Build a “My Dashboard” Page 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.

All users have an individual dashboard with existing reports that they can customize called “My Dashboard.” You can create and update as many pages on your personal dashboard as you need.

This guide provides a basic overview of the steps to create a My Dashboard page in the EPM Data Warehouse. It describes the following parts of a dashboard.

- Column
- Section
- Properties
- Reports

For a more in-depth description of dashboards, view the Create a Dashboard reference guide.

Steps to complete:

- Step 1: Navigate to the EPM Data Warehouse
- Step 2: Open the My Dashboard page
- Step 3: Add reports to the My Dashboard page
- Step 4: Run the dashboard

Steps to build a “My Dashboard” page in the EPM Data Warehouse

Step 1: Navigate to the EPM Data Warehouse

Follow this navigation to the EPM Data Warehouse.

<table>
<thead>
<tr>
<th>Navigation Options</th>
<th>Navigation Path</th>
</tr>
</thead>
<tbody>
<tr>
<td>Administrative Portal, Data Warehouse, Warehouse Reporting.</td>
<td></td>
</tr>
</tbody>
</table>

Step 2: Open the My Dashboard page

2. The *My Dashboard* page opens. It will say “This page has no content. To add content, click Edit here or in the tool bar.” Select the *Edit* link.

**Step 3: Add reports to the My Dashboard page**

The *My Dashboard* page appears. It has four main parts.

- **Top Right Menu:** Use to add, delete, run, save, and preview the dashboard page.
- **Dashboard Objects:** Use to drag and drop objects you can make on the dashboard workspace such as columns and sections.
- **Catalog:** Use 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 the *My Dashboard* page.

**Scenario:** For this example, we will create a *My Dashboard* page to help a buyer manage supplier contracts using existing reports. We’ll add one column with two sections, which are existing reports.

1. Add a column to the Workspace.

Use columns to align content within the dashboard. From the *Dashboard Objects* area, drag and drop the *Column* button to the workspace. You can add as many columns as you want. We’ll create one column.
2. Add a section to the newly created column.

Use sections to hold the reports of a dashboard in a column. Sections are aligned 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. We’ll add two sections for two reports.

3. Edit properties as an option. You can edit the properties of the column and section objects. In this guide, we’ll rename the section to describe its report. We’ll also show the section title on the report display.

   a. Select the Properties icon on the top right of the section.

      i. The EPM Data Warehouse displays the Properties menu on the right. Select “Rename.”
ii. The Rename Properties window appears. Enter the name. Select OK. Update the properties on the second section to rename it.

iii. Update the sections to “Show the Section Title.” This will make the display easier to use when you run the My Dashboard. Update the properties of the second section.

b. On the top, right menu, select Save.

4. Add the reports to your sections.
   a. Using the Catalog menu on the left side, find the reports you wish to add to the sections.
   b. Drag and drop the reports into the correct sections.

In this example, we made the following changes to Column 1.

- We collapsed the Dashboard Object area to be able to see the list of reports in the Catalog.
- We opened the Catalog and then opened My Folders.
- We dragged and dropped two reports in “Column 1,” which are “Expiring Contracts” and “Contracts for G1001.”
Step 4: Run the dashboard

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

2. The EPM Data Warehouse runs the My Dashboard and displays the reports. As an option, you can select the Expand and Collapse icons (arrows) to change the view of the display.

3. The next time you return to My Dashboard and select Run, the EPM Data Warehouse will display the updated reports.