



## IBM Cognos Planning Analyst: Build Models (V10.1) (P8101G)

### IBM Course Code: P8101

IBM Cognos Planning Analyst: Build Models (V10.1) is a five-day, instructor led course that teaches modelers how to design and build models for business planning. Participants will learn the data modeling process and participate in hands-on demos and workshops that illustrate good model design and best practice techniques while learning how to use the product.

### Who Needs to Attend

This intermediate course is intended for Modelers.

### Prerequisites

- Knowledge of your organization's data **and** structure
- Knowledge of Microsoft Excel

### Follow-On Courses

There are no follow-ons for this course.

### Course Outline

Introduction to IBM Cognos Planning Analyst

- Examine the components of the IBM Cognos Planning solution
- Discuss libraries, D-Lists, D-Cubes, and D-Links
- Create libraries

Create D-Lists and D-Cubes

- Manually create D-Lists
- Import D-List items from external sources
- Modify D-Lists
- Build D-Cubes

Load Data

- Determine what can be used as source data
- Create file maps to assist in loading data
- Load data from an external source into a D-Cube
- Load data from one D-Cube to another

Enhance D-Lists and D-Cubes

- Prevent calculations on a D-List item
- Control user input using a formatted D-List
- Use Built-in Functions (BiFs) to calculate data
- Use time averages in a D-List
- Use weighted averages in a D-List
- Apply conditional formulas to a D-List

Distribute Data

- Use a D Cube to allocate data
- Summarize D Cube data with Accumulation D Links
- Populate a D Cube based on text in the target D Cube using Lookup D Links

## Create and Distribute an Income Statement

- Determine the requirements for building and populating an income statement
- Discuss various methods of depreciation
- Calculate depreciation using a Built-in Function
- Export income statement data

## Forecast Data

- Examine the Forecast Built-in Function
- Build a revised rolling forecast
- Use various methods to forecast data

## Automate Processes

- Use D List and D Cube update links to update structure and data
- Create macros to automate the update process
- Enhance macros functionality
- Record a macro to perform repetitive tasks

## Object Maintenance and Administration

- Examine IBM Cognos security
- Add and maintain libraries
- Apply security to a library or object
- Add, remove, and modify objects
- Create copies of objects and libraries
- Discuss features that affect performance

## Use Complex Calculations

- Move values through periods using the FeedParam Built-in Function
- Round values using TRound Built-in Function
- Examine Tier calculations
- Calculate balances based on profiles

## Examine Advanced Concepts

- Discuss calculation precedence
- Restructure D Cubes
- Transfer data within a D Cube
- Examine cascading allocations

## Design for Reporting

- Explore the tools available for reporting on Planning Analyst data
- Design a model for reporting purposes
- Publish objects for external reporting
- Make published data available for reporting in IBM Cognos
- Create a report based on Planning Analyst published data
- Populate a D-Cube using IBM Cognos as a datasource

## Enhance Functionality Using the IBM Cognos Planning Analyst Add-in for Microsoft Excel

- Examine the IBM Cognos Planning Analyst Add-in for Microsoft Excel
- Build views
- Update views
- Create and use templates for data entry
- Format and customize Microsoft Excel spreadsheets
- Update reports
- Examine batch printing

## Illustrate the Model Using IBM Cognos Planning Manager

- Design reports
- Create a flowchart
- Link the flowchart to objects in IBM Cognos Planning Analyst
- Create tables

## End-to-End Workshop (Optional)

Use IBM Cognos Planning Analyst with IBM Cognos Planning Contributor (Optional)

Use IBM Cognos Planning Analyst with IBM Cognos Finance (Optional)

## Further Information:

For More information, or to book your course, please Call/Email us on - +254 713 027 191

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