Update a Dashboard in the EPM Data Warehouse

Once you create a dashboard in the EPM Data Warehouse, you can update it.

A dashboard is a customized collection of reports that appear by default when a user accesses the Dashboards tab in the EPM Data Warehouse.

This guide describes the common updates to dashboards in the EPM Data Warehouse.

- Create a new page on an existing dashboard
- Update the description, rename the dashboard, reorder pages, and delete pages
- Delete a dashboard from the Catalog page

If you have questions about dashboards in the EPM Data Warehouse, refer to the “Create a New Dashboard” reference guide in the SWIFT Reporting section on Minnesota Management and Budget’s website. [https://mn.gov/mmb/accounting/swift/reporting/swift-data-warehouse/](https://mn.gov/mmb/accounting/swift/reporting/swift-data-warehouse/)

Create a new page on an existing dashboard

1. Find the dashboard you wish to update. You may need to select the Home option on the global header to find your dashboards. Select the Edit link below the desired dashboard.

2. The dashboard displays. Create a new page on a dashboard.
   a. When you open the dashboard, you can see the available pages on the left. To add a new dashboard page, select the Add Dashboard Page icon (green plus sign on the right menu).
The Add Dashboard Page appears. Add a Page Name and Page Description. Select OK.

b. The EPM Data Warehouse adds the new dashboard page. Add columns, sections, and reports to it as needed.

NOTE: For information on how to add these items, refer to the “Create a New Dashboard” reference guide in the SWIFT Reporting section on Minnesota Management and Budget’s website.

Update the dashboard page.

There are several actions you can take to update a dashboard.

- Update the description
- Rename the dashboard
- Add a dashboard prompt
- Reorder pages
- Delete pages
- Save any changes you make to the page

1. From your Home menu, find the dashboard you wish to edit. Select Edit.

2. Open the Tools icon on the right menu of the dashboard. Select “Dashboard Properties.”
3. The Dashboard Properties window appears.

Use the Dashboard Properties page to rename, add a dashboard prompt, reorder, and delete dashboard pages. Select OK when you are done making changes. Then, save any changes on the dashboard page.

   a. As desired, you can update the Description by adding text to the field.

   b. Rename the dashboard page.
      i. You may have to uncheck the Show Add To Briefing Book box in the Dashboard Properties window. Then, select the Rename icon.

      ii. The EPM Data Warehouse opens the Rename pane. Add the new name, then select OK on the Rename pane.

      iii. The EPM Data Warehouse adds a title on the dashboard page.

   c. Add a dashboard prompt.
The dashboard prompt you choose must include data that is already in your dashboard.

For more information about dashboard prompts, review the Add a Dashboard Prompt quick reference guide on Minnesota Management and Budget’s SWIFT Reporting webpages.

i. Choose the Select a Prompt icon in the Dashboard Properties window.

ii. The EPM Data Warehouse opens the Filters and Variables window. Select the Embed new hidden dashboard prompt icon.

iii. The EPM Data Warehouse displays the Open folder. Select an existing dashboard prompt to add to the dashboard.

iv. Press OK.
v. The newly added dashboard prompt will appear when you run the dashboard. For example, we added a dashboard prompt to include the contract document type.

![Dashboard Prompt Example]

- Reorder the dashboard pages. If you have multiple pages on a dashboard, you can reorder them.
  1. Open the Dashboard properties page.
  2. On the Dashboard Pages section, select the page.
  3. Then, use the arrows on the right to move the selected item up, down, or to the bottom of the list. Then, select OK.

![Dashboard Pages Reordering]

- Delete a dashboard page. You may have multiple pages on a dashboard and you want to delete one or more of the pages.
  1. Select the Delete icon in the Dashboard Properties window.
  2. The Confirm Deletion pane appears. Select “Yes” to delete the dashboard page.

![Dashboard Pages Deletion]
f. **IMPORTANT!** Select the Save or Save as icon to save any changes. These icons are located on the top, right of a dashboard page.

Delete an entire dashboard from the Catalog

1. Select the Catalog button on the top menu of any page in the EPM Data Warehouse.
2. The Catalog page appears. In the Folder section of the Catalog, highlight the dashboard you wish to delete.
3. Select the Delete icon (e.g., red “X”) on the Catalog page menu.
4. The Confirm Delete window appears. Select OK.