

**ERA 300 ENTERPRISE
ANALYTICS - ANALYSIS STUDIO
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

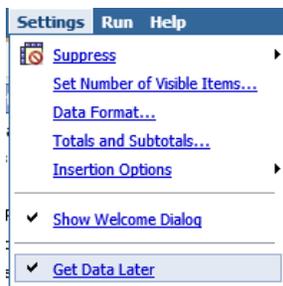
- ER is available to all faculty and staff
- Request Roles via myUFL with your Departmental Security Administrator o FI access is granted with the UF_FI_UNIVERSAL_INQUIRY o HR access is tied to your HR PeopleSoft Roles

Benefits of Enterprise Reporting

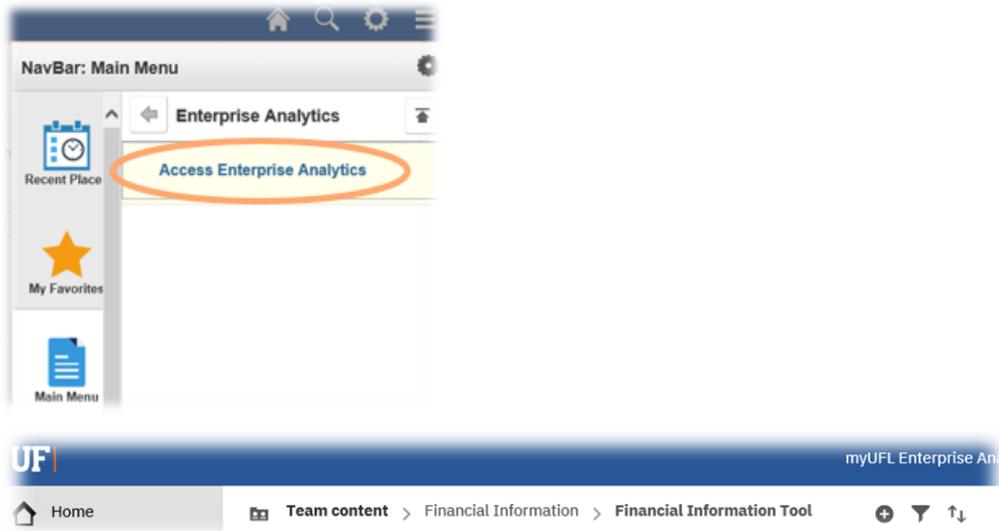
- Self-service/On-demand Web Access
- Get what you need FASTER
- Reduce need for shadow databases
- Reduce reliance on IT staff
- Meet reporting needs for all departments
- New and historic data

The Best Experience

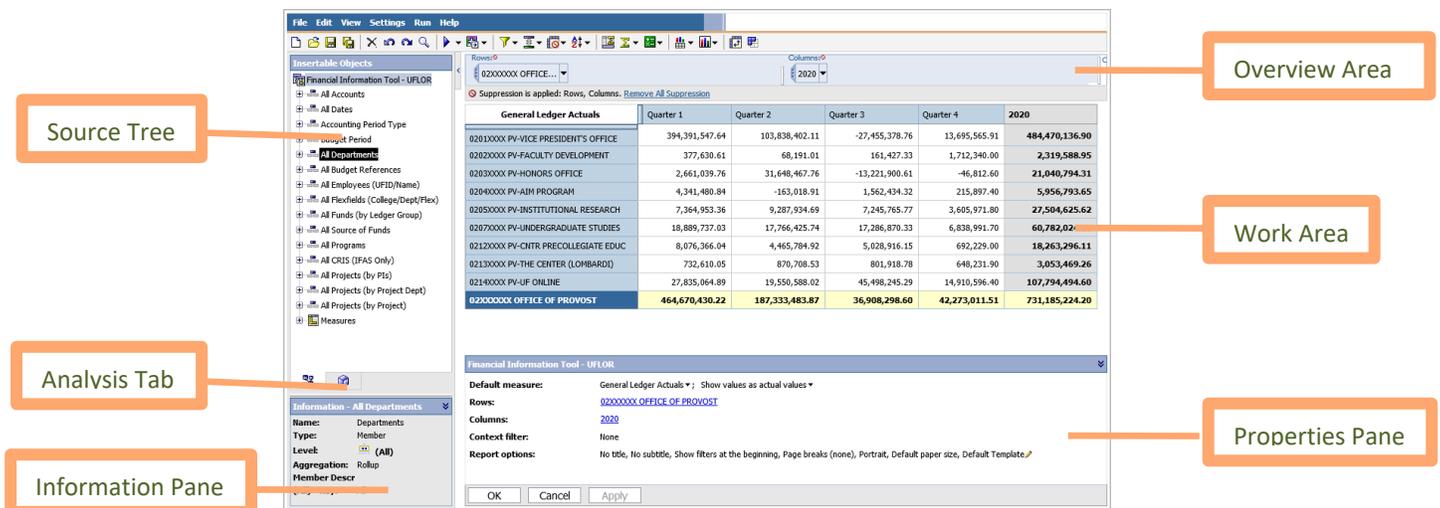
- Internet Explorer with Compatibility Mode enabled for ufl.edu
- Save time by turning data off while creating your view and filtering - Get Data Later - Settings > Get Data Later



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.

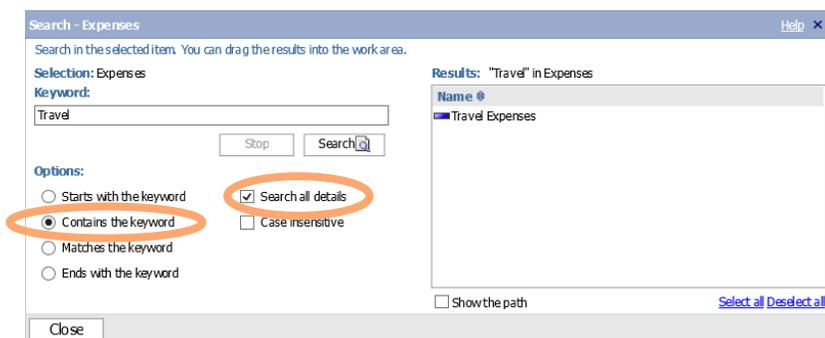
The Menu Bar – Now at the Top!



- | | |
|--------------------------|-----------------------|
| 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 - UFLOR' interface. On the left is a source tree with categories like 'All Accounts', 'All Dates', 'Accounting Period Type', etc. On the right is a data table with columns for '2000' and '2001'. A context menu is open over the table, showing options like 'Delete', 'Departments', and 'Search (Departments)...'. The table data includes values such as -412,803,108.34 and 830,882,889.12.

Organizing Your Canvas

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

General Ledger Actuals		2000	2001
00XXXXXX BOARD OF TRUSTEES	Other Operating Expenses		
01XXXXXX OFFICE OF PRESIDENT			
02XXXXXX OFFICE OF PROVOST			
03XXXXXX OFFICE ENROLLMENT MANAGEMENT			
04XXXXXX OFFICE OF STUDENT AFFAIRS			

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

The first screenshot shows a context menu with options: 'Search (Funds (by Ledger Group))...', 'Set Number of Items to Show...', 'Sort', 'Insert', 'Replace', 'Insert Level ((All))', 'Replace with Level ((All))', and 'Filter as Context'. The 'Replace' option is circled in orange, and a sub-menu is open showing 'Rows' and 'Columns' options, both also circled in orange.

The second screenshot shows the same context menu with 'Insert' circled in orange. A sub-menu is open 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 shows a hierarchy of budget categories. On the left, a list includes 'All Expense Budget', 'Contractual Expenses', 'MATERIAL', 'Repairs and Maintenance', 'Travel Expenses', 'OTHER', and 'Other Operating Expenses'. The 'Other Operating Expenses' item is circled in orange, with a callout box labeled 'Up a Level' pointing to it. On the right, a detailed view of 'Other Operating Expenses' is shown, listing 'Contractual Expenses', 'Utilities & Communications', 'MATERIAL', 'Repairs and Maintenance', 'Travel Expenses', 'Capital Asset Purchase', 'OTHER', and 'Other Operating Expenses'. The 'Travel Expenses' item is circled in orange, with a callout box labeled 'Down a' pointing to it. Below this, a callout box labeled 'Expand or Down a Level' points to a context menu for 'Other Operating Expenses'. This menu includes options like 'Save as Custom Set...', 'Delete', 'Filter', 'Top or Bottom', 'Sort', 'Totals and Subtotals...', 'Summarize', 'Calculate...', 'Expand Other Operating Expenses', 'Down a Level', 'Up a Level', and 'Show Attributes'. The 'Expand Other Operating Expenses' and 'Down a Level' options are circled in orange.

Reorder Columns or Swap Rows and Columns

The diagram shows a software interface with a menu bar (View, Settings, Run, Help) and a list of options: 'Crosstab', 'Chart', 'Crosstab and Chart', 'Swap Rows and Columns', 'Objects and Information', and 'Properties Pane'. The 'Swap Rows and Columns' option is circled in orange. To the right, a 'Row' dropdown menu is shown with two items: '18XXXXXX COLLEG...' and 'Other Operating...'. Two curved orange arrows indicate a swap between these two items.

Delete Data from Your Work Area

The diagram shows a 'Departments' dropdown menu with a 'Delete' option circled in orange. Below the menu, a list of departments is shown: '00XXXXXX BOARD OF TRUSTEES', '01XXXXXX OFFICE OF PRESIDENT', and '02XXXXXX OFFICE OF PROVOST'. To the right, a context menu for 'Departments' is shown, listing options like 'Properties (Departments)', 'Custom Set...', 'Delete', 'Filter', 'Top or Bottom', 'Sort', 'Totals and Subtotals...', 'Summarize', 'Calculate...', 'Expand Departments', 'Down a Level', 'Up a Level', and 'Show Attributes'. 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:

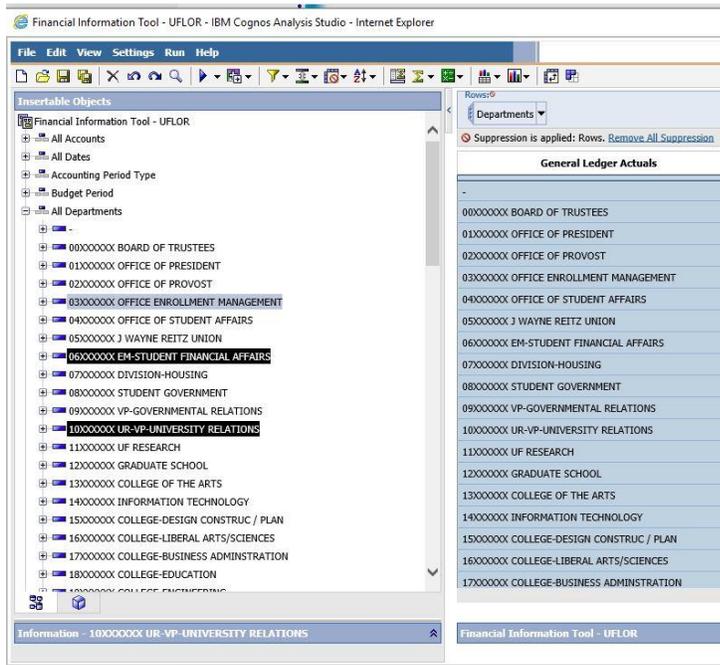
Name	Target
Commitment Control Budget Journal Detail - UFLOR	Team Content > PowerPlay Drill-Through Targets > Commitmer
Commitment Control Detail - UFLOR	Team Content > PowerPlay Drill-Through Targets > Commitmer
Managerial Budget Journal Detail - UFLOR	Team Content > PowerPlay Drill-Through Targets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

Cancel

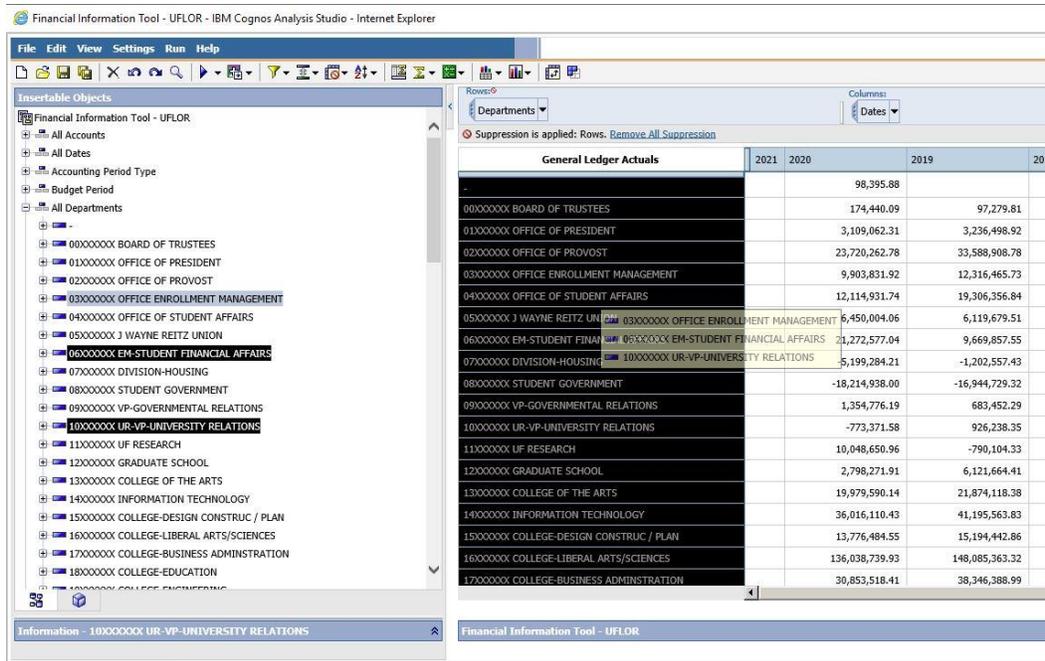
Custom Subsets – 2 Options

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

Context Menu:

- 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.

Rows: Departments | Columns: Dates

Suppression is applied: Rows, Columns: Remove All Suppression

General Ledger Actuals	2020	2019	2018	2017
-	98,395.88			
00XXXXXX BOARD OF TRUSTEES	174,440.09	97,279.81	136,469.55	
01XXXXXX OFFICE OF PRESIDENT	3,109,062.31	3,236,498.92	3,449,641.42	
02XXXXXX OFFICE OF PROVOST	23,720,262.78	33,588,908.78	23,481,031.86	
03XXXXXX OFFICE ENROLLMENT MANAGEMENT	9,903,831.92	12,316,465.73	12,058,727.42	
04XXXXXX OFFICE OF STUDENT AFFAIRS	12,114,931.74	19,306,356.84	15,023,255.60	
05XXXXXX J WAYNE REITZ UNION	6,450,004.06	6,119,679.51	6,066,658.55	
06XXXXXX EM-STUDENT FINANCIAL AFFAIRS	21,272,577.04	9,669,857.55	11,007,990.38	
07XXXXXX DIVISION-HOUSING	-5,199,284.21	-1,202,557.43	-4,885,460.43	
08XXXXXX STUDENT GOVERNMENT	938.00	-16,944,729.32	-18,309,607.02	
09XXXXXX VP-GOVERNMENTAL RELATIONS	776.19	683,452.29	1,212,581.04	
10XXXXXX UR-VP-UNIVERSITY RELATIONS	371.58	926,238.35	1,613,621.32	
11XXXXXX UF RESEARCH	650.96	-790,104.33	-17,637,973.89	
12XXXXXX GRADUATE SCHOOL	271.91	6,121,664.41	4,076,708.78	
13XXXXXX COLLEGE OF THE ARTS	590.14	21,874,118.38	20,537,178.04	
14XXXXXX INFORMATION TECHNOLOGY	110.43	41,195,563.83	69,530,051.23	
15XXXXXX COLLEGE DESIGN CONSTRUC / PLAN	484.55	15,194,442.86	13,205,977.78	
16XXXXXX COLLEGE-LIBERAL ARTS/SCIENCES	739.93	148,085,363.32	136,927,510.55	
17XXXXXX COLLEGE-BUSINESS ADMINISTRATION	30,853,518.41	38,346,388.99	35,802,425.30	
18XXXXXX COLLEGE-EDUCATION	21,187,055.94	21,584,204.70	21,356,416.94	
19XXXXXX COLLEGE-ENGINEERING	52,717,779.96	99,016,556.51	84,761,064.88	
20XXXXXX INTERNATIONAL CENTER	3,833,921.20	3,250,689.97	2,687,016.50	
21XXXXXX CHIEF FINANCIAL OFFICER	6,113,982.52	1,858,857.62	-6,039,562.31	
22XXXXXX 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.

04XXXXXX 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
05XXXXXX 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
06XXXXXX 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
07XXXXXX 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
08XXXXXX 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
09XXXXXX 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
10XXXXXX 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
11XXXXXX 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
12XXXXXX GRADUATE SCHOOL	2,788,271.91	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
13XXXXXX 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
14XXXXXX 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
15XXXXXX 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
16XXXXXX 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
17XXXXXX 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
18XXXXXX 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

Save as custom set

Save a set from the work area to reuse later or to compare against another set. Custom sets are saved to the Analysis Items tab of the Insertable Objects pane.

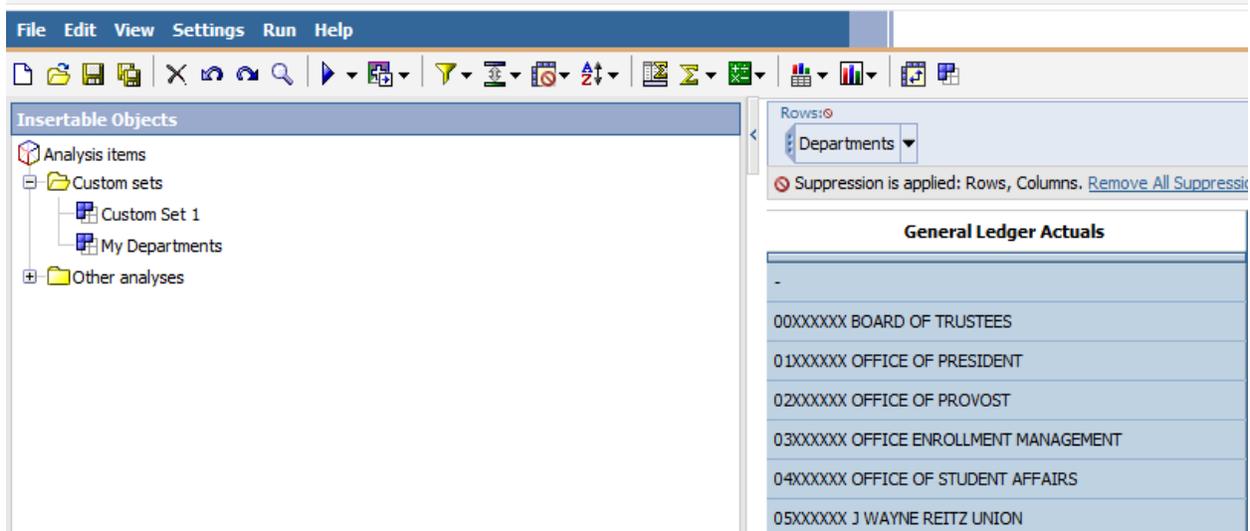
Name: My Department Subset

Description: Set with 05XXXXXX, 06XXXXXX, 07XXXXXX Departments |

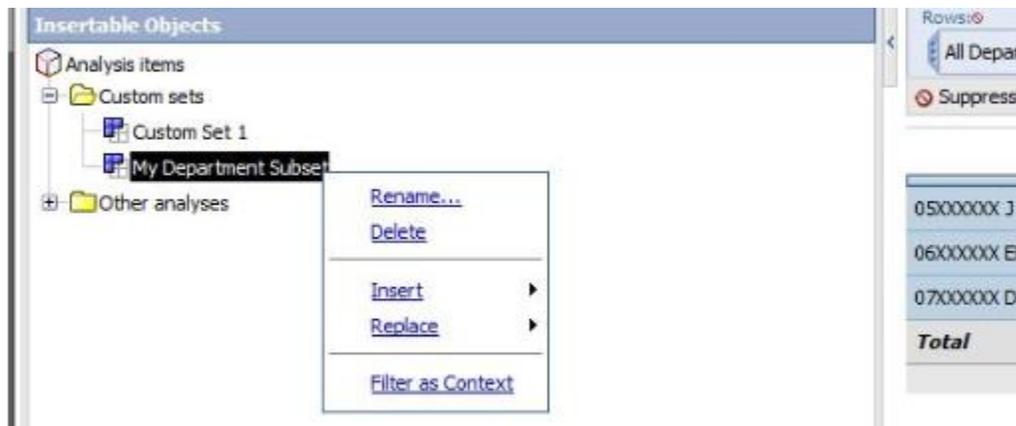
Existing custom sets: Custom Set 1

OK Cancel

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