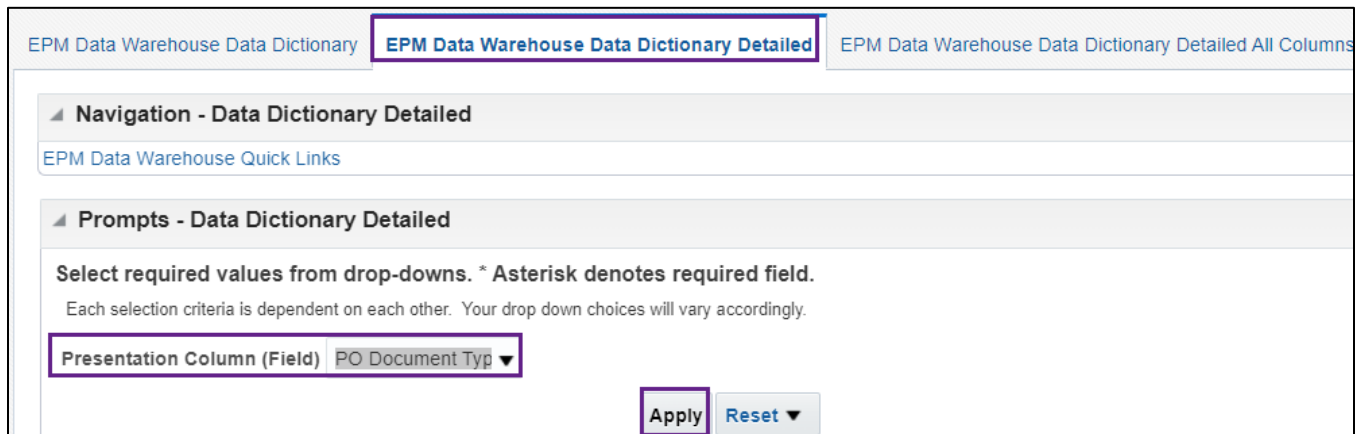
4. The EPM Data Warehouse Data Dictionary updates the **Available** pane with all the data fields that match your search.
 - a. Review the list and highlight the one(s) that fit your search value.
 - b. You can keep adding other values to search for.
 - c. Then, choose the **Move** or **Move all** icon in the middle of the screen.



5. Your chosen value is moved to the **Selected** pane.
 - a. You can keep adding other search values.
 - b. After all your chosen values are in the Selected pane, press **OK**.



6. The EPM Data Warehouse Data Dictionary Detailed tab displays. The Prompts section reflects the search value(s). Select the **Apply** button.



Step 3: Review the search results

1. The search results displays in the Results section. You can see the Subject Areas, Presentation Tables (folder), and Presentation Columns (field) that contain the data field(s).
2. The EPM Data Warehouse Data Dictionary groups SWIFT data fields by these categories: FMS and SCM.
 - a. **FMS**: All SWIFT financial reports are under “FMS” for Financial Management System.
 - b. **SCM**: All SWIFT procurement reports are under “SCM” for Supply Chain Management.
3. We’ll explore the “SCM-PROC-Requisitions and Purchase Order” Subject Area, “PO Document Type” folder, and “PO Document Type Desc” in a new analysis.

Results - Data Dictionary Detailed

Data Dictionary Detailed
 EPM Data Warehouse Repository Documentation
 Time run: 7/26/2024 10:16:55 AM

Fact Repository				
Subject Area	Presentation Table (Folder)	Presentation Column (Field)	Presentation Column Desc	Logical T
SCM - PROC - Purchase Order Distribution Line	PO Document Type	PO Document Type Cd		PO Document
SCM - PROC - Purchase Order Header	PO Document Type	PO Document Type Cd		PO Document
SCM - PROC - Purchase Order Line	PO Document Type	PO Document Type Cd		PO Document
SCM - PROC - Purchase Order Schedule	PO Document Type	PO Document Type Cd		PO Document
SCM - PROC - Requisitions and Purchase Orders	PO Document Type	PO Document Type Cd		PO Document

4. To reuse the EPM Data Warehouse, clear your results when you’re done.

The **Prompts** values on the EPM Data Warehouse Data Dictionary dashboard pages are dependent on any preceding prompt fields. The available values will change depending on the values selected in the previous prompt field.

- a. Use the **Reset** button at the bottom of the prompts section. Select an option.
 - i. Reset to last applied values.
 - ii. Reset to default values.
 - iii. Clear All – This option removes any prompt selections before running the report with new prompt values.
- b. Select **Apply**.

Prompts - Data Dictionary Detailed

Select required values from drop-downs. * Asterisk denotes required field.
 Each selection criteria is dependent on each other. Your drop down choices will vary accordingly.

Presentation Column (Field) PO Document Typ ▼

Apply Reset ▼

- Reset to last applied values
- Reset to default values
- Clear All

Filters - Data Dictionary Detailed

Step 4: Use the SWIFT data in a new analysis or report

To show how to use the data field, we’ll create a small new analysis. For more details about this process, view the [Create a New Analysis](#) Quick Reference Guide.

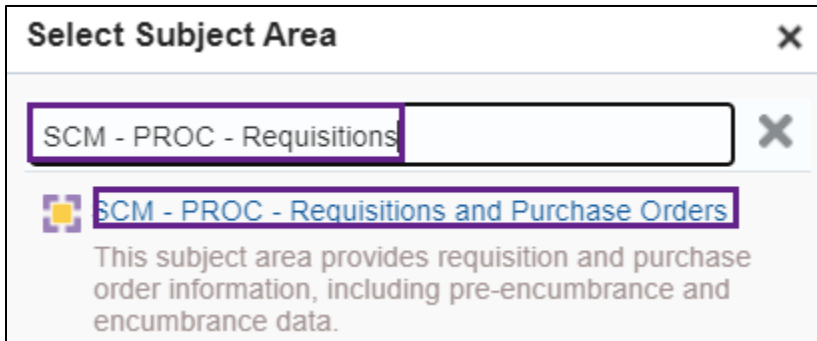
1. On the global menu, select the **New** icon. On the drop-down list, select the “**Analysis**” option.

Home Catalog Favorites ▼ Dashboards ▼ **New** ▼ Open ▼ Signed In A

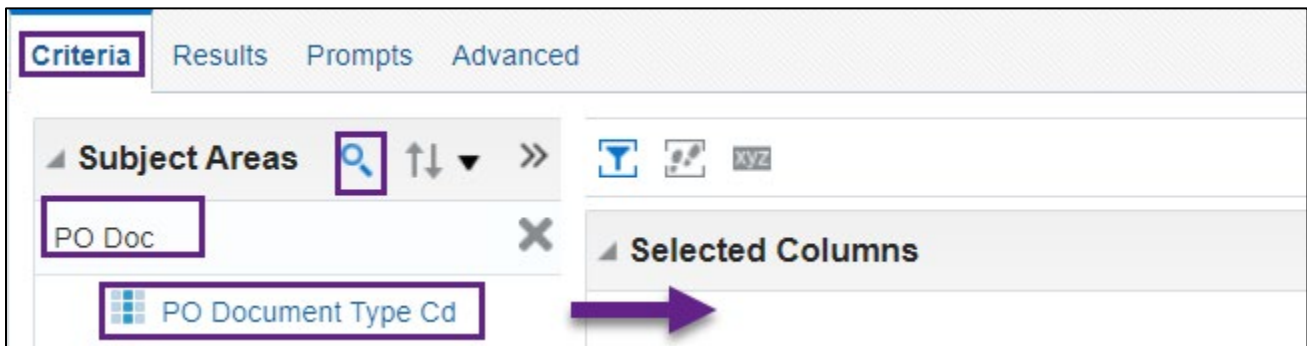
Analysis and Interactive Reporting

Analysis

2. You will see the Select Subject Area list.
 - a. Review and select the **Subject Area** that best fits. **HINT:** You can type the exact title of the subject area and it will appear.



- b. To create a report that contains a list of purchase orders that are annual plans, we need to create a new analysis with Document Type in the Purchase Order module. One of the Subject Areas from the EPM Data Warehouse Data Dictionary is “SCM-PROC-Requisitions and Purchase Orders.” We’ll select this option.
3. The EPM Data Warehouse opens the Analysis Editor page that is untitled.
 - a. **In the Criteria tab, go to the Subject Area and look for the desired folder or field.**
 - i. **Hint:** press the **Search** icon. The Search field opens. Start typing in the name.
 - ii. In this case, we’ll select the “PO Document Type” folder.



- b. **Drag and drop all the desired data fields into the Selected Columns pane.**
For this report, add “PO Document Type Cd,” “PO ID,” “PO Business Unit,” and “Budget Period.”
 - c. **As needed, add a filters to the selected columns.**
 - i. Open the menu and select **Filter**.
 - ii. The **New Filters** window appears. Enter a value and select **OK**.
 - iii. For this report, we’ll add several filters: PO Document Type of “APK” for annual plans; PO Business Unit of “G1001 – Minnesota Management and Budget” and Budget Period.

New Filter

Column PO Document Type Cd *fx*

Operator is equal to / is in

Value APK

Add More Options Clear All

Protect Filter

Convert this filter to SQL

OK Cancel

4. The Filter section displays the filters.

Selected Columns

PO Document Type	Budget Period Year	Business Unit - Purchase Order	PO Distribution Line
PO Document Type Cd	Budget Period	PO Business Unit	PO Id

Filters

PO Business Unit is equal to / is in G1001 - Minnesota Management & Budget

AND PO Document Type Cd is equal to / is in APK

AND Budget Period is equal to / is in 2024

5. Select the **Results** tab.

- The Compound Layout pane displays the list of purchase orders for annual plans for “G1001 – Minnesota Management and Budget.”
- You can download the report results in various formats as needed.
- As desired, **save** it **My Folders** if you want to rerun this report.

Untitled

Home Catalog Favorites Dashboards New Open Signed In As

Criteria **Results** Prompts Advanced

Subject Areas

Search

SCM - PROC - Requisitions

- Fact Requisitions and P
- Account
- Account Tree - KK Acco
- Agency Cost1 (CF1)
- Agency Cost2 (CF2)
- AM Profile

Compound Layout

Title [A] [X]

Table [A] [X]

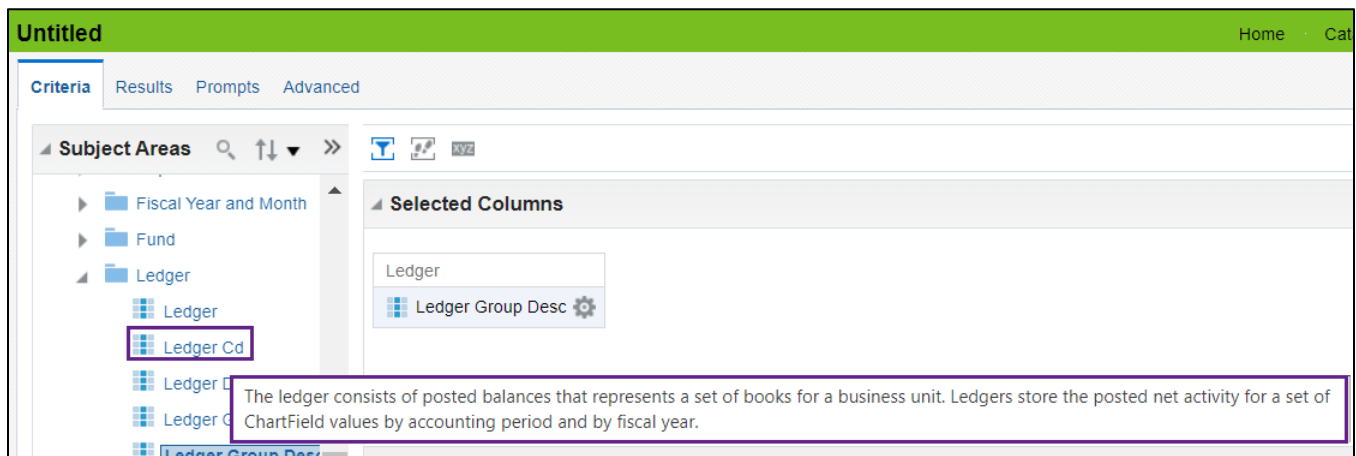
PO Document Type Cd	Budget Period	PO Business Unit	PO Id
APK	2024	G1001 - Minnesota Management & Budget	3000007719
APK	2024	G1001 - Minnesota Management & Budget	3000007720
APK	2024	G1001 - Minnesota Management & Budget	3000007739

Appendices

Appendix A: Hover Over Text in a New Analysis

When you open a new analysis and select a Subject Area, you can hover over the text of a SWIFT data field. The EPM Data Warehouse will display a description of that data field from the EPM Data Warehouse Data Dictionary. This description can help you understand what is included in the data field. **NOTE:** Not all data fields have hover over descriptions.

1. On the global menu, select **New**. Then, select **Analysis**.
2. The EPM Data Warehouse Data Dictionary opens the Select Subject Area page. Select the desired subject area.
3. The EPM Data Warehouse opens the Subject Areas folders on the left side of the page.
 - a. Open a folder on the column.
 - b. Hover over the SWIFT data field and see a description of what is contained in it.



Appendix B: EPM Data Warehouse Data Dictionary Tab

Overview: When you open the EPM Data Warehouse Data Dictionary, it defaults to the EPM Data Warehouse Data Dictionary tab. The EPM Data Warehouse Data Dictionary tab requires that you select one or more Subject Areas.

- You can also select folders and fields within the selected Subject Area(s).
- Whatever you select in the Subject Area will limit the options available on the other search fields. For example, selecting “FMS – AP- Vouchers” will yield only folders and fields in the Accounts Payable (AP) module.

Target Audience: This tab is likely most useful for users who want to explore the SWIFT data fields within a Subject Area. Because it requires knowledge of Subject Areas, it is also likely useful for more experienced users of the EPM Data Warehouse.

1. You must select at least one Subject Area in the Prompts section. It allows you to find data fields in Subject Areas that you want to search.
 - a. Select **Apply** to find all the data fields in your chosen Subject Area(s).
 - b. You can also further limit the data by selecting values in the Presentation Table (Folder) or Presentation Column (Field) sections. Then, select **Apply**.

EPM Data Warehouse Data Dictionary | EPM Data Warehouse Data Dictionary Detailed | EPM Data Warehouse Data Dictionary Detailed All Columns

Navigation - Data Dictionary

EPM Data Warehouse Quick Links

Prompts - Data Dictionary

Select required values from drop-downs. * Asterisk denotes required field.
Each selection criteria is dependent on each other. Your drop down choices will vary accordingly.

* Subject Area: FMS - ALL - Experi ▼

Presentation Table (Folder): --Select Value-- ▼

Presentation Column (Field): --Select Value-- ▼

Apply | Reset ▼

2. The Results section shows the selected Subject Area, Presentation Table (Folder), and Presentation Column (Field).

Results - Data Dictionary

Data Dictionary
EPM Data Warehouse Repository Documentation
Time run: 7/26/2024 12:15:26 PM

Fact Repository				
Subject Area	Presentation Table (Folder)	Presentation Column (Field)	Presentation Column Desc	Logical Table
FMS - ALL - Expenditures	""- AR Billing Type (AR Billing Header)""	Billing Type		AR Billing Header
FMS - ALL - Expenditures	""- AR Billing Type (AR Billing Header)""	Billing Type Desc		AR Billing Header

3. It is likely that the results will be long, and you cannot see all the options. Go to the bottom of the results and select the **Get more rows** link. You may need to do this a few times to see all the results.

FMS - ALL - Expenditures	""- Customer - Service (AR Billing Line)""	Service - Customer Address	AR Billing Line
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[Get more rows](#)

Analyze - Edit - Refresh - Print - Export

Appendix C: EPM Data Warehouse Data Dictionary Detailed Tab

Overview: The EPM Data Warehouse Data Dictionary Detailed tab allows you to view all Subject Areas, all folders, and all fields starting with one or more search fields. **This tab operates like a key word search.** It is explained in detail in this Quick Reference Guide.

Target Audiences: It is useful for beginners of the EPM Data Warehouse who may not know which Subject Area to select. It allows you to explore a wide range of data fields. It is also useful for users who want to explore an individual subject area to see what is available for a new analysis.

1. Enter a value in the Presentation Column (Field) section and select **Apply**.

EPM Data Warehouse Data Dictionary | **EPM Data Warehouse Data Dictionary Detailed** | EPM Data Warehouse Data Dictionary Detailed All Columns

Navigation - Data Dictionary Detailed

EPM Data Warehouse Quick Links

Prompts - Data Dictionary Detailed

Select required values from drop-downs. * Asterisk denotes required field.
Each selection criteria is dependent on each other. Your drop down choices will vary accordingly.

Presentation Column (Field) PO Document Typ ▼

Apply Reset ▼

2. You'll see the Subject Areas, folders, and fields where the selected field appears in an EPM Data Warehouse report.

Results - Data Dictionary Detailed

Data Dictionary Detailed
EPM Data Warehouse Repository Documentation
Time run: 7/26/2024 10:16:55 AM

Subject Area	Presentation Table (Folder) ▲ ▼	Presentation Column (Field)	Presentation Column Desc	Logical T ▼
SCM - PROC - Purchase Order Distribution Line	PO Document Type	PO Document Type Cd		PO Document
SCM - PROC - Purchase Order Header	PO Document Type	PO Document Type Cd		PO Document
SCM - PROC - Purchase Order Line	PO Document Type	PO Document Type Cd		PO Document
SCM - PROC - Purchase Order Schedule	PO Document Type	PO Document Type Cd		PO Document
SCM - PROC - Requisitions and Purchase Orders	PO Document Type	PO Document Type Cd		PO Document

Appendix D: EPM Data Warehouse Data Dictionary Detailed All Columns Tab

Overview: The EPM Data Warehouse Data Dictionary Detailed All Columns tab does not have any required prompts, which allows for flexibility in searches.

Target Audience: It is likely best used by an experienced user of the EPM Data Warehouse who understand database structures such as data tables.

1. To use this tab, make sure you remove the defaulted column values.
 - a. Open the section and deselect All Column Values.
 - b. Remove any fields that say "Null." Scroll through the list or use the Search option. If you don't, you won't be able to use the desired search value.

- The Logical Table/Source/Column fields and the Physical Table/Column fields provide information about how the data is stored in the EPM Data Warehouse repository. You can use this information to help identify relationships between the data fields.
- Whatever you select in the Subject Area will limit the options available on the other search fields. For example, selecting “FMS – AP- Vouchers” will yield only folders and fields in Accounts Payable (AP) module.
- Select **Apply**.

EPM Data Warehouse Data Dictionary EPM Data Warehouse Data Dictionary Detailed **EPM Data Warehouse Data Dictionary Detailed All Columns**

Navigation - Data Dictionary Detailed All Columns

EPM Data Warehouse Quick Links

Prompts - Data Dictionary Detailed All Columns

Select required values from drop-downs. * Asterisk denotes required field.
Each selection criteria is dependent on each other. Your drop down choices will vary accordingly.

Subject Area: FMS - ALL - Expe

Presentation Table (Folder): --Select Value--

Presentation Column (Field): --Select Value--

Logical Table: --Select Value--

Logical Column: --Select Value--

Physical Table: --Select Value--

Physical Column: --Select Value--

Apply Reset

- The **Results** section may yield a large results list that includes the usual columns.
- The results also may show additional columns related to the data structure. Columns could include Logical Column, Logical Column Source, Physical Table, and Physical Column.

EPM Data Warehouse Data Dictionary EPM Data Warehouse Data Dictionary Detailed **EPM Data Warehouse Data Dictionary Detailed All Columns**

Data Dictionary Detailed All Columns
EPM Data Warehouse Repository Documentation
Time run: 7/26/2024 12:30:39 PM

Subject Area	Presentation Table (Folder)	Presentation Column (Field)	Presentation Column Desc	Logical Table	Log
FMS - ALL - Expenditures	Account	Account Cd		Account	D_W_A
FMS - ALL - Expenditures	Account	Account Detail Cd		Account	D_W_A
FMS - ALL - Expenditures	Project Activity	Activity User4		Project Activity	D_PR

Horizontal scrollbar at the bottom of the table.

- To find the additional columns on the right side of the table, go to the bottom of the report and slide the bar to the right.

Logical Table Source	Logical Column	Logical Column Source
D_W_Account_VW	Account Cd	""Enterprise Warehouse"".SYSADM.D_W_ACCOUNT_VW.ACCOUNT
D_W_Account_VW	Account Detail Cd	""Enterprise Warehouse"".SYSADM.D_W_ACCOUNT_VW.ACCOUNT