Introduction to the EPM Data Warehouse and OBIEE

EPM Data Warehouse

The Enterprise Performance Management (EPM) Data Warehouse is an online database that allows you to make customized reports for analyzing SWIFT data. To make these reports, you will use three features in this database:

- **Subject Area**: A content area or category of SWIFT data. The EPM Data Warehouse loads data from SWIFT and classifies that information according to Subject Areas.
- **Analysis**: A query based on a Subject Area. When creating an analysis, you can select a Subject Area to analyze SWIFT data.
- **Data Elements and Columns**: A data element is SWIFT data or information that you can add from a Subject Area to an analysis. Adding a data element will create a column in the analysis.
- **Report**: After creating and saving an analysis, you can export it as a report, which is a file that may be formatted as a Word document, Excel spreadsheet, or PDF.

OBIEE

To search for a Subject Area, add those Subject Areas and data elements to an analysis, and run a report for that analysis, you will use a reporting tool in the EPM Data Warehouse called the Oracle Business Intelligence Enterprise Edition (OBIEE).

**Note**: Information on the EPM Data Warehouse only loads SWIFT data from the previous business day, so keep in mind that OBIEE can run reports that are only as recent as the prior workday.

Navigating the EPM Data Warehouse and OBIEE

This Quick Reference Guide provides an overview of the navigation features in the EPM Data Warehouse and OBIEE, including:

- **Login**: How to log in and change your starting page.
- **Basic Navigation**: How using the following navigation menu options:
  - **Home**
  - **Catalog**
  - **My Folders and Shared Folders**
  - **Favorites**
  - **Dashboards**
  - **New**
  - **Open**
  - **Log Out**
Login

Log in to the EPM Data Warehouse

1. Log in to the Administrative Portal, and from My Homepage, open the EPM Data Warehouse by selecting the following tiles:

<table>
<thead>
<tr>
<th>Navigation Option</th>
<th>Navigation Path</th>
</tr>
</thead>
<tbody>
<tr>
<td>Navigation Collection</td>
<td>Data Warehouse, Warehouse Reporting.</td>
</tr>
<tr>
<td></td>
<td>The Data Warehouse will open in a new browser tab or window.</td>
</tr>
</tbody>
</table>

2. When the EPM Data Warehouse opens, you will land on your starting page.

   **Note:** Different users may not land on the same starting page, depending on their account settings—see View or change your starting page below.

View or change your starting page

1. Find your name or Employee ID in the Signed In As field toward the top-right side.

   Hover your cursor over this field to open the My Account drop-down link.

2. Select the My Account drop-down link to open your account settings.

   **Note:** The My Account window will display, where you can find and change your account settings.

   Make sure the Preferences tab is selected, and select the Starting Page field.
4. A drop-down list will open, showing all pages available to you in the EPM Data Warehouse. Select the page you would like as your default starting page, and then press the OK button.

Basic Navigation

To the left of the Signed In As field, you will find the following navigation menu options (also known as the Global Header options), which open the following options in the EPM Data Warehouse:

- **Home**: The EPM Data Warehouse Homepage.
- **Catalog**: A collection of folders that open analyses and dashboards.
- **Favorites**: A drop-down option that lets you save and access pages added to your favorites list.
- **Dashboards**: A collection of analyses or reports that provide visualizations or summaries of data.
- **New**: An option to create an analysis, dashboard, filter, or dashboard prompt.
- **Open**: An additional navigation method to open an existing analysis or dashboard.

Home

Select Home to navigate to the EPM Data Warehouse Home page.

When you open the EPM Data Warehouse Home page, you will see it divided into sections with links. These links allow you to quickly access the following actions in OBIEE:
• **Create**: Create a new analysis and run a report.

• **Browse/Manage**: Search for an existing analysis or dashboard.

• **Get Started**: Open pages with additional product information and software details regarding the EPM Data Warehouse and OBIEE.

• **Recent**: Go to recently opened pages, including analyses and dashboards.

• **Most Popular**: Go to popular pages, including analyses and dashboards.

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**Catalog**

Select **Catalog** to go to the Catalog page, which is collection of folders in the EPM Data Warehouse that you can use to open saved analyses and dashboards.
My Folders vs. Shared Folders

When using the catalog page, you will see folders organized according to the following two categories:

- **My Folders** refer to personal catalog folders that can only be accessed by you and not by any other users of the EPM Data Warehouse. If you wish to find a folder that’s only accessible to you, you can find it in the *My Folders* location.

- **Shared Folders** refer to catalog folders that can be accessed by any users of the EPM Data Warehouse. If you wish to find or share a folder that can be accessed by both you and other users with the same security access, you can find it in the *Shared Folders* location.

Once on the *Catalog* page, you can use the left-menu to drill down through these folders and find an analysis or dashboard you wish to open.

**Note:** You can close the left-menu at any time by selecting the left arrow in the middle of the menu.
The left-menu will collapse to the side. Select the right arrow to reopen the left-menu.

Once you find the analysis or dashboard you want to open on the Catalog page, select the Open link or the Edit link.

- The Open link opens an analysis or dashboard in a format with criteria that cannot be modified.

**Note:** When you open an analysis, some may fail to open when they have too much data; if this occurs, select the Edit link instead, which allows you to filter what data display—see below.
The Edit link opens the analysis or dashboard in a format with criteria that can be modified.

Overview the analysis page: After opening an analysis, you will see the following four tabs:

- **Criteria**: Allows you to add data elements from the subject area to the analysis.
- **Results**: Allows you to display and edit the results of the analysis.
- **Prompts**: Allows you to add prompts to filter data in the analysis.
- **Advanced**: Allows you to edit code used in the analysis.

**Note**: The Advanced tab should only be used by advanced EPM Data Warehouse users. For more details about using these tabs on the analysis page, see the EMP Data Warehouse page.

**Note on Security Roles**: Not all employees have access to the same folders or pages. What folders and pages you are able to open using the catalog may depend on your security roles.

- State employees who are users of SWIFT have assigned security roles, which determine what business functions users have access to in SWIFT. These security roles are based on job duties (as determined by agencies).
If you have security roles to access data in SWIFT, you will have those same inquiry security roles to access subject areas in the EPM Data Warehouse, as long as you also have the BI Author role and one of the General Warehouse roles.

For more info on EPM Security Roles, please see the EPM Data Warehouse Security Quick Reference Guide.

Favorites

After opening a page, you can save it to your Favorites, which is a drop-down list of pages you save for quick and easy access. To save pages to your Favorites, select Favorites. Then select the “Add to Favorites” option from the drop-down list.

When you select the Favorites drop-down list again, the page you just added will display in your Favorites list. Now, you can quickly open this page by selecting it from this drop-down list.

If you need to remove the page from your Favorites, select the “Remove from Favorites” option from the Favorites drop-down list after opening that page.

Note: The “Remove from Favorites” option will not appear unless you have already opened and saved the page to your favorites.
Dashboards

In addition to using the *Catalog*, you can navigate to a dashboard using the *Dashboards* menu option. A dashboard is a collection of analyses or reports that provide visualizations or summaries of data. Select this navigation menu option to open a drop-down list of folders in the EPM Data Warehouse.

To open a dashboard folder and find a specific dashboard, select the plus (+) icon for that folder.

Likewise, you can close a dashboard folder by selecting the minus (-) icon for that folder.

After opening a dashboard folder, select which dashboard you want to open.

**Note:** After the page for the dashboard opens, it may include different links and tabs.

- For example, the *OBIEE Support* dashboard includes multiple links to other dashboards, such as the *Commitment Control and General Ledger* dashboard.
Likewise, the *Commitment Control and General Ledger* dashboard includes multiple tabs. Make sure to select the tab for which kind of data you want to view.
New

Select New to create one of the following options:

- **Analysis**: Create an analysis.
- **Dashboard**: Create a dashboard.
- **Filter**: Create a filter for an analysis to limit the amount of data displayed in the analysis.
- **Dashboard Prompt**: Create a prompt to filter data for an analysis embedded within a dashboard.

Note: For Quick Reference Guides on how to create analyses, dashboards, filters, or dashboard prompts, see the EMP Data Warehouse page for further details.

Open

In addition to using the Catalog and Dashboards, another way to navigate to an analysis or dashboard is by using the Open link. Select this link to open a drop-down list with three navigation options:

- **Open folder**: allows you to search for and open a page.
- **Recent section**: displays a list of recently opened pages.
- **Most Popular section**: displays a list of popular pages used in the EPM Data Warehouse.

Open Recent and/or Most Popular pages

From the Recent and Most Popular sections, select a page to open it.

- The Recent section list pages most recently opened in the EPM Data Warehouse.
• The *Most Popular* section lists pages most commonly opened in the EPM Data Warehouse.

**Use the *Open* Folder**

1. To search for a page in the EPM Data Warehouse, select the *Open* folder.

   ![Open Folder](image1.png)

2. An *Open* window will display. The left side of this window will list the folders in the EPM Data Warehouse. Select the arrow icon for a folder to open it and reveal further menu options.

   ![Open Window](image2.png)

   - **Note:** After you open a folder, the arrow will change from pointing right to pointing down.
3. Many folders have subfolders. Select the arrow icon for each subfolder you want to open until you drill down to a final folder. Then, select that folder.

4. A list of pages in that folder will display to the right. Select which page you want to open.

5. After selecting the page you want to open, the name of the analysis or dashboard for that page will appear in the Name field below. Select the OK button to continue.

The analysis or dashboard will open in a new page. (The page may take a few moments to load.)

Log Out