

IBM COGNOS PLANNING ANALYST/PLANNING MANAGER & ADD-IN FOR EXCEL

COURSE OVERVIEW

This course will enable you to understand the functionality of the IBM Cognos Planning Analyst, Manager and Add-In for Excel whilst practicing and applying these functions to a hands-on case study.

Over the four days of the course, you will apply a variety of modelling tasks and powerful techniques whilst building a Profit and Loss system. This will require learning about the objects that exist within IBM Cognos Planning Analyst. This knowledge of objects can then be applied to your own modelling requirements.

Finally, you will create portions of a front end that can be used to access the model and generate simple reports, using both Manager and the Add-In for Excel functionality.

COURSE OBJECTIVES

- To learn the IBM Cognos Planning Analyst, Planning Manager and Add-In for Excel functionality and apply what you have learnt to a pre-defined business scenario
- To understand the principles of good model design and best practice
- To start thinking about how what you have learnt relates to your business environment.

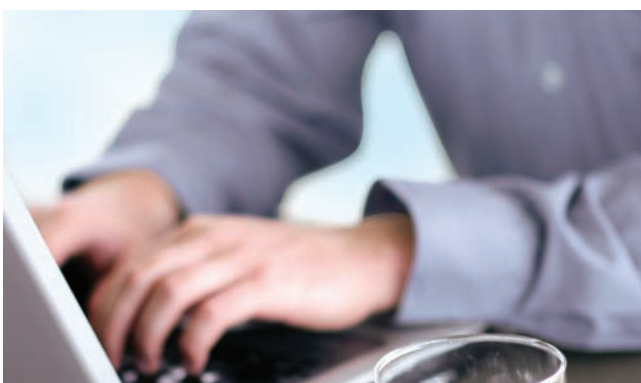
WHO SHOULD ATTEND:

Users who are responsible for the building and maintenance of IBM Cognos Planning Analyst/Planning Manager and Add-In for Excel models

LENGTH: Four days

COURSE CODE: AMAE4

LOCATION: Inca Academy or Customer Site



COURSE OUTLINE: IBM COGNOS PLANNING ANALYST/COGNOS PLANNING MANAGER & COGNOS ANALYST ADD-IN FOR EXCEL

MODULE ONE

- Describe the role of the Analyst product within the IBM Cognos Planning system
- Understand the principles of good model design and best practice
- Create Libraries
- Build a portion of a case study model, using modeling techniques, including:
 - Creating D-Lists, D-Cubes, D-Links and File Maps
 - Defining various calculations for D-Lists
 - Creating Saved Formats to format D-List items
 - Create Conditional Formulae
 - Defining a simple Built-in Function
 - Understand and use Breakback
 - Define Local and Saved Allocations
 - Create an Open Database Connectivity (ODBC) D-Link
 - Use a Built in Function
 - Use Weighted and Time Averages

MODULE TWO

- Understand and use D-List formatted items
- Understand and create Lookup D-Links
- Use the Drill Down feature
- Manually maintain D-Lists by adding new items
- Maintain D-Lists with Import Links
- Format D-Cubes in terms of aesthetics
- Use Breakback to phase data into D-Cubes
- Use a D-Cube as an Allocation Table
- Understand and define D-Cube Updates
- Create Macros to automate module updates

MODULE THREE

- Understand recommended design techniques
- Use the Depreciation and Lag BiFs
- Create Consolidation D-Links
- Export D-Cube Data
- Use the Macro Wizard
- Apply D-Cube Maintenance
- Create Internal D-Links
- Use the Forecast BiF
- Use Advanced Conditional Formulae

MODULE FOUR: ADMINISTRATION, MAINTENANCE & PERFORMANCE

- Set up Libraries, Users and Groups
- Apply security to a Library or an Object
- Maintain Objects
- Trace the usage of Objects
- Define various options that impact performance

MODULE FIVE: MANAGING THE ANALYST MODEL

- Understand how Manager fits in with Analyst and the IBM Cognos Planning system
- Create a manual Flowchart
- Create an automatic Flowchart based on the model built with in Analyst
- Make Reports active i.e. Open Objects, Run D-Links, Run Macros and start other applications

- Build a menu-driven front end for an Analyst application
- Build linked Table views
- Change Table views
- Format Tables
- View nested dimensions within Tables
- Create Graphs
- Change Graph views

MODULE SIX: COGNOS ANALYST ADD-IN FOR EXCEL

- Describe the uses for the Analyst Add-In for Excel and how information flows between Excel and IBM Cognos Planning Analyst
- Create normal, multiple, and hierarchical views and pivot tables
- Create a data entry template for use by non-Planning users
- Format views

- Refresh and recalculate your views with data from Planning Analyst
- Connect an existing spreadsheet to Planning Analyst
- Create ad hoc formulae and custom items for specific views
- Create a refresh button that allows a user to automatically refresh their view without using menu options
- Update existing reports
- Audit a view for renamed list items and missing or invalid items. Also, replace text strings for all objects that have Adaytum items attached to them
- Copy a view onto a series of worksheets and set print options for batch printing

HELP TEXT AND INCA SUPPORT

- OnLine Help, BiF Help and Inca Support Services

