

# IBM Planning Analytics Business Modeler Role

## Typical Job Role

I am responsible for designing, managing, and maintaining budget, forecast, or operational planning models, as well as overseeing the overall planning process for the organization.

## Summary of the Learning Path

The learning path and outcomes for the business modeler is to provide you with the foundational skills and knowledge on how to architect planning analytics models for budgeting, forecasting and operational planning.

Learn the fundamentals of building multi-dimensional planning models and their effectiveness. Streamline planning processes and eliminate spreadsheet bottlenecks by leveraging IBM Planning Analytics within a comprehensive data architecture.

You'll begin to re-imagine how you can apply planning analytics modeling to various aspects of your business and organizational processes, helping transform how you and your organization automate non-value adding activities, enhance collaboration and planning, and drive decisions based on data at both strategic and tactical levels.

### Courses for this learning path include:

- IBM Planning Analytics – Fundamentals for Analysts & Content Creators
- IBM Planning Analytics – Workspace Reporting & Analysis
- IBM Planning Analytics – Cube Rules: The Calculation Engine
- IBM Planning Analytics – Turbo Integrator: The Scripting Engine
- IBM Planning Analytics – Additional Modelling & Security
- IBM Planning Analytics – Planning Analytics for Excel (Optional)

### Certifications/Badges obtained:

- Coming soon!

### Advanced and additional courses include:

- IBM Business Analytics (CA/PA) – Multi-Dimensional Dashboards (Optional)
- Other Advanced Modeling course - coming soon

# IBM Planning Analytics Fundamentals For Analysts

This course offers a comprehensive introduction to IBM Planning Analytics (TM1), comparing its capabilities to Microsoft Excel and other OLAP cube technologies. Learners will gain hands-on experience by building a simplified Income Statement model, reinforcing their understanding of multi-dimensional planning and its core components within the IBM Planning Analytics platform.

**Recommended for:** Analyst/Content Creator, Business Modeler

## Unit 1: Overview of IBM Planning Analytics

- What is the difference between a Relational & OLAP Database?
- What makes Planning Analytics a unique OLAP database?
- How does Planning Analytics compare to Excel?
- How can Planning Analytics make my day-to-day work more effective?
- What are the core components of a Planning Analytics Model?

## Unit 2: Building an Income Statement Model

- Build the foundations of an Income Statement Cube
- Understand what a dimension is, and why it is important
- Build the core dimensions of the Income Statement - Time, General Ledger / Accounts, Department, Scenarios

## Unit 3: Load Financial Data & Perform Analysis

- Load data via Turbo Integrator
- Create cube views and perform analysis
- Create a KPI using a business formula (Planning Analytics cube rules)

# IBM Planning Analytics Workspace Reporting & Analysis

This course is designed for analysts and modelers, focusing on the effective design and layout of Planning Analytics Workspace (PAW) books. Learners will gain the skills to create user-friendly interfaces that enable seamless report review, data analysis, and budget/forecast input across the organization.

Using a prebuilt model, learners will build a forecasting workbook with input templates, summary views, and visualizations. They will also learn to do ad-hoc analysis to explore variances, calculate key performance indicators (KPIs), share data & reports, and identify ways to improve business and financial efficiency.

**Recommended for:** Analyst/Content Creator, Business Modeler

## Unit 1: PAW Reporting Overview

- PA Reporting Options
- PAW Roles
- Navigating Planning Analytics Workspace
- PAW Books
- Dimension Sets
- Create a Personal Folder

## Unit 2: Creating a Forecasting Workbook

- Create a Revenue Entry Template
- Create an Expense Entry Template
- Create a Payroll Entry Template
- Create a P&L Dashboard
- Create a Welcome page with navigation buttons

## Unit 3: Data Entry and Analysis

- Enter Data Manually
- Enter Data Through Consolidation Typing
- Enter Data Through Keyboard Shortcuts
- Enter Data Through Spreading Methods
- Base vs Sandbox Data Entry
- Using Snap Commands
- Perform Ad-Hoc Analysis

# IBM Planning Analytics Cube Rules: The Calculation Engine

Throughout the course, learners will develop an understanding of cube rules, the Planning Analytics equivalent of Excel formulas, and their fundamental role in Planning Analytics modeling. The course will also explore how Excel modeling techniques and methods translate into cube rule development and model configuration, highlighting key similarities and differences between cube rules and Excel formulas.

Using an Income Statement and Commission Rates Cube, we will systematically apply and analyze various rules and calculations. Beginning with a basic sales commission expense rule, we will progressively introduce more dynamic rules that account for multi-department exceptions, commission threshold flags, and time-based commission changes. Additionally, we will explore best practices for optimizing and scaling rules through cube feeders, leveraging real-world sales data examples to illustrate key concepts.

**Recommended for:** Analyst/Content Creator, Business Modeler

## Unit 1: What are Cube Rules?

- Cube Rules Overview
- Basic Syntax of a Cube Rule
- When to Use Consolidations Instead
- Rule Order of Evaluation

## Unit 2: Intra-Cube Rules

- Creating a Simple Rule
- How Do We Create Exceptions for our Rules?
- Using Functions in Cube Rules

## Unit 3: Inter-Cube and Consolidated Rules

- Rules Between Cubes
- Disabling a Rule Conditionally
- Resolving Level of Detail Issues
- Consolidated Rules to Override Aggregations
- Performing a Rule at all Levels
- Creating a Ratio Rule
- Creating Rules for String Cells

## Unit 4: Skipcheck & Feeders

- What are Feeders, and Why Do We Need Them?
- When Do Feeders Execute?
- Examine Common Feeder Examples

# IBM Planning Analytics Turbo Integrator: The Scripting Engine

This course is designed for business modelers seeking to enhance their expertise in Planning Analytics. Turbo Integrator (TI), the ETL tool within Planning Analytics, plays a critical role in data integration by facilitating the transfer of data in and out of Planning Analytics models, and within and between cubes. With TI you can streamline data integration, automate dimension management, and mimic Excel Macro-like functionality to enhance workflows.

Learners will gain hands-on experience building an Income Statement cube and its key dimensions—Departments, Organization, Products, Customers, Accounts, and Time—using CSV files, SQL tables, and manual methods in TI. Learners will also develop TI processes to create the Income Statement cube, load General Ledger (GL) data from SQL and automate tasks like set creation and hierarchy updates.

**Recommended for:** Analyst/Content Creator, Business Modeler

## Unit 1: What is Turbo Integrator?

- How Turbo Integrator Works
- What Can We Do with Turbo Integrator?

## Unit 2: Building Dimensions

- Building a Simple Dimension
- Modifying the TI Script
- Dimensions with Multiple Hierarchies
- Handling Dimension Changes Over Time
- Dimensions from Parent/Child Data Sources
- Building a Dimension from an Uploaded File

## Unit 3: Loading Cubes and Other Functions

- Manipulating Sets with Turbo Integrator
- Loading a Cube with Data
- Keeping Dimension Hierarchies Up to Date

# IBM Planning Analytics Additional Modeling & Security

This course is designed for business modelers looking to expand their expertise in Planning Analytics by applying additional modeling techniques, best practices, and security configuration. It covers key features such as drill-through and picklists to enhance user interaction, along with the setup and management of user security and access. Additionally, the course provides best practices for implementing applications and planning workflows for budget and forecast processes.

**Recommended for:** Analyst/Content Creator, Business Modeler

## Unit 1: Additional Modeling Features

- Drill Thru - Cube to Cube, Cube to Database Transactions
- Picklists - 3 types, how to leverage picklists, cascading picklists

## Unit 2: User Security and Access

- PAW Security for Groups and Users
- Model Security Overview of Cubes, Dimensions, Elements, Cell
- Adding Users and Groups
- Best Practice, tips and documenting your environment

## Unit 3: Design Tips and Troubleshooting

- Attributes vs Measures
- User Experience and Navigations
- Documenting your Environment

## Unit 4: Applications and Plans

- Configure Applications
- Configure Plans

# IBM Planning Analytics Planning Analytics for Excel (PAfE)

This course is designed for analysts and content creators to maximize the use of Planning Analytics for Excel (PAfE). Learners will discover how to access live data directly from Planning Analytics models, build highly customized reports in Excel, and create tailored budget and forecast input templates for both Excel and Planning Analytics Workspace, eliminating the possibilities of standard excel calculation errors that exist in multiple company workbooks.

The course also covers how to automate reporting with PAfE, eliminating the need for manual data exports from PAW to generate Excel reports. Learners will explore the various PAfE report types, their advantages and limitations, interactive features, and how to publish reports for use in Planning Analytics Workspace.

**Recommended for:** Analyst/Content Creator, Business Modeler

## Unit 1: PAfE Reporting Overview

- What is Planning Analytics for Excel (PAfE)?
- The PAfE Ribbon
- The Task Pane
- Explore the PAfE Interface

## Unit 2: Creating PAfE Workbook

- Types of PAfE Reports
- Create an Exploration from a View
- Create an Exploration from Scratch
- Create a Quick Report
- Create a Custom Report
- Create a Dynamic Report
- Create a Universal Report

## Unit 3: Data Entry and Publishing to PAW

- Explore Data Entry Options
- Publishing to PAW or Spreadsheet Services

# IBM Cognos Analytics Multi-Dimensional Dashboards

This course is designed for analysts and content creators who own both Planning Analytics and Cognos Analytics (Business Analytics). It highlights how these tools work together to create real-time, interactive dashboards using Planning Analytics models.

Learners will learn to leverage built-in Planning Analytics features—such as sets, security, rules/measures, and hierarchies—to streamline dashboard creation and maintenance within Cognos. Through hands-on practice, they will configure a Planning Analytics cube as a data source for Cognos, apply best practices, and build a dynamic, interactive, multi-tab dashboard. This course is ideal for those looking to elevate their Planning Analytics reporting and expand its impact beyond finance (traditional rows and columns).

**Recommended for:** Analyst/Content Creator

## Unit 1: Setup Planning Analytics Model for Cognos

- Defining the Measure and Time Dimensions
- Adding Additional Hierarchies
- Customizing Level Names
- Updating Cognos Metadata
- Configure the Planning Analytics Cube

## Unit 2: Overview and Layout of Cognos Dashboards

- The Dashboards Layout
- The Vertical Toolbar
- The Horizontal Toolbar
- The Analytics/Filters/Fields/Properties Panes
- Predefined Dashboard Templates
- Dashboard Interface

## Unit 3: Creating an Interactive Dashboard

- Creating a Tabbed Dashboard
- Creating a Freeform Tab
- Drilling and Top/Bottom Feeders