

# IBM COGNOS PLANNING MANAGER & ADD-IN FOR EXCEL

## COURSE OVERVIEW

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

You will create an active front end that can be used to access a pre built Analyst model, generate reports and graphs and create data entry sheets, which your users can input information into, using both Manager and the Add-In for Excel functionality.

### COURSE OBJECTIVES

- To learn the IBM Cognos Planning Manager and Add-In for Excel functionality and apply what you have learnt to a pre-defined business scenario
- To start to think about how what you have learnt relates to your business environment and how you and your users may wish to use the functionality

### PREREQUISITE

Attendees should have attended the 3 Day IBM Cognos Planning Analyst Course

### WHO SHOULD ATTEND

Users who are responsible for the building and maintenance of IBM Cognos Planning Manager and Add-In Excel reports, flow-charts and front end systems

**LENGTH:** One day

**COURSE CODE:** MAE1

**LOCATION:** Inca Academy or Customer Site



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

### MODULE ONE: 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 TWO: IBM 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 with out 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 Planning Analyst 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

