

## QUICK REFERENCE GUIDE

Updated November 28, 2022

### Glossary of Terms for the EPM Data Warehouse

**Analysis:** An analysis is the process of using the Criteria tab to add columns (fields) in the Selected Columns section that will display on the Results tab. An analysis allows you to explore and interact with information by visually presenting data in easy-to-understand formats such as tables or graphs. Once an analysis is saved in an organized coherent format that is suitable for sharing, printing, and/or publishing; it becomes a report.

**Catalog:** The Catalog is where the EPM Data Warehouse stores objects, saved reports, and dashboards that are organized into personal or shared folders.

**Column:** A column is a data element from a Subject Area folder in the EPM Data Warehouse. Columns represent fields in SWIFT. When creating a new analysis, dashboard, or prompt, you add the column from the Subject Area folder into the Selected Columns section. You can add filters in columns to limit the data you want displayed.

**Dashboard:** A dashboard is a customized collection of objects, such as analyses, actions, alerts, pages, and links. Dashboard pages are presented as tabbed sheets and allows an agency to develop and present several analyses and reports that are accessible from one place.

**ELM:** An acronym for Learning Management for the enterprise (ELM). It is the State of Minnesota's learning management system.

**EPM Data Warehouse:** It is the reporting platform for the State of Minnesota. The EPM (Enterprise Performance Management) Data Warehouse contains Financial and Supply Chain Management (FSCM), Human Capital Management (HCM), and Enterprise Learning Management System (ELM) data. You can use the EPM Data Warehouse to gather, analyze, present, and save data. You can query and present data in various formats such as tables, graphs, and dashboards.

**EPM Data Warehouse Data Dictionary:** The data dictionary is a repository of where all pieces of data are located by Subject Area, table (folder), and column (field). While working on an analysis, location information is available when hovering over a particular column. The EPM Data Warehouse Data Dictionary is updated whenever new tables are added to the EPM Data Warehouse. Access it from Dashboards in the Global menu.

**EPM Data Warehouse Overview.** This is a dashboard that provides links to training, reference guides, documentation, and module-specific dashboards. It also links to support resources for the EPM Data Warehouse.

**Export:** An export is the process of transferring the data from a report or analysis in the EPM Data Warehouse into a different format such as a spreadsheet, HTML, PowerPoint, or PDF document.

**Fact:** It is usually a numerical value or a measure related to the data in an analysis. Fact folders provide context and meaning to the facts. Many Subject Areas contain a Monetary Amount fact, which adds up the data values selected in the analysis. For example, in the All-Expenditure Subject Area, Monetary Amount is the sum of the amount expended for that ChartField selection or the amount on an individual voucher line in a drill down.

**Favorites:** The Favorites drop-down menu is located on the global menu and lists saved pages you marked as a favorite.

**Filter:** Filters allow you to apply criteria to limit results when creating an analysis. A prompt in EPM Data Warehouse is a type of filter. You can create and update filters in several places in the Criteria tab of an analysis.

- Create a filter in an existing column in the Selected Columns area
- Create a filter in the Filters section
- Create a filter for the current Subject Area inside the Filters section

**FSCM:** It is an acronym for *Financial and Supply Chain Management*. It is a group of data within the EPM Data Warehouse that holds financial (accounting) and supply chain (procurement) data from SWIFT.

**Folder:** The EPM Data Warehouse uses folders to store saved reports, analysis, dashboards, and data elements. By saving the analysis or report to a Subject Area folder, you can access it when you run it or create a new version of it in the same Subject Area. When you access the Catalog, you will see two main folders: My Folders and Shared Folders. My Folders allows individuals to save their personal analyses. My Folders is only available to the individual user. Shared Folders are available to all users with EPM Data Warehouse security. It includes shared dashboards and analyses. You will need permissions to access the data in some of the shared folders. Depending on your permissions, you likely cannot save reports to a shared folder. The most common shared folder is the `_Portal` in the `_Statewide` folder.

**Global Menu:** This menu area is always displayed at the top of the pages in the EPM Data Warehouse. This menu allows you to easily access the functionality provided by the EPM Data Warehouse. Menu items include Home, Catalog, Favorites, Dashboards, New, and Open.

**HCM:** It is an acronym for *Human Capital Management* (HCM). It is a group of data within the EPM Data Warehouse that holds workforce and compensation data from SEMA4. HCM data includes both financial and non-financial elements.

**My Folders:** This is the area within the Catalog section of EPM Data Warehouse where users save content and is only accessible to the individual user.

**My Dashboard:** This is your personal dashboard. All users have their own dashboard which they can customize as desired.

**OBIEE:** is an acronym for *Oracle Business Intelligence Enterprise Edition (OBIEE)*. It is the comprehensive reporting platform for the EPM Data Warehouse.

**ODBC:** An acronym for *Open DataBase Connectivity*. This functionality allows interaction between applications using a common set of communication protocols. ODBC connections are required to run the EPM Data Warehouse Crystal reports that are accessible via the EPM Data Warehouse webpage.

**Presentation Field.** In the EMP Data Warehouse Data Dictionary, a presentation field is a column or data element.

**Presentation Table.** In the EPM Data Warehouse Data Dictionary, a presentation table is a folder.

**Prompt:** A prompt allows you to customize which data is returned in an analysis or report typically from a dashboard. Not all existing dashboards, analyses, or reports have prompts. There are two types of prompts in the EPM Data Warehouse: Inline prompts and dashboard prompts. Inline prompts occur at the analysis or report level. It is embedded in the individual analysis and is not stored in the Catalog. They are not reusable in other analyses. Dashboard prompts occur at the dashboard level and are stored in the Catalog and are reusable in other dashboards.

**Report:** A report begins as an analysis. Reports are a saved, coherent and organized group of data intended for presenting, sharing and/or printing.

**Security:** Security determines the level of access to information afforded to a person based on their roles and permissions.

There are three areas of roles needed to access SWIFT data in the EPM Data Warehouse.

1. **Access to the EPM Data Warehouse:** Everyone must have BI Author role to access the EPM Data Warehouse.
2. **Access to Statewide Systems:** Statewide System access roles determine which EPM Data Warehouse Subject Areas and the columns within those Subject Areas a user can see.
  - **HCM Roles:** SEMA4-related roles as listed on the Security Access Form
  - **FSCM Roles:** SWIFT INQUIRY roles that are associated with each module
  - **ELM Roles:** M\_EPM\_ELM\_REPORT (Learning Management Reporting) role
3. **General EPM Data Warehouse Roles:** These roles determine the type of work a user can perform and which folders, dashboards, and reports the user can access in the EPM Data Warehouse. There are four roles:
  - Basic Report Developer
  - Agency Specific Advanced Report Developer
  - Agency Specific Dashboard Developer
  - Agency Administrator

# SWIFT STATEWIDE INTEGRATED FINANCIAL TOOLS

**Statewide Folder:** In the EPM Data Warehouse, the Statewide folder contains dashboards, reports and analyses widely available to all agency users with appropriate permissions. The Statewide Folder can be accessed from the Global Menu as well as the Catalog.

**Subject Area:** Data in the EPM Data Warehouse is organized into Subject Areas. Subject areas are predefined and represent logical groupings of data. Every analysis is based on data contained and presented within a Subject Area. When you create a new analysis, you first select the Subject Area. Subject Areas describe the information contained within, for example, accounting entries.

**Supply Chain:** This refers to SWIFT procurement data, such as purchase orders, requisitions, receipts, and events.