

## QUICK REFERENCE GUIDE

Updated December 9, 2022

### Update the Data on an Existing Report

After you run and save an existing report in the EPM Data Warehouse, you can return to it and update the data in the report. Most data updates occur using filters in the *Criteria* tab.

In the EPM Data Warehouse, individual fields or pieces of data elements are called columns. In the *Selected Columns* section, you can add or delete columns. You can also add or update filters for any selected column.

- **Filter:** A filter allows you to apply criteria to limit results of a selected column when creating or updating a report.
- **Prompt:** A prompt presents users with options to choose from a particular column to limit the data returned in a report. Prompts appear if you created and saved a report from an existing dashboard with prompts. You can see these prompts in the *Results* tab of the report.

If a column “is prompted,” you can filter it as desired. You can leave the prompted column in the *Filters* section or delete it. It will not impact your report results.

**IMPORTANT!** If you wish to create a filter, check the *Filters* section first to see if there is an existing one. Update that filter. Do not create or update filters in both the *Selected Columns* and *Filters* sections in the *Criteria* tab. You will likely get errors in your results.

**This guide demonstrates how to update the data in an existing report in the *Criteria* tab.**

- Add a new or update an existing column in the *Selected Columns* section
- Update a filter or prompt for a column in the *Filters* section
- Create a filter for the current *Subject Area* inside the *Filters* section
- View the *Guidelines for Choosing an Operator in the EPM Data Warehouse* in the Appendix

There are other ways to update an existing report. These topics are covered in separate reference guides.

- Update the view of a report from the EPM Data Warehouse
- Add an inline prompt to update an existing report or analysis
- Add a dashboard prompt to an existing dashboard, such as My Dashboard

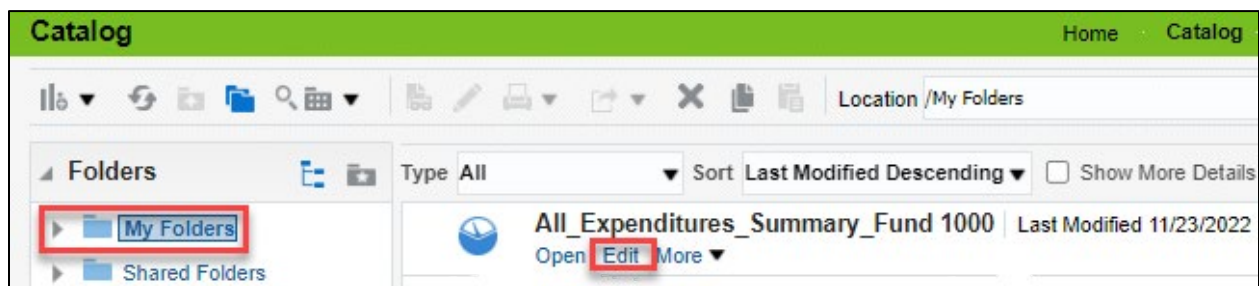
Find the [EPM Data Warehouse Training](#) quick reference guides on Minnesota Management and Budget’s website.

## Navigate to the EPM Data Warehouse

1. Navigate to the EPM Data Warehouse.

Navigation Options	Navigation Path
Navigation Collection	Administrative Portal, Data Warehouse, Warehouse Reporting.

2. Use the top menu options to search for or navigate to the desired report. For most users, you can find your reports from the *Catalog*.
3. In the *Catalog*, search for *My Folders*. In the middle pane, find the report and select the *Edit* link below it.

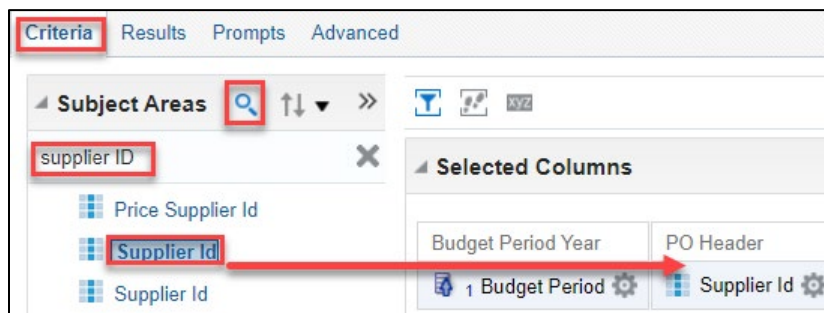


## Add a new column, add a filter to a column, or delete a column in the Selected Columns section

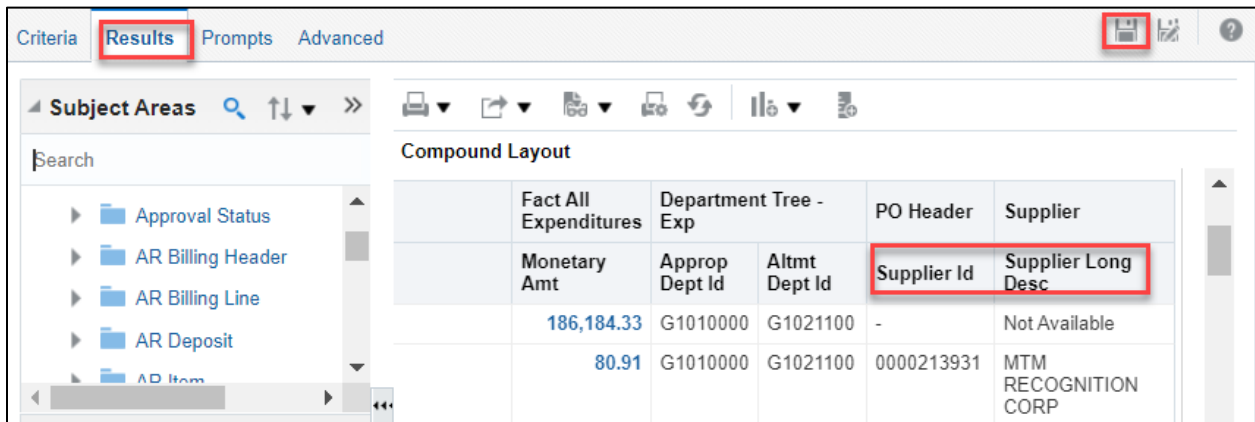
The EPM Data Warehouse displays the *Results* tab. Select the *Criteria* tab.

This example adds the *Supplier ID* and *Supplier Long Desc* columns to an All Expenditures report

1. **Add a new column.**
  - a. To add a column, open the required *Subject Areas* folder from the left menu. You can search inside of the *Subject Areas* folder to easily find a subfolder or data element within it.
    - i. Select the **Search** icon. It is a looking glass.
    - ii. Enter a keyword or the wildcard, which is a percentage sign, in the **Search** box.
    - iii. Select the **Enter** key.
    - iv. The folder or data element appears at the top of the list.
  - b. Highlight the data element or column. Drag and drop it to the *Selected Columns* section.



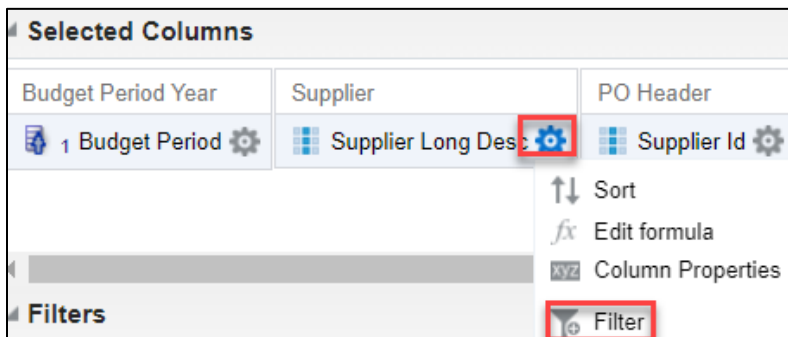
- c. Select the *Results* tab to check the new column. As desired, save the report with the edits.



## 2. Add a filter to an existing column.

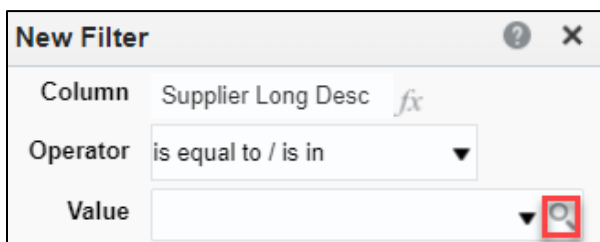
This example filters the *Supplier Long Desc* column for a specific supplier, “Innovative Office Solutions.”

- a. Open the column menu next to the column. It is a gear icon. Select the *Filter* option.



- b. The EPM Data Warehouse opens the *New Filter* window for the “Supplier Long Desc” column.

- Update the *Operator* field as needed.
- Next to the *Value* field, select the **Search** icon. It looks like a looking glass.

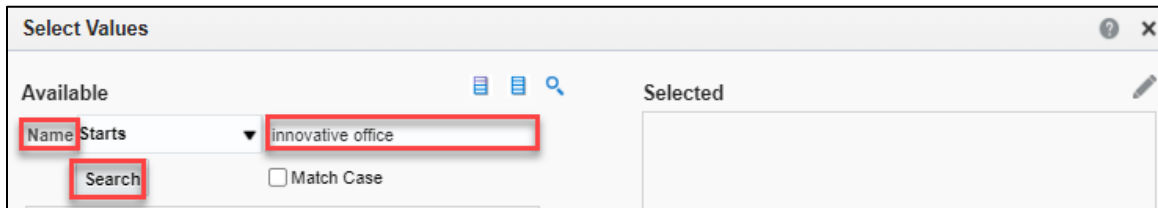


**NOTE:** To understand operators, view the *Appendix* of this guide.

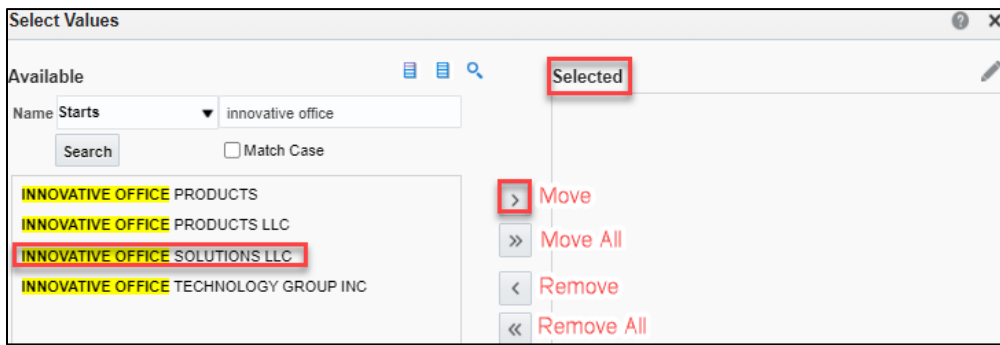
- c. The *Select Values* window appears. In the *Available* section, go to the *Name* section.
  - You can change the value to “Starts,” “Contains,” “Ends,” or “Is Like (pattern match).”

# SWIFT STATEWIDE INTEGRATED FINANCIAL TOOLS

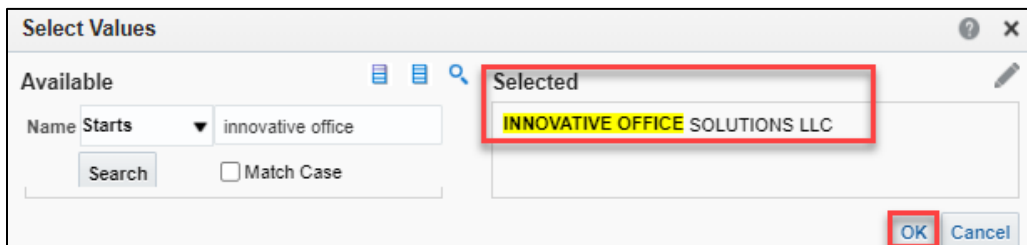
- Enter text in the field. This example uses “Innovative Office.”
- Select **Search**.



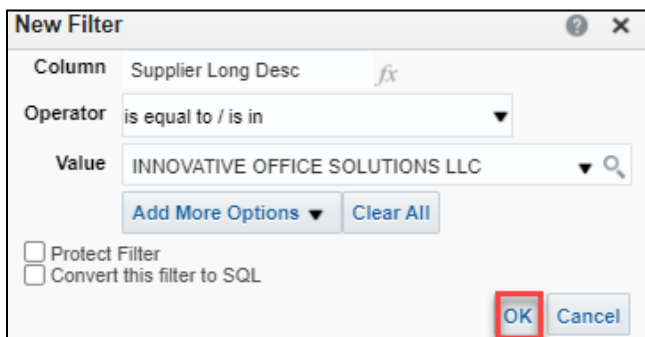
- d. SWIFT updates the *Select Values* section with your search term.
- Use the move or remove icons in the middle of the page to move values back and forth between the *Available* and *Selected* sections as needed.
- Select the value and then the **Move** icon, which is a forward arrow.



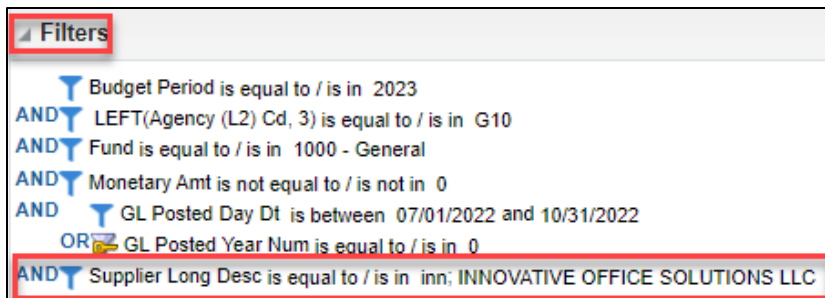
- e. The value or values appear in the *Selected* section. Select **OK**.



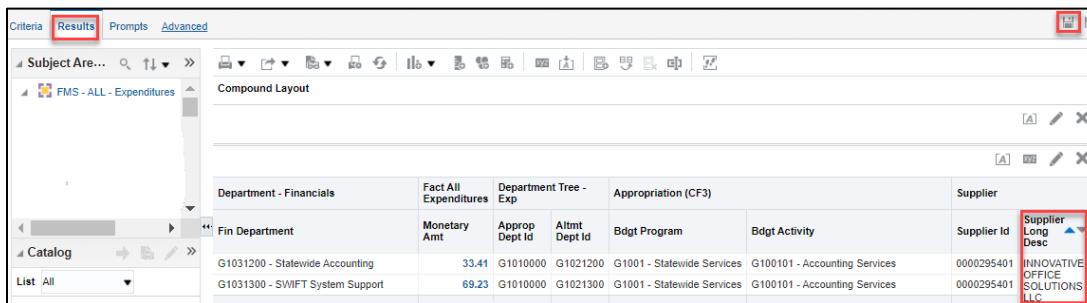
- f. The EPM Data Warehouse returns to the updated *New Filter* window. It has the desired value in it. Select **OK**.



- g. The EPM Data Warehouse returns to the *Criteria* tab on the report. The updated filter appears in the *Filters* section.



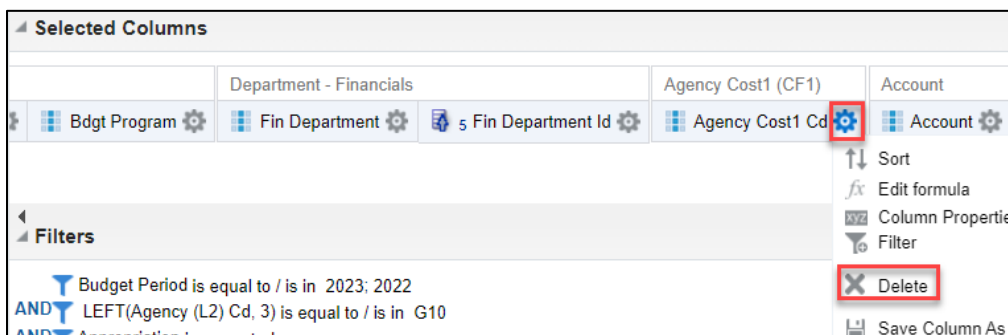
- h. Test the data results to make sure you have the correct values by selecting the *Results* tab. If the results are what you desire, select the **Save** icon.



### 3. Delete a column.

This example deletes the *Agency Cost1* column.

- a. From the *Criteria* tab in the *Selected Columns* section, open the column menu using the gear icon. Select the *Delete* option.



- b. The EPM Data Warehouse deletes the column from the *Selected Columns* section. The column will no longer be included in the report.

**IMPORTANT!** If the filter is applied in both the *Selected Columns* and *Filters* sections, delete it in both places.

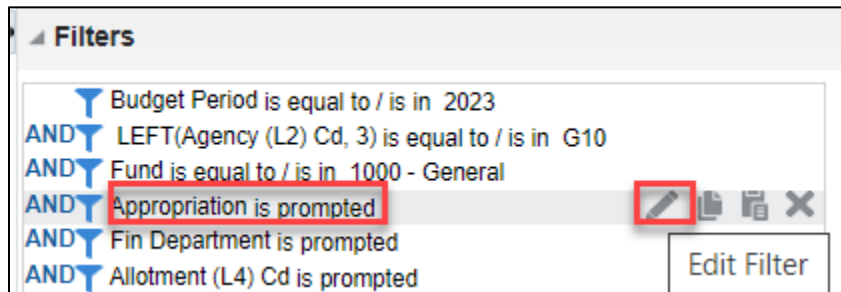
- c. Save the report using the **Save** icon on the top right of the page. To continue updating a column, select the *Criteria* tab.

## Update a filter or prompt for a column in the Filters section

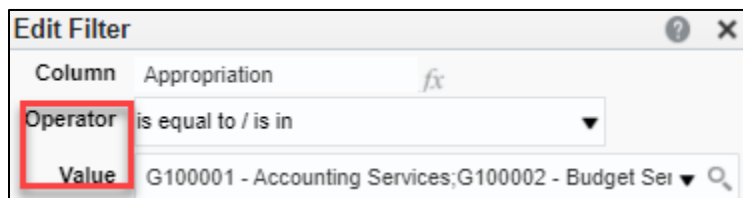
The *Filters* section of the report shows the existing filters for the selected columns.

# SWIFT STATEWIDE INTEGRATED FINANCIAL TOOLS

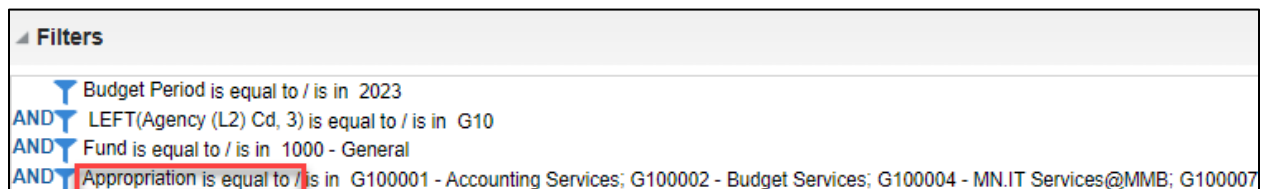
- It includes columns that are prompted and filtered.
  - It includes all filters, including those that were added at the creation of the report and filters that were added in the *Selected Columns* section.
1. To add a filter to a prompted column, select the **Edit Filter** icon to the right of it. It is a pencil.



2. SWIFT opens the *Edit Filter* window. In the *Operator* section, change it from “is prompted” to another operator. This example uses “equal to.” Update the *Values* field.



3. Follow the steps outlined in the “Add a filter to an existing column” step in the *Add a new, update, or delete a column in the Selected Columns* section of this guide.



## Create a filter for the current Subject Area inside the Filters section

You can further refine the results of your report by creating a filter for the current *Subject Area* in the *Filters* section of your report. You need to understand which folder and field (column) you need from the current *Subject Area*. You also need to know the specific values you wish to filter and which operator to use.

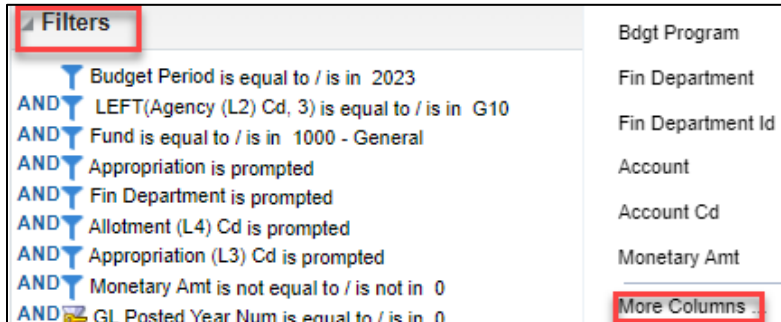
If you don't know the folder and field for that *Subject Area*, the EPM Data Dictionary can help you. Select the *EPM Data Warehouse Data Dictionary Detailed* tab. The [Use the Data Dictionary](#) reference guide provides an overview.

This example looks for transactions in the first quarter of a budget year.

1. In the *Filters* section, select the **Create a filter for the current Subject Area** icon. It is a funnel.

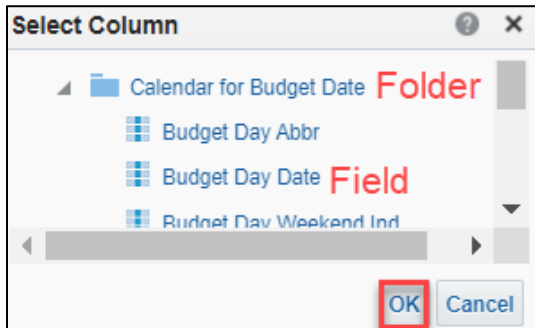


2. The menu appears on the right. Select “More Columns” at the bottom.



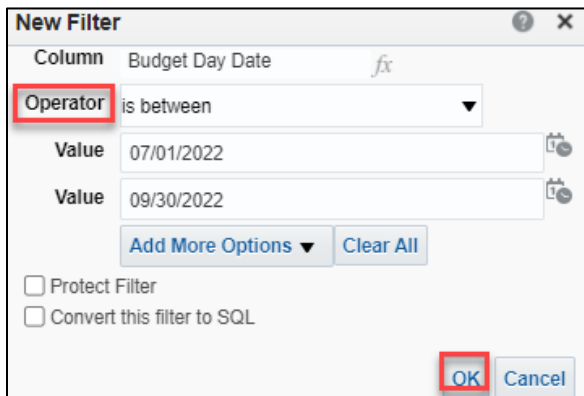
3. The *Select Column* window appears for that report’s *Subject Area*. Open the appropriate folder and field. Select **OK**.

This example uses the *Calendar for Budget Date* folder and the *Budget Day Date* column.

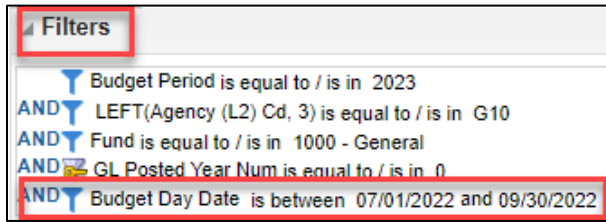


4. The *New Filter* window appears. Update the *Operator* and *Value* fields to reflect the desired filters. Select **OK** when you are done.

This example filters the *Budget Day Date* column in the *Subject Area* and uses the operator of “is between.” Select the **Calendar** icon in both *Value* fields to enter desired dates. Select **OK**.



- SWIFT updates the *Filters* section with the new filter that you added from the *Create a filter for the current Subject Area* menu.



- Check in the *Filters* section to see if there is another filter for that column. If so, delete one of them.
- Test the changes in the *Results* tab. Update the filters as needed.
- Save the report.

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

**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)

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.



Operator	Guidelines
<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.
<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.