SWIFT STATEWIDE INTEGRATED FINANCIAL TOOLS

EPM Data Warehouse Security

The Enterprise Performance Management (EPM) Data Warehouse is accessed through the Administrative Portal using the Oracle Business Intelligence Enterprise Edition business intelligence tool. Users may only access the EPM Data Warehouse from a State-networked computer or via a secure VPN connection.

General Warehouse Roles

Users will need security clearance in order to access the EPM Data Warehouse. To obtain access, you will need to fill out the Request for Access to SWIFT Statewide Systems form. Complete and gather signatures on pages 1 and 2. The EPM Data Warehouse Roles are currently on page 10 of the form.

The EPM Data Warehouse security is focused on three areas.

1. You will need to be assigned the **BI Author** role. This gives you access to the EPM Data Warehouse.

EPM Data Warehouse Role Selections
Use this section only for access to the EPM Data Warehouse. For access to the old Information Access (IA) Data Warehouse, use the form "Request for Clearance: Information Access Warehouse" at https://www.mn.gov/mmb/accounting/swift/security/security-forms.jsp.
XX BI Author (required for all EPM Data Warehouse users)
DATA EXTRACTS (from warehouse tables)
☐   Data Extract (M_EPM_DATA_EXTRACTS) (staging tables only; not available in OBIEE)

2. In addition to the BI Author role, you will need one of the **General Warehouse Roles**. These roles define your permissions in the EPM Data Warehouse. The role assigned to you is determined by your agency security administrator.

GENERAL WAREHOUSE ROLES		
All users of the EPM Data Warehouse must be assigned one or more General Warehouse Roles:		
Agency Code (3 characters) for agency-specific roles*:		
Agency Specific Basic Report Developer ☐	Agency Specific Advanced Report Developer ☐	Agency Specific Dashboard Developer ☐
Agency Specific Administrator (M_EPM_XXX_AGY_ADMINISTRATOR + M_EPM_AGY_ADMINISTRATOR)		
* The agency code entered under General Warehouse Roles is used only to assign the user to the appropriate agency dashboard in OBIEE. It does not affect access to detail-level data in the warehouse. The user's chartfield security role (M_FS_CF_SEC_xxxxxx) for the Financial Management System controls access to accounting and procurement data in the EPM Data Warehouse. The user's row security permission list (agency or department ID access) for SEMA4 controls access to SEMA4-related data in the warehouse. A user cannot have access in the warehouse that is different from access in the source FMS and SEMA4 systems.		

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3. Data presented in the EPM Data Warehouse is organized into subject areas. In order to create an analysis or view a report from the EPM Data Warehouse, you will also need to be assigned **specific system roles**: FMS, HCM, and/or ELM.

- **Financial Management System (FMS).** FMS Data Subjects and FMS Statewide report access is based on the SWIFT system module inquiry roles and the assigned Business Unit.
- **Human Capital Management (HCM).** HCM Data Subjects and HCM Statewide report access is based on SEMA4 roles (Human Resources, Payroll, and Recruiting Solutions) and Department security.
- **Learning Management (ELM).** In order to create ELM analysis, or view an ELM reports, you will need the M_EPM_ELM_REPORT (Learning Management Reporting) role. This role will provide access to the ELM Data Subjects and ELM Statewide reports.

NOTE: If you have SEMA4 or SWIFT inquiry roles but do not have access to EPM Data Warehouse, complete a SWIFT Security Access form and request the "BI Author" and one of the General Warehouse Roles.

EPM Data Warehouse Security Roles

- **Agency-Specific Basic Report Developer:** Has access to navigate within the shared agency folder and access the reports and dashboards within it.
- **Agency-Specific Advanced Report Developer**: Has access to navigate within the shared agency folder and access the reports and dashboards within it. Also has the ability to save reports into the Development subfolder for its agency.
- **Agency-Specific Dashboard Developer**: Has access to navigate within the shared agency folder and access the reports and dashboards within it. Also has the ability to save reports and dashboards into the agency folder and subfolders.
- **Agency-Administrator**: Has full control of the agency folder, subfolders and all contents. Can set permissions and create additional subfolders. The agency user is also responsible for requesting additional catalog roles for its agency as needed for more flexible security within the agency folder than the default security provides.

EPM Data Warehouse Security Role Matrix

The General Warehouse Roles define your permissions in the EPM Data Warehouse. The role assigned to you is determined by your agency security administrator. These roles and permissions determine which specific reports, folders, and dashboards you can see.

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The permissions list below is a checklist of what each Warehouse Role is able to do.

Permission	Agency-Specific Basic Report Developer	Agency-Specific Advanced Report Developer	Agency-Specific Dashboard Developer	Agency Administrator
View reports	✓	✓	✓	✓
Create or modify reports	✓	✓	✓	✓
Save a report to My Folder	✓	✓	✓	✓
Edit My Dashboard	✓	✓	✓	✓
Access to an agency folder	✓	✓	✓	✓
View dashboards	✓	✓	✓	✓
Save reports to an agency folder		✓	✓	✓
Edit an agency dashboard			✓	✓
Create a dashboard				✓
Change users permissions				✓