

QUICK REFERENCE GUIDE

Updated December 12, 2022

Add or Update a View on an Existing Report

In the EPM Data Warehouse, a view is the visual display of the results of a report. You can add or update a variety of views to display the results in different ways. Adding or updating a view will not change the data available in the report. It can change the data that you can see in the view. Save a new view if you want to use it again.

There are several ways to add or update a view in an existing report in the *Results* tab, including the following.

1. **Compound Layout section.** You can edit the table view in the *Compound Layout* section using the *Editing from Compound Layout* page. Select the **Edit View** icon to access this page.
2. **Views section.** You can add a view such as a pivot table or graph using *Views* under the *Subject Area* section using the **New View** icon.



This guide provides an overview of the *Editing from Compound Layout* page. It demonstrates the steps to update the view from it.

- Rearrange, add, delete, or prompt columns in the table view of the report
- Add or delete Grand Totals to subsections in the table view of a report
- Add the run date and time to the Title in a report created from a new analysis

This guide also demonstrates how to add or change the report view to a graph, pivot table, or another view in the *Views* section.

For advanced information about updating views in the Oracle Business Intelligence Enterprise Edition (OBIEE) platform used in the EPM Data Warehouse, refer to the [OBIEE User Guide from Oracle](#).

There are other ways to update an existing report. They are covered in separate reference guides. You can find them in the [EPM Data Warehouse Training](#) page.

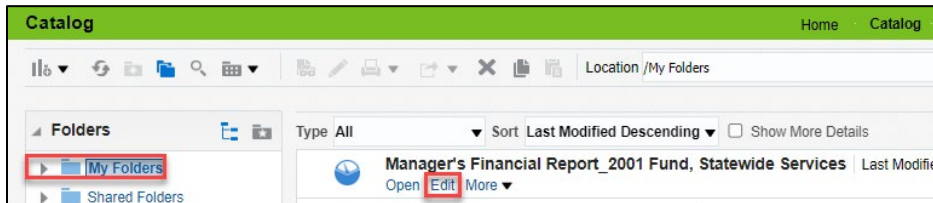
- You can update the data on an existing report from the EPM Data Warehouse.
- You can add an inline prompt to update an existing report or analysis

Navigate to the EPM Data Warehouse

1. Navigate to the EPM Data Warehouse to access the report.

Navigation Options	Navigation Path
Navigation Collection	Administrative Portal, Data Warehouse, Warehouse Reporting, Catalog.

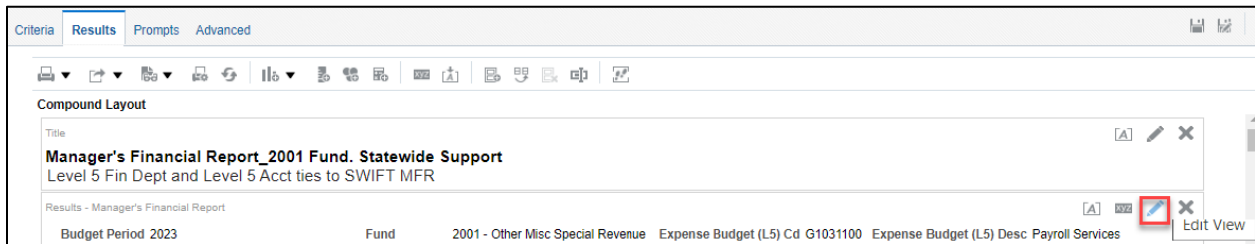
2. In the *Catalog* page, find the report to update from *My Folders*. Select the *Edit* link below it.



3. The report displays.

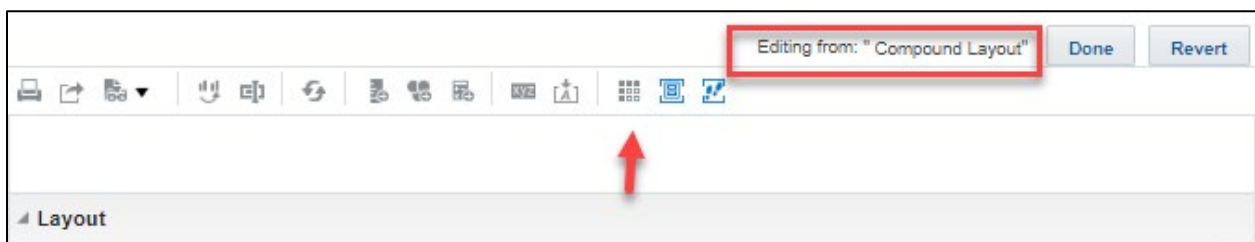
Overview of updating the view of an existing report using the Compound Layout page

Use the *Results* tab to update the report view. Inside the table, select the **Edit View** icon. It looks like a pencil.



The *Editing from Compound Layout* page appears. Use it to make changes to the columns that appear in the report view.

- The EPM Data Warehouse will display any changes you make to the view as you make them.
- Use this page to drag/drop measures and columns and to update the view in other ways. There are several sections in this page.
- You can expand the page by dragging the line above the *Layout* section upward.

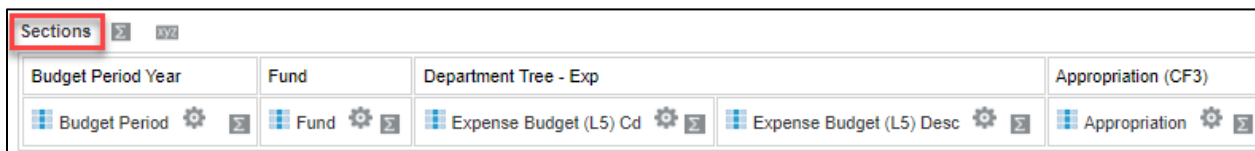


Sections on the Editing from Compound Layout page

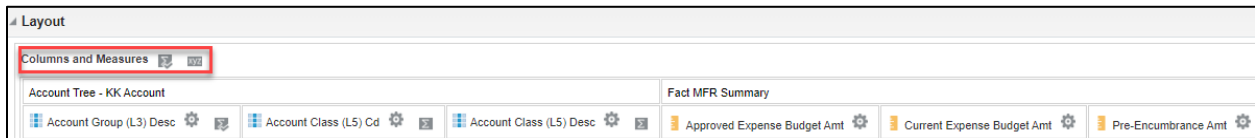
- **Table Prompts.** Use it to create a prompt in the report view. It shows any table prompts. It allows you to add totals and update page properties in these prompts.



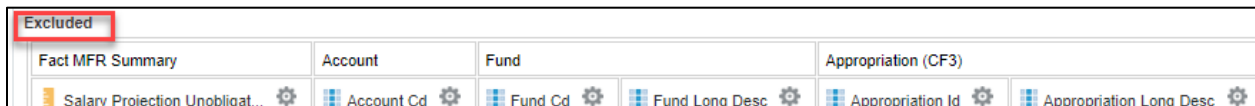
- **Sections.** It shows the source data selected from the *Subject Areas* for this report. This data is represented in columns.



- **Columns and Measures.** It shows all of the selected columns in the report view.



- **Excluded.** It shows the selected columns that were excluded from the report view.

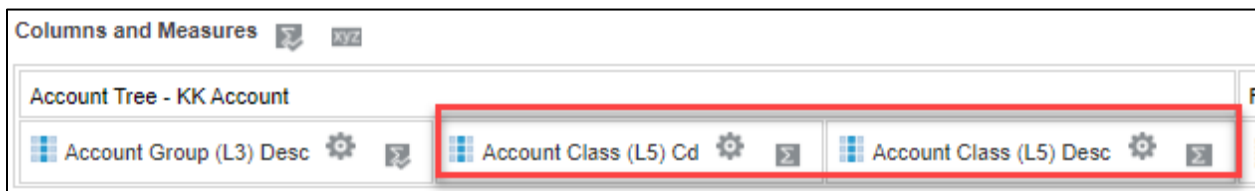


Rearrange, add, delete, or prompt columns in the table view of a report

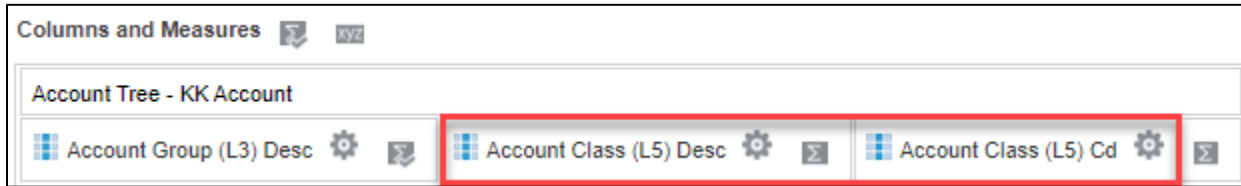
Rearrange the columns in the table view using *Editing from Compound Layout* page

1. Go to the *Columns and Measures* section. Select the column name and drag it to the desired position in the *Table* view.

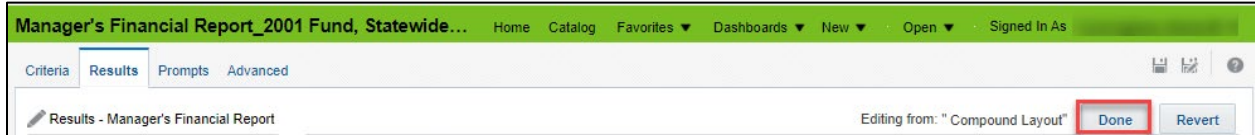
This example moves the *Account Class (L5) Description* column before the *Account Class (L5) Code* column.



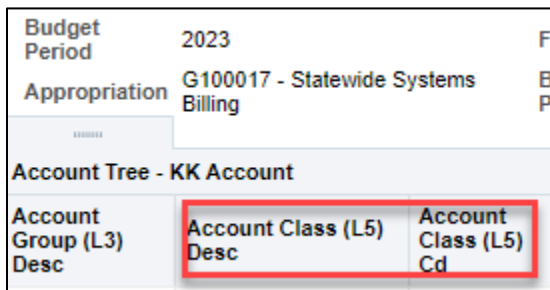
- When you are done moving the columns, determine if you want to keep the changes.



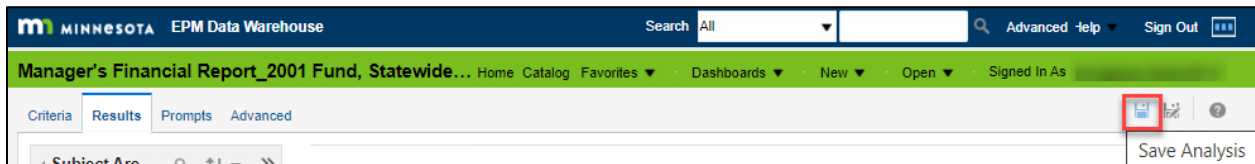
- Select the **Done** button on the top right of the *Editing* page.



- The report table shows the change in the order of the columns.



- If you wish to keep this change, select the **Save Analysis** icon at the top right of the page.

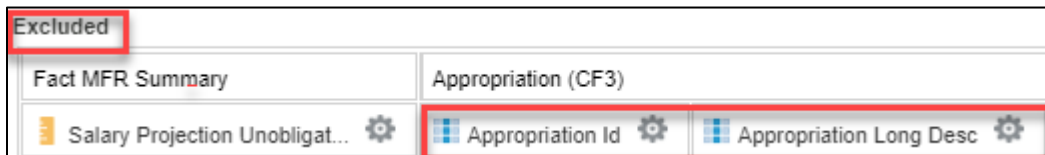


Add columns in the table view using the *Editing from Compound Layout* page

The EPM Data Warehouse may not display all of the selected columns on the *Criteria* tab. Some reports exclude columns. You can add them to the table view.

- Go to the *Excluded* section. Select a column and drag it to the *Columns and Measures* section.

This guide adds the *Appropriation ID* and *Appropriation Long Desc* columns to the report view as an example. Not all reports may have this column.



- Slide the desired column to the *Columns and Measures* section where you wish it to be in the display of your report.



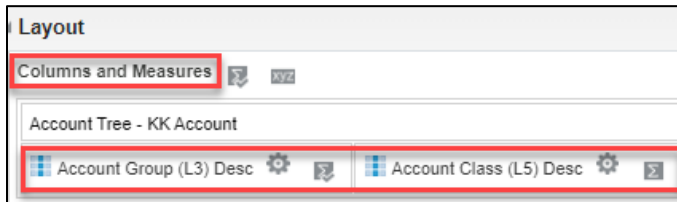
- Select the **Done** button in the upper right-hand corner.
- The EPM Data Warehouse returns to the updated table. It now includes the column.

Account Tree - KK Account	Appropriation (CF3)		Account Tree - KK Account
Account Group (L3) Desc	Appropriation Id	Appropriation Long Desc	Account Class (L5) Desc

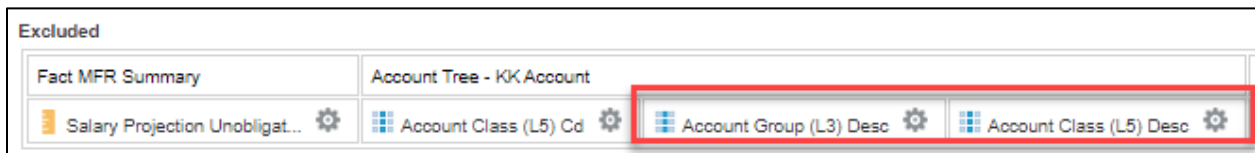
- If you wish to keep this change, select the **Save Analysis** icon at the top right of the page.

Delete columns in the table view using the *Editing from Compound Layout* page

- In the *Columns and Measures* section, select a column and drag it to the *Excluded* section.



- This guide deletes the *Account Group (L3) Desc* and the *Account Class (L5) Desc* from the report view.



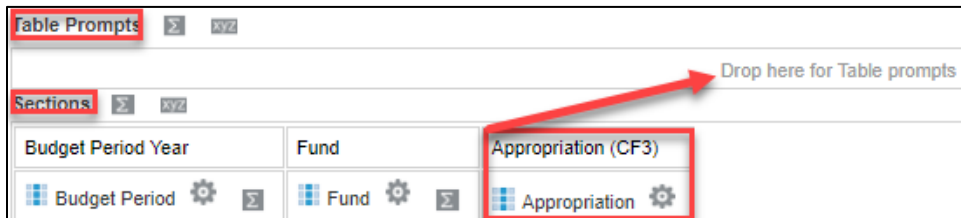
- Select the **Done** button in the upper right-hand corner.
- The EPM Data Warehouse returns to the updated table. It now excludes the columns. If you wish to keep this change, select the **Save Analysis** icon at the top right of the page.

Add a report prompt to the view.

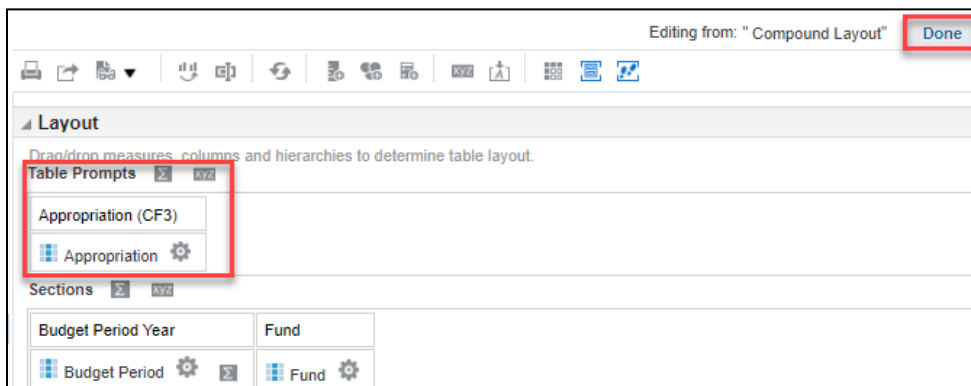
A prompt allows you to select from different display options on the report. It limits the data for the report view. For example, you can create a prompt on a column such as *Appropriation (CF3)*. On the view, you can select which *Appropriation* will appear.

1. Go to the *Sections* area. Select a column and drag it to the “Drop Here for Table prompts” area of the *Table Prompts* section.

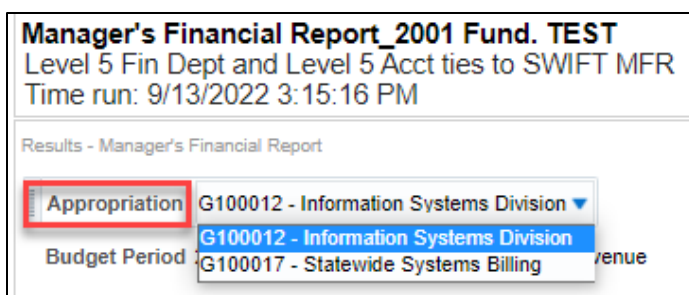
NOTE: You may have to do this a few times. The table prompts box will show an outline when it works.



2. When the column appears in the *Table Prompts* section, select the **Done** button.



3. The EPM Data Warehouse returns to the updated table. The report view now is prompted at the top of the page. You can run the report for any of the prompted values.



4. If you wish to keep this change, select the **Save Analysis** icon at the top right of the page.
5. If you want to export the report, it will show the selected value.

Add or delete Grand Totals in the subsections of the report view

The EPM Data Warehouse can update the report view to create *Grand Totals* for the subsections in the results.

Add a Grand Total to the subsections of a report view

Typically, when you create a report from a “_Statewide” shared dashboard, *Grand Total* defaults at the bottom of the report and any subsections.

Account Tree - KK Account			Fact MFR Summary				
Account Group (L3) Desc	Account Class (L5) Cd	Account Class (L5) Desc	Approved Expense Budget Amt	Current Expense Budget Amt	Pre-Encumbrance Amt	Encumbrance Amt	E A
Non-Payroll Expense	41196	Rate-Based MNIT Services	10,000.00	10,000.00	0.00	0.00	
Non-Payroll Expense	41197	Agency-Specific MNIT Services	1,406,000.00	1,406,000.00	0.00	0.00	
Non-Payroll Expense Total			1,416,000.00	1,416,000.00	0.00	0.00	
Grand Total			1,416,000.00	1,416,000.00	0.00	0.00	

IMPORTANT! The *Grand Total* functionality requires that the report uses a measure from a *Fact* folder in the *Subject Area*.

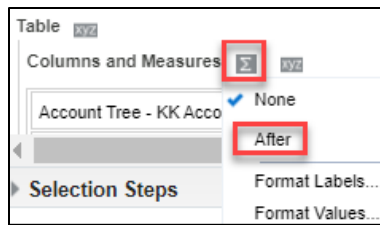


If you created a new analysis and used a *Fact* folder from the *Subject Area*, *Grand Total* may not automatically appear at the bottom of the report or its subsections.

Current Expense Budget Amt	Agency (L2)*CU	Fund	Budget Period	Unexpended Amt	Expended Amt
443,314.06	G1000000	2000 - Restrict Misc Special Revenue	2022	0.00	443,314.06
212,000.00	G1000000	2000 - Restrict Misc Special Revenue	2023	196,766.55	15,233.45
13,527,266.44	G1000000	2001 - Other Misc Special Revenue	2022	114,379.33	13,412,887.11
17,911,420.00	G1000000	2001 - Other Misc Special Revenue	2023	17,347,956.72	563,463.28

If a report doesn't display a *Grand Total*, you can add it to the view.

1. Go to the *Columns and Measures* section.
2. Select the **No Totals** icon on the right side of that title. It looks like a sum symbol or a capitalized “E.” It opens the options menu. Select “After.”



3. At the top of the page, select **Done**.
4. The EPM Data Warehouse displays *Grand Total* in the view.

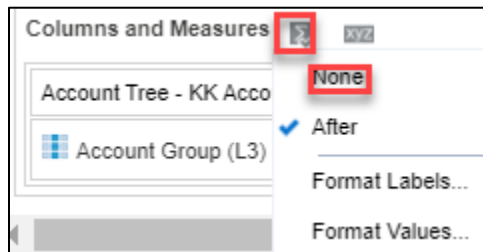
Current Expense Budget Amt	Agency (L2) Cd	Fund	Budget Period	Unexpended Amt	Expended Amt
443,314.06	G1000000	2000 - Restrict Misc Special Revenue	2022	0.00	443,314.06
212,000.00	G1000000	2000 - Restrict Misc Special Revenue	2023	196,766.55	15,233.45
13,527,266.44	G1000000	2001 - Other Misc Special Revenue	2022	114,379.33	13,412,887.11
17,911,420.00	G1000000	2001 - Other Misc Special Revenue	2023	17,347,956.72	563,463.28
32,094,000.50	Grand Total			17,659,102.60	14,434,897.90

5. Save the report as desired.

Remove Grand Totals from the subsections of a report view

You can remove the *Grand Total* from the subsections in the report view.

1. Go to the *Columns and Measures* section.
2. Select the **Totals After** icon on the right side of that title. It looks like a sum symbol or a capitalized “E” with a checkmark. It opens the options menu. Select “None.”



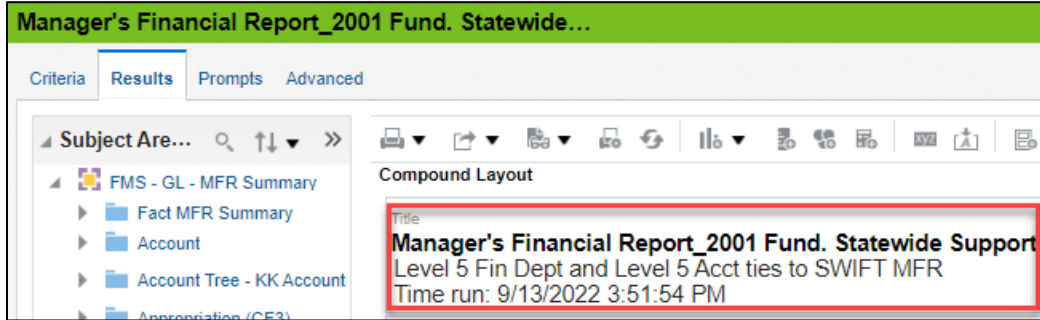
3. At the top of the page, select **Done**.
4. The EPM Data Warehouse displays the report without *Grand Total* in the view.

Payroll Expense	41050	Overtime and Premium Pay	38,620.00	38,620.00
Payroll Expense	41070	Other Employee Cost	55,900.00	55,900.00
Payroll Expense Total			2,564,120.00	2,564,120.00

5. Save the report as desired.

Add the run date and time to the Title in a report created from a new analysis

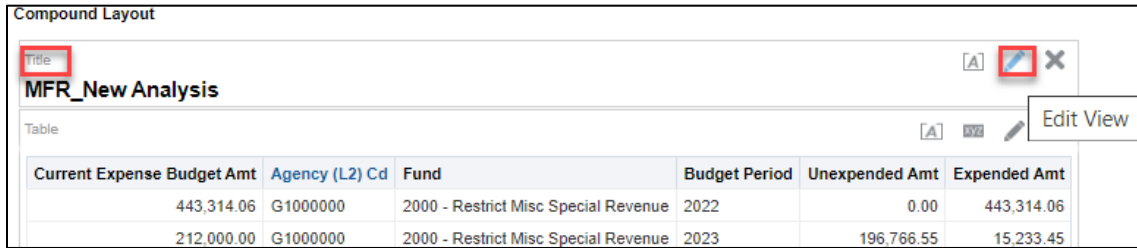
When you create a report from a “_Statewide” shared dashboard, the run date and time typically appear in the *Title* section.



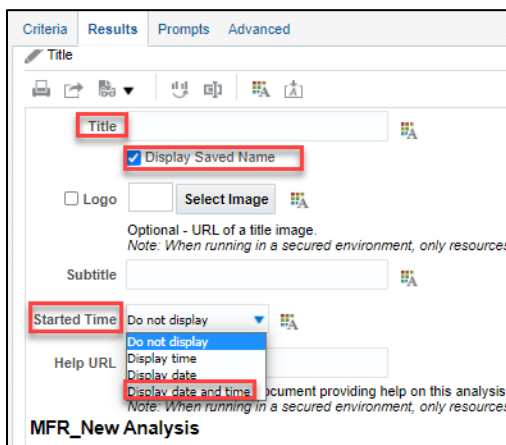
If you created a new analysis, the run date and time may not appear in the *Title* section.

1. On the *Compound Layout* pane of the report, select the **Edit View** icon on *Title* section. This icon looks like a pencil.

IMPORTANT! Make sure you are in the *Title* section and not the *Table* section.



2. The EPM Data Warehouse opens a *Title* window. Update it as needed.
 - a. You may wish to change the *Title* of the report. If so, add the title and uncheck the *Display Saved Name* box.
 - b. On the *Started Time* field, select an option as desired such as “Display date and time.”



- c. Then, select **Done**.

d. The *Results* page shows the run date and time in the *Title* section.

Compound Layout

Title						
MFR_New Analysis						
Time run: 9/13/2022 3:48:58 PM						

Table						
Current Expense Budget Amt	Agency (L2) Cd	Fund	Budget Period	Unexpended Amt	Expended Amt	
443,314.06	G1000000	2000 - Restrict Misc Special Revenue	2022	0.00	443,314.06	
212,000.00	G1000000	2000 - Restrict Misc Special Revenue	2023	196,766.55	15,233.45	

3. Save the report as desired.

Add or change the report view to a graph, pivot table, or another view in the Views section

1. In the *Results* tab, open the *Views* section on the left side of a report. Select the **New View** icon. It looks like a bar graph with a plus button in it.

Criteria Results Prompts Advanced

Subject Are... Catalog Views Title Table

Compound Layout

Title

MFR_New Analysis

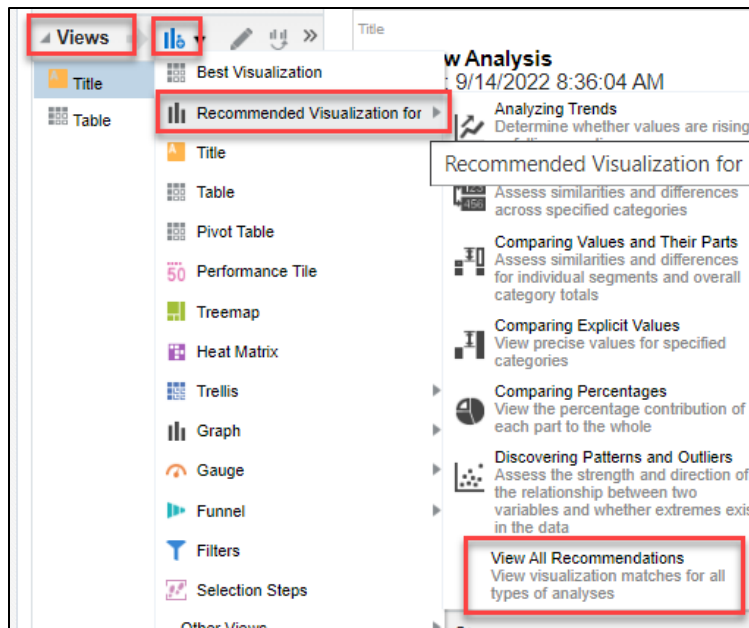
Time run: 9/14/2022 8:36:04 AM

Table

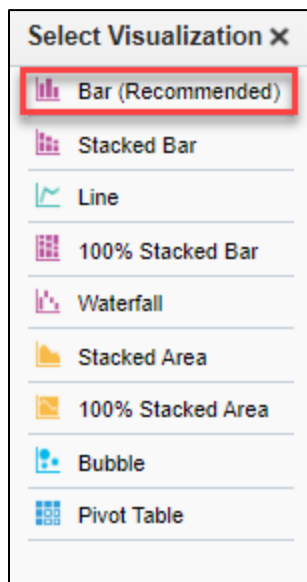
2. The EPM Data Warehouse opens the *View* options. It provides several ways to select a view.

- a. If you know the view, select it.
- b. If you don't know the exact view, select *Recommended Visualization for* options.
 - i. The EPM Data Warehouse will open a window with explanations of options. If you select one of these options, it will create the new view for you.
 - ii. If you want more information, select *View All Recommendations*.

SWIFT STATEWIDE INTEGRATED FINANCIAL TOOLS

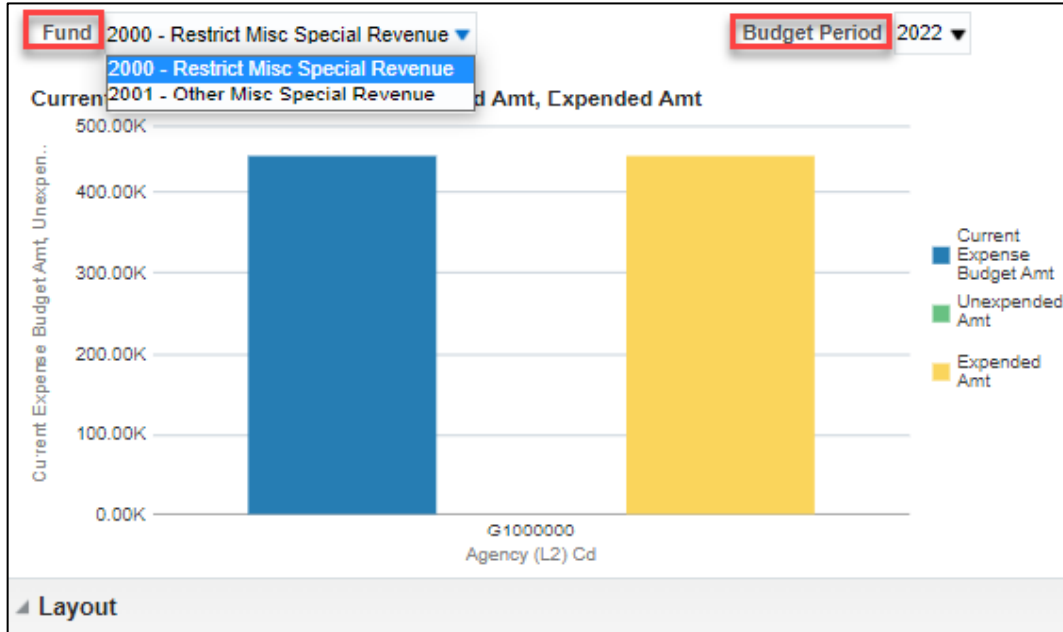


- iii. If you want more information, select *View All Recommendations*.
- iv. The *Select Visualization* window appears. It lists visualizations, including the recommended one for this view. Select an option. This example shows a Bar graph. You may wish to select another option.

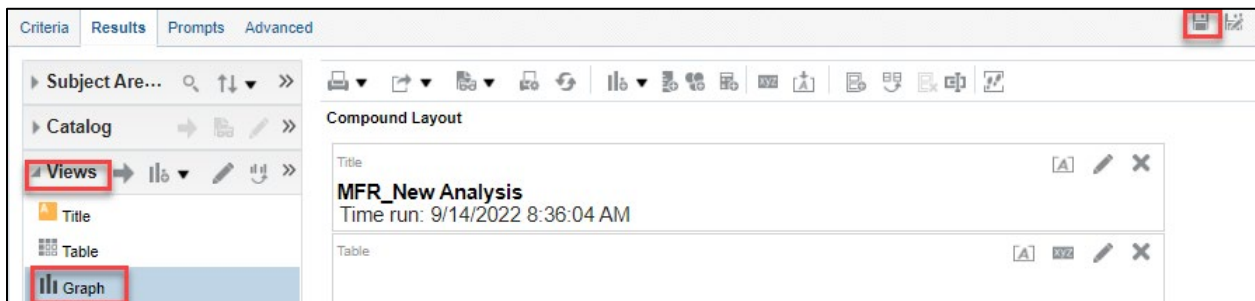


SWIFT STATEWIDE INTEGRATED FINANCIAL TOOLS

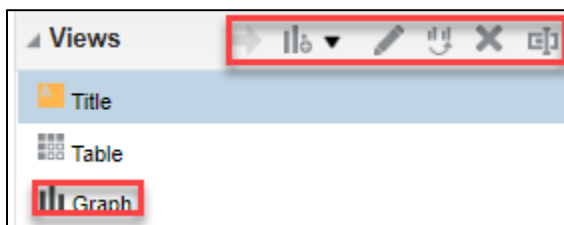
3. The EPM Data Warehouse displays the selected view above the *Layout* section of the page.
 - a. In this example, the view is a graph. It includes two prompts, *Fund* and *Budget Period*, to narrow the view.



- b. At the top, right of the page, select **Done**.
 - c. The updated *Results* page shows the new view in the *Views* section. This guide adds a graph.



- d. If you want to save this view, select the **Save Analysis** icon at the top, right of the page.
 - e. On the *Views* bar, there are several options to take on a saved view. In this example, it is the *Graph* view.



SWIFT STATEWIDE INTEGRATED FINANCIAL TOOLS

- **New View:** It looks like a graph with a plus button in it. It allows you to create another view.
- **Edit View:** It looks like a pencil. It allows you to edit the current view.
- **Duplicate View:** It looks like two small graphs connected with an arrow. It allows you to create a duplicate view. You can update it as needed and create a new name for it.
- **Remove View from Analysis:** It is an “X.” It deletes the view.
- **Rename View:** It is a box with a capital “I” through it. You can rename this view.

4. The next time you open this report, the view appears below the table.

Compound Layout

Time [A] [I] [X]

MFR_New Analysis

Time run: 9/14/2022 8:36:04 AM

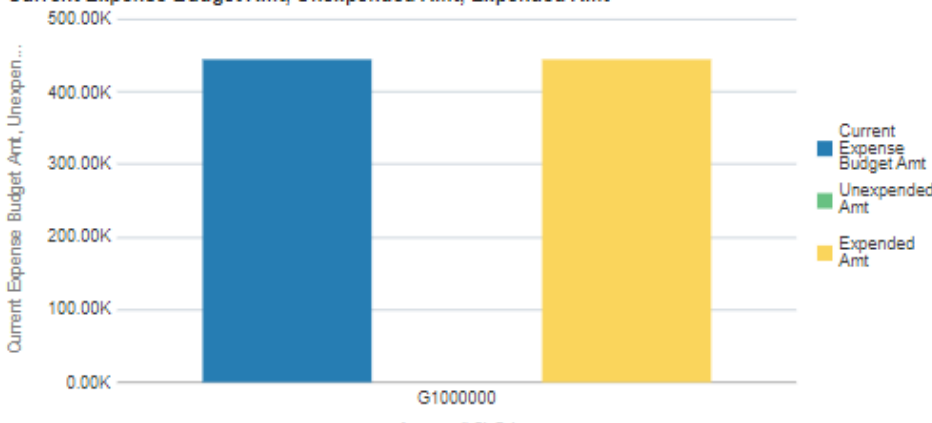
Table [A] [M] [I] [X]

Current Expense Budget Amt	Agency (L2) Cd	Fund	Budget Period	Unexpended Amt	Expended Amt
443,314.06	G1000000	2000 - Restrict Misc Special Revenue	2022	0.00	443,314.06
212,000.00	G1000000	2000 - Restrict Misc Special Revenue	2023	196,766.55	15,233.45
13,527,266.44	G1000000	2001 - Other Misc Special Revenue	2022	114,379.33	13,412,887.11
17,911,420.00	G1000000	2001 - Other Misc Special Revenue	2023	17,347,956.72	563,463.28

Graph [A] [M] [I] [X]

Fund 2000 - Restrict Misc Special Revenue Budget Period 2022

Current Expense Budget Amt, Unexpended Amt, Expended Amt



G1000000
Agency (L2) Cd

■ Current Expense Budget Amt

■ Unexpended Amt

■ Expended Amt

5. Follow the same step to add another view.