

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 elements within each view, tells the type and length of data, and may give a brief description of a data element. It ties the data element 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.

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 hover over text descriptions and the three tabs 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

This reference guide lists the steps to find a data element using the *EPM Data Warehouse Data Dictionary Detailed* search option for SWIFT reports. It also shows you how to use a data element you located in the *Data Dictionary* in a new analysis.

Steps to complete

- Step 1: Navigate to the EPM Data Warehouse Data Dictionary
- Step 2: Open the EPM Data Warehouse Data Dictionary Details tab and enter your search criteria in the Prompts section
- Step 3: Review the search results
- Step 4: Use the SWIFT data in a new analysis or report

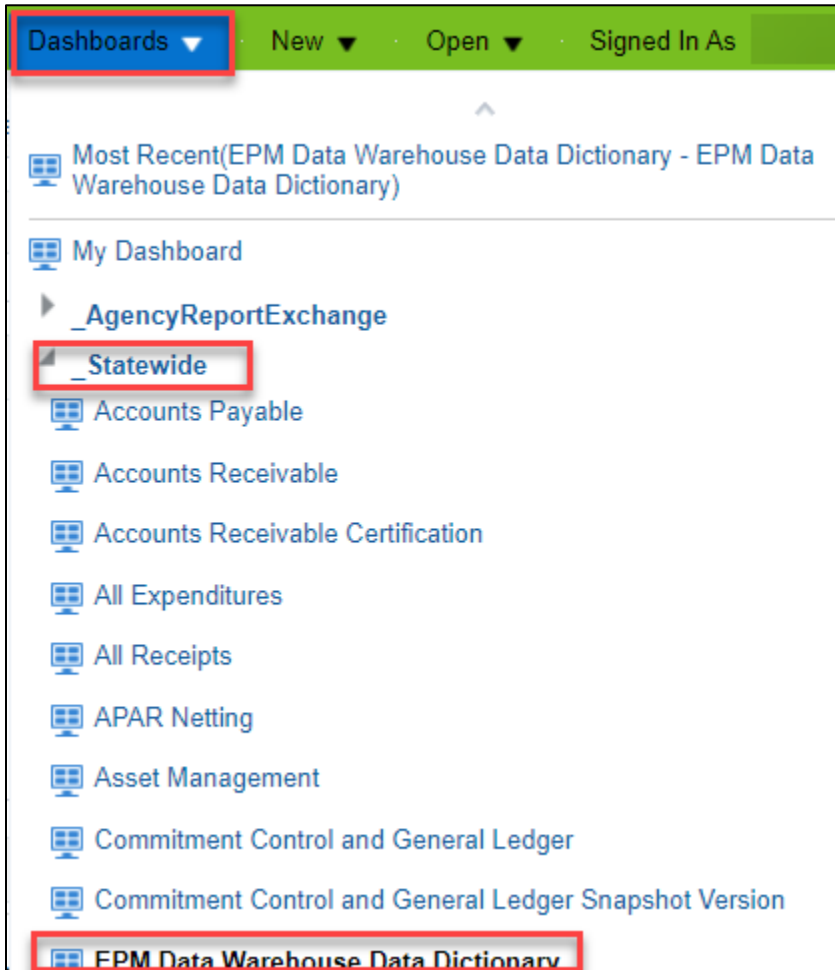
Steps to Use the EPM Data Warehouse Data Dictionary for SWIFT Reports

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 element 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.

1. Follow this navigation path.

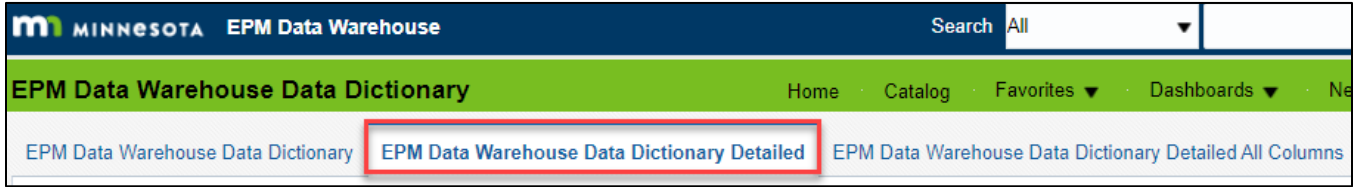
Navigation Options	Navigation Path
Navigation Collection	Administrative Portal; Data Warehouse; Warehouse Reporting; Global menu, Dashboards, _Statewide, EPM Data Warehouse Data Dictionary.



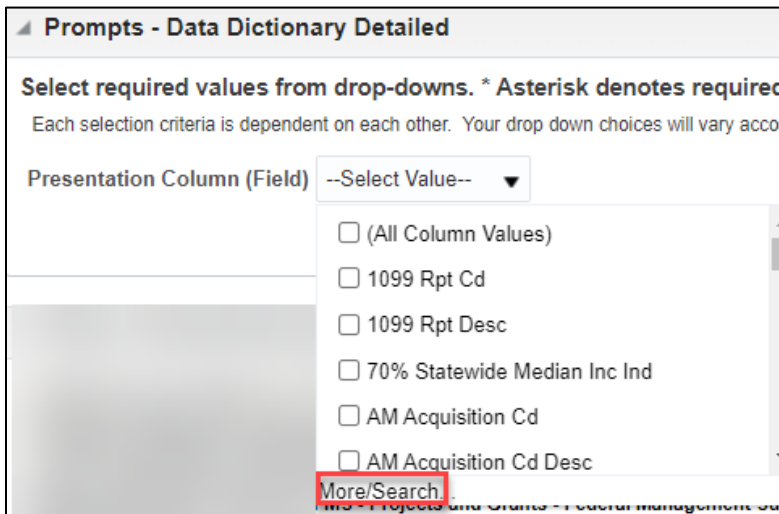
2. The EPM Data Warehouse opens the *EPM Data Warehouse Data Dictionary*.

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

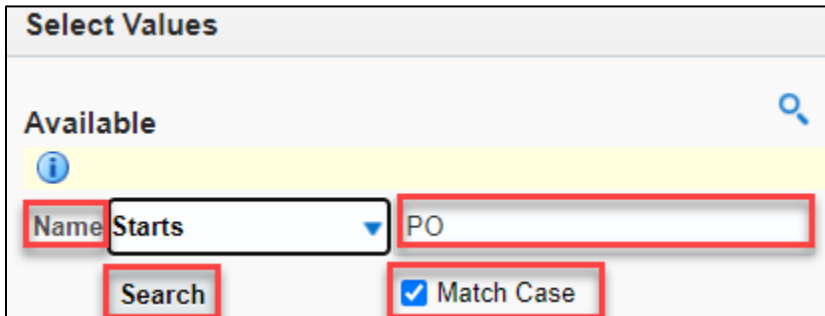
1. Select the *EPM Data Warehouse Data Dictionary Detailed* tab.



2. In the *Prompts* section, open the *More/Search* link at the bottom of the *Presentation Column (Field)* menu field.

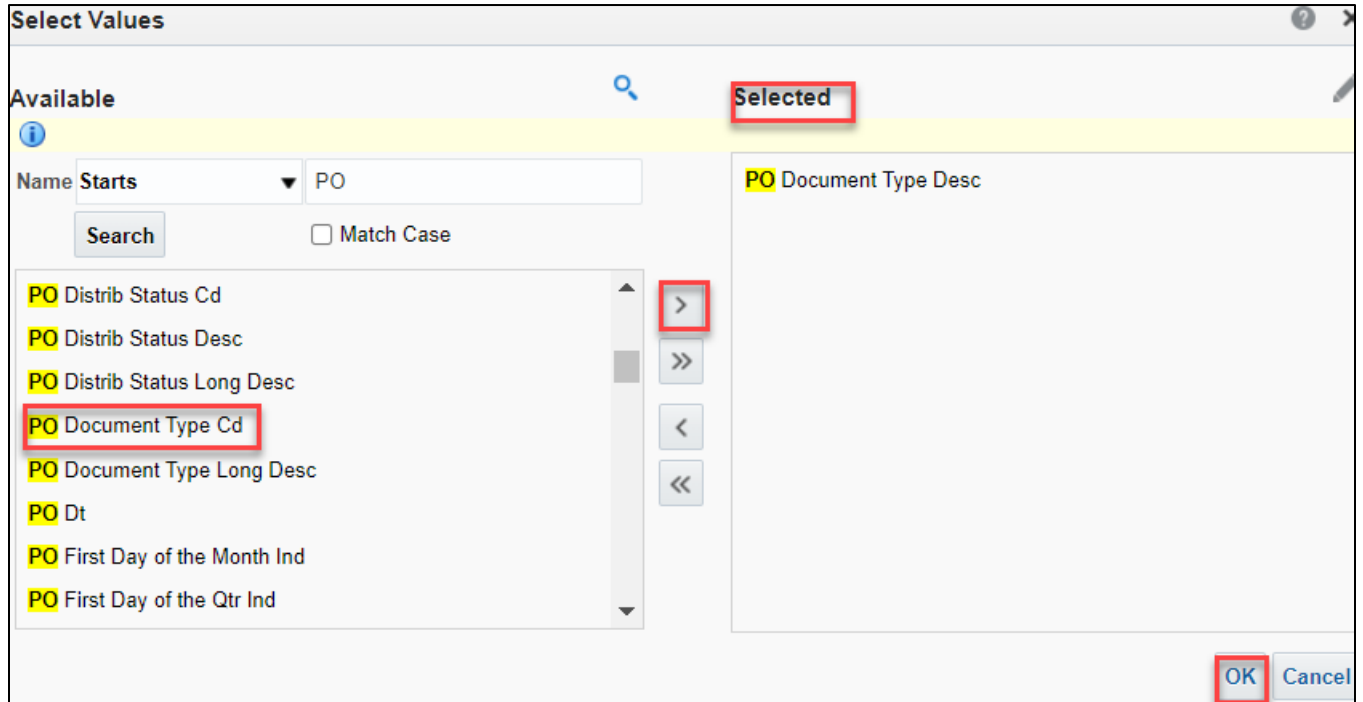


3. The EPM Data Warehouse Data Dictionary opens the *Select Values* window.
 - a. Enter a search value in the *Name* field such as "PO" for the purchase order module.
 - i. In the name field, "Starts" defaults. If that operator does not yield desired results, try using "Contains."
 - ii. Deselect the **Match Case** box to expand search options.
 - iii. Select the **Search** button.

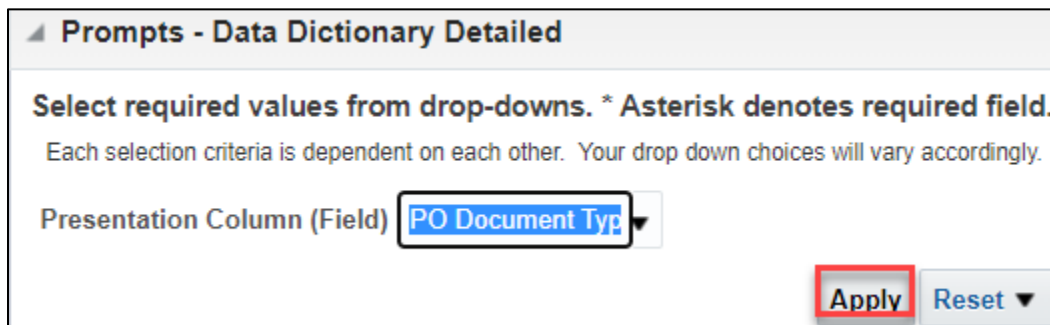


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4. The EPM Data Warehouse Data Dictionary updates the *Available* pane with all the data fields that start with "PO."
 - a. Review the list and highlight the one(s) that fit your search value.
 - b. You can keep adding other values to search for.
 - 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. You can keep adding other search values. After all your chosen values are in the *Selected* pane, press **OK**.
6. The *Prompts* section reflects the search value(s). Select the **Apply** button.



Step 3: Review the search results

1. The EPM Data Warehouse Data Dictionary displays the search results in the *Results* section. You can see the *Subject Areas*, *Presentation Tables (folder)*, and *Presentation Columns (field)* that contain the data elements.

Results - Data Dictionary Detailed

Data Dictionary Detailed

EPM Data Warehouse Repository Documentation
Time run: 6/27/2022 11:56:51 AM

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

The EPM Data Warehouse Data Dictionary groups SWIFT data fields by these categories: FMS and SCM.

- **FMS:** All SWIFT financial reports are under “FMS” for Financial Management System.
- **SCM:** All SWIFT procurement reports are under “SCM” for Supply Chain Management.

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.

2. 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.

- Use the **Reset** button at the bottom of the prompts section. Select an option.
 - *Reset to last applied values*
 - *Reset to default values.*
 - *Clear All* removes any prompt selections before running the report with new prompt values.
- 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 ▼

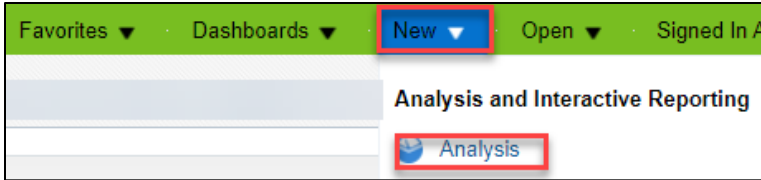
Filters - Data Dictionary Detailed

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

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

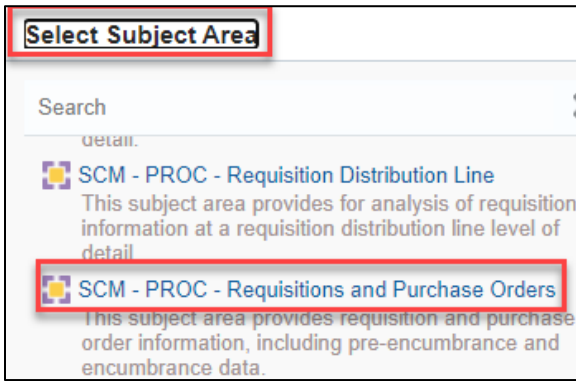
To show how to use the data element, we'll create a new analysis. For more details about this process, view the [Create a New Analysis](#) quick reference guide from the [EPM Data Warehouse Training](#) webpage.

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

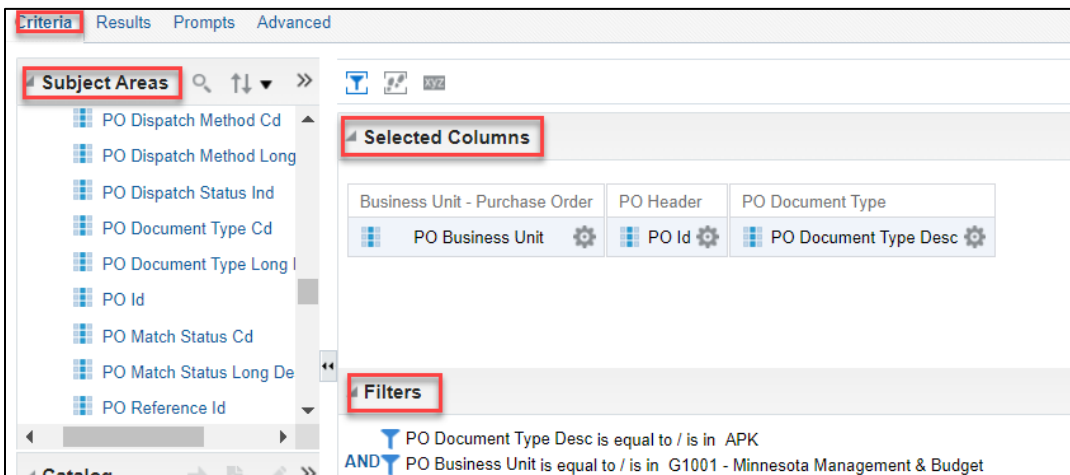


2. You will see the *Select Subject Area* list. Review and select the *Subject Area* that best fits.

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." Select this option.



3. The EPM Data Warehouse opens an untitled analysis pane for the "SCM-PROC-Requisitions and Purchase Orders."
 - a. In the *Subject Area*, look for the "PO Document Type" folder. Drag and drop all the desired data elements into the *Selected Columns* pane. For this report, add "PO Document Type Desc," "PO ID," and PO Business Unit.
 - b. Add a filter for the *PO Document Type* of "APK" for annual plans. Also, add a filter for *PO Business Unit* of "G1001 – Minnesota Management and Budget."



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4. 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. You can save it *My Folders* to run an updated version.

The screenshot shows the SWIFT software interface with the 'Results' tab selected. The left sidebar contains a tree view under 'Subject Areas' with folders for 'SCM - PROC - Requisitions', 'Fact Requisitions and P...', 'Account', 'Account Tree - KK Acco...', 'Agency Cost1 (CF1)', 'Agency Cost2 (CF2)', and 'AM Profile'. Below this is a 'Catalog' section. The main area is titled 'Compound Layout' and contains a table with the following data:

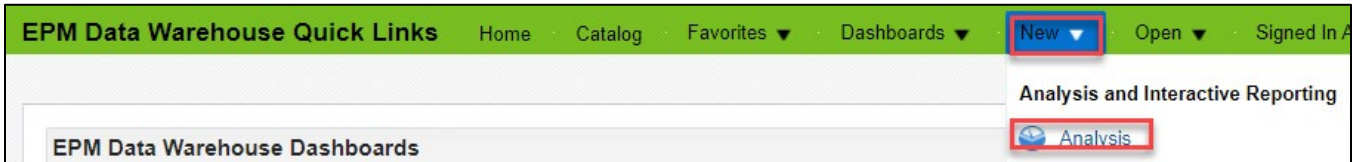
PO Business Unit	PO Id	PO Document Type Desc
G1001 - Minnesota Management & Budget	3000000115	APK
G1001 - Minnesota Management & Budget	3000000118	APK
G1001 - Minnesota Management & Budget	3000000120	APK
G1001 - Minnesota Management & Budget	3000000122	APK

Appendix A: Hover Over Text in a New Analysis

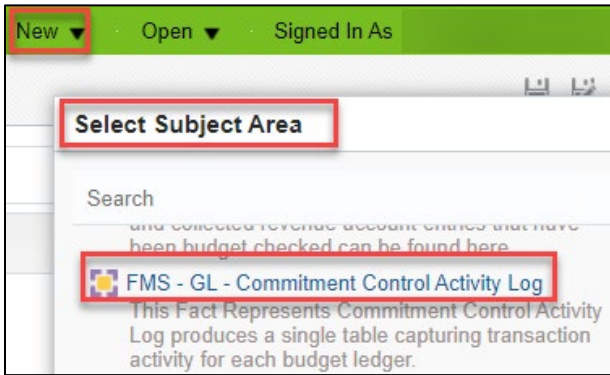
When you open a new analysis and select a *Subject Area*, you can hover over the text of a SWIFT data field. The EPM Data Warehouse will display a description of that data field from the EPM Data Warehouse Data Dictionary. This description can help you understand what is included in the data field.

NOTE: Not all data fields have hover over descriptions.

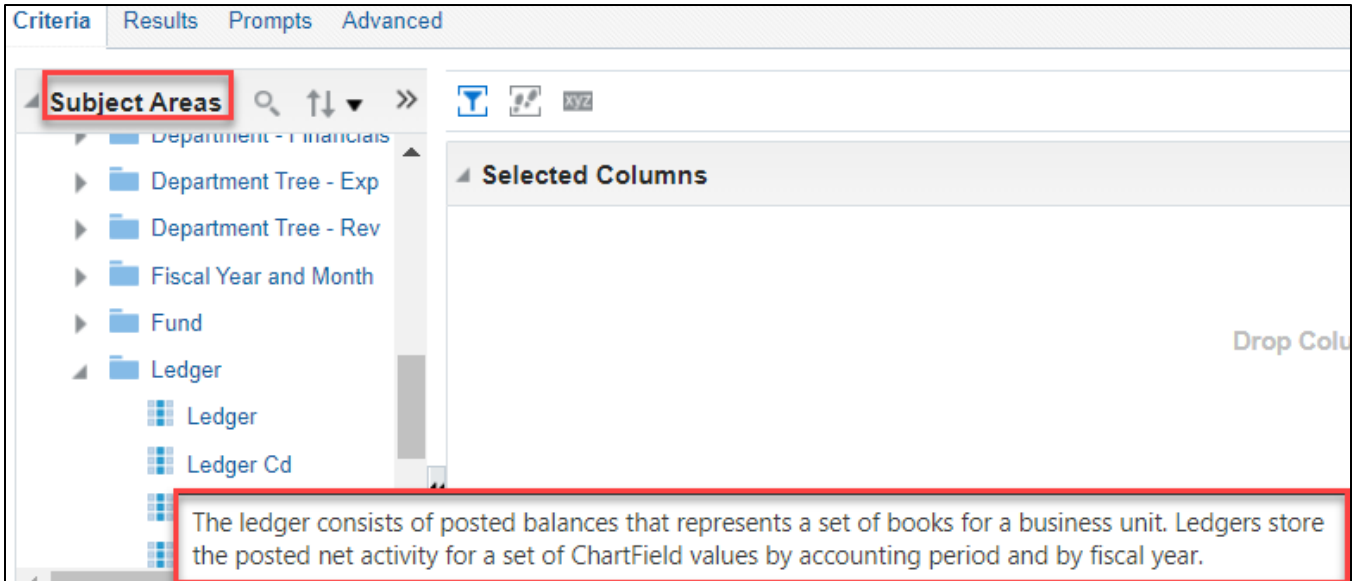
1. On the global menu, select *New*. Then, select *Analysis*.



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. Open a folder on the column. Hover over the SWIFT data field and see a description of what is contained in it.



Appendix B: EPM Data Warehouse Data Dictionary Tab

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 elements in *Subject Areas* that you want to search.
 - a. Select **Apply** to find all the data elements 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**.

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: 6/27/2022 12:35:56 PM

Fact Repository

Subject Area	Presentation Table (Folder)	Presentation Column (Field)
FMS - ALL - Expenditures	""- Customer - Bill To (AR Item Activity)""	Bill To - Customer Address4
FMS - ALL - Expenditures	""- Customer - Bill To (AR Item Activity)""	Bill To - Customer City

- 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 - Bill To (AR Item)""	Bill To - Customer State	AR Item
FMS - ALL - Expenditures	""- Customer - Service (AR Billing Line)""	Service - Customer Address	AR Billing Line

[Get more rows](#)

Analyze - Edit - Refresh - Print - Export

Appendix C: EPM Data Warehouse Data Dictionary Detailed Tab

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 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.

EPM Data Warehouse Data Dictionary Home Catalog Favorites Dashboards

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 ▼

- Enter a value in the *Presentation Column (Field)* section.
- Select **Apply**.

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3. 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: 6/27/2022 12:43:10 PM			
Fact Repository			
Subject Area	Presentation Table (Folder)	Presentation Column (Field)	Presentation Column
FMS - ALL - Expenditures	PO Header	PO Document Type Cd	
FMS - ALL - Receipts	PO Header	PO Document Type Cd	

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

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. Open the section and deselect All Column Values. 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.
2. 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.
3. 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.

4. Select Apply.

EPM Data Warehouse Data Dictionary Home Catalog Favorites Dashboards

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 - Exper ▼

Presentation Table (Folder): NULL

Presentation Column (Field): (All Column Values)

Logical Table: FMS - ALL - Expenditures

Logical Column: FMS - ALL - Receipts

Physical Table: FMS - AP - Account Entries

Physical Column: FMS - AP - Voucher

Physical Column Search: Search...

Apply Reset ▼

5. The Results section may yield a large results list that includes the usual columns.

Results - Data Dictionary Detailed All Columns

Data Dictionary Detailed All Columns
EPM Data Warehouse Repository Documentation
Time run: 6/27/2022 12:41:26 PM

Presentation Table (Folder)	Presentation Column (Field)	Presentation Column Desc	Logical Table	Logical Table Source
Account	Account Cd		Account	D_W_Account_VW
Account	Account Detail Cd		Account	D_W_Account_VW
PO Distribution Line	Account Cd		PO Distribution Line	D_W_PO_LN_DIST_AS_DIM

6. 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

Results - Data Dictionary Detailed All Columns

Data Dictionary Detailed All Columns
EPM Data Warehouse Repository Documentation
Time run: 7/1/2022 11:42:40 AM

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

7. 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.

FMS - ALL - Expenditures	""- Customer - Bill To (AR Billing Header)""	Bill To - Customer Address1	AR Billing Header	D_W_B
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◀ [Horizontal scrollbar] ▶