

Cognos Planning- Analyst

Course Overview

New Analyst users: Learn how to use Cognos Planning - Analyst to reduce the time you spend preparing data, saving more time for analysis and interpretation. Using both conceptual overview and hands-on practice, rapidly move from simple tasks to complex modeling techniques you can use right away.

Who Should Attend

New Analyst users
 New Contributor Administrators
 New Model Designers
 Project Managers

Course Objectives

- Describe the role of Analyst in the Planning system
- Identify the tools and primary objects you will use or create in Analyst
- Learn basic modeling techniques
- Learn advanced modeling techniques within Analyst such as importing data, controlling input, and more
- Learn forecasting techniques within Analyst
- Learn how to administer and maintain the Analyst system
- Build flowcharts, menu-driven front ends, interactive reports, tables, and graph views using Manager link options
- Create various views of D-Cubes using Cognos Planning - Analyst *Add In For Excel*

Prerequisites

None

Length

4 days

Course Outline

Module 1:

- Describe the role of Analyst within the Cognos Planning Solution
- Understand principles of good model design and Best Practice
- Create Libraries
- Build a portion of a larger model, using various techniques

Module 2:

- Manually maintain D-Lists
- Control updates to D-Cube Data
- Use D-List formatted items
- Create Lookup D-Links
- Format D-Cubes
- Write Conditional Formulae



Module 2 – continue

- Maintain D-Lists with Import Links
- Use Drill Down
- Define D-Cube Updates
- Create Macros to Automate model updates
- Maintain D-Cubes
- Use Breakback to phase data into D-Cubes
- Use a D-Cube as an Allocation Table

Module 3: Model Building

- Understand recommended design techniques
- Use the Depreciation BiF
- Export D-Cube Data
- Create Consolidation D-Links
- Use the Forecast BiF
- Use the Macro Wizard

Module 4: Cognos Planning – Add-In for Excel

- Describe the uses for the Analyst Add-In for Excel and how information flows between Excel and Analyst
- Create normal, multiple, and hierarchical views and pivot tables
- Format your views
- Refresh and recalculate your views with data from Analyst
- Connect an existing spreadsheet to Analyst
- Create ad hoc formulas and custom items for specific views
- Create buttons that allows a user to carry out Excel/Analyst task from the worksheet
- Update existing reports
- Audit a view for renamed list items and missing or invalid items. Also, replace text strings for all objects that have Cognos items attached to them.
- Copy a view onto a series of worksheets and set print options for batch printing

Module 5: Managing an Analyst Model

- Understand how Planning Manager fits with Analyst and the entire Cognos solution
- Create a Flowchart in Manager
- Make reports active (open objects, run D-Links, run macros and start applications)
- Understand the purpose and value of menu-driven front ends and build one
- Build linked Table views
- Create linked Graph views and change views

Module 6: Basic Administration

- 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
- Library maintenance

Help Reference

- Use the Online Help that explains how to use the Cognos Planning Analyst and Manager
- Use the dedicated BiF documentation