

ERA 300

ENTERPRISE ANALYTICS - ANALYSIS STUDIO

QUICK START WORKSHOP

Analysis Studio Quick Start Guide

This guide is intended for customers that are familiar with and use the PowerPlay cubes in Enterprise Reporting. Analysis Studio replaces PowerPlay and provides the same functionality in Enterprise Analytics with a very similar interface. Users can use Analysis Studio to: Explore data from different angles and gain new insights; find fast answers to organizational questions and make informed decisions by analyzing your data.

Objectives

- Overview of Analysis Studio Basics
 - Navigation
 - Analysis Studio Interface
 - Menu Option
 - Gathering Data
 - Organizing your Canvas
 - Drill Through Reports
 - Custom Subsets
 - Additional Reference Material

[myUFL Toolkits - hr.ufl.edu/training/myUFL/Toolkits/](http://hr.ufl.edu/training/myUFL/Toolkits/)

- Web Simulations
- Instruction Guides
- Security Roles
- Training
- Contact Information
- Other Helpful Information

Access & Security

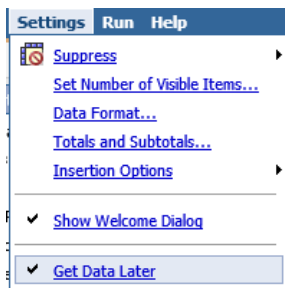
- ER is available to all faculty and staff
- Request Roles via myUFL with your Departmental Security Administrator o FI access is granted with the UF_FI_UNIVERSAL_INQUIRY o HR access is tied to your HR PeopleSoft Roles

Benefits of Enterprise Reporting

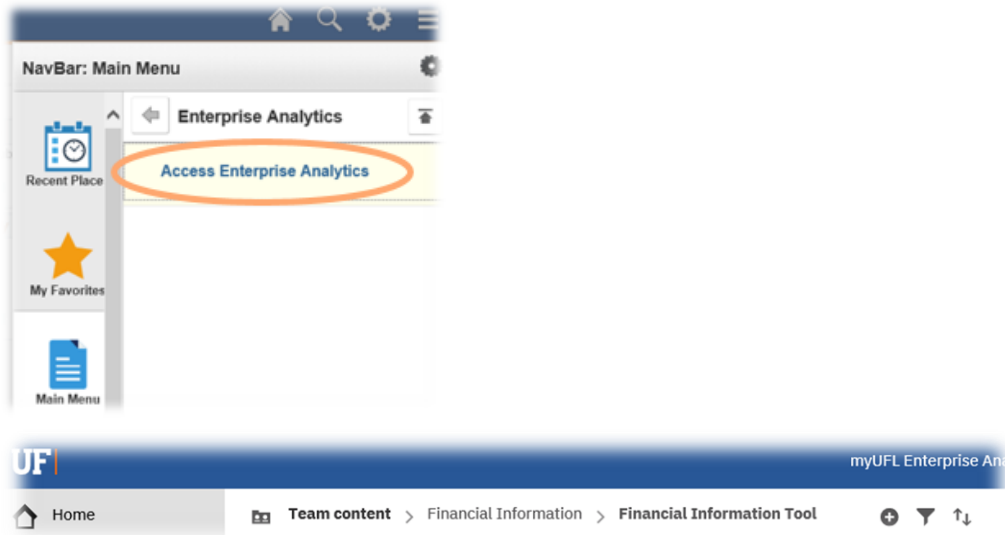
- Self-service/On-demand Web Access
- Get what you need FASTER
- Reduce need for shadow databases
- Reduce reliance on IT staff
- Meet reporting needs for all departments
- New and historic data

The Best Experience

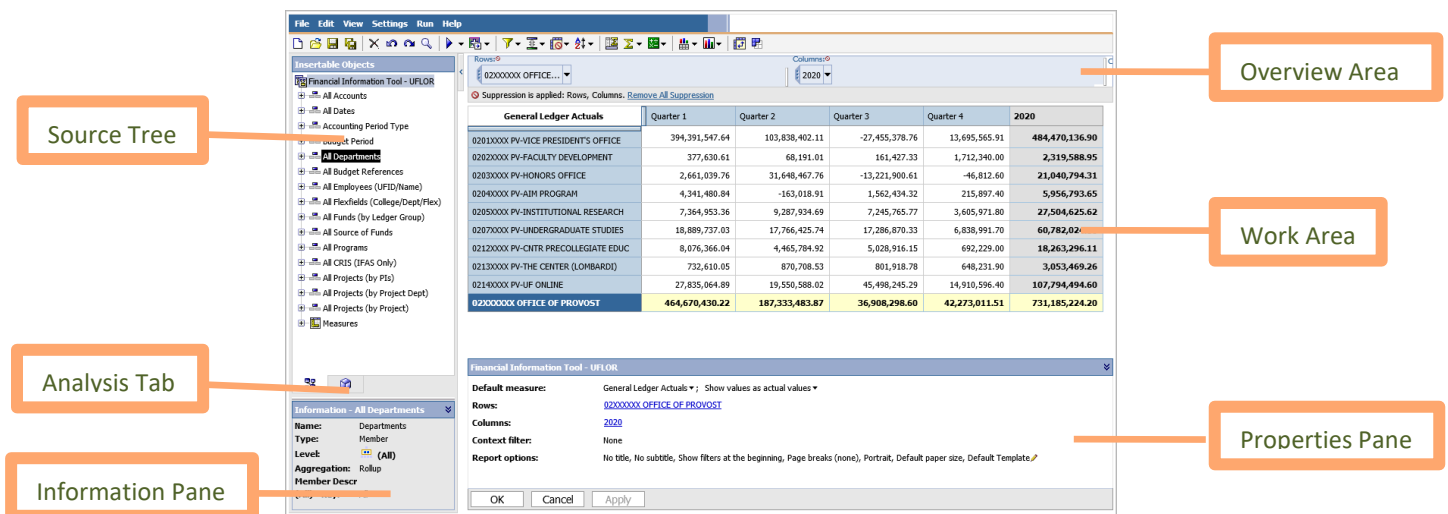
- Internet Explorer with Compatibility Mode enabled for ufl.edu
- Save time by turning data off while creating your view and filtering - Get Data Later - Settings > Get Data Later



Navigation

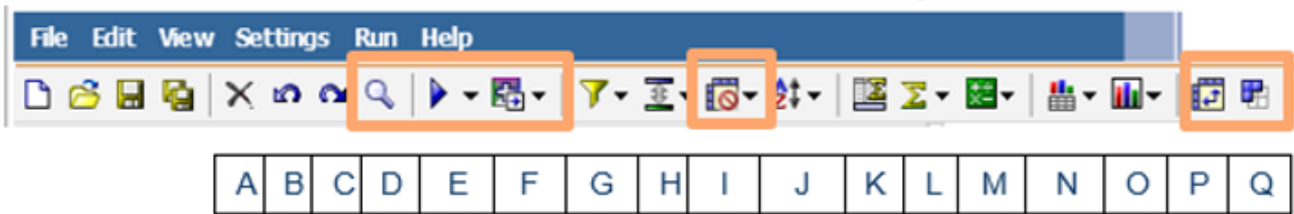


Analysis Studio Interface – Similar to PowerPlay!



- **The Work Area** - The work area contains the crosstabs and charts that you use to explore and analyze data. You can view your analysis as a crosstab, a chart, or a crosstab and a chart.
- **The Source Tree** - The Source tab of the Insertable Objects pane contains the source tree for the package selected for the analysis.
- **The Analysis Items Tab** - The Analysis Items tab contains items created in the analysis, such as custom sets and named sets.
- **The Information Pane** - The Information pane shows the name, level, attributes (if any), and aggregation associated with the selected item in the source tree, as well as any additional information provided by the data modeler.
- **The Properties Pane** - The properties pane provides a comprehensive view of the crosstab or selected set in the work area.
- **The Overview Area** - You can use the overview area as a convenient place to quickly explore and change the contents of the work area.

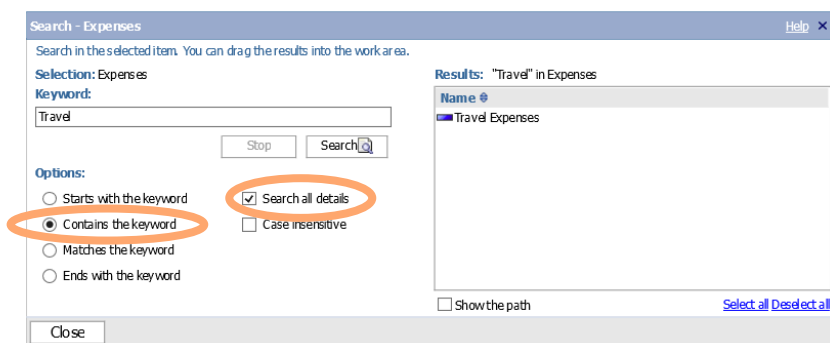
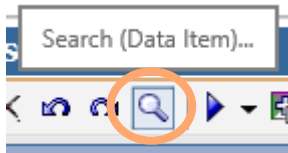
The Menu Bar – Now at the Top!



- | | |
|--------------------------|-----------------------|
| A. Delete | I. Zero Suppression |
| B. Undo | J. Sort |
| C. Redo | K. Subtotals |
| D. Search | L. Summarize |
| E. Run / File Export | M. Create Calculation |
| F. Go To / Related Links | N. Crosstab / Chart |
| G. Filter | O. Create Chart |
| H. Top/Bottom Filter | P. Swap Rows/Columns |
| | Q. Custom Subset |

Gathering Data

Search for specific values or descriptions



Using Source Tree or Overview Area

The screenshot shows the 'Financial Information Tool - UFLOM' interface. On the left is a source tree with categories like 'All Accounts', 'All Dates', 'Accounting Period Type', 'Budget Period', 'All Departments', 'All Budget References', 'All Employees (UFID/Name)', 'All Flexfields (College/Dept/Flex)', 'All Funds (by Ledger Group)', 'All Source of Funds', 'All Programs', 'All CRIS (IFAS Only)', 'All Projects (by PIs)', 'All Projects (by Project Dept)', 'All Projects (by Project)', and 'Measures'. On the right, a data table is displayed with a 'Context filter' set to '16XXXXXX COLLEG...'. A search dropdown menu is open, showing options like 'Delete', 'Departments', 'Previous (15XXXXXX COLLEGE-DESIGN CONSTRUC / PLAN)', 'Next (17XXXXXX COLLEGE-BUSINESS ADMINISTRATION)', and a search for '1600XXXX COLLEGE-LIBERAL ARTS/SCIENCES'. The table shows values for various departments, with '1602XXXX LS-AFRICAN-ASIAN LANG / LIT' highlighted.

Organizing Your Canvas

'Drag-n-Drop' onto the "Hot Spots" just like PowerPlay!

The screenshot shows a 'General Ledger Actuals' table with columns for '2000' and '2001'. The rows list various departments: '00XXXXXX BOARD OF TRUSTEES', '11XXXXXX OFFICE OF PRESIDENT', '22XXXXXX OFFICE OF PROVOST', '33XXXXXX OFFICE ENROLLMENT MANAGEMENT', and '44XXXXXX OFFICE OF STUDENT AFFAIRS'. Orange circles highlight the '2000' and '2001' column headers and the first two rows, indicating 'Hot Spots' for organizing the canvas.

Insert, Replace or Nest Rows and Columns just like PowerPlay!

The screenshot shows a context menu for organizing rows and columns. The menu options include: 'Search (Funds (by Ledger Group))...', 'Set Number of Items to Show...', 'Sort', 'Insert', 'Replace', 'Insert Level ((All))', 'Replace with Level ((All))', 'Filter as Context', 'Glossary', and 'Lineage'. The 'Replace' option is circled in orange. A sub-menu is open for 'Replace', showing options: 'As Rows', 'As Columns', 'As Nested Rows', 'As Nested Columns', 'After Selected Set', 'Before Selected Set', 'Above Selected Set', 'Below Selected Set', and 'As Last Item in Selected Set'. The 'As Nested Rows' and 'As Nested Columns' options are circled in orange.

Expanding and Drilling Up or Down a Level

The diagram illustrates navigation options in a budget hierarchy. On the left, a list of budget categories includes 'Other Operating Expenses', which is circled in orange. A box labeled 'Up a Level' points to this category. In the center, a list of sub-categories includes 'Travel Expenses', which is also circled in orange. A box labeled 'Down a' points to this category. On the right, a context menu for 'Properties (Other Operating Expenses)' is shown. The 'Expand Other Operating Expenses' and 'Down a Level' options are circled in orange. A box labeled 'Expand or Down a Level' points to these options.

Up a Level

Down a

Expand or Down a Level

Reorder Columns or Swap Rows and Columns

The diagram shows two menu options. On the left, a 'View' menu is open, and the 'Swap Rows and Columns' option is circled in orange. On the right, a 'Row' menu is open, and the 'Other Operating...' option is circled in orange. A curved arrow points from the 'Other Operating...' option back to the 'Swap Rows and Columns' option.

Delete Data from Your Work Area

The diagram shows two menu options for deleting data. On the left, a 'Departments' menu is open, and the 'Delete' option is circled in orange. On the right, a 'Properties (Departments)' menu is open, and the 'Delete' option is circled in orange.

Drill Through Reports – Get the Details!

Access any Related Reports (Drill Through Reports) from within the Cross Tab body by highlighting a cell and using the right click on the mouse to access the drill menu. Navigate to the option Go To and click on Related Links.

General Ledger Actuals		2020	2019	2018	2017	2016
1400XXXX INFORMATION TECHNOLOGY	Expenses					
	Revenues					
1401XXXX IT-CHIEF INFORMATION OFFICER	Expenses	14,785,276.65	29,032,902.27	33,834,998.61	28,158,317.52	
	Revenues	-16,946,683.68	-23,905,985.41	-21,599,618.91	-24,877,543.00	
	All	-2,161,407.03	5,126,916.86	12,235,379.70	3,280,774.52	
1402XXXX IT-BUSINESS CENTER	Expenses	1,406,830.45	1,571,413.86	1,122,353,379.70	1,051,000.00	
	Revenues	-682,563.00	-648,002.00	-65,000.00		
	All	724,267.45	923,411.86	1,063,073.70	1,051,000.00	
1403XXXX IT-PMO PROJECT MANAGEMENT OFF	Expenses	1,208,108.33	1,395,562.84	1,490,888.26		
	Revenues		-800,000.00	-792,000.00		
	All	1,208,108.33	595,562.84	698,888.26		
1410XXXX IT-WEB ADMINISTRATION	Expenses					
	All					
1420XXXX IT-AT ACADEMIC TECHNOLOGY	Expenses	13,144,339.88	14,766,292.96	13,201,643.35	13,651,263.92	

Go to - Mozilla Firefox
https://qat-reporting.it.ufl.edu/ibmcognos/bi/v1/disp

Go to Help

Available links:

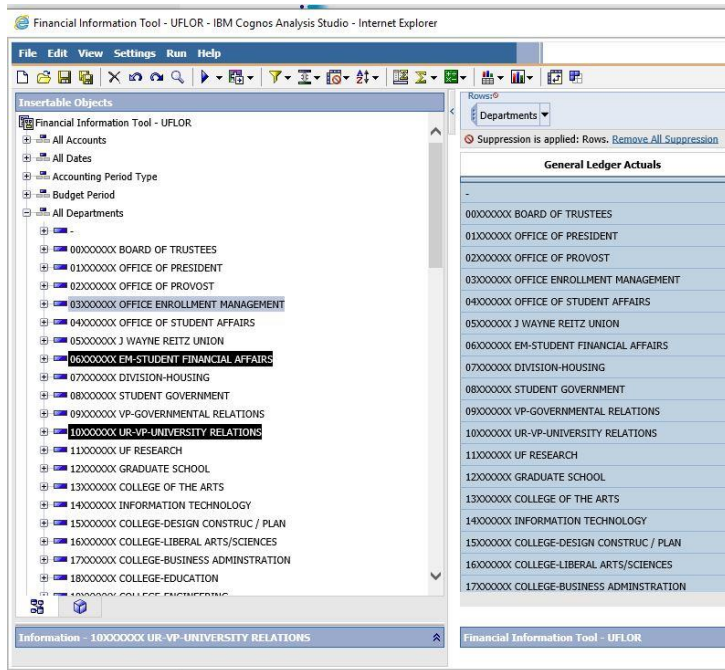
Name	Target
Commitment Control Budget Journal Detail - UFLOR	Team Content > PowerPlay Drill-Through Targets > Commitmer
Commitment Control Detail - UFLOR	Team Content > PowerPlay Drill-Through Targets > Commitmer
Managerial Budget Journal Detail - UFLOR	Team Content > PowerPlay Drill-Through Targets > Managerial
Payroll Employee Summary - UFLOR	Team Content > PowerPlay Drill-Through Targets > Payroll Imp
Projected Payroll Employee Summary - UFLOR	Team Content > PowerPlay Drill-Through Targets > Projected P
Show me passed parms	Team Content > PowerPlay Drill-Through Targets > Report show
Source Transaction Detail - UFLOR	Team Content > PowerPlay Drill-Through Targets > Source Tran

Cancel

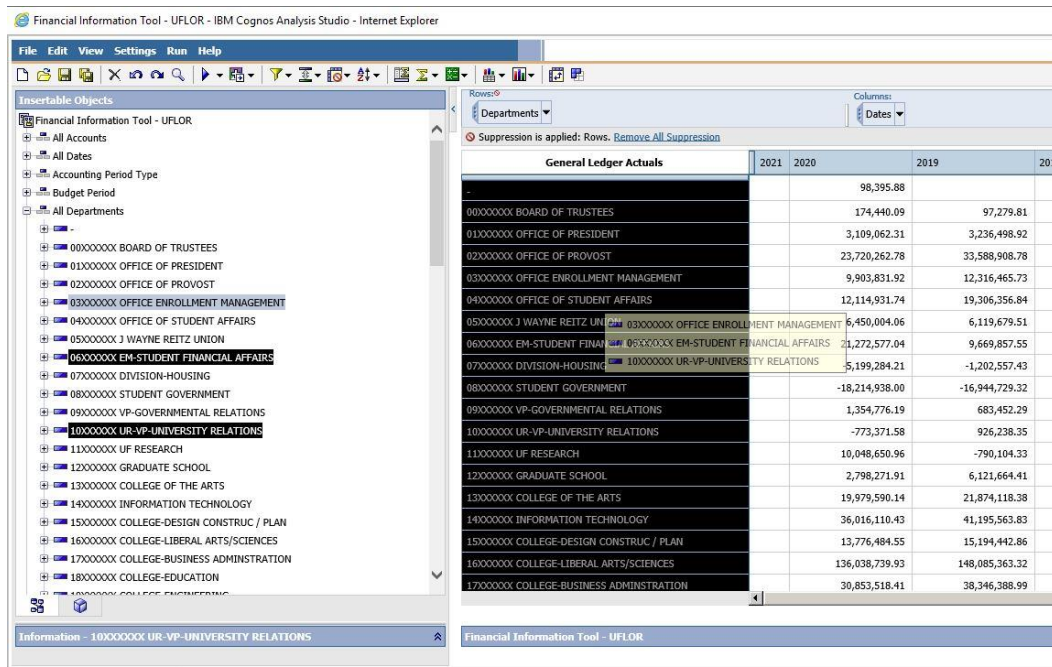
Custom Subsets – 2 Options

Insert, Replace or Nest Rows and Columns just like PowerPlay!

Select multiple items directly from the tree using the Ctrl key and your mouse.



Drag the selected items over to the crosstab and drop.



Once you drop the selected items, the crosstab will reflect your selection as seen below.

Financial Information Tool - UFLOR * - IBM Cognos Analysis Studio - Internet Explorer

File Edit View Settings Run Help

Insertable Objects

- Financial Information Tool - UFLOR
 - All Accounts
 - All Dates
 - Accounting Period Type
 - Budget Period
 - All Departments
 -
 - 00XXXXXX BOARD OF TRUSTEES
 - 01XXXXXX OFFICE OF PRESIDENT
 - 02XXXXXX OFFICE OF PROVOST
 - 03XXXXXX OFFICE ENROLLMENT MANAGEMENT
 - 04XXXXXX OFFICE OF STUDENT AFFAIRS
 - 05XXXXXX J WAYNE REITZ UNION
 - 06XXXXXX EM-STUDENT FINANCIAL AFFAIRS
 - 07XXXXXX DIVISION-HOUSING
 - 08XXXXXX STUDENT GOVERNMENT
 - 09XXXXXX VP-GOVERNMENTAL RELATIONS
 - 10XXXXXX UR-VP-UNIVERSITY RELATIONS
 - 11XXXXXX UF RESEARCH
 - 12XXXXXX GRADUATE SCHOOL
 - 13XXXXXX COLLEGE OF THE ARTS
 - 14XXXXXX INFORMATION TECHNOLOGY
 - 15XXXXXX COLLEGE-DESIGN CONSTRUC / PLAN
 - 16XXXXXX COLLEGE-LIBERAL ARTS/SCIENCES
 - 17XXXXXX COLLEGE-BUSINESS ADMINSTRATION
 - 18XXXXXX COLLEGE-EDUCATION
 - 19XXXXXX COLLEGE ENGINEERING

Rows: 0
All Departments...
Columns: Dates

Suppression is applied: Rows. Remove All Suppression

General Ledger Actuals	2021	2020	2019
03XXXXXX OFFICE ENROLLMENT MANAGEMENT		9,903,831.92	12,316,465
06XXXXXX EM-STUDENT FINANCIAL AFFAIRS		21,272,577.04	9,669,857
10XXXXXX UR-VP-UNIVERSITY RELATIONS		-773,371.58	926,238
Total		30,403,037.38	22,912,561

Information - 10XXXXXX UR-VP-UNIVERSITY RELATIONS

Financial Information Tool - UFLOR

Finally, from here if you right click on the selected items in the crosstab, you can see a drop down menu where you can save your items as a custom set.

Financial Information Tool - UFLOR * - IBM Cognos Analysis Studio - Internet Explorer

File Edit View Settings Run Help

Insertable Objects

- Financial Information Tool - UFLOR
 - All Accounts
 - All Dates
 - Accounting Period Type
 - Budget Period
 - All Departments
 -
 - 00XXXXXX BOARD OF TRUSTEES
 - 01XXXXXX OFFICE OF PRESIDENT
 - 02XXXXXX OFFICE OF PROVOST
 - 03XXXXXX OFFICE ENROLLMENT MANAGEMENT
 - 04XXXXXX OFFICE OF STUDENT AFFAIRS
 - 05XXXXXX J WAYNE REITZ UNION
 - 06XXXXXX EM-STUDENT FINANCIAL AFFAIRS
 - 07XXXXXX DIVISION-HOUSING
 - 08XXXXXX STUDENT GOVERNMENT
 - 09XXXXXX VP-GOVERNMENTAL RELATIONS
 - 10XXXXXX UR-VP-UNIVERSITY RELATIONS
 - 11XXXXXX UF RESEARCH
 - 12XXXXXX GRADUATE SCHOOL
 - 13XXXXXX COLLEGE OF THE ARTS
 - 14XXXXXX INFORMATION TECHNOLOGY
 - 15XXXXXX COLLEGE-DESIGN CONSTRUC / PLAN
 - 16XXXXXX COLLEGE-LIBERAL ARTS/SCIENCES
 - 17XXXXXX COLLEGE-BUSINESS ADMINSTRATION
 - 18XXXXXX COLLEGE-EDUCATION
 - 19XXXXXX COLLEGE ENGINEERING

Rows: 0
All Departments...
Columns: Dates

Suppression is applied: Rows. Remove All Suppression

General Ledger Actuals	2021	2020	2019
03XXXXXX OFFICE ENROLLMENT MANAGEMENT		9,903,831.92	12,316
06XXXXXX EM-STUDENT FINANCIAL AFFAIRS			9,669
10XXXXXX UR-VP-UNIVERSITY RELATIONS			926
Total			22,912

Information - 10XXXXXX UR-VP-UNIVERSITY RELATIONS

Financial Information Tool - UFLOR

- Save as Custom Set...
- Delete
- Keep
- Exclude
- Sort
- Calculate
- Suppress
- Drill Down
- Drill Up
- Go To
- Show Attributes
- Properties (All Departments (list))

Create a subset without using the drag and drop method.

To create a subset of items, you can select the items holding the CTRL key and using the mouse to Left Click on each item you wish to group. Right click on the item(s) selected and you will be presented with a drop down menu shown below.

The screenshot shows a table titled "General Ledger Actuals" with columns for years 2020, 2019, 2018, and 2017. A context menu is open over the row for "07000000 DIVISION-HOUSING". The menu options include: Save as Custom Set..., Hide, Keep, Exclude, Calculate, Go To, Show Attributes, and Properties (Departments).

General Ledger Actuals	2020	2019	2018	2017
-	98,395.88			
00X00000 BOARD OF TRUSTEES	174,440.09	97,279.81	136,469.55	
01X00000 OFFICE OF PRESIDENT	3,109,062.31	3,236,498.92	3,449,641.42	
02X00000 OFFICE OF PROVOST	23,720,262.78	33,588,908.78	23,481,031.86	
03X00000 OFFICE ENROLLMENT MANAGEMENT	9,903,831.92	12,316,465.73	12,058,727.42	
04X00000 OFFICE OF STUDENT AFFAIRS	12,114,931.74	19,306,356.84	15,023,255.60	
05X00000 J WAYNE REITZ UNION	6,450,004.06	6,119,679.51	6,066,658.55	
06X00000 EM-STUDENT FINANCIAL AFFAIRS	21,272,577.04	9,669,857.55	11,007,990.38	
07000000 DIVISION-HOUSING	-5,199,284.21	-1,202,557.43	-4,885,460.43	
08X00000 STUDENT GOVERNMENT	938.00	-16,944,729.32	-18,309,607.02	
09X00000 VP-GOVERNMENTAL RELATIONS	776.19	683,452.29	1,212,581.04	
10X00000 UR-VP-UNIVERSITY RELATIONS	371.58	926,238.35	1,613,621.32	
11X00000 UF RESEARCH	650.96	-790,104.33	-17,637,973.89	
12X00000 GRADUATE SCHOOL	271.91	6,121,664.41	4,076,708.78	
13X00000 COLLEGE OF THE ARTS	590.14	21,874,118.38	20,537,178.04	
14X00000 INFORMATION TECHNOLOGY	110.43	41,195,563.83	69,530,051.23	
15X00000 COLLEGE DESIGN CONSTRUC / PLAN	484.55	15,194,442.86	13,205,977.78	
16X00000 COLLEGE-LIBERAL ARTS/SCIENCES	739.93	148,085,363.32	136,927,510.55	
17X00000 COLLEGE-BUSINESS ADMINISTRATION	30,853,518.41	38,346,388.99	35,802,425.30	
18X00000 COLLEGE-EDUCATION	21,187,055.94	21,584,204.70	21,356,416.94	
19X00000 COLLEGE-ENGINEERING	52,717,779.96	99,016,556.51	84,761,064.88	
20X00000 INTERNATIONAL CENTER	3,833,921.20	3,250,689.97	2,687,016.50	
21X00000 CHIEF FINANCIAL OFFICER	6,113,982.52	1,858,857.62	-6,039,562.31	
22X00000 VP-GENERAL COUNSEL	2,239,979.00	3,425,392.30	1,877,427.36	

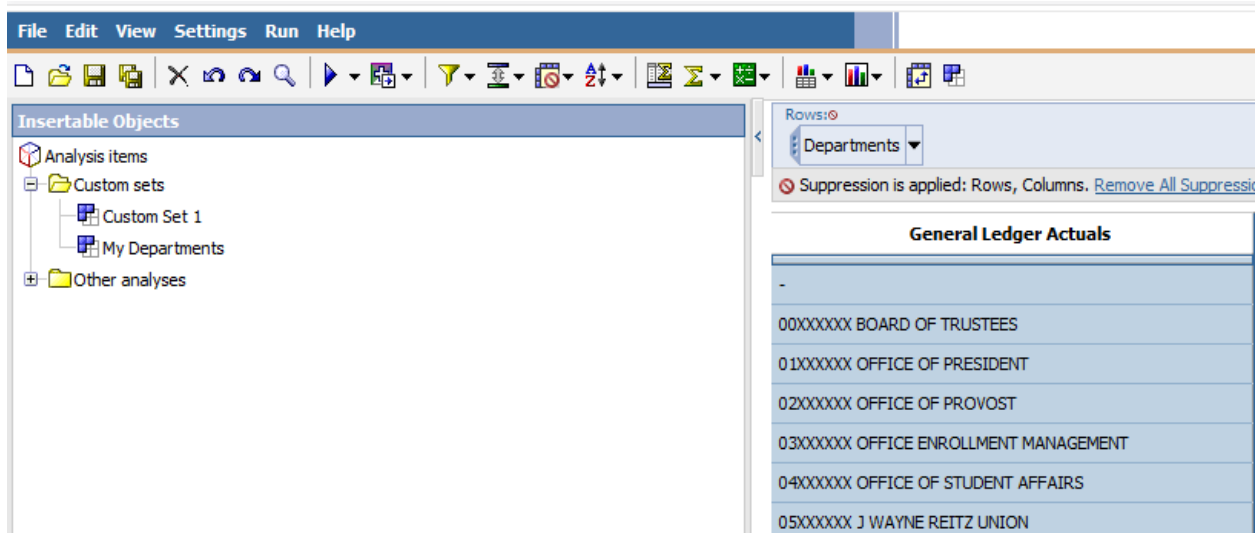
From this drop down menu, select the Save as Custom Set... option. This will open the Save as custom set dialog window shown below. Here you will give your Set a name and optionally provide a Description for your set. You can save over an existing Custom Set or save a newly created subset.

The screenshot shows a detailed view of the financial data table with 10 columns. The rows are the same as in the previous screenshot, but with additional data points for the years 2016, 2015, 2014, 2013, and 2012.

	2020	2019	2018	2017	2016	2015	2014	2013	2012
04X00000 OFFICE OF STUDENT AFFAIRS	12,114,931.74	19,306,356.84	15,023,255.60	15,581,338.60	14,450,837.88	12,345,215.58	14,360,320.91	14,883,891.20	
05X00000 J WAYNE REITZ UNION	6,450,004.06	6,119,679.51	6,066,658.55	7,688,340.68	6,454,239.23	6,024,590.30	5,827,990.40	5,479,436.48	
06X00000 EM-STUDENT FINANCIAL AFFAIRS	21,272,577.04	9,669,857.55	11,007,990.38	15,983,362.48	16,276,224.65	17,540,077.06	17,313,172.79	14,031,346.69	
07000000 DIVISION-HOUSING	-5,199,284.21	-1,202,557.43	-4,885,460.43	2,365,832.64	-47,820,145.95	5,899,830.97	12,185,433.97	12,493,004.31	
08X00000 STUDENT GOVERNMENT	-18,214,938.00	-16,944,729.32	-18,309,607.02	-14,896,405.15	-14,772,844.60	-14,625,852.91	-14,098,053.46	-10,699,100.79	
09X00000 VP-GOVERNMENTAL RELATIONS	1,354,776.19	683,452.29	1,212,581.04	1,277,653.42	1,117,116.59	1,501,010.20	728,448.76	377,065.81	
10X00000 UR-VP-UNIVERSITY RELATIONS	-773,371.58	926,238.35	1,613,621.32	1,395,212.33	947,925.80	1,102,600.45	891,212.73	888,810.16	
11X00000 UF RESEARCH	10,048,650.96	-790,104.33	-17,637,973.89	1,396,339.85	8,738,631.49	39,411,986.63	5,178,551.73	10,794,068.70	
12X00000 GRADUATE SCHOOL	2,786,271.91	6,121,664.41	4,076,708.78	4,763,693.77	4,820,648.08	4,879,226.41	4,712,380.75	2,532,815.77	
13X00000 COLLEGE OF THE ARTS	19,979,590.14	21,874,118.38	20,537,178.04	18,939,624.10	17,588,983.42	15,996,076.62	17,077,170.33	15,087,273.67	
14X00000 INFORMATION TECHNOLOGY	36,016,110.43	41,195,563.83	69,530,051.23	35,348,746.58	43,070,993.55	33,990,961.48	37,497,575.49	37,582,690.40	
15X00000 COLLEGE DESIGN CONSTRUC / PLAN	13,776,484.55	15,194,442.86	13,205,977.78	12,325,501.60	11,953,003.77	9,973,340.26	10,952,435.59	10,808,159.36	
16X00000 COLLEGE-LIBERAL ARTS/SCIENCES	136,038,739.93	148,085,363.32	136,927,510.55	128,176,509.99	119,826,316.20	109,557,126.41	109,337,682.91	102,615,814.62	
17X00000 COLLEGE-BUSINESS ADMINISTRATION	30,853,518.41	38,346,388.99	35,802,425.30	32,714,675.42	29,078,891.21	20,356,043.64	19,674,033.30	26,753,354.53	
18X00000 COLLEGE-EDUCATION	21,187,055.94	21,584,204.70	21,356,416.94	24,049,927.99	23,657,589.35	22,032,316.78	22,373,477.97	20,054,085.98	

The screenshot shows the "Save as custom set" dialog box. It has a "Name" field containing "My Department Subset" and a "Description" field containing "Set with 05000000, 06000000, 07000000 Departments". There is a list of "Existing custom sets" with "Custom Set 1" selected. The dialog has "OK" and "Cancel" buttons.

Your custom Sets are saved to the Analysis Items tab of the Insertable Objects pane.



Where they can easily be dragged onto the worksheet to replace rows, columns, or used as a Context filter. The Custom Set's use menu can be accessed by right clicking on the Custom Set. See below.



A Few Reminders

- Drag-n-drop – it's that easy!
- Use Internet Explorer browser

Help

- 392-HELP – UF Help Desk
- Include details:
 - Browser Information
 - Navigation
 - Error Messages
 - Expected Results
- Include your UFID and/or GatorLink username

Additional Reference Material

IBM® COGNOS® ANALYSIS STUDIO OVERVIEW -

https://www.ibm.com/support/knowledgecenter/en/SSEP7J_11.0.0/com.ibm.swg.ba.cognos.ug_cr_pps.doc/c_id_ans_overview.html#id_ans_overview

IBM® COGNOS® ANALYSIS STUDIO CANVAS/INTERFACE

https://www.ibm.com/support/knowledgecenter/en/SSEP7J_11.0.0/com.ibm.swg.ba.cognos.ug_cr_pps.doc/c_id_pps_ui_window.html#id_pps_ui_window