

COGNOS PLANNING 7.3/8.1 FASTTRACK

Cognos Planning 7.3/8.1 FastTrack is a five-day, instructor-led accelerated course that starts with a conceptual overview of Analyst and continues with hands-on practice of simple functionality to complex modeling techniques. Once modeling in Analyst has been completed, you will learn the role that Contributor plays in the planning process, and the steps required to design, build and deploy Contributor applications. In addition to lectures and workshops, there will be a case study exercise to continue the learning process.

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

Introduction to Cognos Planning - Contributor

- Review Corporate Performance Management (CPM)
- Review the components of Cognos Planning
- Identify the objects in a Cognos Planning - Contributor application
- Identify the basic tasks required to create a Contributor application and deploy it online

Build an Application

- Examine best practices for building the underlying Cognos Planning - Analyst model
- Create a Contributor application using the Application wizard
- Specify navigation, orientation, and application settings
- Import the e.List, user classes, and rights
- Run Go To Production (GTP)
- Set up and navigate the Contributor Web site

Apply Security

- Secure activities and objects
 - plan Access Manager user classes
 - secure the Planning administration domain
 - grant permissions to application administrators
- Secure applications and data
 - manage e.List files
 - manage user classes
 - manage rights files
 - create saved selections
 - create, import, and export access tables

Administer Applications

- Review what happens during Go To Production
- Set advanced options for subsequent GTP processes
- Back up the datastore and view datastore names
- Examine job management and the types of jobs that can be performed
- Create instructions for end users

Manage Workflow and Web Site Activities

- Examine the user roles and workflow states
- Create annotations
- Bounce users from the application
- Work offline

Manage Data

- Synchronize the Cognos Planning – Contributor application with Cognos Planning - Analyst
- Import data into the Contributor application
 - as planners/reviewers
 - as administrators
- Publish Contributor data

Move Data Between Analyst and Contributor (optional)

- Export data from Analyst for use in Contributor
- Integrate Contributor with Analyst
- Move data from Analyst to Contributor using a D-Link
- Move data from Contributor to Analyst using a D-Link
- Compare D-Links to importing data in the Administration console

Use Contributor Extensions

- Examine Cognos Planning - Contributor extensions
- Understand how to report from your Contributor data using extensions
- Configure Contributor extensions
- Use client extensions
- Use administration extensions

Self-study

- Object maintenance and administration
- Use complex calculations
- Examine advanced concepts
- Design for reporting
- Enhance functionality using the Excel Add-in
- Illustrate the model using Cognos Planning - Manager
- End-to-end workshop for Cognos Planning - Analyst
- Use the Cognos Planning - Contributor Add-In for Excel
- Automate a Cognos Planning - Contributor application
- Translate a Cognos Planning Contributor application
- Cognos Planning - Contributor case study

INTENDED AUDIENCE

This course is intended for project managers and executives who need an overview of what a Cognos Planning system does. This course is also recommended for users at the initial stages of a Cognos Planning project, who need an overview of the components. This course is not intended to serve as a substitute for full Cognos Planning product training.



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PREREQUISITES

Participants should have knowledge of Microsoft Excel, as well as knowledge of their business's data and structure.

LET US HELP YOU

We believe an effective training program reduces the time it takes for users to learn and adopt new technology and will lead to greater satisfaction overall. Whether you choose to attend public training, deliver your own training, take self-paced training, or require customized training that reflects your business, let Cognos Training Services assist you in developing comprehensive and economical training plans to meet these needs. To learn more or find a Training Services contact near you, visit <http://support.cognos.com/training/>.



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