

Cognos Planning 7.3 – Analyst Model Building

Cognos Planning 7.3 – Analyst Model Building is an instructor-led course that covers how to design and build models, and create flowcharts of models to perform business planning. Attendees 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.

Introduction to Cognos Planning - Analyst

- ◊ Examine the components of the Cognos Planning solution
- ◊ Examine the main parts of an Analyst model
- ◊ Discuss libraries
- ◊ Discuss D-Lists
- ◊ Discuss D-Cubes
- ◊ Discuss D-Links
- ◊ Create a library

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 the income statement
- ◊ Discuss various methods of depreciation
- ◊ Calculate depreciation using a Built-in Function
- ◊ Export income statement data
- ◊ Publish 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
- ◊ Discuss macros for performing other repetitive tasks
- ◊ Discover other macros and their parameters using Online Help

Object Maintenance and Administration

- ◊ Examine the use of Access Manager to authenticate users
- ◊ Add libraries
- ◊ Apply security to a library or object
- ◊ Add, remove, and modify objects
- ◊ Create copies of objects and libraries
- ◊ Set workspace size to maximize performance

Use Complex Calculations

- ◊ Review Build-In Functions
- ◊ Move values through periods using the FeedParam
- ◊ Round values using TRound
- ◊ Examine Tier calculations
- ◊ Calculate balances based on profiles



Examine Advanced Concepts

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

Design for Reporting

- ◊ Define reporting
- ◊ Review reporting options
- ◊ Examine reporting strategies
- ◊ Publish objects for external reporting

Enhance Functionality Using the Excel Add-In

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

Intended Audience

This course is recommended for Application Administrators, Model Designers, Data Analysts, and Business Subject Matter Experts.

Prerequisites

It is recommended that you have knowledge of:

- ◊ Your organization's data and structure
- ◊ Microsoft Excel

Illustrate the Model Using Cognos Planning - Manager

- ◊ Describe Cognos Planning - Manager
- ◊ Design reports
- ◊ Create a flowchart
- ◊ Link the flowchart to objects in Cognos Planning - Analyst
- ◊ Create tables
- ◊ Create graphs

End to End Workshop

- ◊ Reinforce concepts learned throughout the course
- ◊ Design and build objects to create a cash flow statement

