Cognos Planning Analytics

Basic User Interface

Viewing / Entering Data in Planning Analytics

1. Login to Planning Analytics and select the Application to launch.

2. A graphical overview of all the areas you are responsible for appears on the left side of the screen; the colored icon represents the status of the data entry.

3. Clicking on an organization on the left-hand side of the screen opens a table on the right side of the screen.

4. Clicking on an organization within “You are a reviewer or contributor for:” section will open the organization in a grid where data can be viewed / entered.

5. Take Ownership by selecting icon once the application is open to enter data. The icon is located at the top left of the screen and allows users to make changes within the module.

6. Release Ownership by going to index screen and clicking on this icon .

Please note that another user can bounce a current user by Taking Ownership .

Frequently Used Icons

- **Action Menu** for print selection and reset views
- **Commit** save data
- **Take Ownership** activates ability to insert / enter data and use buttons
- **Submit** approve and lock application
- **Autofit** adjust column width
- **Release Ownership** at index screen and clicking on this icon
Steps to Print / Export

You can quickly export data to a tab in Excel. Access the quick export from the Action menu by right clicking, selecting Export, and then Snapshot to Excel. **Snapshot to Excel contains static values not linked to the server.** *Export to PDF* may be useful in providing summary reports/information to various stakeholders. **Please do not use the Slice to Excel function.**

1. Select Action Menu Icon
2. Right Click and Select Export
3. Select Snapshot to Excel
4. Click on OK
5. Select Open
6. Format sheet and print

Steps to Reset Application Views

1. Select Action Menu Icon
2. Right Click and Select Reset View

**Note:** It is helpful to “Reset current view” after making changes within a cube.
**Web sheets and Cubes**

- Tabs with spreadsheet looking icons are web sheets that contain selection fields
- Tabs with cube looking icons are dimensional and can be changed to display different data in grid

**Helpful Definitions**

**Application** - An application is a planning model such as base budget reconciliation, salary and wage allocation, general fund unit budget planning and many others. One application can be used by many users in different locations at the same time.

**Break back** - Break back is a function that changes the value of variables to make a formula equal to a specified value. If you type an amount into the Total cell for Jan through Dec and press Enter, the amount is automatically divided over the 12 months.

**Commentary** - Commentary represents any additional information attached to Contributor cells, tabs, or e.List items, including both user annotations and attached files.

**Cubes** - A cube is similar to a spreadsheet. A cube always contains rows and columns and usually at least one other page, making it multidimensional. It is used to collect data. Cells in cubes can contain entered data or calculations.

**Dimensions** - The rows, columns, and pages of a cube are created from dimensions. Dimensions are lists of related items, such as employee groups, fiscal year, organization, object codes, semesters and months.

**Dimension Bar** - Shows the dimensions that are in the rows, columns, and context.

**D-Links** - Cubes are linked by a series of D-Links in Analyst. A D-Link copies information in and out of cubes, and sometimes to and from ASCII or text files.
e.Lists - The structure of an application is based on an e.List. An e.List is a kind of dimension that contains a hierarchical structure that reflects the structure of the university. For example, it may include MAU and department organizations. There is one e.List per application, and the e.List item is assigned to a group/role.

Grid - Where you add or edit data.

Grid Handles - Where a dimension or tab can be “grabbed” to move it within the grid.

Help Icon - Clicking on the help icon will bring up the Contributor Web Client User Guide. This is a handy guide when working with Contributor.

Tabs - A separate tab represents each cube in the application.