



QueBIT[®]
Trusted Experts in Analytics

Financial Performance Management
Training Catalog



Why use QueBIT for training?

QueBIT aims to make it easy to help you find the right information. Our mission is to empower you with the training you need, so that you can apply analytic techniques with confidence. We want you to succeed and see the power in the data that is at your fingertips, so that you can make better informed decisions. QueBIT is a full-service operation, offering flexible training sessions to meet your busy schedules. Our training is presented by certified, expert, technical trainers.

QueBIT will support your training needs for all the IBM Business Analytics products: Planning Analytics, Cognos Analytics, and SPSS. QueBIT Consulting, LLC is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit.



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Contact Information

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Financial Performance Management Training

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Financial Performance Management Training Roadmap

Planning Analytics Roadmap		TM1 Roadmap	
ANALYSTS/ MANAGERS	ADMINISTRATORS/ DEVELEPORS	ANALYSTS/ MANAGERS	ADMINISTRATORS/ DEVELEPORS
Planning Analytics Introduction (2 days)	Planning Analytics Introduction (2 days)	TM1 Introduction (2 days)	TM1 Introduction (2 days)
Planning Analytics for Excel (PAX) (1 day)	Planning Analytics for Excel (PAX) (1 day)	TM1 Exploration (1 day)	TM1 Exploration (1 day)
Planning Analytics Workspace (1 day)	Planning Analytics Workspace (1 day)	IBM CAFÉ with TM1 (1/2 day)	IBM CAFÉ with TM1 (1/2 day)
Planning Analytics Adv. Reporting (2 days)	Planning Analytics Adv. Reporting (2 days)	TM1 Adv. Reporting (2 days)	TM1 Developer (3 days)
	Planning Analytics Developer (3 days)		TM1 Adv. Developer (2 days)
	Planning Analytics Adv. Developer (2 days)		TM1 Modeler Workshop (2 days)
	Planning Analytics Modeler Workshop (2 days)		TM1 Administration (1 day)
	Planning Analytics Administration (1/2 day)		Cognos Disclosure Management (3 days)
	Cognos Disclosure Management (3 days)		

Analysts/Managers – Analysts/managers create their own FOPM reports to analyze the business.

Developer – The developer is responsible for system installation, configuration, and system optimization.

Administrator – The administrator is responsible for the overall administration of the FOPM products, including security, configuration, maintenance, and system optimization.

IBM Planning Analytics Introduction

2 day course

IBM Planning Analytics capabilities span personal, functional, and enterprise requirements for planning, analysis and reporting to help Finance drive timely decision-making. Analysts and Managers can use Planning Analytics Architect and Microsoft Excel, and a web interface to analyze their business performance.

Overview: Attendees will learn to create spreadsheets and views to analyze data. Students will also understand the basic principals of Planning Analytics model building by creating a TurboIntegrator process and creating business rules.

Prerequisites: A knowledge of your organization's data and structure, as well as Microsoft Excel experience, is necessary.

Knowledge Level: Introduction

Performance Goals: Upon successful completion of this course, students will be able to:

- Use Planning Analytics for Model Analysis
- Analyze Multi-Dimensional Data
- Create "What If" Analysis
- Create a Model
- Add Basic Business Rules
- Review the Project Life Cycle
- Create Reports in Planning Analytics for Excel

IBM Planning Analytics for Microsoft Excel (PAX)

1 day course

IBM Planning Analytics for Microsoft Excel (PAX) brings the benefits of modern enterprise performance management to Microsoft Excel Spreadsheets. It provides a way for business and financial analysts, line-of-business managers, and users to access data from a variety of sources, including IBM Planning Analytics and IBM Cognos Analytics to perform analysis in a familiar Microsoft Excel spreadsheet environment.

Overview: Students will be able to create spreadsheet reports from multidimensional IBM Planning Analytics models and IBM Cognos Analytics. Participants will retain the power of Microsoft Excel functionality and formatting while integrating with data between IBM Planning Analytics and share results with IBM Cognos Analytics-sourced reports in Cognos dashboards and reports.

Knowledge Level: Introduction

Prerequisites: Knowledge of the use of web browser to access the corporate intranet environment is assumed. Familiarity with Microsoft Windows and basic navigation.

Performance Goals: Upon successful completion of this course, students will be able to:

- Explore and Analyze Planning Analytics Cube Data
- Retain Excel Functionality and Formatting
- Modify Data and Commit Data back to the TM1 Server
- Share Results

IBM Planning Analytics Workspace

1 day course

IBM Planning Analytics capabilities span personal, functional, and enterprise requirements for planning, analysis and reporting to help Finance drive timely decision-making. Analysts and Managers can use Microsoft Excel and a web interface to analyze their business performance.

Overview: Attendees will learn to provide self-service analytics to key performance indicators to users through an interactive, customizable workspace, analyze data exploration and natural language queries based on common business terms, create clear, compelling graphics and integrated scorecards to share with decision makers. Participants will retain familiar Microsoft Excel spreadsheets with enhanced functionality, and plan detailed, what-if scenario modelling with powerful hierarchy capabilities, enabling you to model attributes of hierarchies for more granular analysis.

Knowledge Level: Introduction

Prerequisites: A knowledge of your organization's data, structure and Microsoft Excel experience is necessary.

Performance Goals: Upon successful completion of this course, students will be able to:

- Define IBM Planning Analytics Workspace and IBM Cognos Planning Analytics
- Understand Hierarchies
- Analyze Data with Planning Analytics Workspace
- Create a New Book and View
- Define Elements, Dimensions, Attributes, and Cubes
- Access Data and Objects Quickly
- Utilise Worksheets and Sandboxes
- Explore Scorecards

IBM Planning Analytics Developer

3 day course

IBM Planning Analytics combines a powerful, multidimensional database engine, Microsoft Excel add-in, Server Explorer front end, Web Interface, Turbo Integrator, and Extract Transform and Load (ETL) tools. The combination of these utilities will allow developers and end users to access multidimensional data with speed and efficiency, regardless of the source.

Overview: Attendees will learn to define dimensions, create cubes and apply security to your multidimensional data using Turbo Integrator. You will also be able to create basic rules to data in the cubes.

Knowledge Level: Intermediate

Prerequisites: Planning Analytics Introduction or Exploration course or equivalent skill set. You should be familiar with Planning Analytics concepts of views, cubes, and browsing data prior attending the Planning Analytics Administration course. A working knowledge of Microsoft Excel and your organizational structure and data is recommended.

Performance Goals: Upon successful completion of this course, students will be able to:

- Understand OLAP and Planning Analytics Servers
- Create Dimensions
- Build and Populate Cubes
- Add Business Rules
- Create Currency Translations
- Implement Security
- Understand Best Proven Practices

IBM Planning Analytics Advanced Developer

2 day course

IBM Planning Analytics combines a powerful, multidimensional database engine, Microsoft Excel add-in, Server Explorer front end, web interface, Turbo Integrator, and Extract Transform and Load (ETL) tools. The combination of these utilities will allow developers and end users to access multidimensional data with speed and efficiency, regardless of the source.

Overview: Attendees will learn to define dimensions, create cubes and apply security to your multidimensional data using Turbo Integrator. Students will learn techniques and best practices to develop, test, and run effective Turbo Integrator processes. You will also be able to create, test, and problem solve advanced rules to data in the cubes.

Knowledge Level: Advanced

Prerequisites: Planning Analytics Introduction or Exploration and Planning Analytics Developer course or equivalent skill set. You should be familiar with Planning Analytics concepts of views, cubes, and browsing data, TurboIntegrator processes, basic rule writing techniques prior attending the Planning Analytics Advanced Developer course. A working knowledge of Microsoft Excel and your organizational structure and data is recommended.

Performance Goals: Upon successful completion of this course, students will be able to:

- Review SQL Basic Concepts and Skills needed to Develop TurboIntegrator Scripts
- Build Dimensions and load Data with TurboIntegrator
- Add Complex Business Rules
- Utilize Advanced Business Rule Techniques

IBM Planning Analytics Advanced Reporting

2 day course

IBM Planning Analytics is a technology based on On-Line Analytical Processing or OLAP. With Planning Analytics, you can quickly view and understand large sets of Complex business data. Analysts and Managers can use Planning Analytics Perspectives and Microsoft Excel, and Server Explorer to analyze their business performance.

Overview: Attendees will learn to create static and dynamic subsets for spreadsheets and views to analyze data. You will create dynamic subsets, learn how to record and create MDX statements. Students will review the benefits and purposes for a snapshot, slice, and active form and create more advanced Planning Analytics Excel reports for distribution for your organization.

Knowledge Level: Advanced

Prerequisites: Planning Analytics Introduction or Exploration course or equivalent skill set. You should be familiar with Planning Analytics concepts of views, cubes, and browsing data prior attending the Planning Analytics Advanced Reporting class. A knowledge of your organization's data and structure, as well as Microsoft Excel experience, is necessary.

Performance Goals: Upon successful completion of this course, students will be able to:

- Create Static and Dynamic Subsets
- Export and Modify a Slice and Active Form
- Design Complex Reports for Distribution
- Understand Best Proven Practices and Tips

IBM Planning Analytics Administration

1/2 day course

IBM Planning Analytics capabilities span personal, functional, and enterprise requirements for planning, analysis and reporting to help Finance drive timely decision-making. Analysts and Managers can use Planning Analytics

Overview: This course is intended for end users, administrators, developers, who need to become familiar with Planning Analytics tools that will assist in optimizing performance of the application(s).

Knowledge Level: Intermediate

Prerequisites: It is recommended that you have Microsoft Excel experience. The completion of the QueBIT's Planning Analytics End User and Developer classes is a mandatory prerequisite.

Performance Goals: Upon successful completion of this course, students will be able to:

- Understand the Planning Analytics Architecture
- Review Installation Options
- Apply Security
- Monitor System Performance
- Evaluate Migration & Disaster Recovery

IBM Cognos TM1 Introduction

2 day course

IBM Cognos TM1 capabilities span personal, functional, and enterprise requirements for planning, analysis, and reporting to help finance drive timely decision-making. Analysts and managers can use TM1 Perspectives, Microsoft Excel, or a web interface to analyze their business performance.

Overview: This course is intended for new clients who need an overview of the tool, prior to attending a QueBIT design session. Attendees will learn to create views and spreadsheets, in order to analyze and modify financial data.

Knowledge Level: Introduction

Prerequisites: Knowledge of your organization's data and structure, as well as Excel experience is assumed.

Performance Goals: Upon successful completion of this course, students will be able to:

- Use TM1 for Model Analysis
- Explore Model Data
- Create Spreadsheets
- Perform "What-If" Analysis
- Organize and Distribute Results
- Create an Application and Dimensions
- Utilize TurboIntegrator
- Create Basic Business Rules
- Review Project Life Cycle
- Create Reports utilizing IBM Cognos Analysis for Excel

IBM Cognos TM1 Exploration

1 day course

TM1 is an online, analytical, processing (OLAP) technology. With TM1, you can quickly view and understand large sets of complex business data. Analysts and managers can use TM1 Perspectives, Microsoft Excel, or a web interface to analyze their business performance.

Overview: Attendees will learn to create views and spreadsheets, in order to analyze and modify data.

Prerequisites: Knowledge of your organization's data and structure, as well as Excel experience is assumed.

Knowledge Level: Introduction

Performance Goals: Upon successful completion of this course, students will be able to:

- Use TM1 for Model Analysis
- Explore Model Data
- Create Spreadsheets
- Perform "What-If" Analysis
- Organize and Distribute Results

IBM Cognos Analysis for Excel (CAFÉ) with TM1

1/2 day course

IBM Cognos Analysis for Microsoft Excel (CAFÉ) with TM1 brings the benefits of modern enterprise performance management to Microsoft Excel spreadsheets. It provides a way for business and financial analysts, line of business managers, and users to access data from a variety of sources, including IBM Cognos TM1 and IBM Cognos Business Intelligence, to perform analysis in a familiar Microsoft Excel spreadsheet environment.

Overview: Students will be able to create spreadsheet reports from multidimensional IBM Cognos TM1 models and IBM Cognos Business Intelligence sources; leverage the power of Microsoft Excel functionality and formatting, while integrating with data between IBM Cognos TM1 and share results with IBM Cognos Business Intelligence-sourced reports in Cognos dashboards and reports.

Knowledge Level: Introduction

Prerequisites: Knowledge of the use of a web browser to access a corporate intranet environment is assumed. Familiarity with Microsoft Windows and basic navigation.

Performance Goals: Upon successful completion of this course, students will be able to:

- Explore and Analyze TM1 Cube Data
- Retain Excel Functionality and Formatting
- Modify and Commit Data Back to TM1
- Share Results

IBM Cognos TM1 Advanced Reporting

2 day course

TM1 is a technology based on On-Line Analytical Processing or OLAP. With TM1, you can quickly view and understand large sets of Complex business data. Analysts and Managers can use TM1 Perspectives and Microsoft Excel, and Server Explorer to analyze their business performance.

Overview: Attendees will learn to create static and dynamic subsets for spreadsheets and views in order to analyze data. In order to create dynamic subsets, you will also learn how to record and create MDX statements. You will review the benefits and purposes for a snapshot, slice, and active form and create more advanced TM1 Excel reports for distribution for your organization.

Knowledge Level: Advanced

Prerequisites: TM1 Introduction or Exploration course or equivalent skill set. You should be familiar with TM1 concepts of views, cubes, and browsing data prior attending the TM1 Advanced Reporting class. A knowledge of your organization's data and structure, as well as Microsoft Excel experience, is necessary.

Performance Goals: Upon successful completion of this course, students will be able to:

- Create Static and Dynamic Subsets
- Export and Modify a Slice and Active Form
- Design Complex Reports for Distribution
- Understand Best Proven Practices and Tips

IBM Cognos TM1 Developer

3 day course

TM1 combines a powerful, multidimensional database engine, Microsoft Excel add-in, Server Explorer front end, web interface, Turbo Integrator, an extract transform and load (ETL) tool. The combination of these utilities allow developers and end users to access multidimensional data with speed and efficiency, regardless of the source.

Overview: Attendees will learn to define dimensions, create cubes and apply security to a multidimensional data using Turbo Integrator. You will also be able to create basic rules in the cubes.

Prerequisites: Completion of TM1 Introduction or TM1 Exploration class is mandatory, or equivalent skill set is required.

Knowledge Level: Intermediate

Performance Goals: Upon successful completion of this course, students will be able to:

- Understand OLAP and TM1 Servers
- Create and Maintain Dimensions
- Build and Populate Cubes
- Add Business Rules
- Create Currency Translations
- Implement Security
- Understand Proven Practices

IBM Cognos TM1 Administration

1 day course

IBM Cognos TM1 capabilities span personal, functional, and enterprise requirements for planning, analysis and reporting to help the office of finance drive timely, decision-making.

Overview: This course is intended for end users, administrators and developers, who need to become familiar with TM1 tools that will assist in optimizing performance of the application(s).

Prerequisites: The completion of QueBIT's TM1 Introduction or Exploration and Developer classes, or equivalent skill set is mandatory.

Knowledge Level: Advanced

Performance Goals: Upon successful completion of this course, attendees will be able to:

- Understand the TM1 Architecture
- Operate the TM1 Server
- Apply Security
- Perform Backup and Recovery
- Understand Administrative Jobs

IBM Cognos TM1 Modeler Workshop

2 day course

TM1 combines a powerful, multidimensional database engine and Microsoft Excel add-in, allowing your organization to create budgets, forecasts, plans, and financial reports.

Overview: Attendees will learn to review end user requirements and reports to determine how to build a TM1 model effectively. The facilitator will be guiding you through the process of analyzing and building your model based on requirements given. Each part of the model is first discussed in detail, reports, and budgets are analyzed, and files are reviewed before students design and build models.

Prerequisites: Completion of QueBIT's IBM Cognos TM1 Introduction or Exploration, Developer, and Advanced Developer course, or equivalent skill set is mandatory.

Knowledge Level: Advanced

Performance Goals: Upon successful completion of this course, students will be able to:

- Analyze Business Requirement
- Plan for Model Building
- Build an Effective Model
- Test Model Design

IBM Cognos Disclosure Management

3 day course

The office of finance will use Cognos Disclosure Management to create typical reports, such as, statutory, corporate, industry, and internal reporting intended for management review boards, audit committees, and executive management.

Overview: Attendees will learn to create reports, including adding both numerical and text content. You will learn how to manage reports, including putting workflow into place and learning how to roll reports forward from one period to the next.

Knowledge Level: Introduction

Prerequisites: Knowledge of the use of a web browser to access a corporate intranet environment is assumed. Familiarity with Microsoft Windows and basic navigation.

Performance Goals: Upon successful completion of this course, students will be able to:

- Understand Report Creation and Design
- Utilize Report and Query Variables
- Manage Workflow and Auditing
- Add Data Sources and Queries
- Add Checklists, Tasks and Dashboards
- Implement Security

QueBIT offers Business Analytics Training

Contact Information

To find out more information on how QueBIT can work with your organization to achieve results, please contact us at **1-800-QUEBIT1** or email us at **training@quebit.com**.

www.QueBIT.com