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

OEM: IBM • Duration: 3 Days (24 hrs) • Code: P8472G

COURSE MODULES & TOPICS

Objectives

- 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

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: Create Dimensions

- 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: Build 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: Load and Maintain Data

- 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: Add 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: Optimize Business 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: Transfer Data into Your Model

- 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: Customize Drill Paths

- 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: Use Rules for Advanced Modeling

- 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: Convert Currencies

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

Unit 11: Model for Different Fiscal Requirements

- 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