



## **Cognos Planning 10.1 Course Content:35-40hours**

### Course Outline

#### **Introduction to IBM Cognos Planning - Administrator**

- Review IBM Cognos Performance Management (PM) Solution
- Identify IBM Cognos Planning and its components
- Identify IBM Cognos BI and its components
- Examine the IBM Cognos Planning architecture
- Examine IBM Cognos Planning - Contributor and its components
- Examine the development process for the Contributor solution

#### **Build a Contributor Application**

- Examine best practices for building the underlying IBM Cognos Planning - Analyst model
- Configure IBM Cognos Planning Administrator
- Create a Planning Contributor application using the Application wizard
- Specify navigation, orientation, and application settings
- Import the e.List and rights
- Run Go to Production and preview a Planning Contributor application

#### **Manage Workflow and Web Application Activities**

- Access the application in Cognos Connection
- Examine the user roles and workflow states
- Create annotations
- Attach documents to Planning Contributor application items
- View and delete commentary
- Bounce users from the application
- Work offline

#### **Apply Security**

- Examine Cognos Planning security: authentication and authorization



- Examine Cognos Planning roles
- Assign access rights to end users
- Examine levels of user rights
- Create saved selections
- Examine and create access tables
- Identify network considerations

### **Administer Applications**

- Review what happens during Go to Production
- Back up the datastore
- Display Invalid Owners and Editors
- Create a planning package
- Reset workflow states
- Set advanced options for subsequent Go to Production processes
- Examine job management and the types of jobs that can be performed
- Create help text for end users
- Verify that data entered is valid

### **Manage Data**

- Synchronize the Cognos Planning - Contributor application with the Cognos Planning - Analyst model
- Import data into the Planning Contributor application as a planner, reviewer and administrator
- Publish Planning Contributor data

### **Use Extensions**

- Examine IBM Cognos Planning - Contributor extensions
- Report from Planning Contributor data using extensions
- Configure Planning Contributor extensions
- Use administration extensions

### **Automate Applications**

- Examine automation of common administration tasks using macros
- Create and publish a macro
- Group related tasks into one macro
- Examine how to run macros

### **Consume Planning Data in Cognos BI**

- Examine Cognos Connection
- Create a portal page to group different types of content into a single view
- Examine how to access live data in Cognos Studios
- Create and run agents based on planning data in Events Studio

### **Case Study**

- Create a Contributor application
- Ensure planners and reviewers have the required access to the appropriate data
- Modify the application to accommodate the addition of new locations
- Bring test data into the application in an administrator role and an end user role
- Publish data for reporting and automate this task

### **Use the Contributor Add-in for Excel (Optional)**

- examine the Cognos Planning - Contributor Add-in for Excel
- enter, save, and submit Planning Contributor data using the Excel Add-in
- modify the display of Planning Contributor data in Microsoft Office Excel
- annotate data in Microsoft Office Excel
- save a workbook as a template

### **Move Data Between Planning Analyst and Planning Contributor (Optional)**

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

### **Translate a Contributor Application (Optional)**

- Examine the translation cycle
- Create a translation
- Translate applications into different languages
- Export files for translation