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 and save a new using the New Analysis 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 in the analysis page. There are likely multiple ways to get the data you need for a new analysis.

This reference guide lists the steps to create a new analysis. It describes the tabs, fields, and processes that you use to create a new analysis within the steps. 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.

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

2. The *State of Minnesota Business Intelligence* page opens. Select the **New** icon on the global menu. In the dropdown, select the “Analysis” option.
3. You will see the Select Subject Area list. The available subject areas depend upon your security access. For this report, search under the “FMS” subject areas. Then, select “FMS_GL_MFR Summary.”

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

The EPM Data Warehouse displays an untitled and unsaved new analysis for the MFR Summary.

Use the Criteria tab to 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.

<table>
<thead>
<tr>
<th>Subject Areas Folder</th>
<th>Data Element(s)</th>
<th>Value(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Budget Period Year</td>
<td>“Budget Period”</td>
<td>2021</td>
</tr>
<tr>
<td>Fund</td>
<td>“Fund” code and “Fund Long Description”</td>
<td>All values</td>
</tr>
<tr>
<td>Department Financials</td>
<td>“Fin Department” code and “Long Description”</td>
<td>Begins with G10</td>
</tr>
<tr>
<td>Appropriation</td>
<td>“Appropriation ID” and “Long Description”</td>
<td>Begins with G10</td>
</tr>
<tr>
<td>Fact MFR Summary</td>
<td>“Expended Amount”</td>
<td>All values</td>
</tr>
</tbody>
</table>

2. Open the folder from the Subject Areas. Select the first data element. Drag and drop it into the Selected Columns pane. For example, open the Budget Period Year folder. Drag and drop the Budget Period Year data element to the Selected Columns pane.

3. Continue opening folders and dragging and dropping the rest of the data elements into the Selected Columns pane.

IMPORTANT! Put them in the order that you want them to appear in the report. You can update the order by dragging and dropping the data elements in the Selected Columns pane.

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 FinDept ID and the Approp ID for MMB which begins with “G10.” We also want to limit the transactions to the current Budget Period of “2021.”

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 “2021.” Then, press OK.

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, which 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. Then, select the Search button. In this case, we’re looking for all FinDept IDs that start with “G10.”
b. The EPM Data Warehouse enters values in the *Available* pane. Select the desired values. In this case, we’ll choose the **Select All** icon.

![Select Values](image1)

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c. The EPM Data Warehouse moved the selected values from the *Available* pane to the *Selected* pane. Review them and press **OK**.

![Select Values](image2)

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

![New Filter](image3)

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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

1. 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.

2. View the results.

3. To update the columns or filters, return to the Criteria tab. Rerun the analysis using the Results tab.

4. 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.

   a. In the Save window or Save As window, choose the location to save the analysis.

   b. 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.

   c. 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.

   We’ll select Excel. Another window appears with the Excel options. Select the best option for you. We’ll select “Excel 2007+.”

   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.

**IMPORTANT!** Some agencies use the *Data* option and export it in a “CSV file.” Sometimes the Excel columns may merge making it difficult analyze the data. Also, you export larger sets of data to CSV.

3. As 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.
   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.

https://docs.oracle.com/cd/E57185_01/SMVUG/ch16s08s04s01.html

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

<table>
<thead>
<tr>
<th>Operator</th>
<th>Guidelines</th>
</tr>
</thead>
<tbody>
<tr>
<td>is equal to / is in</td>
<td>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.</td>
</tr>
<tr>
<td>is not equal to / is not in</td>
<td>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.</td>
</tr>
<tr>
<td>is less than</td>
<td>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.</td>
</tr>
<tr>
<td>is greater than</td>
<td>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.</td>
</tr>
<tr>
<td>is less than or equal to</td>
<td>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.</td>
</tr>
<tr>
<td>is greater than or equal to</td>
<td>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.</td>
</tr>
<tr>
<td>is between</td>
<td>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.</td>
</tr>
<tr>
<td>is null</td>
<td>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.</td>
</tr>
<tr>
<td>is not null</td>
<td>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.</td>
</tr>
<tr>
<td>Operator</td>
<td>Guidelines</td>
</tr>
<tr>
<td>--------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>is ranked first</td>
<td>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.</td>
</tr>
<tr>
<td>ranked last</td>
<td>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.</td>
</tr>
<tr>
<td>contains all</td>
<td>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.</td>
</tr>
<tr>
<td>does not contain</td>
<td>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.</td>
</tr>
<tr>
<td>contains any</td>
<td>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.</td>
</tr>
<tr>
<td>begins with</td>
<td>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.</td>
</tr>
<tr>
<td>ends with</td>
<td>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.</td>
</tr>
<tr>
<td>is LIKE (pattern match)</td>
<td>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.</td>
</tr>
<tr>
<td>is not LIKE (pattern match)</td>
<td>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.</td>
</tr>
</tbody>
</table>