

P8361G: IBM Planning Analytics: Design and Develop Models in Architect v2.0

Course Code: P8361G

Duration: 5 days

Instructor-led Training (ILT) | Virtual Instructor-led Training (VILT)

OVERVIEW

This course is designed to teach modelers how to build a complete model in IBM Planning Analytics using the Architect tool. Through a series of lectures and hands-on exercises, students will learn how to set up and verify dimensions, cubes, and views, manually enter data into these structures, and define the data that users can see. Students will also learn how to transfer data into the IBM Planning Analytics model, including the use of TurboIntegrator scripts to perform data transfer. In addition, the course outlines how to customize drill paths, convert currencies, model for different fiscal requirements, and deploy IBM Planning Analytics applications to the web.

SKILLS COVERED

- Please refer to course overview

WHO SHOULD ATTEND?

Modelers

PREREQUISITES

Understanding of the metrics and drivers of your business

- Significant experience with Microsoft Excel spreadsheets (functions, macros, etc.)
- Basic knowledge of OLAP and IBM Planning Analytics

To gain this knowledge, visit the following websites:

- IBM Planning Analytics Learning Center at <https://developer.ibm.com/clouddataservices/docs/ibm-planning-analytics/how-to>
- IBM Planning Analytics YouTube Channel at <https://www.youtube.com/channel/UCGYcFhVXoA29v8kSbspLudA/featured>
- IBM Planning Analytics Community at <https://www.ibm.com/communities/analytics/planning-analytics/>

MODULES

Module 1: Overview of IBM Planning Analytics

- Review financial performance management
- Identify the IBM Planning Analytics position in a performance management system
- Describe the IBM Planning Analytics components and architecture
- Describe TM1 server fundamentals
- Describe fundamental modeling concepts

Module 2: Create Dimensions

- Describe cubes and dimensions
- Create dimensions manually
- Edit dimensions
- Create dimensions using TurboIntegrator

Module 3: Build Cubes and Views

- Describe cubes and data points
- Create cubes
- Construct views of data in cubes
- Create and use a pick list

Module 4: Load and Maintain Data

- Identify data sources
- Create processes to load data
- Create processes to delete data in a cube
- Create processes to update and maintain the model

Module 5: Add Business Rules

- Describe a rule
- Construct rules for elements or consolidations
- Use functions in rules
- Optimize rule performance
- Describe rules in a rule worksheet

Module 6: Optimize Rule Performance

- Describe consolidations and sparsity
- Enhance consolidation performance using SKIPCHECK
- Use FEEDERS to optimize aggregations
- Check the accuracy of rules and feeders

Module 7: Transfer Data Into the Model

- Describe the Advanced tabs in TurboIntegrator
- Load custom data into a cube
- Add a subset to a dimension
- Use logic in scripts
- Export data to ASCII
- Move data between versions
- Construct chores

Module 8: Customize Drill Paths

- View related data
- Create a drill process
- Create a drill assignment rule
- Edit a drill process

Module 9: Using Rules for Advanced Modeling

- Describe virtual cubes
- List uses for lookup cubes
- Create and use a spread profiles cube
- Implement moving balances in a cube

Module 10: Convert Currencies

- Describe currency challenges
- Create a currency dimension

- Create a currency cube
- Create rules for currency conversion

Module 11: Model for Different Fiscal Requirements

- Identify time considerations
- Use discrete time dimensions
- Implement a continuous time dimension model

Module 12: Deploy IBM Planning Analytics Applications

- Explain the application types
 - Access an IBM Planning Analytics application
 - Create a new application
 - Set the available clients
 - Apply security in the application
 - Activate and deactivate an application
- Appendix A: Optimize and tune models
- Identify characteristics of large models
 - Describe strategies to improve model performance
- Appendix B: Identify common data structures
- Identify characteristics of operational and reporting databases
 - Discuss Online Analytical Processing (OLAP)
 - Examine core model design principles
 - Identify the basic tasks required to create an IBM Planning Analytics model and deploy it

END OF PAGE