



Introduction to the EPM Data Warehouse for SWIFT Data

User Guide

March 27, 2023

Contents

- EPM Data Warehouse for SWIFT 4
- Overview of the EPM Data Warehouse..... 4
 - Security Roles and Permissions for SWIFT Reports 5
 - Key Terms 8
 - Analysis/Report 8
 - Columns 8
 - Filters 8
 - Folders 9
 - Prompts 10
 - Subject Areas 12
 - Glossary of Terms 12
- Navigating the EPM Data Warehouse 13
 - Log In 13
 - Global Menu 13
 - Home 13
 - Catalog 14
 - Favorites 17
 - Dashboards..... 18
 - New..... 22
 - Open 23
 - Signed In As (My Account)..... 24
 - Search 26
 - Sign Out 27
 - Navigational Objects..... 27

Analysis Editor 28

 Criteria Tab 29

 Results Tab..... 29

SWIFT Help Resources 31

EPM Data Warehouse for SWIFT Data

This user guide is for agency staff who are either new to the Enterprise Performance Management (EPM) Data Warehouse or who are experienced users who need to confirm or add to their knowledge. This guide is focused on navigation using SWIFT-related data.

The EPM Data Warehouse is a reporting platform for the State of Minnesota. 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.

The EPM Data Warehouse contains Financial and Supply Chain Management (FSCM), Human Capital Management (HCM), and Enterprise Learning Management System (ELM) data. SWIFT (StateWide Integrated Financial Tools) is the PeopleSoft based online financial, procurement, and reporting system used by the State of Minnesota. FSCM data in the EPM Data Warehouse is SWIFT data. Many of the concepts, processes and terms described in this guide are the same for HCM and ELM reports.

Overview of the EPM Data Warehouse

State Agencies that Support the SWIFT Data in the EPM Data Warehouse

- Minnesota Department of Administration, Office of State Procurement (OSP)
- Minnesota IT Services (MN.IT)
- Minnesota Management and Budget (MMB)

Oracle Business Intelligence Enterprise Edition (OBIEE) Platform

The EPM Data Warehouse uses the Oracle Business Intelligence Enterprise Edition (OBIEE) reporting platform.

Availability of the EPM Data Warehouse

The EPM Data Warehouse availability is not the same as the Administrative Portal and SWIFT. It is generally available from 7 a.m. to 7 p.m. on business days.

Scheduled Data Load

The SWIFT data in the EPM Data Warehouse is not live SWIFT data. It is a data load from SWIFT into the EPM Data Warehouse platform. Once SWIFT's nightly batch completes, the batch load moving SWIFT data to the EPM Data Warehouse begins. This batch load completes the next business day.

Sign up to receive system status emails from the [Email Lists \(GovDelivery\)](#) of the scheduled data load from SWIFT to the EPM Data Warehouse. Select "EPM Data Warehouse" on the list page.

Email Lists (GovDelivery)

The following links will bring you to a GovDelivery QuickSubscribe page. These Quick Subscribe pages will ask for your work email address. Some email lists/topics are intended only for state email addresses, and external (e.g., Gmail or Yahoo) email addresses are not accepted. If you have already subscribed to other GovDelivery topics and bulletins, you may be asked to provide your password. If you have any questions about subscribing to these lists, email website.mmb@state.mn.us.

[EPM Data Warehouse](#)

SWIFT Reports from SWIFT versus from the EPM Data Warehouse

SWIFT queries and reports have real time data. The data output and format for SWIFT reports and queries are predetermined and limited.

The EPM Data Warehouse is a reporting tool outside of SWIFT in the Administrative Portal. The SWIFT data in the EPM Data Warehouse is not live SWIFT data. SWIFT completes batch processing overnight every business day. SWIFT data is loaded into the EPM Data Warehouse the next business day through another batch process. You can create, customize, and save reports with data from a particular Subject Area. The EPM Data Warehouse allows you to manipulate what data is included, determine how it is viewed, and refresh the results easily.

Security is in place to prevent someone from overwriting shared reports. Exceptions include Agency Administrators who can develop shared reports for your agency. You cannot “hurt” the SWIFT data in the EPM Data Warehouse. Expect some trial-and-error when trying to get the data you need. If you customize an existing report and don’t get the expected results, adjust the report criteria and refresh the results.

Security Roles and Permissions for SWIFT Reports

Security determines the level of access to information afforded to a person based on their roles and permissions. There are EPM Data Warehouse Roles needed to access SWIFT data in the EPM Data Warehouse.

Your supervisor needs to request security for you to access the EPM Data Warehouse. They need to complete the “Request for Access to SWIFT, ELM, and SEMA4 Statewide Systems” form. This form is on Minnesota Management and Budget’s Security Access Forms webpage.

<https://mn.gov/mmb/accounting/swift/security/security-forms.jsp>

You will need to have the following.

1. Your Agency Code
2. A role such as the Agency Specific Basic Report Developer
3. Your access to Accounting and Procurement data is based on SWIFT inquiry roles from SWIFT modules.
4. Select the checkbox “M_EPM_FMS_LOOKUP” for access to SWIFT data.

Sample of the EPM Data Warehouse Role Selections Form

EPM Data Warehouse Role Selections		
Use this section only for access to the EPM Data Warehouse. For access to the old Information Access (IA) Data Warehouse, use the form "Request for Clearance: Information Access Warehouse" at https://www.mn.gov/mmb/accounting/swift/security/security-forms.jsp .		
XX BI Author (required for all EPM Data Warehouse users)		
DATA EXTRACTS (from warehouse tables)		
<input type="checkbox"/> Data Extract (M_EPM_DATA_EXTRACTS) (staging tables only; not available in OBIEE)		
GENERAL WAREHOUSE ROLES		
All users of the EPM Data Warehouse must be assigned one or more General Warehouse Roles:		
Agency Code (3 characters) for agency-specific roles*: 1 _____		
2 Agency Specific Basic Report Developer <input type="checkbox"/>	Agency Specific Advanced Report Developer <input type="checkbox"/>	Agency Specific Dashboard Developer <input type="checkbox"/>
Agency Specific Administrator (M_EPM_XXX_AGY_ADMINISTRATOR + M_EPM_AGY_ADMINISTRATOR) <input type="checkbox"/>		
* The agency code entered under General Warehouse Roles is used only to assign the user to the appropriate agency dashboard in OBIEE. It does not affect access to detail-level data in the warehouse. The user's charfield security role (M_FS_CF_SEC_XXXXXX) for the Financial Management System controls access to accounting and procurement data in the EPM Data Warehouse. The user's row security permission list (agency or department ID access) for SEMA4 controls access to SEMA4-related data in the warehouse. A user cannot have access in the warehouse that is different from access in the source FMS and SEMA4 systems.		
ACCESS TO ACCOUNTING/PROCUREMENT DATA (COMES FROM FMS)		
There are no separate roles for financial and procurement data in the OBIEE warehouse. Access is based on the Inquiry roles selected in the Accounting and Procurement sections above. 3 _____		
<input checked="" type="checkbox"/> M_EPM_FSCM_LOOKUP (required if the user will access FMS data in the warehouse) 4 _____		
<input type="checkbox"/> Year-End Financial Reporting Data (staging tables only; not available in OBIEE)		

You can find this and other security forms on MMB's [Security Access Forms](#) webpage.

Your agency may have agency-specific dashboards or reports.

If you cannot access your agency-specific shared dashboards or reports or get the correct data from them, contact your Agency Specific Administrator. The [SWIFT Help Desk](#) can help you find your agency's administrators.

Data Warehouse Security Role Matrix

Your Data Warehouse Security Role impacts what you can see and do in the EPM Data Warehouse. Most new users of the EPM Data Warehouse will be given the Agency Specific Basic Report Developer role. They can view reports, shared dashboards, and agency folders. They can customize and save these reports to My Folders and My Dashboard. They cannot save reports to shared folders such as agency folders.

Permission	Agency Specific Basic Report Developer	Agency Specific Advanced Report Developer	Agency Specific Dashboard Developer	Agency Administrator
View Reports	✓	✓	✓	✓
Create or modify reports	✓	✓	✓	✓
Save a report to My Folders	✓	✓	✓	✓
Edit My Dashboard	✓	✓	✓	✓
Access to Agency folder	✓	✓	✓	✓
View Dashboards	✓	✓	✓	✓
Save reports to Agency Folder		✓	✓	✓
Edit an Agency dashboard			✓	✓
Create a Dashboard				✓
Change users permissions				✓

Information about EPM Data Warehouse Security

- For more details about the security for the EPM Data Warehouse including HCM and ELM roles, view the [Data Warehouse Security](#) quick reference guide.
- You can find required forms on MMB's [Security Access Forms](#) webpage.
- For more information about security roles and permissions, view MMB's [Security](#) webpage.

Key Terms

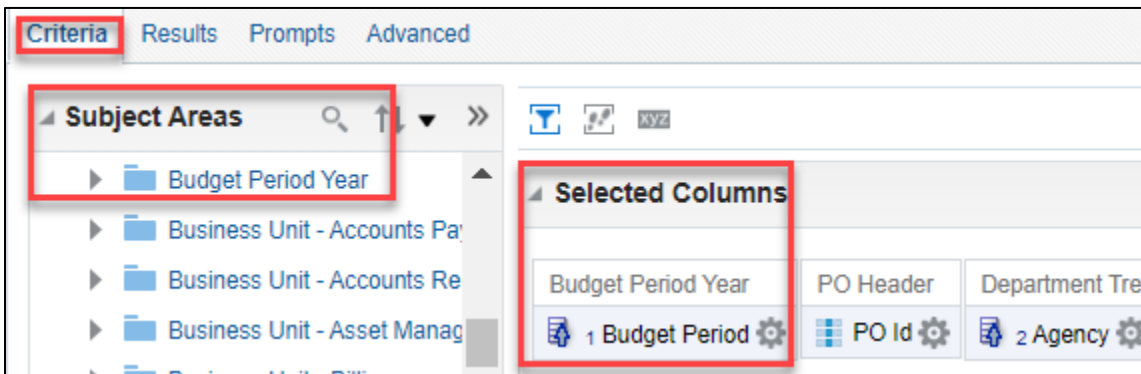
Analysis/Report

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 on the Analysis Editor. 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.

Columns

A column is a data element from a Subject Areas folder in the EPM Data Warehouse. Columns represent fields in SWIFT. When creating or updating a new analysis, report, dashboard, or prompt, you add the column from the Subject Area folder into the Selected Columns section.

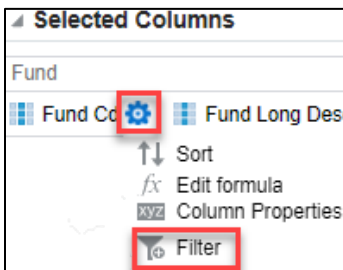


Filters

Filters allow you to apply criteria to limit data results when creating or updating 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.

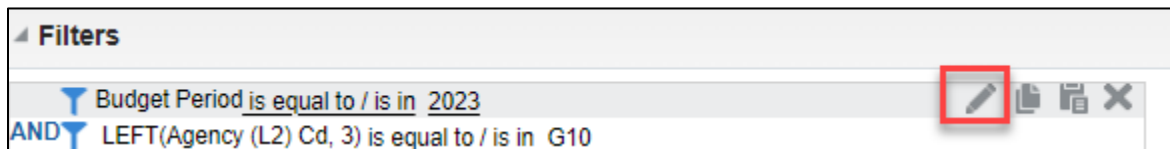
Create and update a filter in an existing column in the Selected Columns area

You can create a filter in an existing column. It will appear in the Filters section.



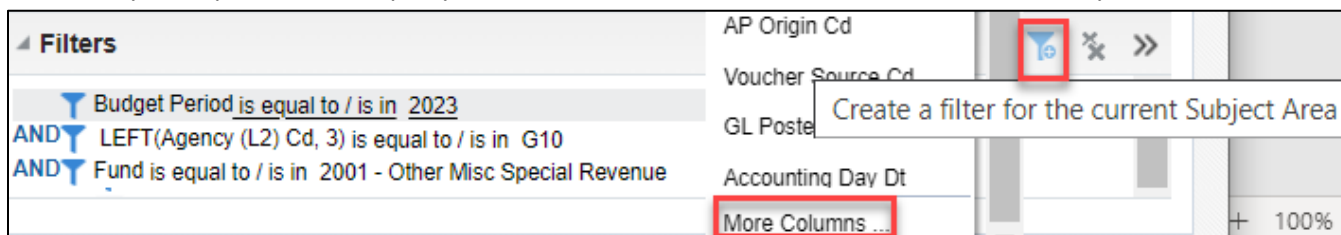
Update a filter in the Filters section

The Filters section of the report shows the existing filters for the selected columns. These filters are originally created from the Selected Columns or from a prompt when saving the report. Using the Edit Filters icon allows you to update them.



Create a filter for the current Subject Area inside the Filters section

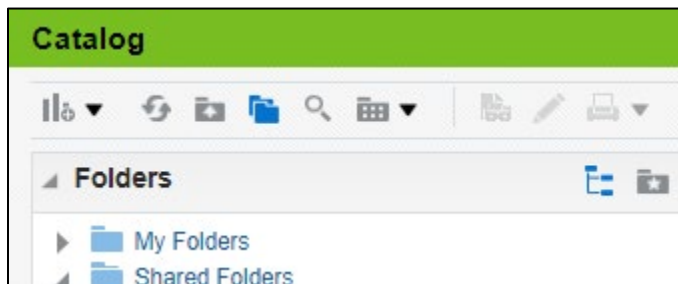
You can further refine the results of your report by creating a filter for the current Subject Area in the Filters section of your report. For example, you can filter the dates to focus on calendar or federal year.



For more information about filters, view the [Update the Data on an Existing Report](#) quick reference guide.

Folders

The EPM Data Warehouse uses folders to store saved objects, such as saved reports, dashboards, prompts and data fields (columns). When you access the Catalog, you will see two main folders: My Folders and Shared Folders.

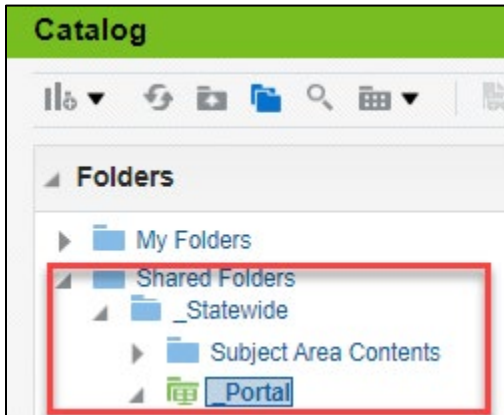


My Folders

My Folders allows individuals to save their personal analyses and reports. My Folders is only available to the individual user.

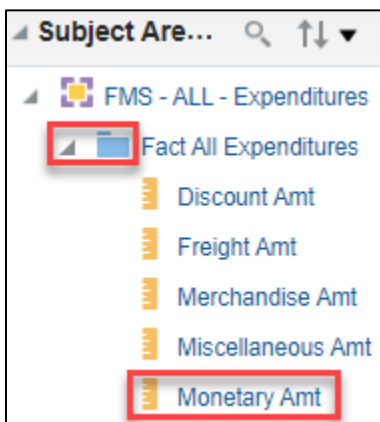
Shared Folders

Shared Folders are available to all users with EPM Data Warehouse security. They include 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 which brings you to `_Statewide` shared dashboards.



Fact Folder

A fact 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.



Prompts

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.

Prompts - PO By Amount

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.

* Budget Period 2023 ▼

* Monetary Amt >= 10000.00

PO Business Unit B0401 - Agriculture ▼

Apply Reset ▼

There are two types of prompts you can add to an analysis in the EPM Data Warehouse: Inline prompts and dashboard prompts.

Inline 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. For more information, view the [Add an Inline Prompt to an Existing Report](#) quick reference guide.

Open Encumbrance Home Catalog Favorites Dashboards New Open

Criteria Results **Prompts** Advanced

Definition
 Add prompts for users when they run this analysis.

Prompt Label	Type	Prompt For	Description	Required
Page 1	Page			

Dashboard Prompts

Dashboard prompts occur at the dashboard level and are stored in the Catalog and are reusable in other dashboards. Depending on your permissions, you may be able to only create prompts to use in My Dashboard. For more information, view the [Add a Dashboard Prompt to a Dashboard](#) quick reference guide.

Search All [] Advanc

Favorites Dashboards **New** Open Signed In

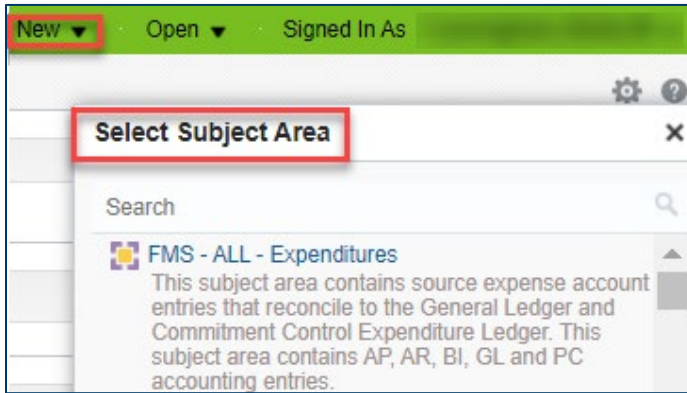
Analysis and Interactive Reporting

- Analysis
- Dashboard**

Subject Areas

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 it.



If you use an existing report, most likely you cannot add data fields from other Subject Areas. If you try, you may get an error a message or the results won't display.

For more information about the Subject Areas for SWIFT, view the [FSCM Subject Areas for Financial and Supply Chain Management](#) quick reference guide. It lists the Subject Area, a description of it, and required SWIFT inquiry roles for it.

1. Financial Management System (FMS) Subject Areas		
FMS – ALL		
Subject Area	Description	SWIFT inquiry role(s)
FMS-ALL-Expenditures	This subject area contains source expense account entries that reconcile to the General Ledger and Commitment Control Expenditure Ledger. This subject area contains AP, AR, BI, GL, and PC accounting entries.	M_FS_AP_INQUIRY M_FS_AR_INQUIRY_REC_ BLLG

Glossary of Terms

For more terms, view the [Glossary of Terms for the EPM Data Warehouse](#) quick reference guide.

Navigating the EPM Data Warehouse

Log In

Log into the EPM Data Warehouse for SWIFT reports through the Administrative Portal.

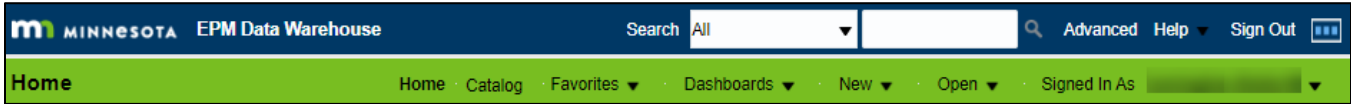
1. Select the following tiles.

Navigation	Navigation Path
Navigation Collection	Data Warehouse, Warehouse Reporting. The EPM Data Warehouse displays.

2. When the EPM Data Warehouse opens, you will land on your starting page. Your starting page may differ from other users depending on settings from your agency or MyAccount

Global Menu

The Global menu is always displayed at the top of the pages in the EPM Data Warehouse. It allows you to easily access the functionality provided by the EPM Data Warehouse. Global menu items include Home, Catalog, Favorites, Dashboards, New, Open, Sign In As (My Account), Search, and Sign Out.



Home

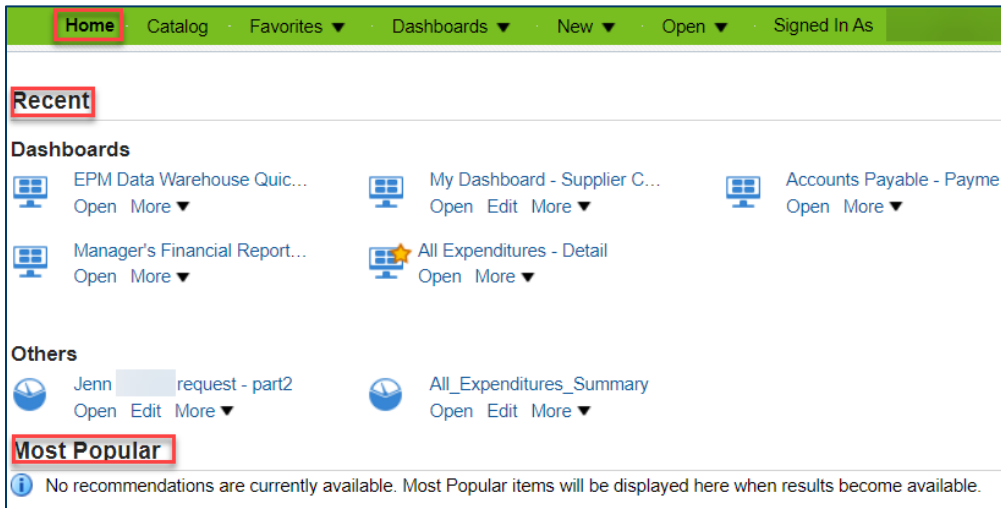
Home refers to a standard Home page provided by Oracle. This Home page is likely not the same as your starting page when you log in. The Home page provides access to recent and most popular objects in the EPM Warehouse.

Recent

This section shows your recent accessed dashboards, reports, and personal prompts if you created any.

Most Popular

This section displays a list of popular pages by users assigned to the groups to which you belong.

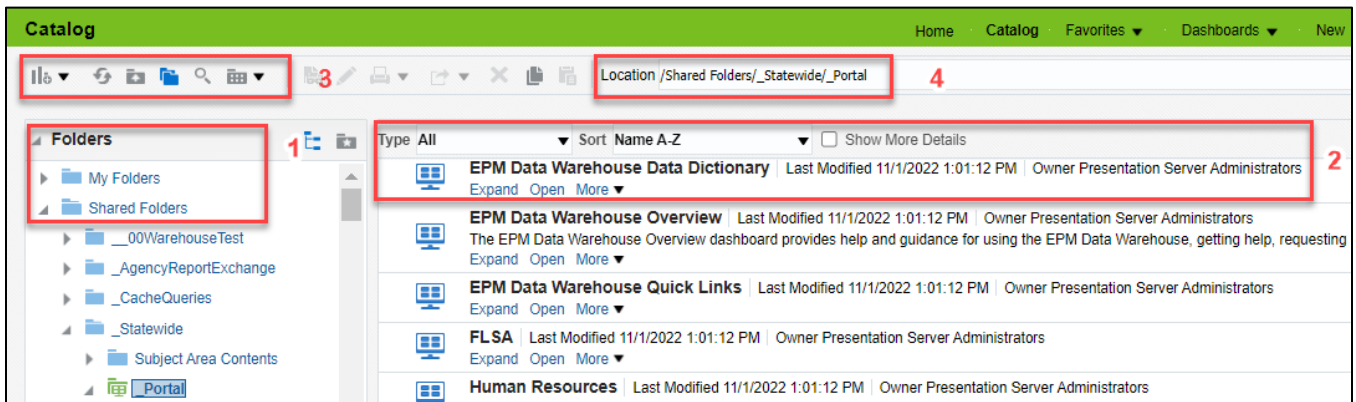


Catalog

The Catalog is where the EPM Data Warehouse stores objects such as reports, folders, dashboards, filters, and prompts. They are organized into My Folders or Shared Folders. What objects and data you can access depends on your security and permissions.

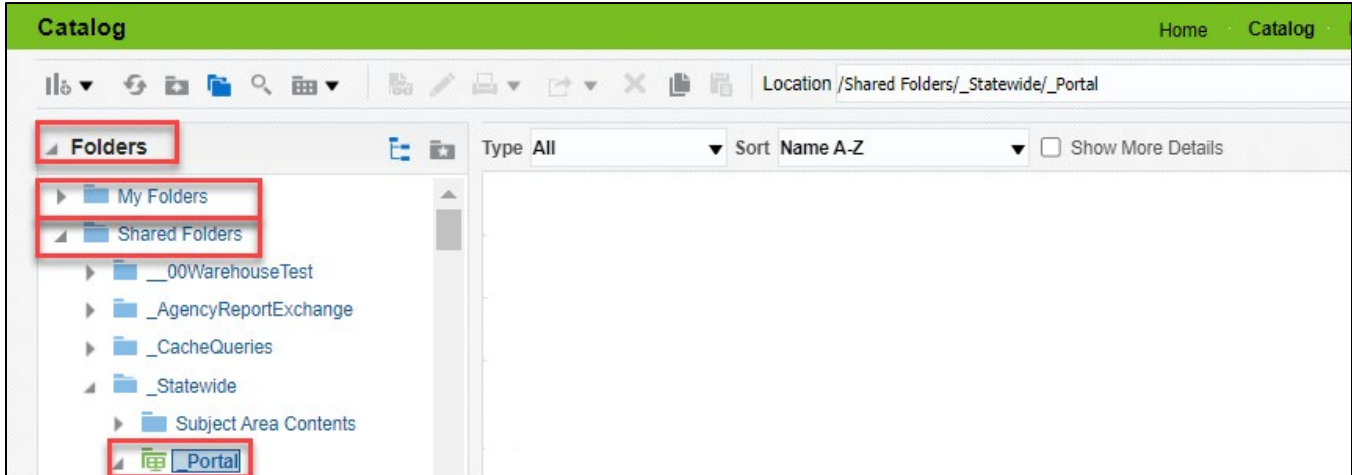
The Catalog displays the following sections.

1. Folders pane
2. Folder contents pane
3. Icons below the green banner
4. Location bar below the green banner.



Folders Pane

Use Folders pane to navigate to My Folders or Shared Folders. The EPM Data Warehouse uses folders to store saved objects.

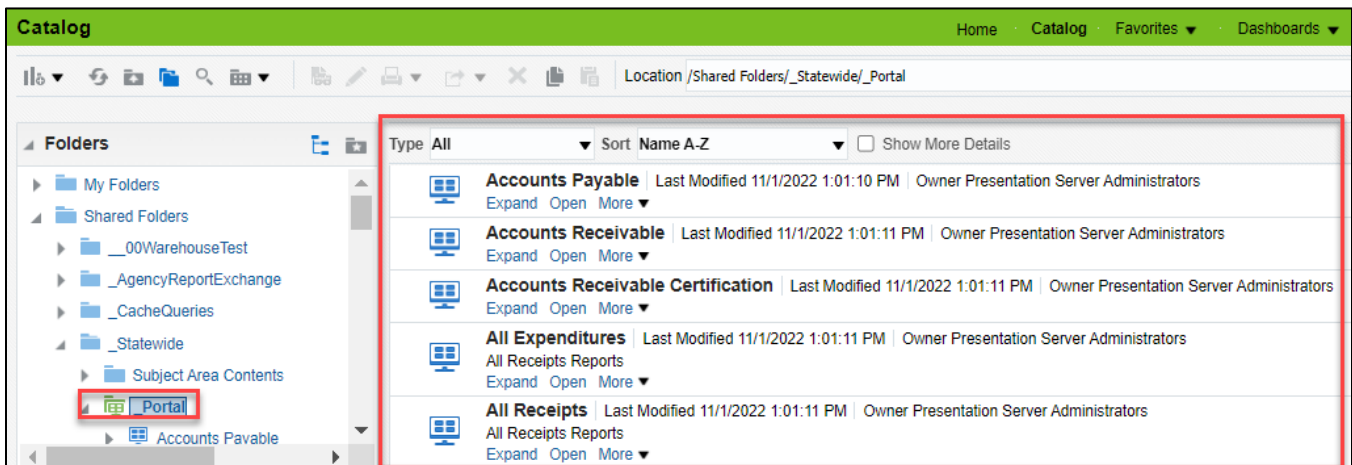


- **My Folders.** My Folders allows individuals to save their personal objects such as reports. My Folders is only available to the individual user.
- **Shared Folders.** Shared Folders are objects that are available to all users with EPM Data Warehouse security. You will need permissions to access the data in some of the shared folders. Depending on your permissions, you likely cannot save reports to a shared folder.

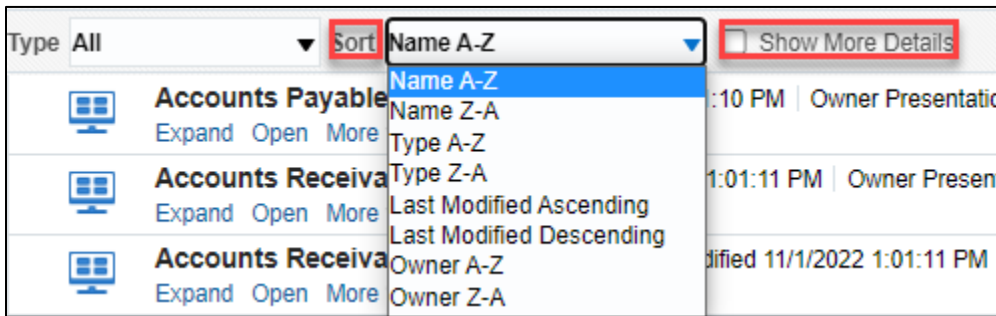
The most common shared folder is the _Portal in the _Statewide folder which brings you to shared dashboards.

Folder Contents Pane

If you select My Folders from the Folders pane, you will see all the objects you saved in My Folders in the catalog contents pane. If you select Shared Folders from the Folders pane, you will see all the shared objects available to you in the catalog contents pane.

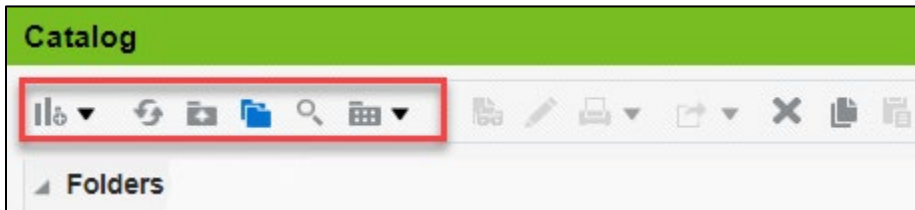


The menu above the catalog contents pane, allows you to sort the folder names and show more details of these folders. It makes it easy to find the report you need.



Icons Below the Green Banner

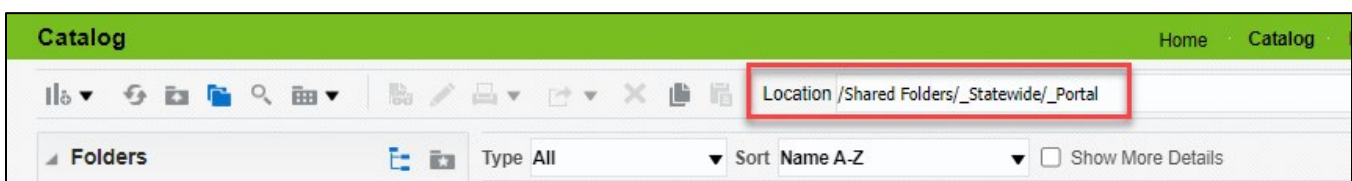
These icons allow you to perform actions on objects within a folder.



- **New.** This icon allows you to add new objects such as a folder in My Folders. It looks like a graph with a plus sign.
- **Refresh.** This icon allows you to refresh the data in a current analysis. It looks like two arrows in a circle.
- **Up.** This icon allows you to move up the next level of folders in the folder tree. It looks like a folder with a plus sign.
- **Show/Hide Folders.** This icon allows you to hide or show the left menu that includes the Folders pane. It looks like folder with an arrow.
- **Search.** The Search icon opens the Search menu. It is a looking glass. The Search menu enables you to search the Catalog for dashboards, folders, or reports with a search term in the title.
- **Change List View Type.** This icon allows you to change the view of the folder contents pane to Descriptive, Details, or List. It looks like a folder with files in it.

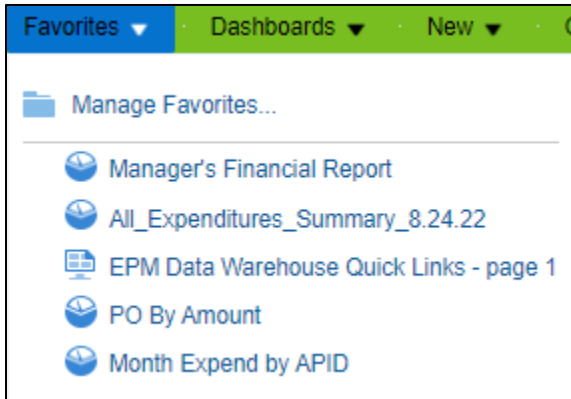
Location Bar Below the Green Banner

This bar shows the folder path where an object is saved. For example, you can see if you are in Shared Folders or My Folder.



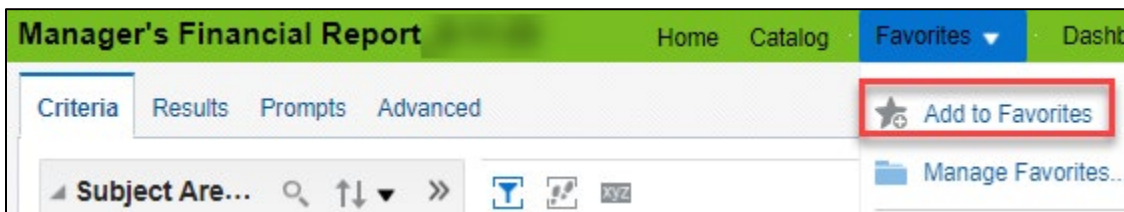
Favorites

The Favorites page displays any object from the Catalog that you mark as a favorite.



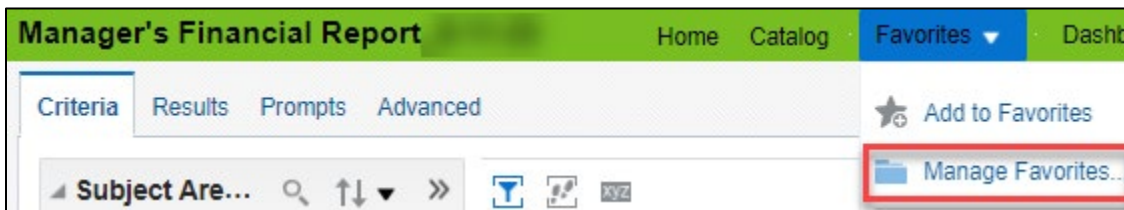
Add to Favorites

When you are in an object from the Catalog such as a report or dashboard, you can save it by selecting Favorites from the Global menu. Then, select Add to Favorites. The object will appear in the Favorites drop-down menu.

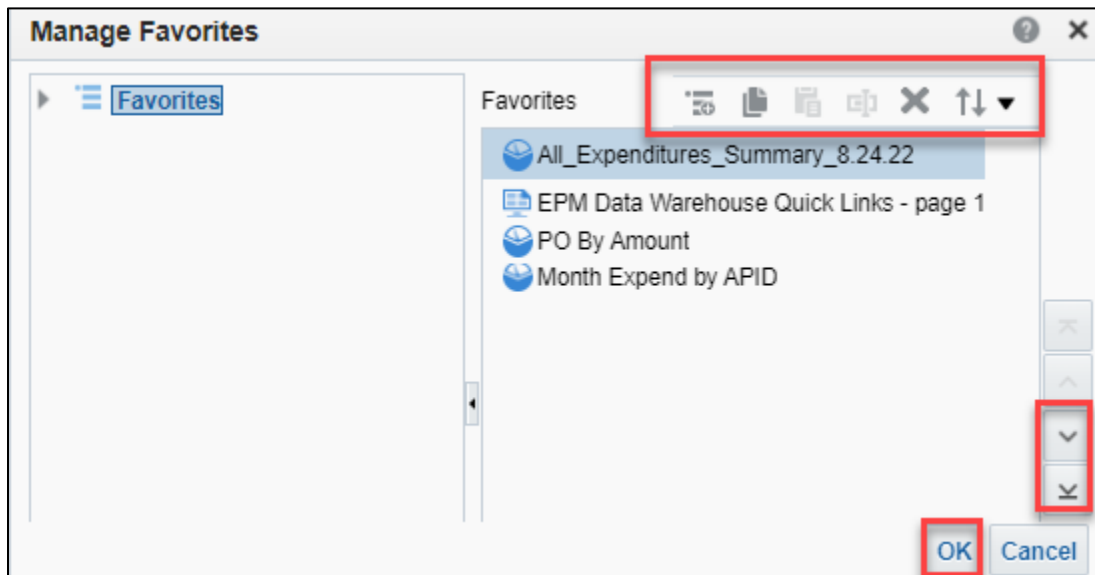


Manage Favorites

The Manage Favorites dialog allows you set up your Favorites menu as desired. Select the Manage Favorites option from the Favorites drop-down menu.



The Manage Favorites dialog allows you to create a category, copy and paste an object to a category, rename, sort, and remove an object from a category or the Favorites menu. When you are done, select **OK**.



Dashboards

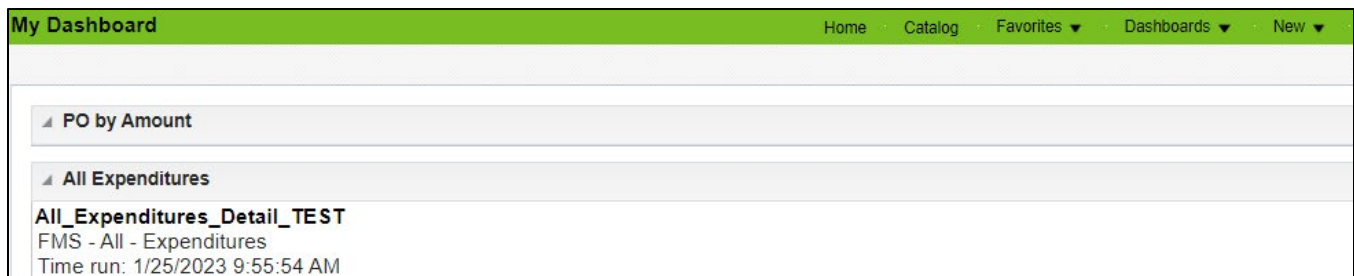
This opens a list of dashboards including My Dashboard and shared dashboards. A dashboard is a customized collection of objects such as analyses, actions, alerts, pages, and links. Dashboard pages are presented as tabbed sheets. Dashboards allow an individual or agency to develop and present several analyses and reports that are accessible from one place.

You can only see dashboards that you have access to. There may be agency-specific dashboards. Only users with the Dashboard Developer or Agency Administrator roles can create dashboards to share with others.

IMPORTANT! Refer to the [Save a Report through a Dashboard](#) quick reference guide for more information on how to use shared dashboards.

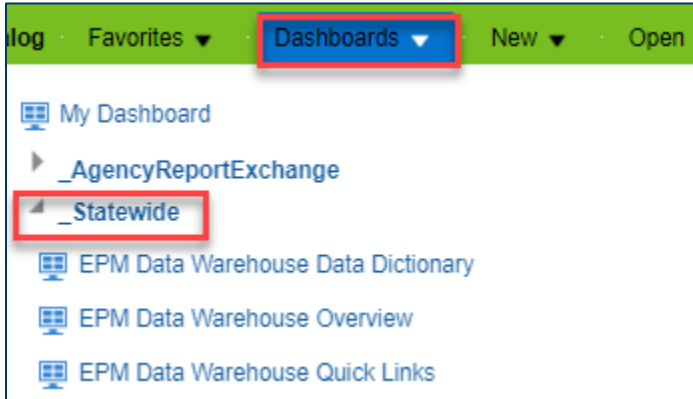
My Dashboard

My Dashboard is each user's personal dashboard. All users have their own dashboard to customize as desired. Access, build, and update it from Dashboards on the Global menu. For more information, view the [Build My Dashboard](#) quick reference guide.

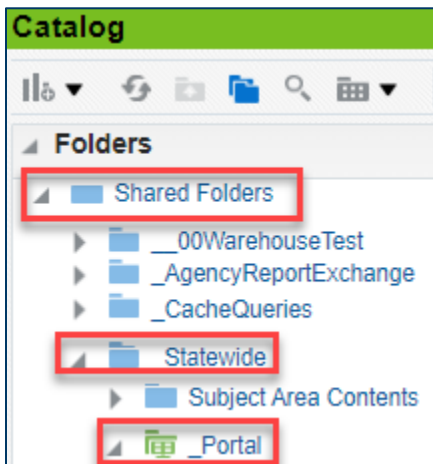


Shared Dashboards from the Global Menu

In the EPM Data Warehouse, the `_Statewide` folder contains dashboards, reports and analyses available to all agency users with appropriate permissions. The canned reports in the `_Statewide` dashboards were created specifically to meet agencies' budget and financial planning needs.



NOTE: If you access the `_Statewide` dashboards from Catalog, make sure to open them up in the `_Portal` section. Go to Shared Folders, `_Statewide` folder, and `_Portal`.



EPM Data Warehouse Data Dictionary Dashboard

The EPM Data Warehouse Data Dictionary is a dashboard that helps agencies find subject areas, folders and fields (columns) for EPM Data Warehouse reports. Access it from Dashboards in the Global menu. There are three different search tabs. The EPM Data Warehouse Data Dictionary Detailed tab is a good place to start. It allows you to find a field (column) by key word.

For example, you need to create a report that lists Sales and Use Tax Amounts and don't know where to start. The EPM Data Warehouse Data Dictionary will help you locate subject areas, folders and fields to create a report that includes your desired data search criteria.

Results - Data Dictionary Detailed		
Data Dictionary Detailed		
EPM Data Warehouse Repository Documentation		
Fact Repository		
Subject Area	Presentation Table (Folder)	Presentation Column (Field)
FMS - ALL - Expenditures	Fact All Expenditures	Sales Tax Amt
FMS - ALL - Expenditures	Fact All Expenditures	Use Tax Amt
FMS - ALL - Expenditures	PO Distribution Line	Sales Tax Amt
FMS - ALL - Expenditures	PO Distribution Line	Use Tax Amt

For more information, view the Use the Data Dictionary quick reference guide.

<https://mn.gov/mmb-stat/documents/swift/training/trainingguides/epm-data-dictionary.pdf>

EPM Data Warehouse Overview Dashboard

The EPM Data Warehouse Overview is a dashboard that provides links to training, reference guides, and documentation. It also links to support resources for the EPM Data Warehouse. Access it from Dashboards in the Global menu.

Welcome to the
EPM Data Warehouse

This reporting tool is built on an Oracle platform called Oracle Business Intelligence Enterprise Edition (OBIEE). It allows you to easily access the data in the EPM Data Warehouse.
To access all Statewide Dashboards, select the EPM Data Warehouse Statewide Dashboard. Then, select the "Catalog" link from the toolbar to browse reports. Select "Dashboards" to find an agency dashboard.
You can also select "New" to begin creating a new analysis.

News

Labor Distribution, Salary Projections, Roster Staffing, GL/Commitment Control, Accounts Payable, Accounts Receivable, All Expenditures, All Receipts, Procurement, Projects and Grants, Payroll and HR subject areas are available in EPM Data Warehouse Reporting. The **EPM Data Warehouse Quick Links** Dashboard is also available providing a link to all Statewide Dashboards.

EPM Data Warehouse Statewide Dashboard

EPM Data Warehouse Quick Links

Tool Training

EPM Data Warehouse Training - EPM Warehouse Training contains quick reference guides on SWIFT and Human Capital Management (HCM) reports. It includes guides on getting started, running reports, and module-specific reports. It also provides other guides such as the Agency Administrators Guide and the User Guide from Oracle. Some guides use SWIFT (Financial and Supply Chain Management) examples. The process is the same for HCM data and reports.

Agency Administrator Guide - Agency administrators can manage folder, report and dashboard privileges. This guide explains the basics associated with these tasks.

Subject Area Training

SCM - Financial and Supply Chain Management Subject Areas - Descriptions of the Financial and Supply Chain Management Subject Areas in EPM Data Warehouse.

HCM - Human Capital Management Subject Areas - Descriptions of the Human Capital Management Subject Areas in EPM Data Warehouse.

Access/Support Documentation

Data Warehouse Security - This document will provide an overview of the security roles that are required to access data subjects and reports in the Data Warehouse.

Data Access Request - If you need additional access while in EPM Data Warehouse Reporting tool, please request the appropriate role using the security access form. EPM Data Warehouse will pick-up the data privileges granted in PeopleSoft the day following when PeopleSoft privileges were given.

EPM Data Warehouse Support Contact / Change Requests - For EPM Data Warehouse Support please contact the SWIFT Help Desk at 855-201-8100, option 2.

EPM Data Warehouse Quick Links Dashboard

The EPM Data Warehouse Quick Links dashboard provides navigation links to all Statewide dashboards. Available dashboards are listed in alphabetical order. This dashboard is often set up as the entry page for beginners. SWIFT users typically have roles and permissions to use the dashboards and reports in "Navigation – FSCM," "Navigation – SCM," and "Navigation – EPM Data Warehouse Support Dashboards."

EPM Data Warehouse Quick Links

EPM Data Warehouse Dashboards

This Dashboard will provide you with navigation links to all State Wide Dashboards. Available Dashboards are listed in alphabetical order.

Navigation - ELM

Navigation - FSCM

- Accounts Payable
- Accounts Receivable
- Accounts Receivable Certification
- All Expenditures
- All Receipts
- APAR Netting
- Asset Management
- Commitment Control and General Ledger
- Loan Receivables Certification Report
- Manager's Financial Report
- Projects and Grants

Navigation - HCM

Navigation - SCM

- Procurement
- Procurement Card
- Procurement Contracts
- Strategic Sourcing Reporting Menu
- Supplier Diversity Reporting

Navigation - Other Dashboards

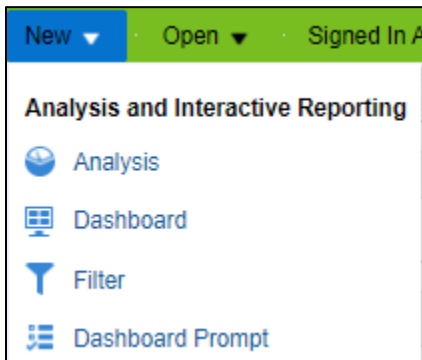
Navigation - EPM Data Warehouse Support Dashboards

- EPM Data Warehouse Data Dictionary
- EPM Data Warehouse Overview

New

Select New to create one of the following options: Analysis, Dashboard, Filter, or Dashboard Prompt.

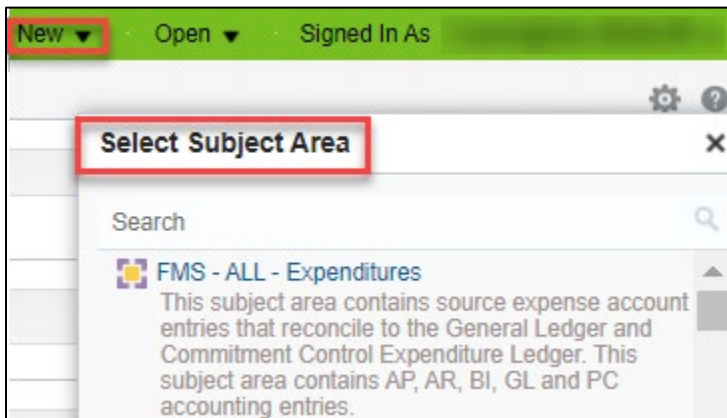
IMPORTANT! These options are typically for advanced users. Users with the Basic Report Writer role may not have permissions to use all options.



Analysis

It brings you to the Select Subject Area dialog. It allows you to create a new analysis. 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. Once you build and save the new analysis, it becomes a report that you can reuse.

Review the [Create a New Analysis](#) quick reference guide for more information.

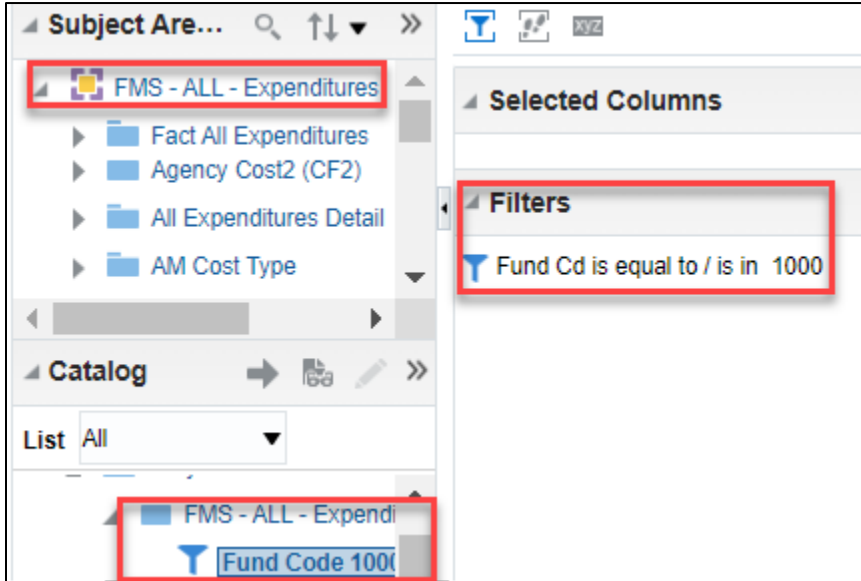


Dashboard

Agency Specific Administrators can use this feature create a dashboard in their agency's Shared Folders.

Filter

It allows you to create a filter for a specific Subject Area and save it to My Folders. You can add it to the Filters section of a new analyses or a saved report from that Subject Area that uses that field.



Dashboard Prompt

This feature allows you to create a dashboard prompt for a specific Subject Area and save it to My Folders. Dashboard prompts occur at the dashboard level. For those with the Agency Specific Basic Report Developer role, use it for My Dashboard. For those with the Agency Specific Dashboard Developer or Agency Specific Administrator role, dashboard prompts are reusable in other dashboards. For more information, view the [Add a Dashboard Prompt to a Dashboard](#) quick reference guide.

Definition						
Add prompts for users when they run this analysis.						
Prompt Label	Type	Prompt For	Description	Required	New Column	
Page 1	Page					

Open

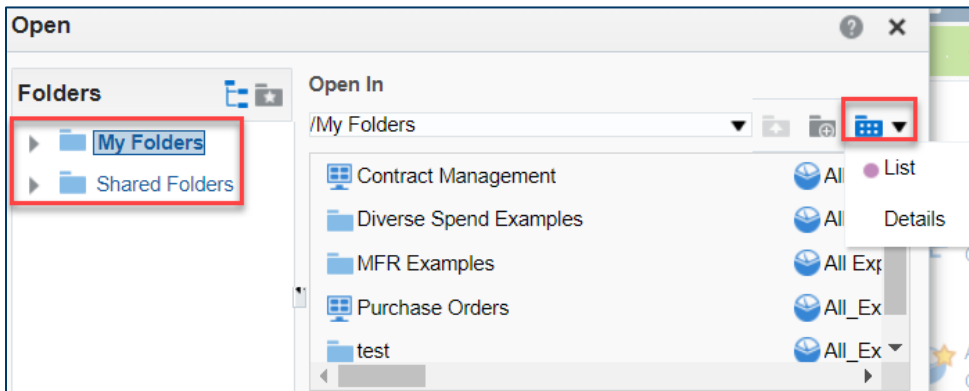
Use Open to search for and access reports or dashboards from My Folders.



Recent: This section displays a list of your recently opened pages.

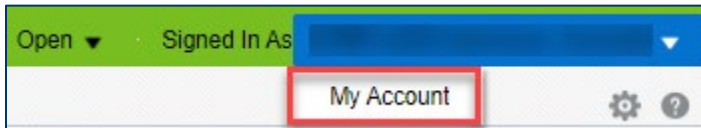
Most Popular: This section displays a list of popular pages by users assigned to the groups to which you belong.

Open: This option brings you to the Open page to access a report. Use the left menu to choose My Folders or Shared Folders. You can use the Change list view type icon to get details.



Signed In As (My Account)

When you hover over your name in Signed In As, the EPM Data Warehouse display My Account.



The My Account page has several tabs. Use only the Preferences and Application Roles tabs.

Preferences Tab

Use the Preferences tab to review and update defaults such as Starting Page, Analysis Editor and Accessibility Mode.

- **Starting Page.** Your starting page opens when you first access the EPM Data Warehouse. Use the drop-down menu to select a shared dashboard for your starting page. Your starting page may be configured by your agency.
- **Analysis Editor.** The Analysis Editor’s drop-down menu allow you to see and update defaults in the Analysis Editor when editing an analysis. You can default to starting on the Criteria or Results tab.

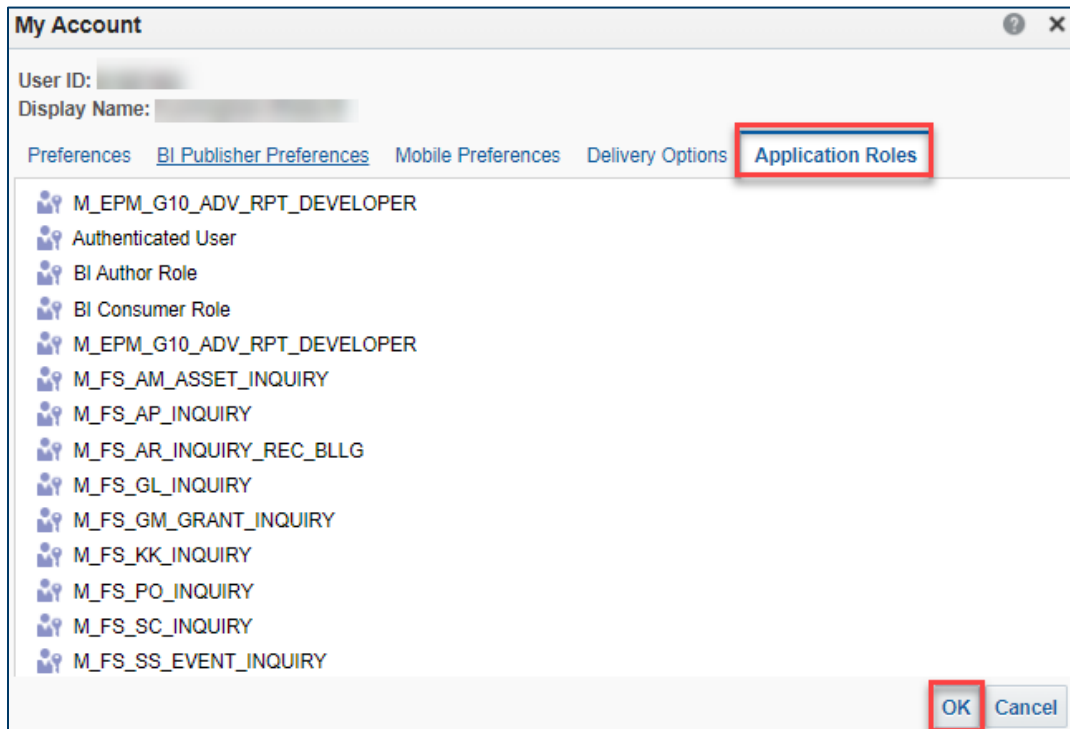
- **Accessibility Mode.** You can turn on or off Accessibility Mode to access the EPM Data Warehouse with a screen reader.

When you are finished reviewing the Preferences tab, select OK.

Application Roles Tab

Use this page to find out your SWIFT inquiry roles. You need specific inquiry roles to access SWIFT data in the Financial Management System (FMS) and Supply Chain Management (PROC) subject areas. See the [Subject Areas for Financial and Supply Chain Management](#) quick reference guide for more information.

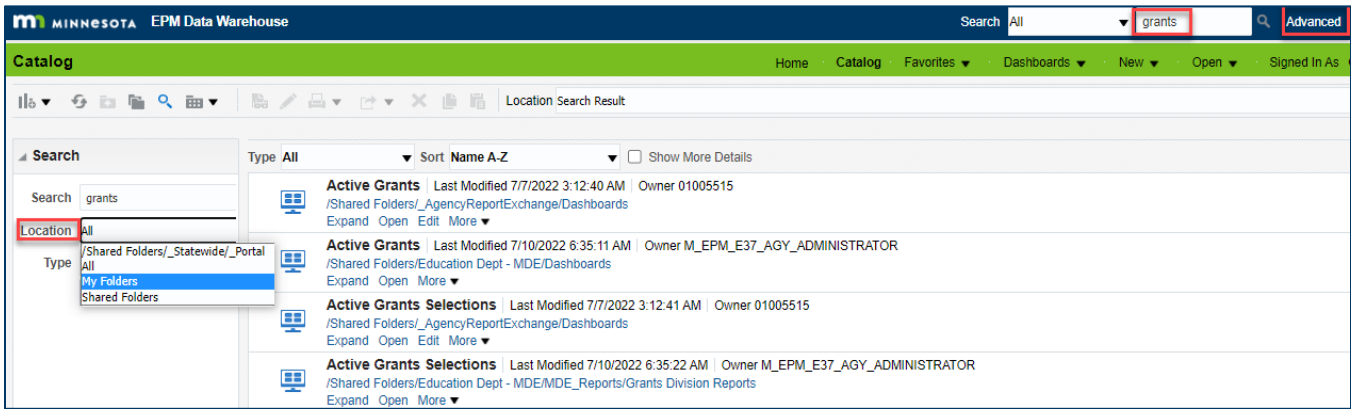
When you are finished reviewing Application Roles tab, select OK.



Search

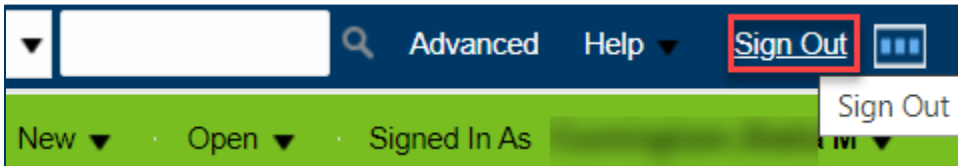
Search enables you to search the Catalog for dashboards, folders, or reports with the search term in the title. For example, maybe you want to find existing reports or dashboards to manage grants. On the Global menu, enter the "grants" in Search. Select either the Search icon, which is a looking glass, or the Advanced link.

The Catalog search page opens. On the left side, you can search the Location by "All," "My Folders," or "Shared Folders." On the right side, you will see dashboards and/or folders with the search term in the title.



Sign Out

Select the Sign Out link to sign out of the EPM Data Warehouse at the end of every session.

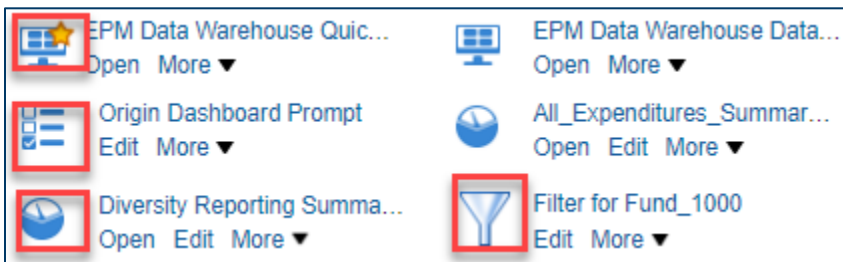


Navigational Objects

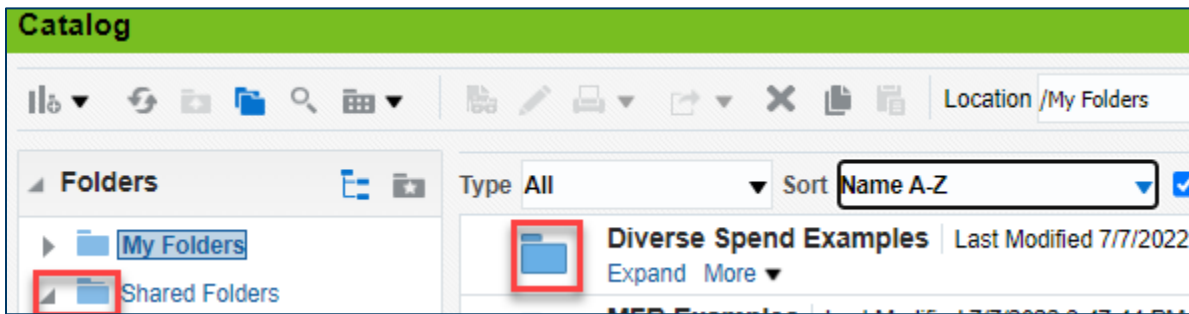
Icons

Opening a menu item from the Global menu brings you a list of objects available to you. The icons next to them tell you what kind of object it is.

- **Analysis/Report.** The icon looks like a circle with a dial in it.
- **Dashboard Prompt.** The icon looks like a list with an item checked.
- **Dashboard.** The icon looks like a computer screen with four images.
- **Filter.** The icon looks like filter.

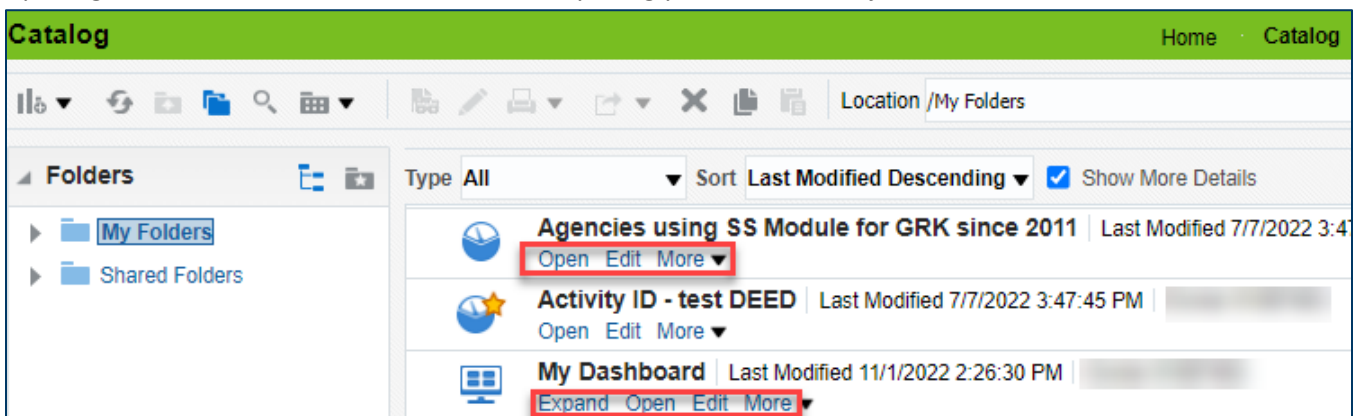


- **Folder.** The Catalog shows folders. The icon looks like a folder.



Links in the Global Menu

Opening a menu item from the Global menu may bring you to a list of objects and links below to select them.



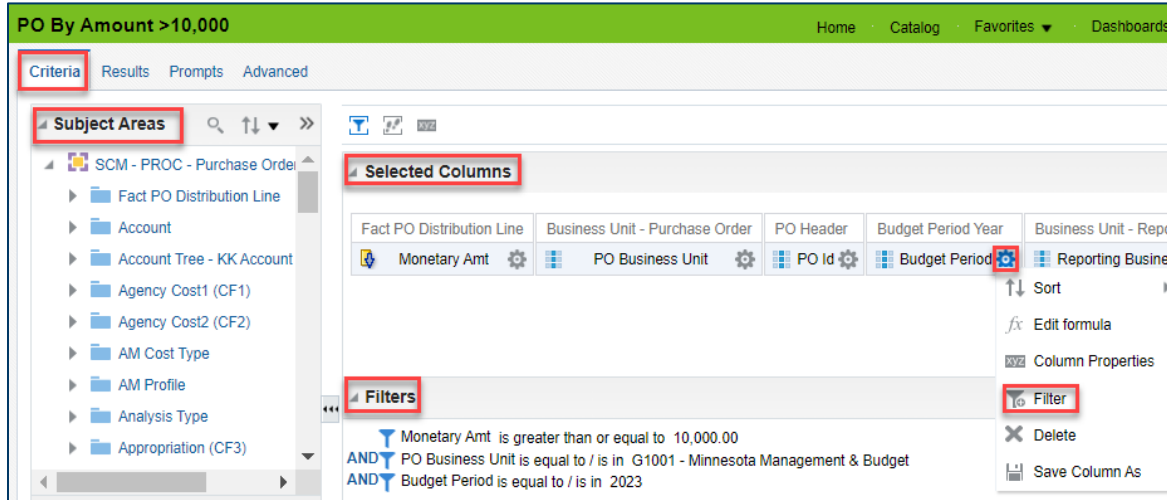
- **Edit.** The Edit link brings you to the saved object. If it is a report, report title brings you to the Analysis Editor. You can update it and save the updates. It refreshes the data.
- **Expand.** The Expand link is for folders and dashboards. It allows you to see what reports are in the folder or dashboard.
- **More.** The More link opens a menu of options to use in the report, folder, or dashboard. The options are different for each object. For example, the options in a report include export, delete, or rename.
- **Open.** The Open link below a report brings you directly to the report display. It does not allow you to update it. It does not refresh the data. The report may fail to open if there is too much data in the report. For a dashboard or folder, Open brings you to the object.

Analysis Editor

When you open an existing report or create a new analysis, the Analysis Editor displays. The Analysis Editor includes four tabs: Criteria, Results, Prompts and Advanced. Use the Criteria page to find fields (columns) to include in your analysis. Use the Results page to view and organize the display of the data. An existing report defaults to the Results tab. A new analysis defaults to the Criteria tab.

Criteria Tab

The Criteria tab lists the criteria selected for the report, which includes the data in it. This tab has several sections.



Subject Areas

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. The Subject Area is listed on the top of every analysis and saved report.

Selected Columns

Columns are the data fields used in the report. Columns are selected and brought over from the folders in the Subject Areas section.

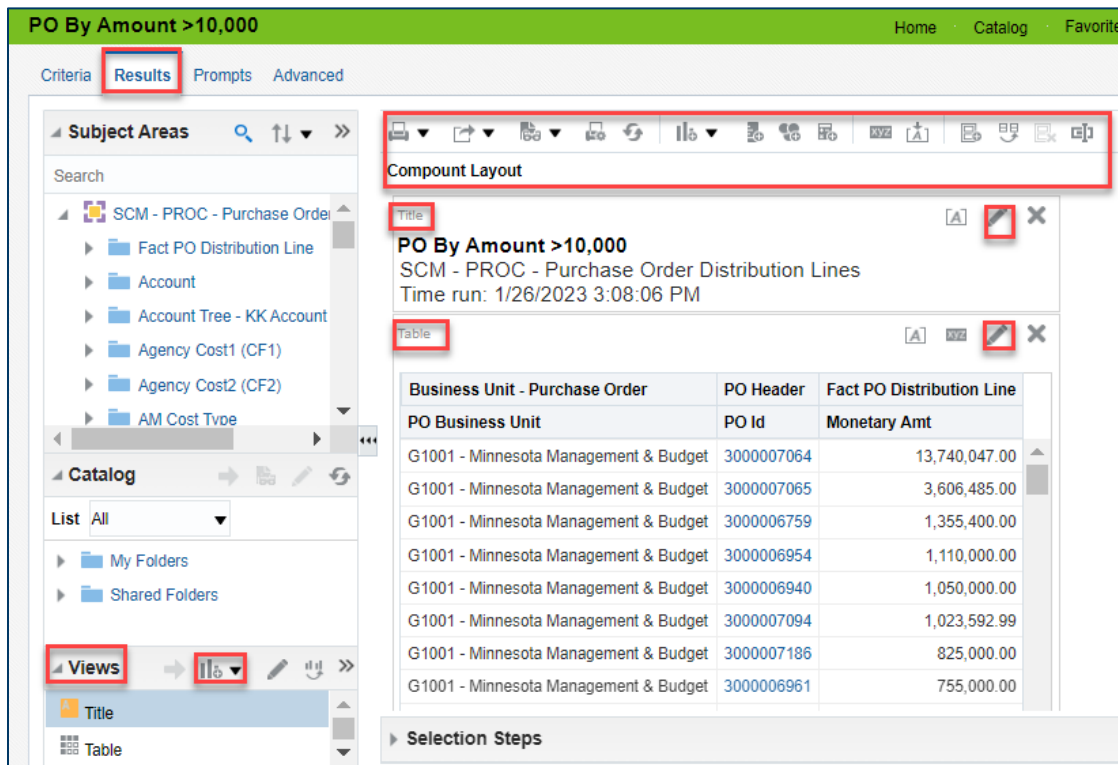
Filters

Filters allow you to apply criteria to limit data results when creating an analysis. You can create and update filters in several places in the Criteria tab of an analysis. All filters on the analysis appear in this section.

For information on how to update the Criteria tab, view the [Update the Data on an Existing Report](#) quick reference guide.

Results Tab

The Results tab displays the view of the report based on the criteria selected for it. It has several parts.



Compound Layout

The Compound Layout contains the views of the report.

Title Section

This section shows the title of the report. It includes the subject area used for it. It also includes the data and time run. You can update it using the Edit icon, which is a pencil.

Table Section

This section shows the table of the report. It includes the columns and the data that was filtered for the view. You can update it using the Edit icon, which is a pencil.

Views

You can add or change the report view to a graph, pivot table, or another view in the Views section. Select the New View icon. It looks like a bar graph with a plus button in it.

Review the [Update the View on an Existing Report](#) quick reference guide for more information.

Icons above the Compound Layout



- **Print this analysis:** This icon looks like a printer. It allows you to print the report in “Printable PDF” or “Printable HTML” format.
- **Export this analysis:** This icon looks like a box with an arrow pointing to the right. It allows you to export the data and save the report to your computer in the following file types: PDF, Excel, PowerPoint, Web Archive, or Data.
 - Data export options include Excel, CSV, Tab Delimited, and XML.
 - If you select Excel, your report will include subtotals.
 - If you select Data, your report will include raw data with no subtitles.
- **Show how the results will look on a dashboard:** This icon looks like a piece of paper with eyeglasses. It will show how the report appears when displayed in a dashboard. It opens in a separate window.
- **Print & export options:** This icon looks like printer with paper. It allows you to set page settings on your printer for printing the report.
- **Refresh the results of the current analysis:** This icon looks like two arrows in a circle. It allows you to refresh the data in the current analysis.
- **New view:** This icon looks like a piece of paper with a plus sign. It allows you to show the results in other views such as a table, a pivot table, or a graph.

There are other icons for more advanced users to review. Hover above an icon to see its function.

SWIFT Help Resources

For further assistance with SWIFT and the EPM Data Warehouse for SWIFT reports, there are a variety of training and support resources available.

SWIFT Help Desk

Contact the SWIFT Help Desk for any SWIFT-related questions or issues.

- Email: SWIFTHelpDesk.MMB@state.mn.us
- Phone: 651-201-8100, option 2
- Hours: 7:30 a.m. to 4:00 p.m., Monday through Friday (closed holidays)

When contacting the SWIFT Help Desk, make sure to include details about your question or issue.

- Your Business Unit
- Description of the issue/question
- SWIFT Module (Accounts Payable, Purchase Orders, etc.)
- Transaction ID (Voucher ID, PO ID, etc.)
- Error message print screen
- EPM Data Warehouse Subject Area, name and location of report, dashboard, or any data issue

EPM Data Warehouse Quick Reference Guides

The [EPM Warehouse Training](#) web page provides quick reference guides for the EPM Data Warehouse for financial, procurement, and Human Capital Management (HCM) reports. These guides are for agency staff who are either new to the EPM Data Warehouse or are experienced users who need to confirm or add to their knowledge.

SWIFT and EPM Data Warehouse Training

Enroll in online training for SWIFT and the EPM Data Warehouse for SWIFT in Learning Management. Webinars and labs run for 60 to 120 minutes. They include live demos of SWIFT and EPM Data Warehouse processes. SWIFT training options are webinars. Some of the EPM Data Warehouse training are labs so that you can follow along.

SWIFT Updates and EPM Data Warehouse System Status Update

The SWIFT Updates newsletter provides news and updates about SWIFT from Minnesota Management and Budget, Administrative Department's Office of State Procurement, and MNIT. The EPM Data Warehouse System Status Update communicates about scheduled data loads and subject areas that may be impacted. You can sign up for these updates on MMB's [Email Lists](#) page. Select "Accounting – SWIFT Newsletter" and/or "Systems – EPM Data Warehouse."

SWIFT Training and Support Resources

Quick reference guides provide brief procedures for a specific task in a SWIFT module or SWIFT basics. Find quick reference guides by module on the [Training Guides and Resources](#) page. SWIFT training videos show you how to use SWIFT by SWIFT basics or module. You can find video tutorials on the [Training Videos](#) page.