



Format Your Report in the EPM Data Warehouse

User Guide

September 24, 2025

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Format Your Report

If you customize and create analyses in the EPM Data Warehouse, then you are familiar with the Analysis editor and views. 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. In this guide, we show you how to apply cosmetic changes in an analysis. Some of cosmetic changes affect only the current view. However, most of the techniques demonstrated here affect the individual column (a data field) at the report level and is retained with any new view you might add.

Changes made to the Column Properties option of a column, persist within the analysis, no matter the view. Changes made in the Column Properties can be made from either the Criteria or the Results tabs. We use a view on the Results tab to demonstrate all the formatting techniques presented here. This allows you to immediately see the effects of each change. After you have customized the appearance of a view, you can reuse the formatting through an import process and apply it to other analyses.



To export a formatted analysis, we suggest exporting directly to Excel if you want to retain the appearance. Excel does the best of job of maintaining the cosmetic changes after export. Exporting to other formats can require additional manipulation.

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 tab to select columns (fields) and measures and apply filters for your analysis. Use the Results tab to view, organize, and apply cosmetic changes to the display of the data. For more information about working with and creating analyses in the EPM Warehouse, refer to other Quick Reference Guides available on the [EPM Warehouse Training](#) page.

Formatting Techniques

There are different ways to apply cosmetic formatting which affects the visual appearance of data in an analysis. Some techniques are applied only to the current working view. It helps to think of a view as an object on the Compound Layout pane of the Results tab of the Analysis Editor.

- You can apply some format changes by selecting the **Container** icon  of the object.
- Other types of changes are made using the **Edit View** icon  for the object.
- Techniques where you use the **Column Properties** to make format changes are applied at the column level. Therefore, if the column is used in another view within the report, the applied format is retained.

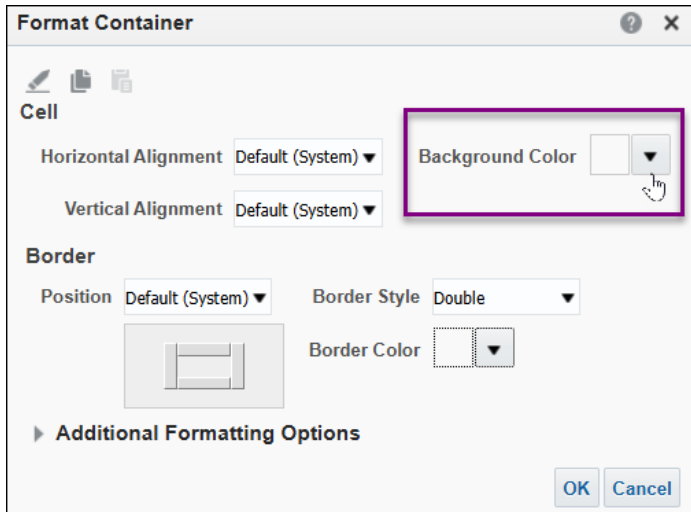
Add Background Color to an Object

You can add background color to an object such as, the title or table view on the Compound layout.

1. Select the **Container** icon of an object. It is in the upper right corner of the view.



2. The Format Container window displays. Select the **Background Color** drop-down menu.



3. Select a color or enter a hex code (hexadecimal color code) from the **Color Selector**.
4. Then select the **OK** button.



5. In this example, we changed the container of a table view and added background color for the table. Notice that the cells or contents of the table are unaffected by the color. Be aware of the color you choose. Make sure there is enough color contrast to easily see and read any text on the object. Simply put, a dark background may require a white or light colored font.

Table						
Appropriation Id: G100001		Appropriation Long Desc: Accounting Services				
2025 G1031100 PR Svcs						
Account Group (L3) Desc	Account Class (L5) Cd	Account Class (L5) Desc	Current Expense Budget Amt	Expended Amt	Unexpended Amt	Unobligated Amt
Non-Payroll Expense	41100	Space Rental And Utilities	23,923.00	23,210.54	712.46	-1,424.20
Non-Payroll Expense	41110	Printing And Advertising	0.00	1,080.65	-1,080.65	-2,307.38
Non-Payroll Expense	41150	Computer and System Services	0.00	6,284.49	-6,284.49	-6,284.49
Non-Payroll Expense	41155	Communications	1,886.00	7,129.02	-5,243.02	-7,950.00
Non-Payroll Expense	41170	Trav/Sub-OutOfState-BorderComm	0.00	1,206.57	-1,206.57	-1,206.57
Non-Payroll Expense	41180	Employee Development	21,000.00	375.00	20,625.00	20,500.00
Non-Payroll Expense	41190	State Agcy-Prov Prof-Tech Serv	0.00	0.00	0.00	-5,000.00
Non-Payroll Expense	41196	Rate-Based MNIT Services	5,013.00	2,748.71	2,264.29	0.00
Non-Payroll Expense	41300	Supplies	0.00	1,140.95	-1,140.95	-1,140.95
Non-Payroll Expense	43000	Other Operating Costs	17,291.00	0.00	17,291.00	17,291.00
Payroll Expense	41000	Full Time - Salary	1,908,963.00	1,562,445.07	346,517.93	0.00
Payroll Expense	41030	Part-Time-Seasonal-Labor Serv	0.00	50,336.18	-50,336.18	0.00
Payroll Expense	41050	Overtime and Premium Pay	17,235.00	16,325.74	909.26	0.00
Payroll Expense	41070	Other Employee Cost	0.00	14,445.75	-14,445.75	0.00
2025 G1031200 St Acct						

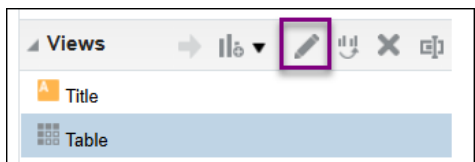
Change the Data Format

You can change how the data displays for a column's values. For example, changing general numbers to look like currency or a percentage.

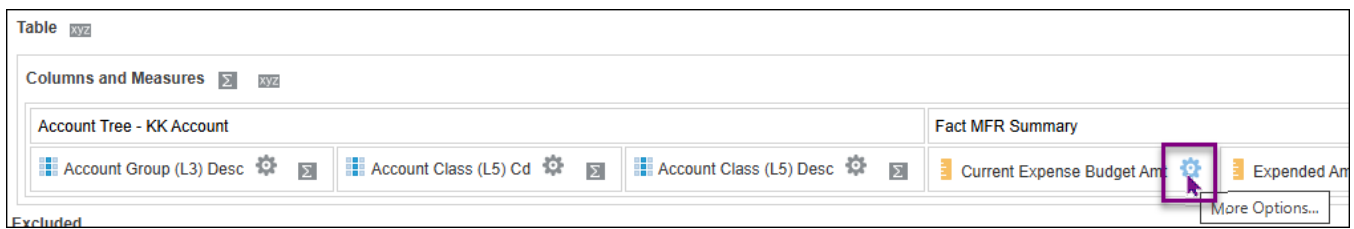
1. Select the **Edit View** icon for the view. There are two location to access the Edit View icon.
 - a. One is in the upper right corner of the view.



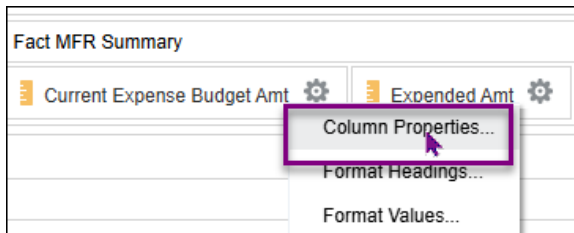
- b. The other is in the Views pane in the lower left corner of the Results tab. With the desired view highlighted, select the **Edit View** icon.



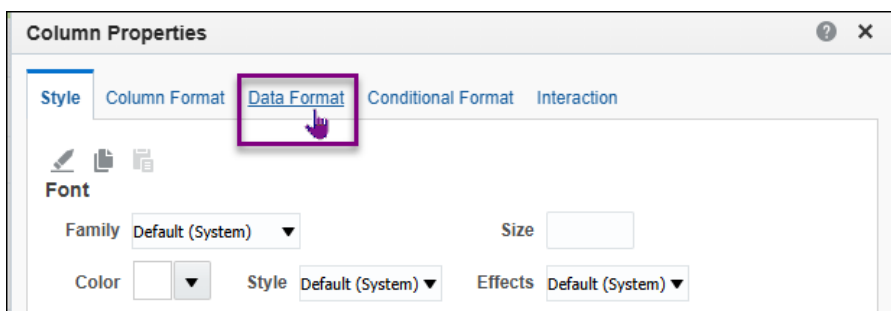
2. In the Layout pane, select the **More Options** icon for one of the columns where you want to change how the values are displayed.



3. Select “Column Properties” from the menu list.

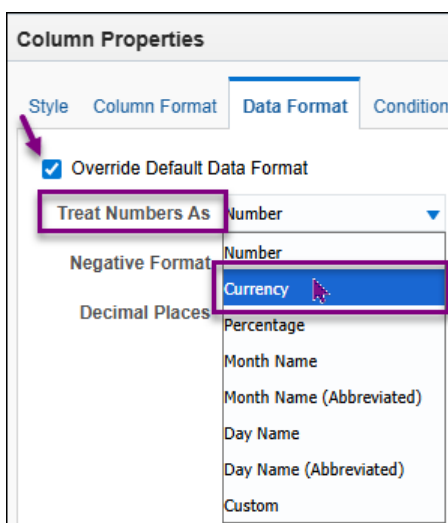


4. The Column Properties window displays. Select the **Data Format** tab.



5. Select the **Override Default Data Format** checkbox.

6. In the **Treat Numbers As** field, choose the appropriate option from the drop-down list. In this example, we chose “Currency.”



7. Enter other choices as desired, such as, using the currency symbol.
8. Select the **OK** button.

Column Properties

Style Column Format **Data Format** Conditional Format Interaction

☒ Override Default Data Format

Treat Numbers As Currency

Currency Symbol \$

Negative Format Minus: -123

Decimal Places 2

☒ Use 1000's Separator

OK Cancel

1. Select the **Done** button located at the top right of the page to exit editing from the Compound Layout.

Editing from: "Compound Layout"

Done Revert

2. Review your results.

Table

Appropriation Id G100001				Appropriation Long Desc	Accounting Service
2025	G1031100	PR Svcs			
Account Group (L3) Desc	Account Class (L5) Cd	Account Class (L5) Desc	Current Expense	Budget Amt	
Non-Payroll Expense	41100	Space Rental And Utilities		\$23,923.00	
Non-Payroll Expense	41110	Printing And Advertising		\$0.00	
Non-Payroll Expense	41150	Computer and System Services		\$0.00	
Non-Payroll Expense	41155	Communications		\$1,886.00	

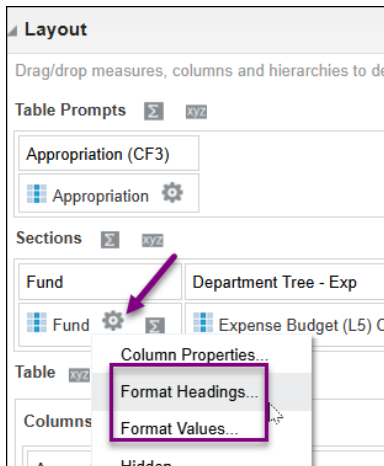
Change the Font

You can change the font for text on an object, such as a column heading or column value. You can change the style, size, and color of the font. In addition, you may be able to change the alignment and padding (white space) between and around the text.

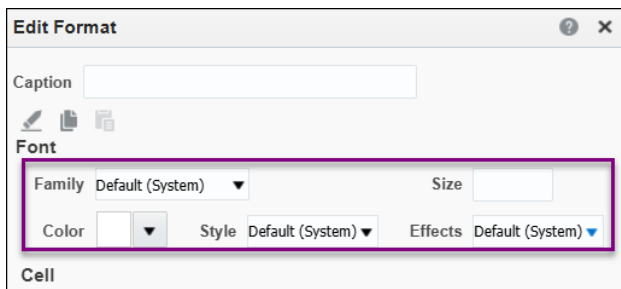
1. Select the **Edit View** icon for the table.



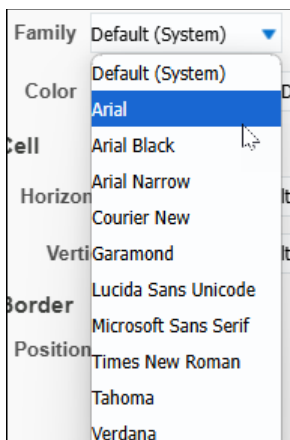
2. If it is a table view, the Layout pane displays. For each column where you want to change the font, select the **More Options** icon.
3. Select the “Format Headings” or the “Format Values” option.



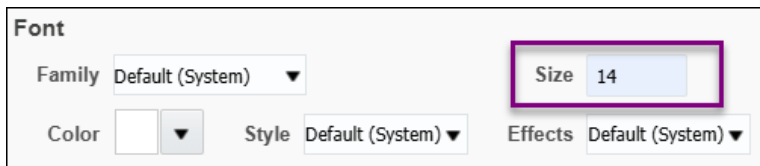
4. The **Edit Format** window displays. In the Font section of the window, you can change the font **Family**, **Size**, **Color**, **Style**, and/or **Effects**.



- a. The font **Family** allows you to choose a typeface, such as, Arial, Times New Roman, or Verdana.

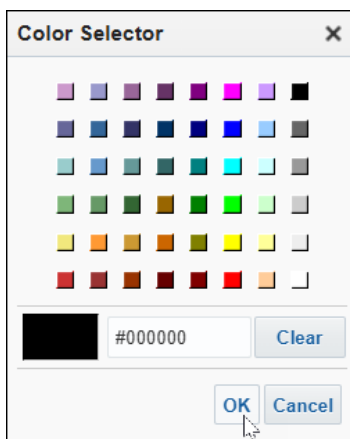


- b. The font Size allows you to choose how big you want your text and numbers, such as 12pt or 14pt font.



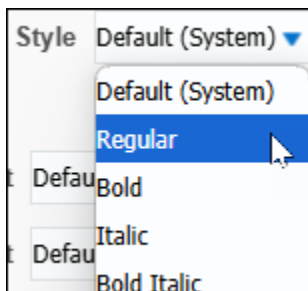
Font settings dialog box. The 'Size' input field is highlighted with a red box and contains the value '14'. Other fields include 'Family' (Default (System)), 'Color' (black), 'Style' (Default (System)), and 'Effects' (Default (System)).

- c. Select the **Color** drop-down menu. Select a color or enter a hex code from the **Color Selector**. The default color for any characters is black (hex #000000). Select the **OK** button.



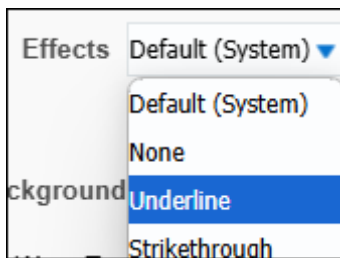
Color Selector dialog box. It displays a grid of color swatches. Below the grid is a hex code input field containing '#000000' and a 'Clear' button. At the bottom are 'OK' and 'Cancel' buttons. A mouse cursor is pointing at the 'OK' button.

- d. The **Style** menu allows you to apply a style to the font, such as, Bold or Italic.



Style dropdown menu. The menu is open, showing options: 'Default (System)', 'Regular' (highlighted), 'Bold', 'Italic', and 'Bold Italic'. A mouse cursor is pointing at the 'Regular' option.

- e. The **Effect** menu allows you to apply an effect to the text. Options include None (the System Default), Underline, or Strikethrough.



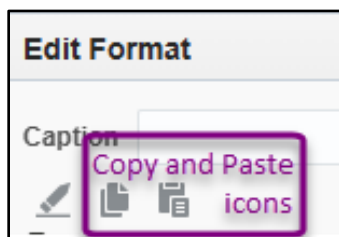
Effects dropdown menu. The menu is open, showing options: 'Default (System)', 'None', 'Underline' (highlighted), and 'Strikethrough'. A mouse cursor is pointing at the 'Underline' option.

Additional Display Options

You can use the **Edit Format** window to apply additional cosmetic changes to column headings and values. Options include:

- **Cell:** you can specify alignment, background color, and whether to wrap text.
- **Border:** you can choose to apply a border, its position, style, and color.
- **Additional Formatting Options:** Specify cell width, height, and add padding.
- **Custom CSS Style Options (HTML Only):** you can use Cascading Style Sheets (CSS) to apply style and format changes in HTML.

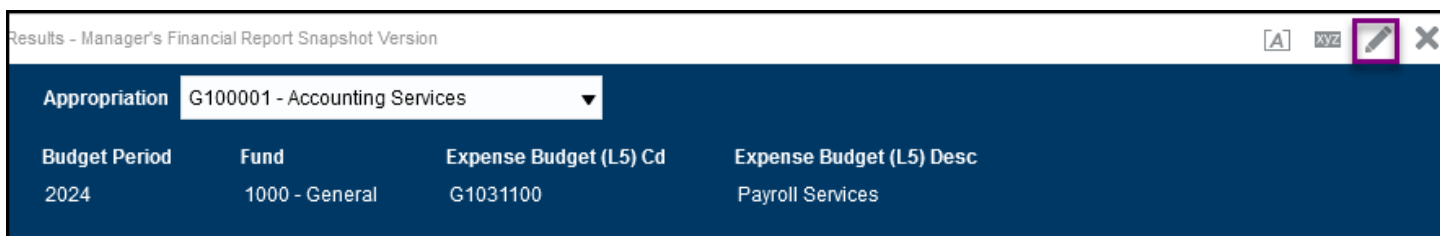
User Tip: When using the **Edit Format** window, you can select the **Copy** and **Paste** icons to apply the same changes to different columns, both headings and values.



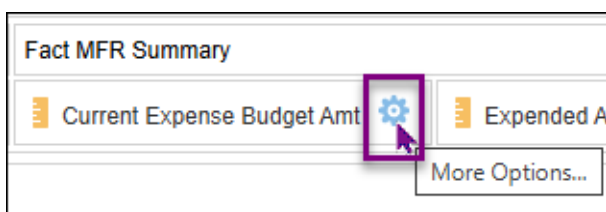
Apply Conditional Formatting

You can use Conditional Formatting to draw attention to a column if it meets a certain condition, such as adding background color to a cell when the dollar amount reaches a particular value.

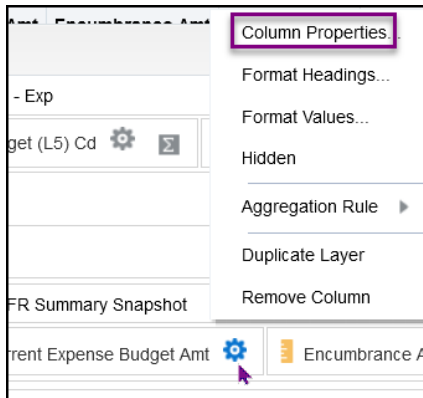
1. Select the **Edit View** icon for the table.



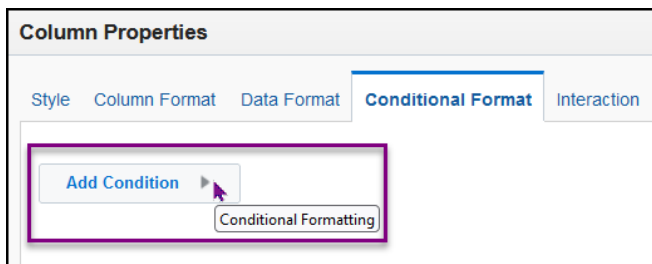
2. In the Layout pane, select the **More Options** icon for one of the columns where you want to apply a conditional format. In this example, we use the Current Expense Budget column to demonstrate.



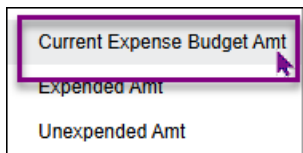
- Choose “Column Properties” in the displayed list.



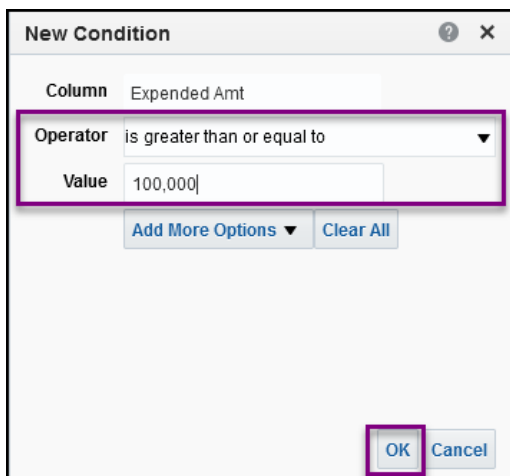
- Select **Add Condition** button to open a list of available columns.



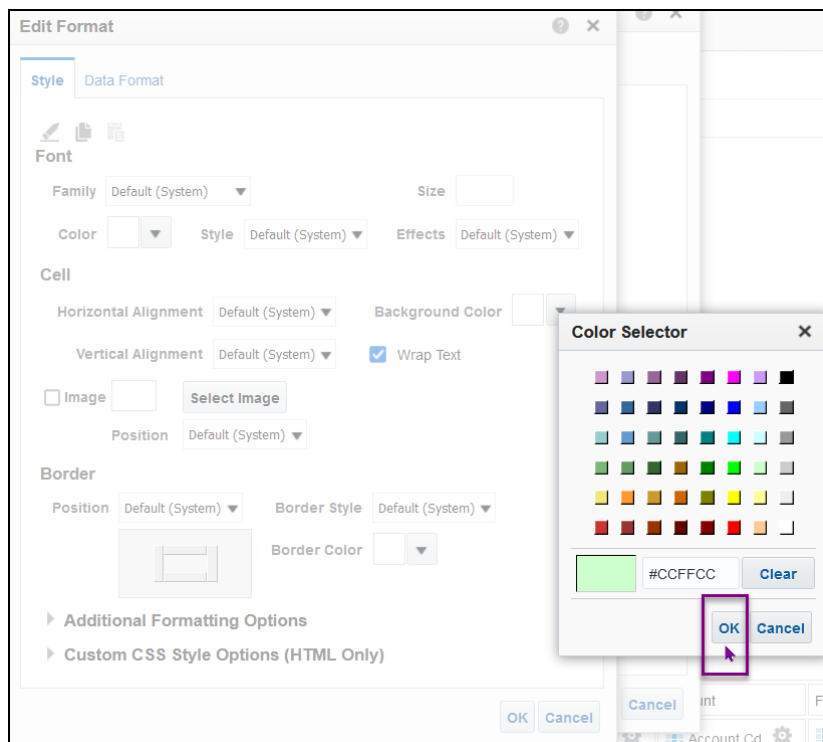
- Choose the appropriate column.



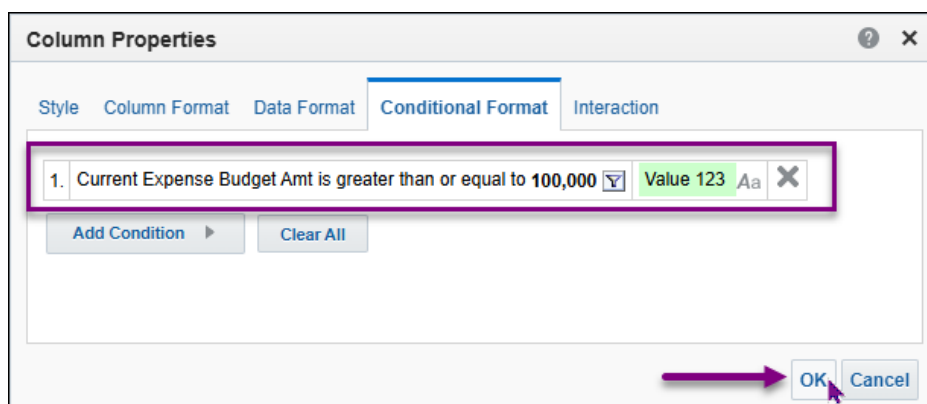
- The New Condition window displays. Choose the desired [operator](#) and enter a value.
- Select the **OK** button.



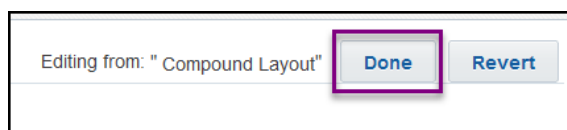
8. The Edit Format window displays. In this example, we are choosing a color to be applied to a data cell when it meets the condition previously defined.
9. Select the **OK** button.



10. A summary of the condition just added displays on the Conditional Format tab of the Column Properties window. Select the **OK** Button.



11. Select the **Done** button located at the top right of the page to exit editing from the Compound Layout.



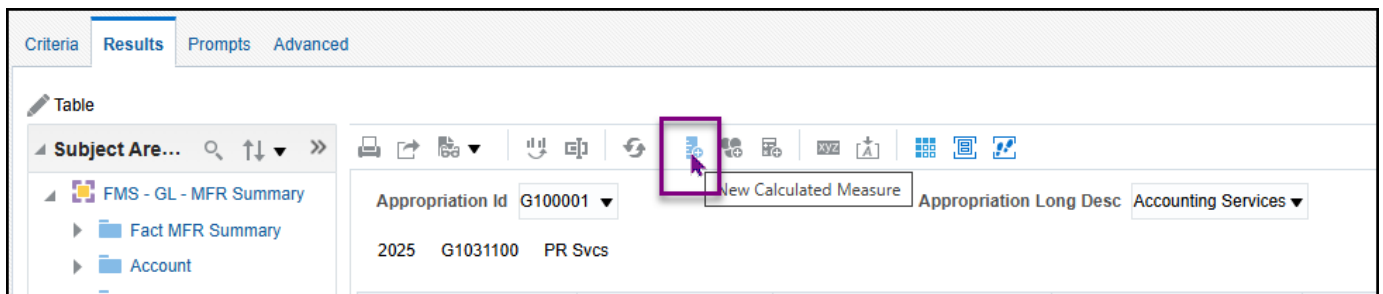
12. Review your results.

Account Class name	Current Expense Budget Amt	Encumbrance Amt
Space Rental And Utilities	202,849.00	30,524.00
Prof-Tech Serv-Outside Vend	0.00	0.00
Communications	0.00	6,538.67
Trav-Sub-InState-Border Comm	0.00	0.00
Trav/Sub-OutOfState-BorderComm	0.00	0.00
Employee Development	0.00	1,485.00
Rate-Based MNIT Services	0.00	4,144.90
Supplies	0.00	5,375.02
Other Operating Costs	0.00	32,000.00
	202,849.00	80,067.59
Full Time - Salary	4,187,962.00	2,695,167.36
Part-Time-Seasonal-Labor Serv	70,644.00	70,644.00
Overtime and Premium Pay	0.00	-1,511.98
Other Employee Cost	34,806.00	12,742.25
	4,293,412.00	2,777,041.63
	4,496,261.00	2,857,109.22


Add Calculated Measures

You can add calculated measures to a report. Measures are a specific type of column, generally found in Fact folders. Calculated Measures are derived from other measures in the analysis and are created using formulas. In this example, we demonstrate how to forecast the next fiscal year's expense budgets by editing the current year's expense budget amounts.

1. Select the **New Calculated Measure** icon in the ribbon located above the Compound Layout.



2. The New Calculated Measure window opens. Optionally, enter a **Folder Heading** name.
3. Enter a **Column Heading** name for your new column.
4. Expand the **Fact** folder in the Folders pane under the subject area.

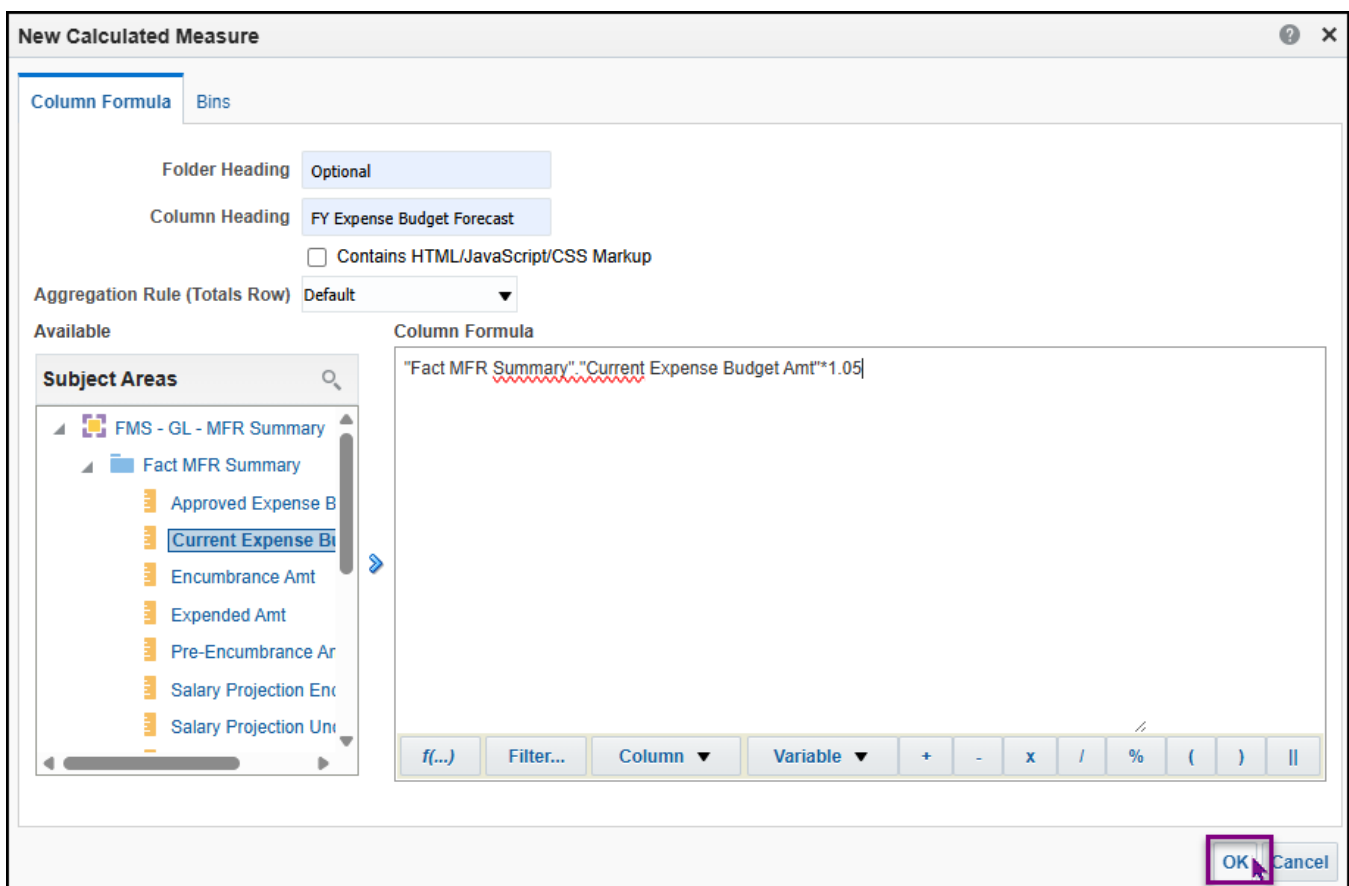
5. From the available options, select a measure for editing so that it is highlighted.
6. Then select the **Add Column** icon . The selected measure moves to the **Column Formula** pane. Notice that it is highlighted by default.

7. Select outside the column title to dehighlight the added column. You must deselect each piece of the formula added to the new measure.

8. Select the appropriate [operator](#) under the **Column Formula** pane. You can also select the operator symbol on your keyboard. In this example, we selected the **Multiply** icon since we expect next year's expenses to be more than the current year.



9. To increase the expense budget line amounts by 5%, we enter 1.05 after the operator. You may need additional operators for your formula. The EPM Data Warehouse uses precedence, left to right, to evaluate order of operations in the expression.
10. When the expression for the new measure is complete, Select the **OK** button.




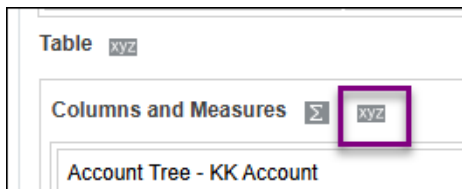
- Review your results. By default, the new column measure is added to the end of the columns in the **Columns and Measures** section. You can move it as desired. Refer to the [Reorganize Layout](#) section in this guide for more information about rearranging columns in the view.

Appropriation Id: G100001		Appropriation Long Desc: Accounting Services					
2025	G1031100	PR Svcs					
Account Group (L3) Desc	Account Class (L5) Cd	Account Class (L5) Desc	Current Expense Budget Amt	Expended Amt	Unexpended Amt	Unobligated Amt	FY Expense Budget Forecast
Non-Payroll Expense	41100	Space Rental And Utilities	23,923.00	25,346.48	-1,423.48	-1,423.48	25119.15
Non-Payroll Expense	41110	Printing And Advertising	0.00	1,256.60	-1,256.60	-2,307.38	0.00
Non-Payroll Expense	41150	Computer and System Services	0.00	12,576.13	-12,576.13	-12,576.13	0.00

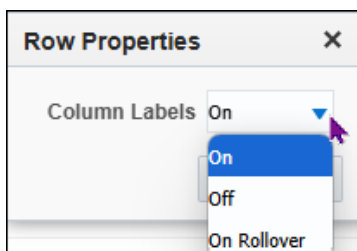
Customize Column Labels

There are several ways to customize column labels, including the visibility, the location, and the name. The choices depend on which section of the view the column resides.


- Select the **Edit View** icon.
- The Layout pane displays. Depending on the desired customization, refer to “a, b, or c” below.
 - Table Prompts section and Columns and Measures sections – Display of heading labels.**
 - You can choose to make labels visible, hidden, or available on rollover. To do so, select the **Column and Measure Properties** icon .

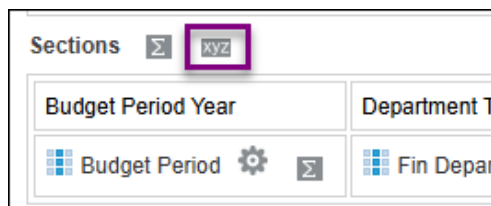


- Choose the appropriate option.
 - “On” makes them headings visible.
 - “Off” hides the headings.
 - “On Rollover” makes the headings visible when your mouse hovers on the column.

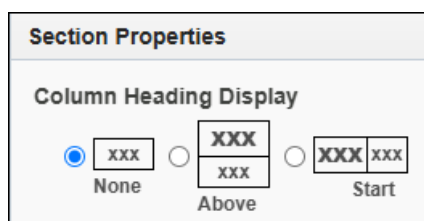


- The Sections section – Location of heading labels.**

- i. You can choose where to display column heading labels in the **Sections** area of the table. Options include **None** for no headings label, **Above** to have the headings above the values, and **Start** to have the headings display to the left of the value. To begin, select the **Section Properties** icon .

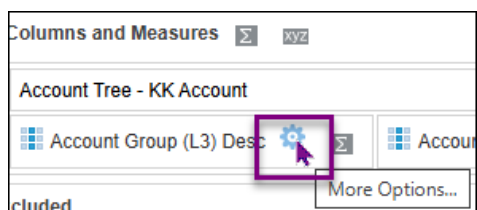


- ii. Choose the appropriate option.

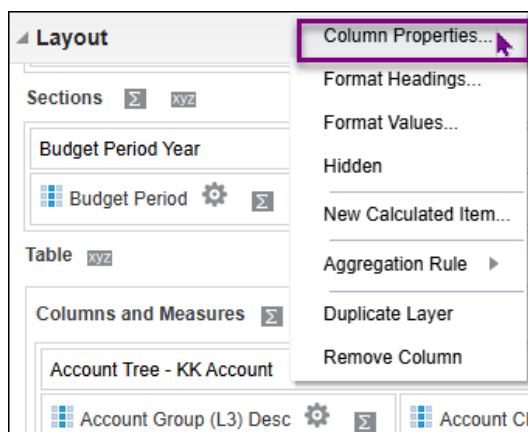


c. Report level – Customize the Text for a Column Label


- i. You can change the name and the appearance of the heading labels. To do so, select the **More Options** icon.

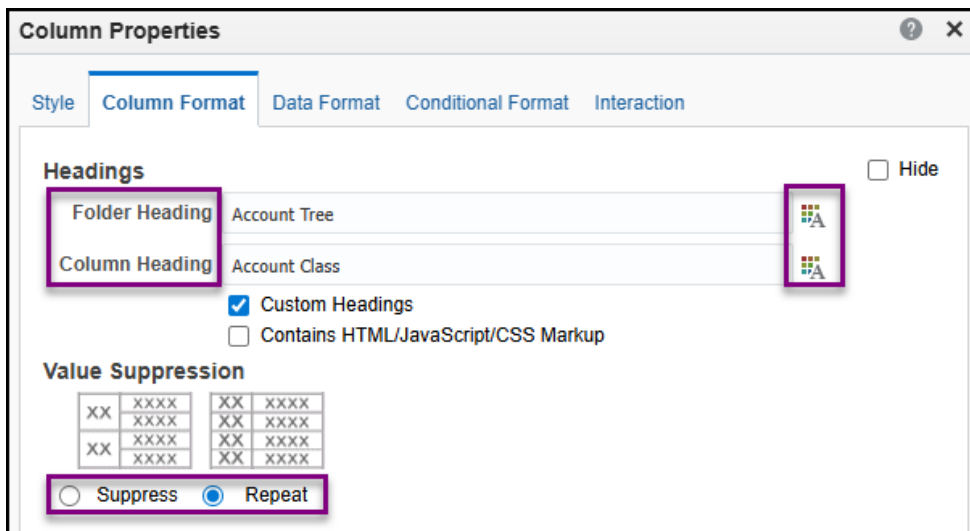


- ii. Select the “Column Properties...” option.



- iii. The Column Format window displays. Select the **Column Format** tab.

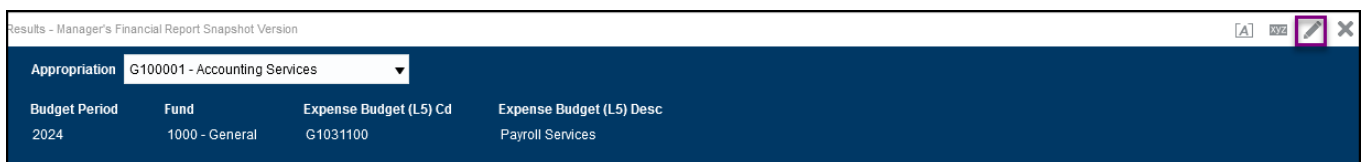
- iv. Select the **Custom Headings** checkbox.
- v. Overwrite or enter the desired text for both or either of the **Folder Heading** or **Column Heading**.
- vi. Select the **Color Selector** icon  to change the font style, size, color, and effects.
- vii. In the Value Suppression section, select "Suppress" to prevent repetition of values or "Repeat" to allow repetition of values.



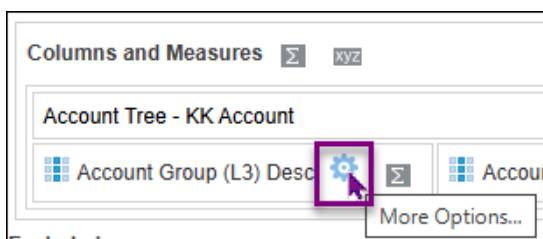
Note: You can also apply text and color changes to heading labels using the **Format Headings** option rather than through the Column Properties. Doing so affects the display of the label only in the current view.

Resize Columns and Rows

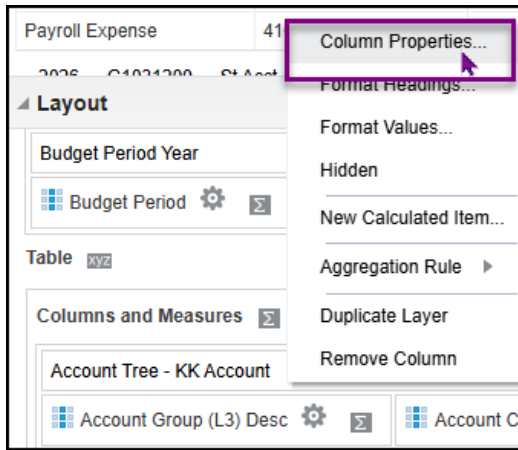
1. Select the **Edit View** icon for the table.



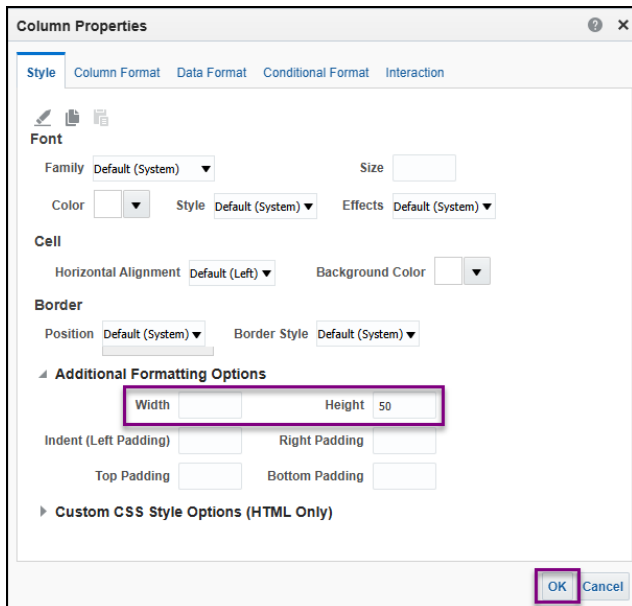
2. In the Layout pane, select the **More Options** icon for one of the columns where you want the rows to be resized. Resizing one column affects the entire row and resizes the row for all columns in that row. In this example, we demonstrate using a column located in the **Columns and Measures** section.



3. Choose “Column Properties” in the displayed list.



4. Enter a desired height in the **Height** field of the Additional Formatting Options section. **Note:** To resize the width of a column, enter a desired width in the **Width** field. Column width only affects the one column and no other columns in the same row.

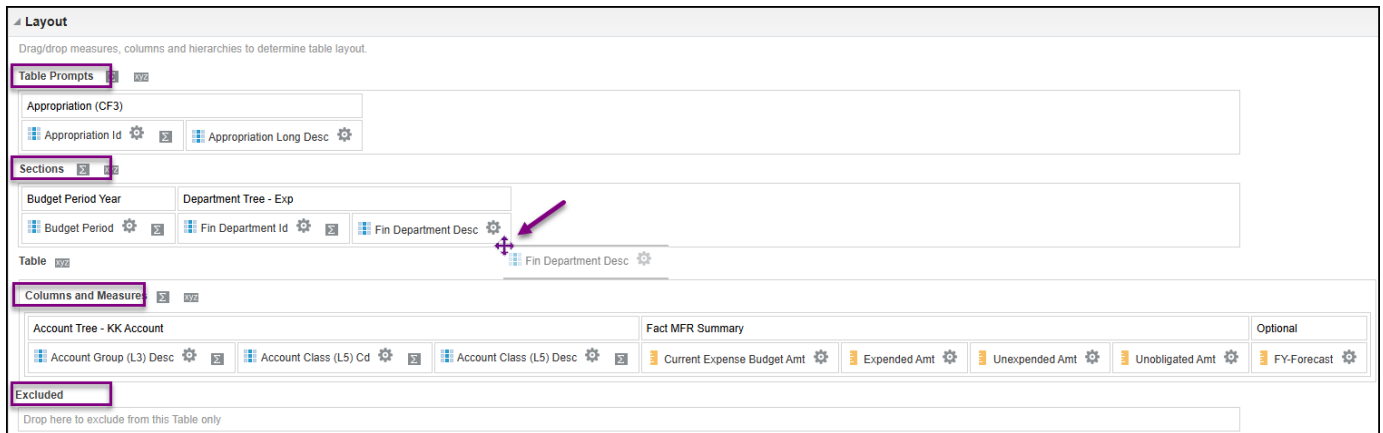


Reorganize Layout

There are various ways you can organize the layout of the results on the view. You can drag columns around, you can right-click on a column using a mouse and select a movement option, and you can use the Layout pane. We demonstrate using the Layout pane.

1. Select the **Edit View** icon for the table.
2. The Layout pane displays. There are four sections. Hover over a column that you want to move until the cross arrows mark appears.

- a. **Table Prompts** – columns dragged to this section will create a drop-down menu of all the values, allowing you to view one value at a time.
 - b. **Sections** – columns in this section create sub-tables of the view. Data will be aggregated based on the columns included in this section.
 - c. **Columns and Measures** – this represents the body of your data.
 - d. **Excluded** – these are columns included in your report but excluded from the view. If you create a new view, all columns in the report will initially display, including those excluded from the previous view.
3. Move columns to various sections and in the desired order by dragging and dropping.

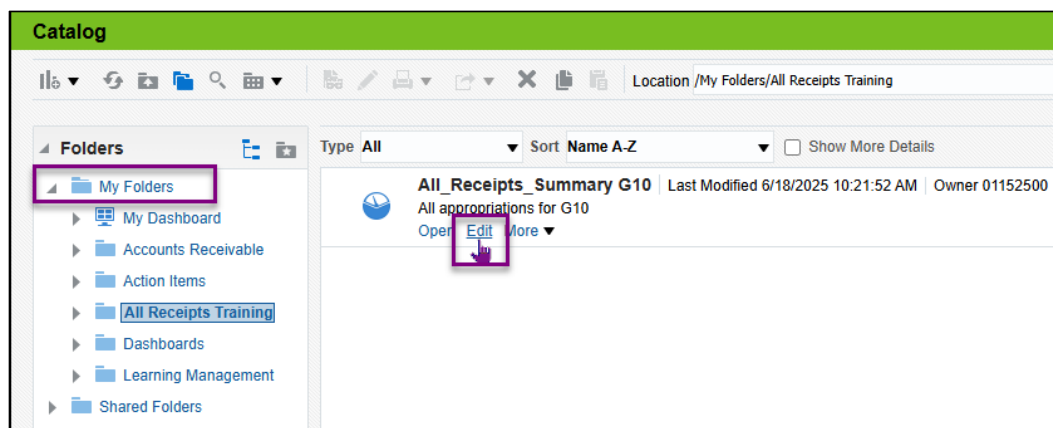


Note: For more detailed information and instructions about reorganizing views, refer to the [Update the View on an Existing Report](#) Quick Reference Guide.

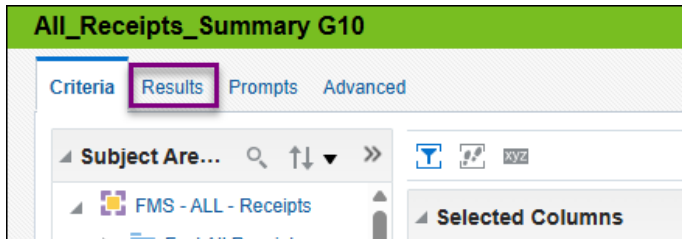
Import Formatting from Another Analysis

You can import formatting from one analysis to another when using the same view from the source analysis.

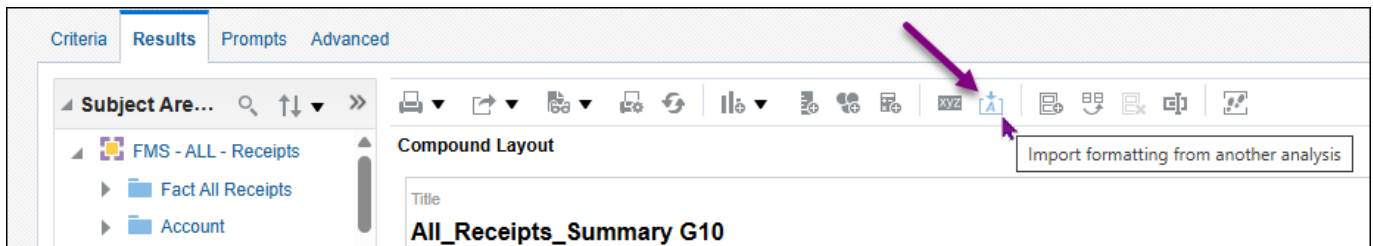
1. Navigate to **My Folders** from the Catalog.
2. Select the **Edit** link for the analysis for which you want to import and apply formatting.



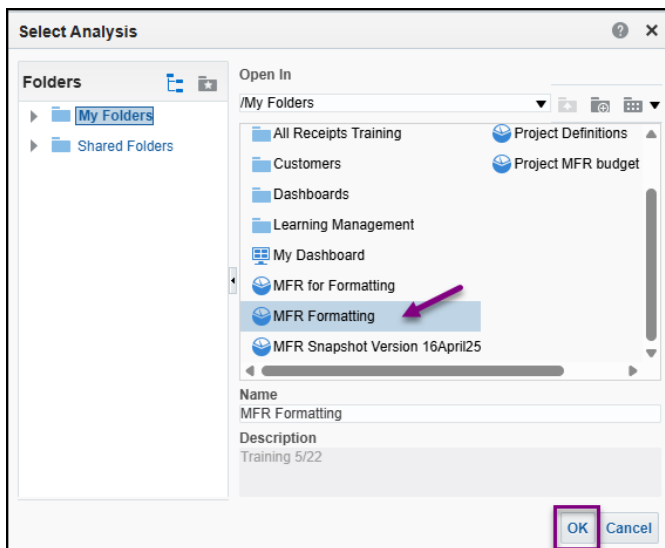
- By the default, editing an analysis opens the Results tab of the Analysis Editor. If it does not, simply select the **Results** tab.



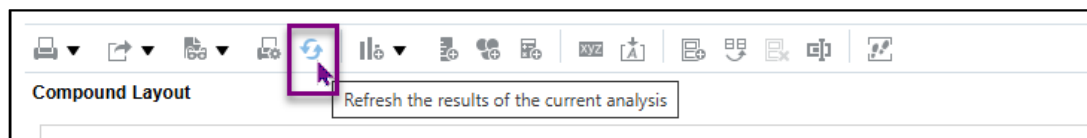
- Select the **Import formatting from another analysis** icon found in the icon ribbon above the Compound Layout.



- The Select Analysis window displays. In **My Folders**, select the analysis from which you want to import formatting.
- Select the **OK** button.



- Select the **Refresh the results of the current analysis** icon.



8. View the Results. Remember to select the **Save** button before exiting.

Compound Layout

Title: Formatting MFR
All_Receipts_Summary G10

Table: Appropriation G100000 - Non Dedicated Receipts

2026 G10

Accounting Day Dt	Fund	Fin Department	Revenue Budget Dept	Monetary Amt
7/10/2025	1000 - General	G1010000 - Minnesota Management & Budget	G1010000 - Minnesota Management & Budget	210.00
7/10/2025	1000 - General	G1010000 - Minnesota Management & Budget	G1010000 - Minnesota Management & Budget Total	210.00

Appendix

Guidelines for Choosing an Operator in the EPM Data Warehouse

Source: [Oracle Smart View for Office User's Guide](#), Oracle Help Center.

Operator	Guidelines
is equal to / is in	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.
is not equal to / is not in	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.
is less than	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.
is greater than	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.
is less than or equal to	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.

Operator	Guidelines
is greater than or equal to	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.
is between	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.
is null	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.
is not null	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.
is ranked first	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.
ranked last	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.
contains all	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 the values in the filter.
does not contain	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.
contains any	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.
begins with	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.
ends with	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.

Operator	Guidelines
is LIKE (pattern match)	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.
is not LIKE (pattern match)	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.

Related Training Materials

- [Create a New Analysis Quick Reference](#) Guide
- [Update the Data on an Existing Report](#) Quick Reference Guide
- [Update the View on an Existing Report](#) Quick Reference Guide