IBM Planning Analytics v2.1.x: Design and Develop Models in PAW

Durée: 3 Jours **Réf de cours: P8472G**

Résumé:

Learn how to design and build a complete model using IBM Planning Analytics Workspace

This course teaches modelers how to design and build a complete model using IBM Planning Analytics Workspace.
Learners progress through the full modeling lifecycle, starting with an overview of Planning Analytics architecture and continuing through dimension design, cube construction, data loading, and business rule development.
The course emphasizes modeling best practices and performance considerations using Planning Analytics version 2.1.x.
Through a combination of instructor-led explanations and hands-on exercises, learners create and enhance a working model that reflects common planning and analysis scenarios.

Topics include TurboIntegrator processes for loading and maintaining data, rules and feeders for advanced calculations, and techniques for optimizing model performance.
The course also covers advanced modeling capabilities such as drill-through paths, currency conversion, and time modeling for different fiscal requirements.
By the end of the course, learners will be able to build scalable, maintainable models that support planning, forecasting, and reporting use cases in Planning Analytics Workspace.

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Public visé:

This course is destinated to Business Analysts.

Objectifs pédagogiques:

- After completing this course, learners should be able to:
- Describe TM1 server architecture and in-memory processing
- Create and access a TM1 server using Planning Analytics Workspace
- Create and edit dimensions using Planning Analytics Workspace
- Design cubes based on business requirements
- Explain TurboIntegrator process components
- Combine rules and dimension structures to perform calculations
- Create effective feeder statements
- Use DB functions to link cubes with different dimensionality
- Enable users to navigate to related detail data
- Implement advanced rule-based modeling techniques
- Design maintainable currency conversion models
- Implement models that support rolling forecasts

Pré-requis:

Participants should have the following knowledge:

- A general understanding of business analytics or performance management concepts
- Basic familiarity with IBM Planning Analytics terminology
- Experience navigating web-based applications

Test et certification

- None

Après cette formation, nous vous conseillons le(s) module(s) suivant(s):

- None recommended

Contenu:

Unit 1: Overview of IBM Planning Analytics

- Explain the role of IBM Planning Analytics in financial performance management
- Identify core Planning Analytics components and services
- Describe TM1 server architecture and in-memory processing
- Navigate the Planning Analytics Workspace modeling environment
- Create and access a TM1 server using Planning Analytics Workspace

Unit 2: Creating Dimensions in PAW

- Describe the role of dimensions and members in a Planning Analytics model
- Create and edit dimensions using Planning Analytics Workspace
- Import dimension structures from external files
- Use member attributes to enhance usability and reporting
- Explain how hierarchies support alternative rollups of data

Unit 3: Building Multidimensional Cubes

- Explain what cubes are and how they store data
- Design cubes based on business requirements
- Create cubes using existing dimensions
- Apply cube properties and attributes appropriately
- Implement pick lists to control data entry

Unit 4: Data Loading and Maintenance

- Identify supported data sources for Planning Analytics
- Explain TurboIntegrator process components
- Create and run processes to load cube and dimension data
- Maintain data accuracy using delete and accumulate techniques
- Schedule processes using chores

Unit 5: Building and Applying Business Rules

- Describe how rules are evaluated in Planning Analytics
- Write rules using area definitions and functions
- Apply rules at leaf and consolidated levels
- Use rules to share data between cubes
- Combine rules and dimension structures to perform calculations

Unit 6: Optimizing Rule Performance

- Explain how sparsity affects cube performance
- Use SKIPCHECK to optimize rule evaluation
- Create effective feeder statements
- Troubleshoot consolidation and feeder issues
- Trace rule-driven and consolidated values

Unit 7: Efficient Data Transfer and Transformation

- Use DB functions to link cubes with different dimensionality
- Describe TurboIntegrator scripting best practices
- Transfer and transform data between cubes
- Manage uneven hierarchies using processes

Unit 8: Customizing Drill-Through Navigation

- Explain the Planning Analytics drill-through process
- Create drill processes using TurboIntegrator
- Associate drill processes with cube cells
- Enable users to navigate to related detail data

Unit 9: Advanced Rule Modeling Techniques

- Describe virtual cubes and their use cases
- Use lookup cubes in calculations
- Apply relative proportional spreading
- Reference attributes within rules
- Implement advanced rule-based modeling techniques

Unit 10: Designing Flexible Currency Conversion Models

- Explain common currency conversion requirements
- Use control cubes and lookup techniques
- Create rules to convert currencies
- Design maintainable currency conversion models

Unit 11: Flexible Time Modeling Strategies

- Describe discrete and continuous time modeling approaches
- Select appropriate time structures based on requirements
- Implement models that support rolling forecasts
- Extend existing models for fiscal variations

Méthodes pédagogiques :

This course has labs provided by IBMOfficial course book provided to participants

Autres moyens pédagogiques et de suivi:

• Compétence du formateur : Les experts qui animent la formation sont des spécialistes des matières abordées et ont au minimum cinq ans d'expérience d'animation. Nos équipes ont validé à la fois leurs connaissances techniques (certifications le cas échéant) ainsi que leur compétence pédagogique.