IBM Planning Analytics Workspace
Introduction

IBM Planning Analytics Workspace is a web-based interface for IBM Cognos TM1. It provides an interface to TM1 data, with exciting ways to plan, create, and analyze your content.

Planning Analytics Workspace helps you focus on the things that matter to your business. Using Planning Analytics Workspace, you can identify and understand patterns and relationships in data. You can use this information to understand why things happen, and predict what might happen. Planning Analytics Workspace opens up the world of advanced analytics to all business users.

Objectives

We are going to cover the following areas in this workshop:

- Welcome page.
- Creating books/views and editing dimensions.
- Hiding rows/columns in views and utilize snap commands.
- Dataset export from PA to Watson Analytics.
- Pie Charts.
- Guide you through PA documentation and community for all of your questions.
- Instructions on how to sign up for free Planning Analytics Trial.

Start of the workshop

You can connect to Planning Analytics Workspace or PAW using any browser (Chrome, Firefox, IE, etc..) by navigating to the URL --> https://www.planning-analytics.ibmcloud.com/.

Welcome Page

When you access Planning Analytics workspace, you first see a welcome page which contains books and views that are shared with other people, or personal. You can also create your own books and share them with others.

Creating books/views and editing dimensions

1. Login using your temporary ID used for the length of the conference time.

2. In the Planning Analytics Workspace (PAW) Interface, click on the PAW logo to create a quick book. OR click on the +New button in the middle pane and select Book.
3. You will be directed to the workspace page, where you see your TM1 servers in the left side pane.

4. Under **Servers**, in the left pane, expand **Planning Sample**.

5. Expand **Applications** -> **Planning Sample** -> **Bottom Up Input**.

6. Drag in the **Budget Input** Websheet to the workspace in the right pane.
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7. Click on the Version drop down to edit/filter your Dimensions subsets

8. Open the subset editor, by clicking on **Open Subset Editor** icon as indicated below.
9. In the Subset Editor you’re able to adjust the subset, in this example, we’ll leave as is. Click **OK**.

10. Click anywhere outside the worksheet widget.

11. You can customize your **dashboard**, choose themes and style options for the book by clicking on the **Properties** icon in the upper right of the screen. To close the Properties pane, tap the **Properties** icon again to close it.
Let’s create a new view/book. On the top center, click **New book**.

**Click Welcome.**

**Click +New > Book from template**

Name your view **3 Widget View** and choose the 3 Widget freeform layout (the one highlighted) to display your visualizations and click **Create**.

You can select multiple cube views and drag them to the widget so you can spread them in the layout as needed. In this example, expand the **Planning Sample** server. Then expand **Cubes > plan_Report > Views** and drag **2004 Budget v LY Actual**, **2003 LY Budget** and **2004 submitted budget**
views to the widgets.

17. You can work on each view and save to the workspace as a separate widget.

18. Click on the view added on bottom right of this layout.

19. Click on the blue icon to enable the Widget toolbar and save it as **Saving View**.

20. When prompted, save the view in the **Personal folder**
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21. To navigate back to the view we just saved, click on 3 Widget View > Welcome from top center of the PAW window.

22. From the left pane, select Personal folder and you will see the newly created Saving View.

![](image1)

23. Click on Saving View, then click on the blue icon to enable the Widget toolbar. Now click on Change visualization icon and select Packed Bubble.

![](image2)

24. The Packed Bubble graph will display and you are able to customize it as needed (ie drill down, hide, unhide all).

![](image3)
Hiding Rows and columns in views and utilizing snap commands

1. On top center, click **Saving View > Welcome**.
2. Click **+New > Book** to create a new book in PAW.

3. Expand **Planning Sample > Cubes > plan_Control > Views**.
4. Drag **System Param** view to **Sheet 1**.

5. Double click on **Sheet 1** tab and rename it to **Plan Control View**.
6. Click on the **Plus sign** (⁺) to add another sheet.
7. Keep the selected **Freeform** template and click **Use**.
8. The second tab name will be **Sheet 1** by default. Click on **Sheet 1** tab, select the **pencil icon** and rename it to **Budget Input**.

9. From the metadata tree on the left, expand **plan_BudgetPlan > Views** and drag in **Budget Input Detailed** view to the widget.
10. You may want to hide columns to focus on a specific slice of data. For example, right click the Q1-2004 column and select Hide from the pop up menu.
11. Click the **Save** icon on top left window from the dashboard to save the book to your **Personal folder** as **Hide Column example**
12. Once the book is saved, it will be stored in the personal folder in the PAW welcome page. To see it, click on the top center click **Hide Column example > Welcome**
Snap Commands are simple commands that you can use to perform tasks quickly. You can type snap commands in full or use some abbreviations. For example, "swap" or "sw". Snap commands are not case sensitive. Available snap commands are: Select, Swap, Find, Hide, Unhide, Keep, Zero, Totals, Level, Drill, Sort. Next, we will show how you can use Swap to swap rows, columns, dimensions in the context area.

1. On the left, select Personal, on the right select the **Hide Column example** book that you just created. When the view opens, click the blue button in the top center of the crosstab.

2. Click **Snap Commands** → type `sw plan_chart_of_accounts, plan_time` and hit **Enter**. NOTE: typing swap on its own swaps the rows and columns.
3. Notice that the rows and columns have swapped places:

 Undo this change by clicking on the **Undo** button from the dashboard toolbar or run the swap command again.
Dataset export from PA to Watson Analytics

1. You can transfer cube view data to Watson analytics for further analysis and predictions. Use the **Transfer data to Watson Analytics** icon in the widget toolbar.

2. You may be prompted to allow access to connect to Watson Analytics. If you do then select **Allow access**

   If you are prompted to allow upload access, select **Allow access**

   ![IBM Planning Analytics would like your permission dialog box](image)
3. Under **Choose a location**, select the **Personal** folder and click **Transfer**

4. Preparing **Transfer** message will show you data transfer is ongoing.
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5. You will be directed to the Watson Analytics welcome page.
6. Navigate to **Personal** folder where your data is located.
7. Click on Data Set plan_BudgetPlan-Budget Input Detailed.

8. This is your starting point where you have many options for creating new Exploration or Predictions. You can assemble your data or refine it.

**Pie Charts**

Return to PAW, on the top left of the browser, click on the **IBM Planning Analytics tab**.

Pie Charts are dependent on one row and one column of data. In PAW, the end-user needs to hold the row of data and select visualization and the pie chart option will display correctly.

1. Add a new sheet by clicking on the **+ icon**.
2. Now from the metadata tree on the left, expand the **Planning Sample** server. Then expand Cubes > plan_BudgetPlan > Views and drag **Goal Input**
3. Edit the `plan_chart_of_accounts` dimension subset to include only one row of data. Click on **Edit this set** as indicated below.

4. Remove all members from the current set by clicking on the X icon.

5. Click on the + icon to expand **Net Operating Income** under Available Members.

6. Click on **Operating Expense** and then on **Insert Arrow** icon in middle of the screen.

7. Click on **Apply and Close**.
8. For the columns, right click on 2004 year and select **Keep**
9. Click on the widget toolbar and from the visualization options, select the pie chart.
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PA documentation and community

Planning Analytics has some good resources to help you get familiar with its functionalities and features either by reviewing on demand documentation or accessing an online community. In addition to that, look for the Planning analytics community online for more detailed information.

You can check out the documentation via the "Docs" link that is embedded in the PAW welcome page portal.

1. You can access Docs link from the top right corner of the welcome page.

2. Click on the question mark.

3. Click on Docs.

4. Again from the help menu, you can click on Community/forums to start a discussion, post your questions and find your answers.
4. Using your browser, navigate to https://www.ibm.com/communities/analytics/planning-analytics/ to stay up-to-date of the latest PA new functionalities/releases. You may want to monitor this web site consistently as it gets updated often.

Sign up for Planning Analytics

You can sign up for a free PA trial where you can give it a try and see how it works for you. You can do it using this link:

http://ibm.co/2cz4WWS

This is a 15-day trial of IBM Planning analytics.

Workshop Complete

Congratulations

You have completed this workshop.