

## QUICK REFERENCE GUIDE

November 12, 2024

### Update the Data on an Existing Report

After you run and save an existing report in the EPM Data Warehouse, you can return to it and update the data in the report. Most data updates occur using filters in the Criteria tab. In the EPM Data Warehouse, individual data fields are called columns. In the Selected Columns section, you can add or delete columns. You can also add or update filters for any selected column.

- **Filter:** A filter allows you to apply criteria to limit results of a selected column when creating or updating a report.
- **Prompt:** A prompt presents users with options to choose from a particular column to limit the data returned in a report. Prompts appear if you open a shared dashboard and respond by adding values in the prompt section. When you save the report, these prompt appear in the Filters section in the Criteria tab. After you save the report and a column “is prompted,” you can filter it as desired. You can leave the prompted column in the Filters section or delete it. It will not impact your report results.

**IMPORTANT!** If you wish to create a filter, check the Filters section first to see if there is an existing one. Update that existing filter. Do not create or update filters in both the Selected Columns and Filters sections in the Criteria tab. You will likely get errors in your results.

**This Quick Reference Guide demonstrates how to update the data in an existing report in the Criteria tab.**

- Add or update a column or add or update filter to a column.
- Update or delete filter or prompt for a column in the Filters section.
- Create a filter for the current Subject Area inside the Filters section.

View the **Guidelines for Choosing an Operator in the EPM Data Warehouse** in the Appendix of this guide.

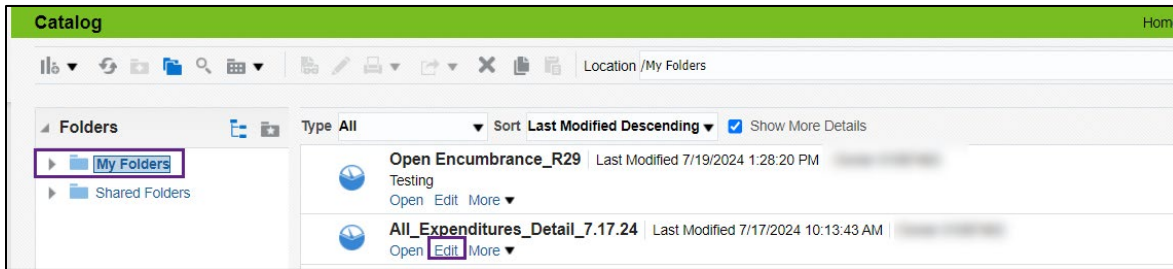
There are other ways to update an existing report, such as the view of it or formatting the report. These topics are covered in separate Quick Reference Guides in the [EPM Warehouse Training](#) webpage.

### Access the report to update in the EPM Data Warehouse

1. Navigate to the **EPM Data Warehouse**.

| Navigation Options    | Navigation Path   |
|-----------------------|---|
| Navigation Collection | Administrative Portal, Data Warehouse, Warehouse Reporting. |

2. Use the top menu options to search for or navigate to the desired report. For most users, you can find your reports from the Catalog.
3. In the Catalog, search for **My Folders**. In the right side, find the report and select the **Edit** link below it.

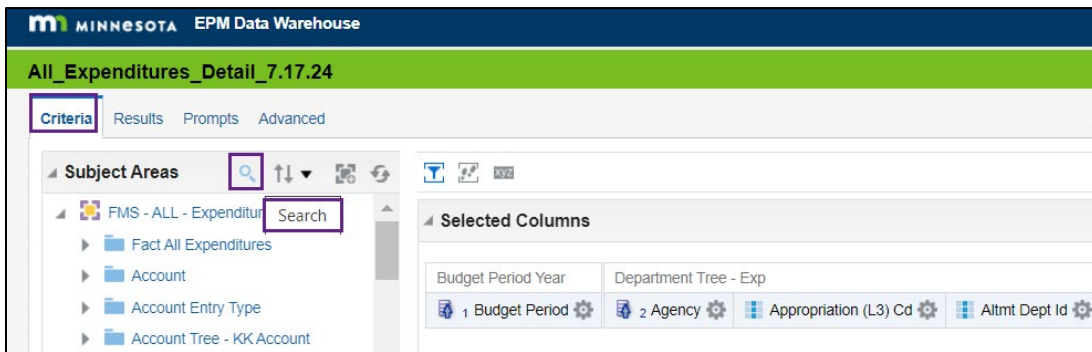


## Add or update a column or add or update filter to a column

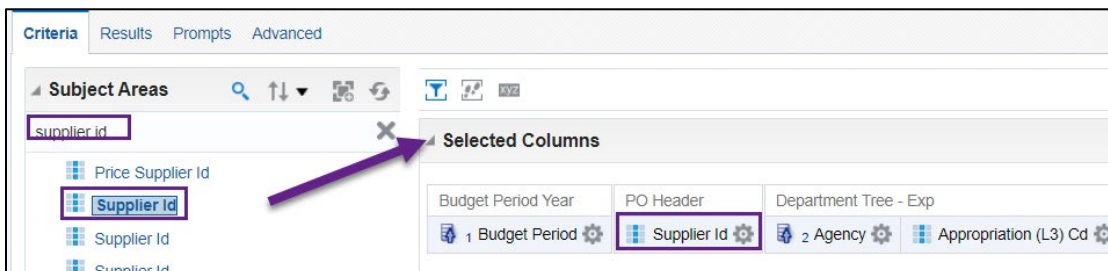
The EPM Data Warehouse displays the report in the Analysis Editor. Select the **Criteria** tab.

### Add a new column to the Selected Columns section

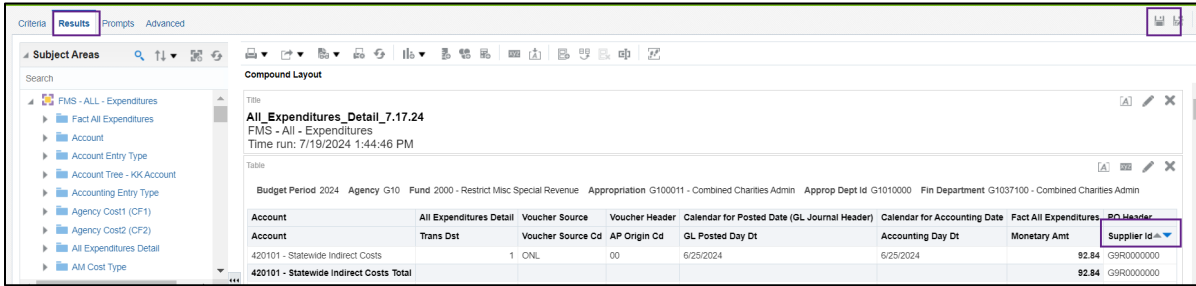
1. Open the required **Subject Areas** folder from the left menu.
  - a. Find the column you wish to add.
  - b. If you don't know what the column is, you can search inside of the Subject Areas folder to find a subfolder or data element within it. Select the **Search** icon. It is a looking glass.



- i. Enter a **keyword** or the wildcard, which is a percentage sign, in the **Search** box.
- ii. It displays the columns and folders with the search criteria.
- iii. Highlight the column that best fits. Drag and drop it to the **Selected Columns** section.



2. Select the **Results** tab to check the new column.
3. As desired, **save** the report to retain the new column you added.

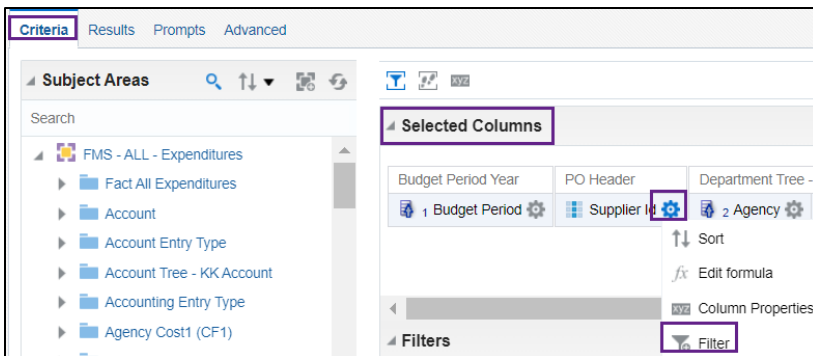


**NOTE:** you can search for and add columns using the Results tab.

## Add a filter to an existing column in the Selected Columns section

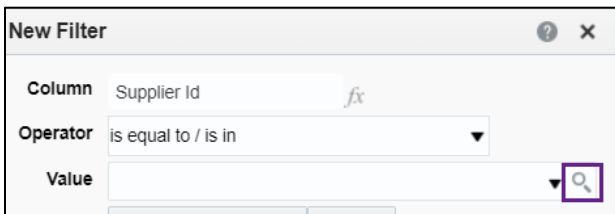
You may wish to add a filter to an existing column to limit the results. This example filters the Supplier Long Desc column for a specific supplier, "Innovative Office Solutions," Supplier ID 0000295401.

1. Go the Selected Columns section and open the column menu. It is a gear icon. Select the **Filter** option.



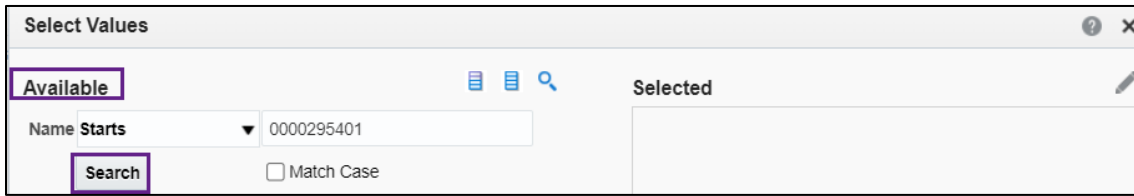
2. The EPM Data Warehouse opens the **New Filter** window for the "Supplier ID" column.
  - a. Update the Operator field as needed.
 

**NOTE:** review the Appendix of this guide to understand operators.
  - b. Next to the Value field, select the **Search** icon. It looks like a looking glass.

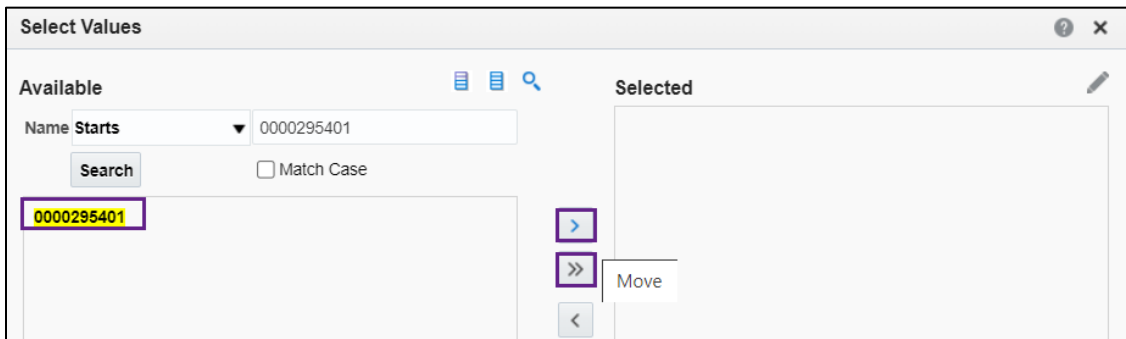


- c. The Select Values window appears.
  - i. In the Available section, go to the **Name** section. You can change the value to "Starts," "Contains," "Ends," or "Is Like (pattern match)."

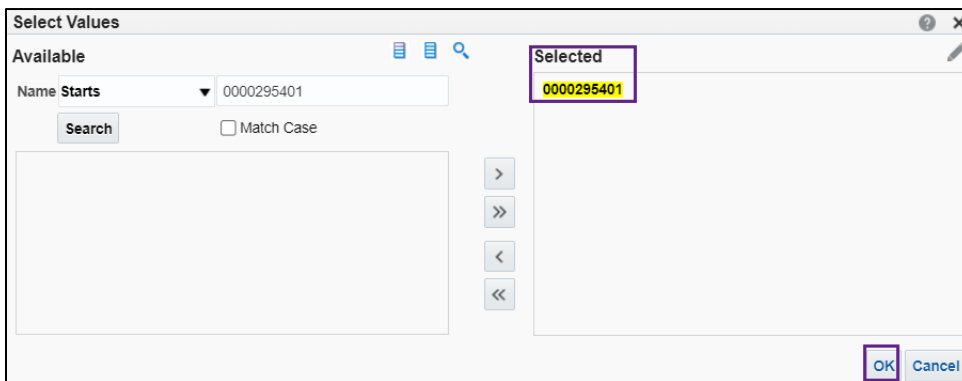
- ii. Enter values in the field. This example uses numbers “0000295401” for “Innovative Office Solutions.”
- iii. Select **Search**.



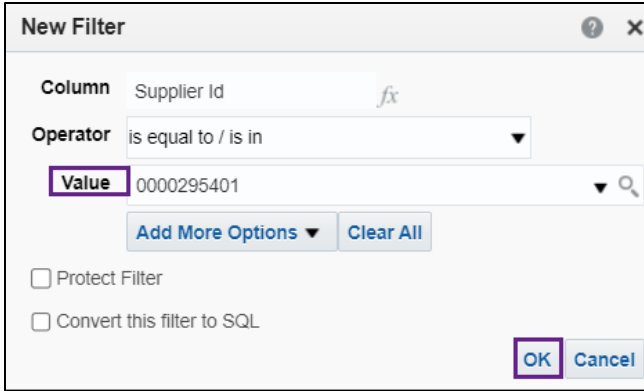
- d. SWIFT updates the Select Values section with your search term.
  - i. Use the **Move** or **Remove** icons in the middle of the page to move values back and forth between the Available and Selected sections as needed.
  - ii. Select the value and then press the **Move** icon, which is a forward arrow.



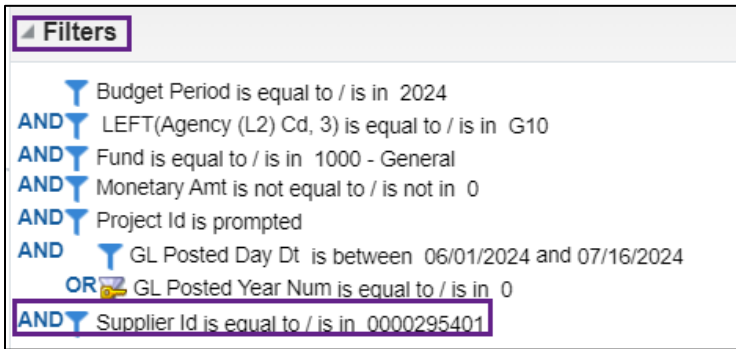
- iii. The value or values appear in the Selected section. Select **OK**.



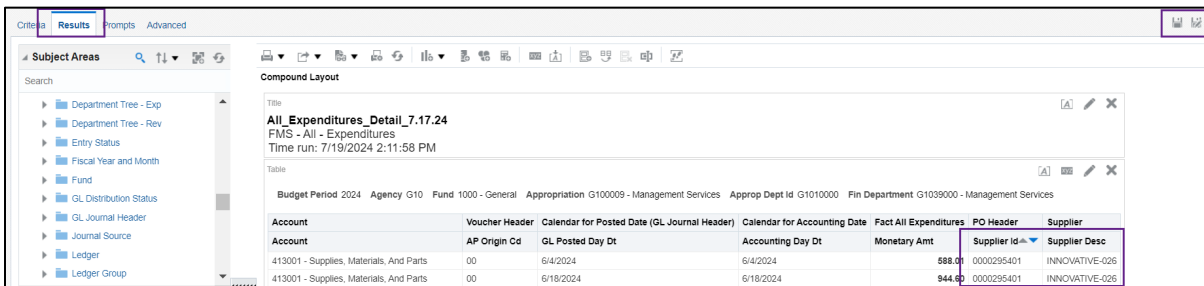
- e. The EPM Data Warehouse returns to the updated New Filter window. It has the desired value in it. Select **OK**.



3. The EPM Data Warehouse returns to the Criteria tab on the report. The updated filter appears in the Filters section.



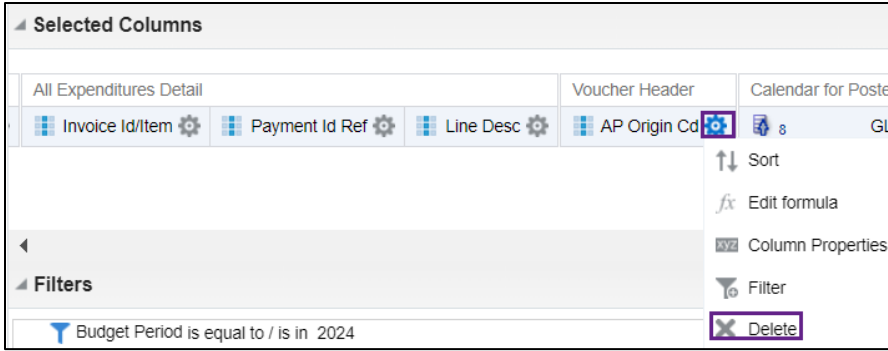
4. Test the data results to make sure you have the correct values by selecting the **Results** tab.
5. If the results are what you desire, select the **Save** icon.



## Delete a column in the Selected Columns section

Sometimes when you create a report from an existing dashboard and there are too many columns that you don't need, you can delete columns. This example deletes the AP Origin Code column from the Selected Columns section.

1. From the **Criteria** tab, go to the Selected Columns section. Open the column menu using the gear icon.
2. Select the **Delete** option.



3. The EPM Data Warehouse immediately deletes the column. Save your report if you want to keep the changes.

**IMPORTANT!** If the filter is applied in both the Selected Columns and Filters sections, delete it in both places.

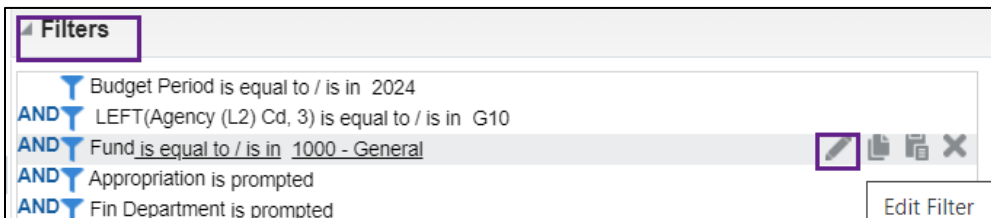
## Update or delete a filter on a column in the Filters section

The Filters section of the report shows the existing filters for the selected columns. It includes columns that are prompted and filtered.

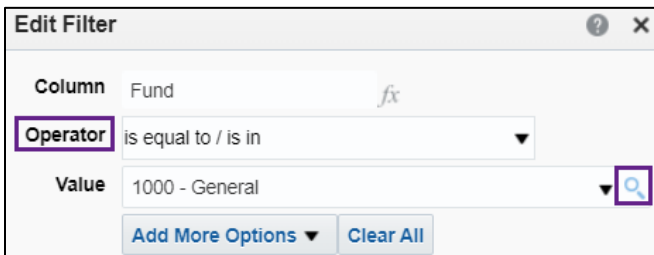
### Edit a filter

In this example, we'll add some Fund Codes to the report.

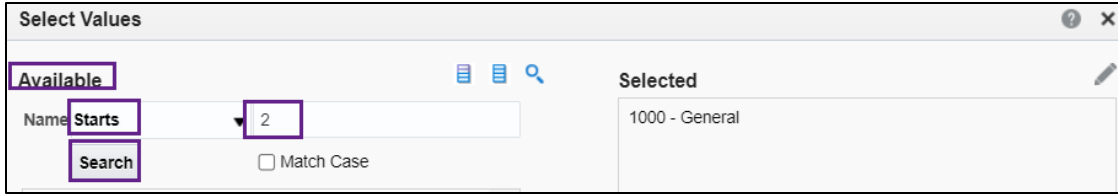
1. Go to the Filters section. In the filter you wish to update, select the **Edit Filters** icon. It looks like a pencil.



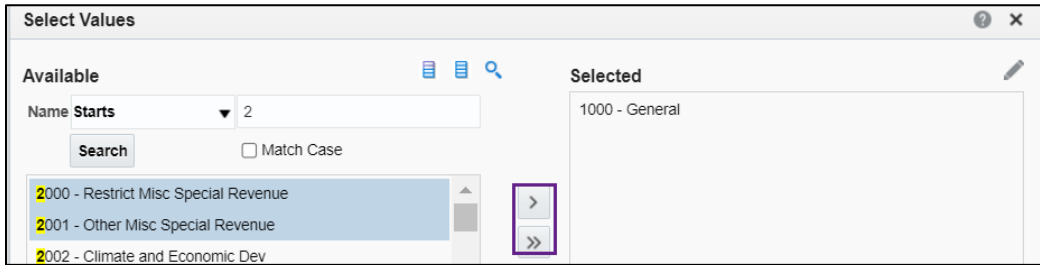
2. The Edit Filter window appears. Update the **Operator** as needed. In the Value section, select the **Search** icon.



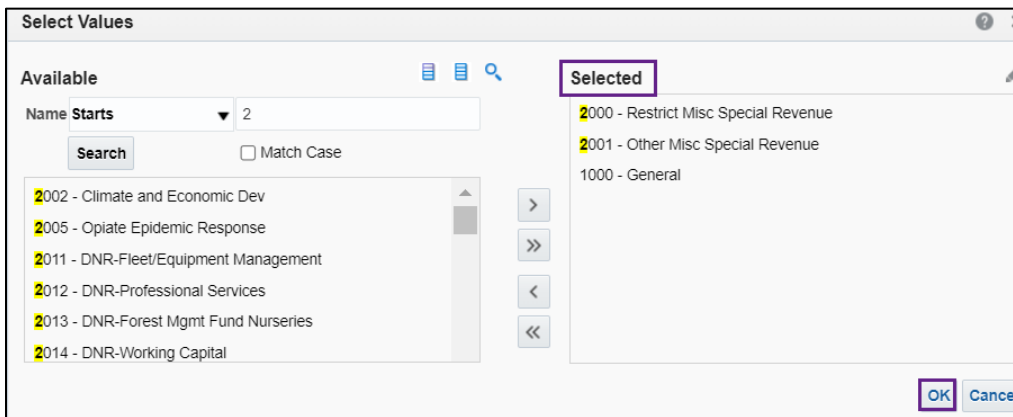
3. Enter a value in the **Available** section.
  - a. You can update “Starts” to “Contains,” “Ends,” and “Is Like (pattern match).”
  - b. Then select **Search**.



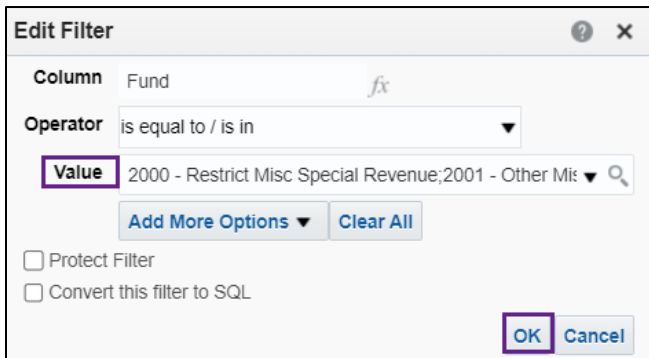
4. Your options appear in the Available section.
  - a. Highlight the options you wish to move the Selected Column.
  - b. Then select the **Move** or **Move All** icons, which are arrows.



5. Your options appear in the Selected column. Press **OK**.



6. The Edit Filter window displays with your updated value or values. Select **OK**.

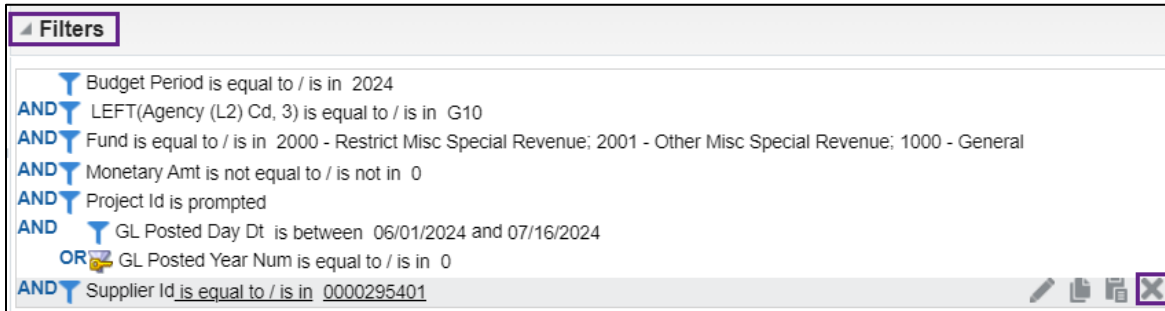


7. The updated values appear in the Filters section.
8. Test them using the Results tab. Save the results as needed.

## Delete a filter

If you created a filter and wish to remove it, you can delete it.

1. Go to the **Filters** section in the Criteria tab.
2. Find the column you no longer wish to have a filter and select the **Delete** icon. It looks like an “X.”



3. The filter immediately is removed from the Filters section. The column remains. Save the report if you wish to keep the update.

## 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.

- You need to understand which folder and field (column) you need from the current Subject Area. You also need to know the specific values you wish to filter and which operator to use.
- If you don't know the folder and field for that Subject Area, the EPM Data Dictionary can help you. Select the EPM Data Warehouse Data Dictionary Detailed tab. The [Use the Data Dictionary](#) Quick Reference Guide provides an overview.

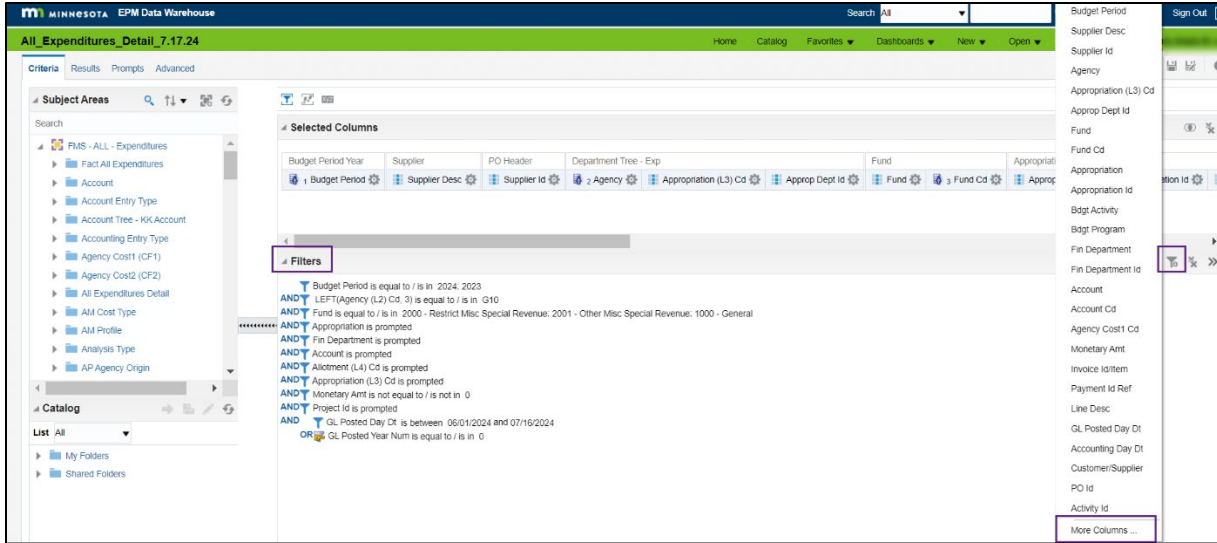
## Budget Fiscal Year using two different Budget Periods

Depending on the report, you can use Accounting dates such as Accounting Period or Accounting Day Date to view data across Budget Fiscal Years using the “Create a filter for the current Subject Area” icon.

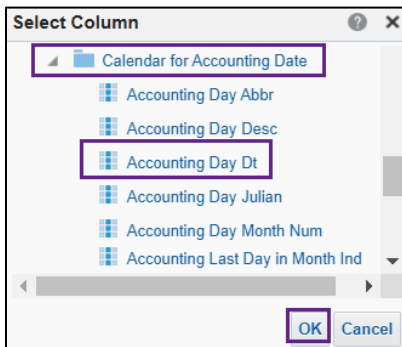
**IMPORTANT!** Test the data. Budget Fiscal Year works in All Expenditures not the Manager's Financial Report.

1. In the Filters section, select the **Create a filter for the current Subject Area** icon. It is a funnel.
2. The menu options display with all the selected columns from your report. Select “More Columns” at the bottom of the list.

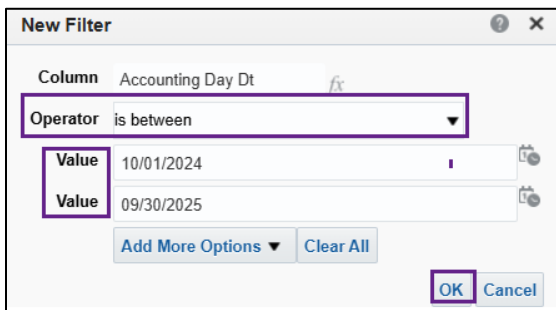




3. In the Select Column section, choose **Calendar for Accounting Date** folder and **Accounting Day Dt (Date)** column.



4. In the New Filter window, change the Operator to “is between” and select the data values for the Budget Fiscal Year. Select **OK**.



5. Run and test the report to make sure you get the data you need.

## Appendix - Guidelines for Choosing an Operator in the EPM Data Warehouse

Source: "Oracle Smart View for Office User's Guide," Oracle Help Center.

[https://docs.oracle.com/cd/E57185\\_01/SMVUG/ch16s08s04s01.html](https://docs.oracle.com/cd/E57185_01/SMVUG/ch16s08s04s01.html)

| Operator                           | Guidelines   |
|------------------------------------|--|
| <b>is equal to / is in</b>         | Valid for a column that contains text, numbers or dates. Specify a single value or multiple values. Results include only records where the data in the column matches the value in the filter.   |
| <b>is not equal to / is not in</b> | Valid for a column that contains text, numbers or dates. Specify a single value or multiple values. Results include only records where the data in the column does not match the value in the filter.  |
| <b>is less than</b>                | Valid for a column that contains numbers or dates. Specify a single value. Results include only records where the data in the column is less than the value in the filter.   |
| <b>is greater than</b>             | Valid for a column that contains numbers or dates. Specify a single value or multiple values. Results include only records where the data in the column is greater than or the same as the value in the filter.  |
| <b>is less than or equal to</b>    | Valid for a column that contains numbers or dates. Specify a single value or multiple values. Results include only records where the data in the column is less than or the same as the value in the filter.   |
| <b>is greater than or equal to</b> | Valid for a column that contains numbers or dates. Specify a single value or multiple values. Results include only records where the data in the column is greater than or the same as the value in the filter.  |
| <b>is between</b>                  | Valid for a column that contains numbers or dates. Specify two values. Results include only records where the data in the column is between the two values in the filter.  |
| <b>is null</b>                     | Valid for a column that contains text, numbers or dates. Do not specify a value. The operator tests only for the absence of data in the column. Results include only records where there is no data in the column. Sometimes it might be useful to know whether any data is present. Using the is null operator is a way to test for that condition. |
| <b>is not null</b>                 | Valid for a column that contains text, numbers or dates. Do not specify a value. The operator tests only for the presence of data in the column. Results include only records where there is data in the column.   |
| <b>is ranked first</b>             | Valid for a column that contains text or dates. Specify a single value. Results include only the first N records, where N is a whole number specified as the value in the filter. This operator is for ranked results.   |

| Operator                           | Guidelines  |
|------------------------------------|---|
| <b>ranked last</b>                 | Valid for a column that contains text or dates. Specify a single value. Results include only the last N records, where N is a whole number specified as the value in the filter. This operator is for ranked results.   |
| <b>contains all</b>                | Valid for a column that contains text, numbers or dates. Specify a single value or multiple values. Results include only records where the data in the column contains all of the values in the filter.   |
| <b>does not contain</b>            | Valid for a column that contains text, numbers or dates. Specify a single value or multiple values. Results include only records where the data in the column does not contain any of the values in the filter.   |
| <b>contains any</b>                | Valid for a column that contains text, numbers or dates. Specify a single value or multiple values. Results include only records where the data in the column contains at least one of the values in the filter.  |
| <b>begins with</b>                 | Valid for a column that contains text, numbers or dates. Specify a single value. Results include only records where the data in the column begins with the value in the filter.   |
| <b>ends with</b>                   | Valid for a column that contains text, numbers or dates. Specify a single value. Results include only records where the data in the column ends with the value in the filter.   |
| <b>is LIKE (pattern match)</b>     | Valid for a column that contains text. Specify a single value or multiple values. Requires the use of a percent sign character (%) as a wildcard character. You may specify up to two percent sign characters in the value. Results include only records where the data in the column matches the pattern value in the filter.        |
| <b>is not LIKE (pattern match)</b> | Valid for a column that contains text. Specify a single value or multiple values. Requires the use of a percent sign character (%) as a wildcard character. You may specify up to two percent sign characters in the value. Results include only records where the data in the column does not match the pattern value in the filter. |