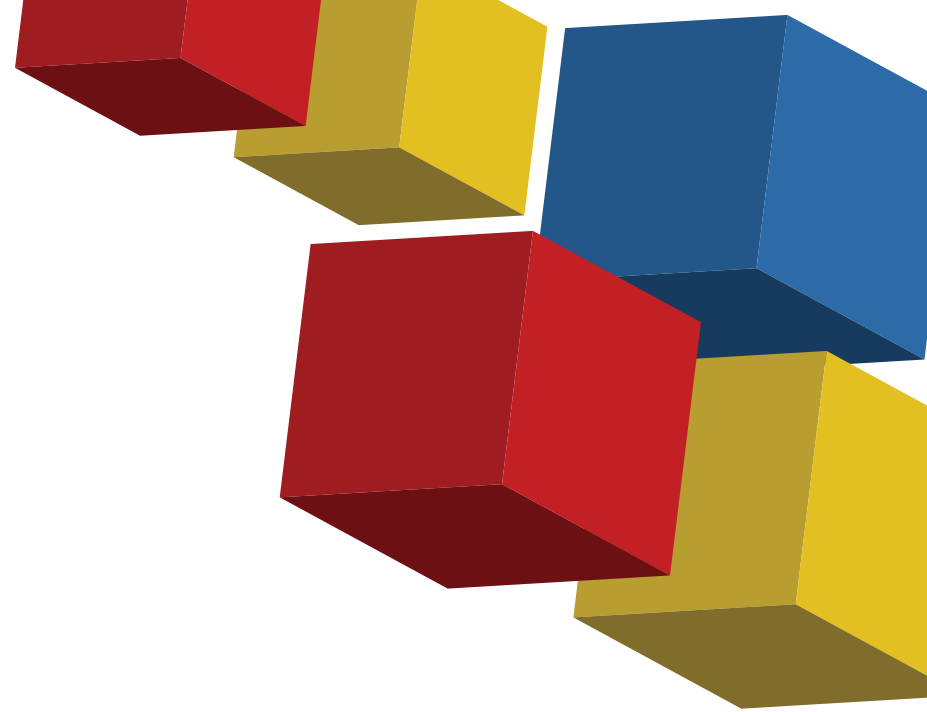




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Performance Management Training Catalog



## Why use QueBIT for training?

QueBIT helps users learn and develop their Cognos skills in a wide variety of situations. Customized courses provide a creative flexible advantage to training. QueBIT fits training to the client's needs by using generic or customized data. Empowering the users to be more productive is QueBIT's main goal.

QueBIT will support your training needs for all the Cognos Performance Management Products: Cognos Planning, TM1, Cognos Finance and Business Intelligence. QueBIT 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.

Complaints regarding registered sponsors may be addressed to the National Registry of CPE Sponsors, 150 Fourth Avenue North, Suite 700, Nashville, TN, 37219-2417. Website: [www.nasba.org](http://www.nasba.org)



### Contact Information

To find out more information on how QueBIT can work with your organization to achieve results, please contact us at 800-QUEBIT1 or email us [training@quebit.com](mailto:training@quebit.com)

QueBIT  
49 Secor Road  
Scarsdale, New York 10583



# The Value of Choice

## Training Options

### **Instructor Led**

Live, instructor-led training is considered to be the most effective, which involves real-time interaction, in-depth information sharing and direct response to questions. Few educational opportunities are considered more valuable than meeting and interacting directly with a instructor or staff support for various programs.

### **Web-based**

Participation is possible anywhere with a telephone and a computer with internet access. Audio is delivered over the telephone (toll free) and the slide show and relevant documents can be viewed simultaneously via a web browser. Students save on travel time and expenses. Each web-based training course is facilitated by a QueBIT instructor and may include relevant staff members. Participants also have an opportunity to ask questions during the session on the phone or by typing in questions through an online “chat” feature.

### **Virtual Workshop**

Just like web-based training, students participate in virtual workshops and forums using the internet and a telephone - no special software is required. The only difference is that virtual workshops concentrate on a single or focused set of topics. These workshop courses are usually short – often only one hour each – and provide a forum for high-level discussions on specific issues. Customized workshops are designed around questions submitted by participants prior to the session.

### **Train the Trainer**

To provide trainers with the knowledge, skills, and materials they need to successfully teach the Cognos Content. This is an instructor led class of the desired software with a certified QueBIT instructor. This is not a customized class, as this class is to show the trainer how to present the software in an effective manner.

## Performance Management

Good decisions are the building blocks of great business performance. The performance management system from Cognos, an IBM company, integrates software, services, best-practices, and partners. As a Platinum Cognos Partner, QueBIT is a leader in software integration and related services. QueBIT delivers value to our client partners by providing accountability and a common understanding based on answers to these basic performance management questions:

### **How are we doing?**

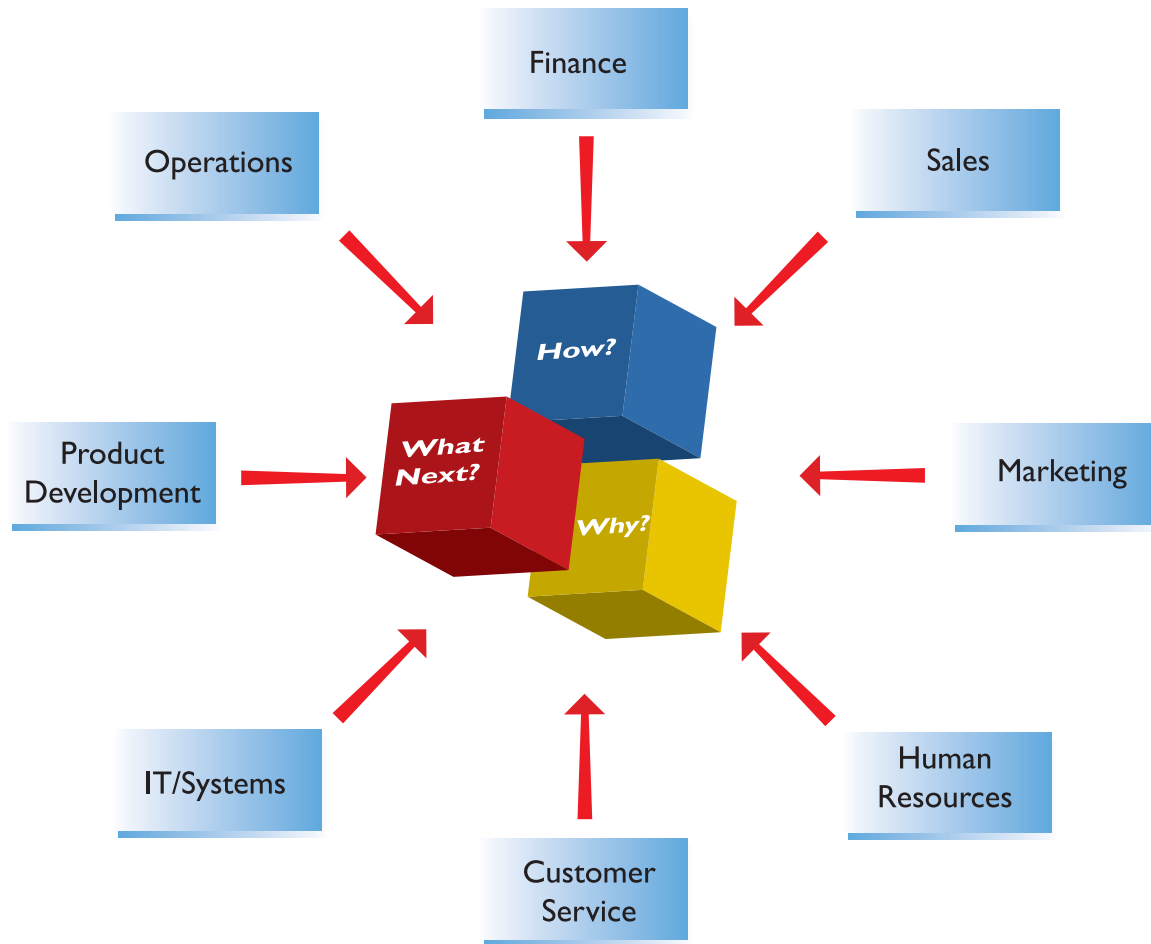
Through the implementation of tools such as dashboards and scorecards, you can track your key metrics. These tools are vital to measuring and monitoring of your business performance.

### **Why?**

As a performance manager, you need to view critical data, gain insight, understand trends, and recognize anomalies. Reporting and analysis tools allow you to perform these functions effectively.

### **What should we be doing next?**

Reliable planning and budgeting tools are necessary to drive accurate forecasts. By implementing an effective performance management system, you can significantly improve your organization's decision making ability. The integrated approach to Cognos' Performance Management System allows you to focus on making decisions, instead of spending time gathering data or questioning timeliness or accuracy. The end result is better alignment, accountability, and performance.



# Office of Finance Roadmap & Table of Contents

- 8** Cognos Planning Analyst Administration
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- 24** Cognos Finance Administration



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## OOF Training Roadmap

Cognos Planning Training Roadmap		TM1 Training Roadmap		Cognos Finance Training Roadmap		
CONTRIBUTOR/ REVIEWER	ADMINISTRATOR/ DEVELOPER	ANALYSTS/ MANAGERS	ADMINISTRATOR/ DEVELOPER	REPORT CUSTOMER	REPORT AUTHOR	ADMINISTRATOR/ DEVELOPER
Webex End User Training (1/2 day)	CP Analyst Admin (2 days)	TM1 End User (1 day)	TM1 End User (1 day)	Webex End User Training (1/2 day)	Report Authoring (2 days)	Report Authoring (2 days)
	CP Contributor Admin (2 days)		TM1 Developer Admin (3 days)			Cognos Finance Admin (2 days)
	CP Analyst Advanced Admin (2 days)		TM1 Suggested Practices and Methodologies (1/2 day Webex session)			
	CP Contributor Advanced Admin (2 days)					

**Report Consumers** – Report Consumers analyze their side of the business by viewing Cognos Finance reports

**Report Authors** – Report Authors create their own Cognos Finance reports in order to analyze the business

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

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

# Cognos Planning Analyst Administration

## 2 day course

This course is intended for deemed administrators, business subject matter experts, and model designers, who will need to learn how to design and build models for business planning.

**Overview:** Attendees will learn to design and create Cognos Planning Analyst models, load and input data, and automate common processes.

**Prerequisites:** Knowledge of your organization's data and structure as well as Microsoft Excel experience is recommended.

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

- Design and create D-Lists, D-Cubes, D-Links
- Modify D-Lists, D-Cubes, D-Links
- Load and input data into D-Cubes
- Apply security to Libraries and Analyst objects
- Create macros for automation



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## Sample Topics Include

- Modeling Design
- Best Practices
- Steps to Building Plans
- What is a Library?
- D-List Categories
- Best Practices on D-Lists
- Force to Zero
- Formatted D-Lists
- Modify or Update D-List Items
- Built-in Functions (BiFs)
- Weighted Averages
- Time Averages
- Conditional Formulas
- What is a D-Cube?
- Order of D-Lists for D-Cubes
- Set formula Priority
- Naming Conventions of D-Cubes
- Data Entry into D-Cubes
- Quick Commands
- Data Entry Commands
- Data Controls
- D-Cube Formatting Options
- Reselecting
- What is a D-Link
- D-Link Window Properties
- Allocations
- Maintenance of A-Tables
- File Maps
- What are Macros?
- Maintain Security
- Create an Itemized Expense Plan Workshop
- Create a Detail & Summary Travel Model

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# Cognos Planning Advanced Analyst

## 2 day course

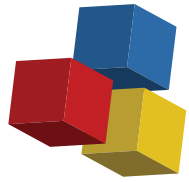
This course is intended for deemed administrators, business subject matter experts, and model designers, who will need to learn advanced topics in order to design and build models for business planning.

**Overview:** Attendees will learn to design and create complex Cognos Planning Analyst models by creating complex calculations, forecasting data, examining advanced concepts, designing for reporting.

**Prerequisites:** Knowledge of your organization's data and structure as well as Microsoft Excel experience is recommended. Completing the Cognos Planning Analyst Administration class is required.

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

- Create forecast data
- Use complex calculations
- Examine advanced concepts
- Design for reporting



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## Sample Topics Include

- Review of Analyst
- Review D-Lists, D-Links, D-Cubes, File Maps, A-Tables
- Examine the Forecast Built-in Function
- Build a revised rolling forecast
- Use various methods to forecast data
- Move values through periods using the FeedParam Built-in Function
- Round values using TRound Built-in Function
- Examine Tier calculations
- Calculate balances based on profiles
- Discuss calculation precedence
- Restructure D-Cubes
- Transfer data within a D-Cube
- Examine cascading allocations
- Explore the tools available for reporting on Analyst data
- Design a model for reporting purposes
- Publish objects for external reporting
- Make published data available for reporting in Cognos 8
- Create a report based on Analyst published data
- Populate a D-Cube using Cognos 8 as a datasource
- Design Reports and Administrative Screens
- Create a flowchart
- Link the flowchart to objects to Analyst
- Create tables
- Create graphs
- Backing up your database
- Manage D-Lists changes
- Transferring data

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# Cognos Planning Contributor Administration

## 2 day course

This course is intended for deemed administrators, business subject matter experts, technical administrators, and model designers, who will be using Contributor to create and administer Web-based plans.

**Overview:** Attendees will be able to design and create Contributor applications, control access and rights to applications, import data, and manage and monitor jobs.

**Prerequisites:** Knowledge of your organization's data and structure as well as Microsoft Excel experience is necessary. Completing the Cognos Planning Analyst Administration course is recommended.

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

- Design and create Contributor applications
- Manage the application
- Import and export data
- Assign rights and access to users
- Navigate the Web interface



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## Sample Topics Include

- Design a Model in Analyst
- Best practices
- Contributor Tabs
- Assumption D-Cubes
- The Administrator, The Planner, The Reviewer
- E.Lists
- Contributor Administration Console
- Planning Administration Domain
- Development and Production Applications
- Job Clusters
- Contributor Application Overview
- Run D-Links for Contributor
- Cut-Down Models
- Import e.List and Right Files
- Go To Production
- About Cognos Contributor
- Workflow State Icons
- Form Navigation
- Pivot or Slicing and Dicing
- Data Entry Form
- Data Entry Commands
- Suppressing Zeros
- Attach documents to Application Items
- Saving Data/Update Data/Reset Data
- Annotations
- Submitting work
- Rejecting the Plan
- Exporting to Excel
- Manage Security
- Create Saved Selections
- Access Tables and Access Levels
- Validation Rules
- Synchronize a Contributor Application
- Import Data into Contributor
- Copy Data to Administration Server
- Load Data into the Datastore
- Prepare Data Blocks
- Administer the Application
- Use Extensions
- Automate Application

Please contact us at [training@quebit.com](mailto:training@quebit.com) for more information.

# Cognos Planning Contributor Advanced Administration

## 2 day course

This course is intended for deemed administrators, business subject matter experts, technical administrators, and model designers, who will need to learn advanced Contributor topics create and administer Web-based plans.

**Overview:** Attendees will be able to apply complex administrative tasks to Contributor applications, such as, managing jobs, moving data using Links, automate Cognos Planning, troubleshooting Planning, integrating with Cognos 8.

**Prerequisites:** Knowledge of your organization's data and structure as well as Microsoft Excel experience is necessary. Completing the Cognos Planning Contributor Administration course is necessary.

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

- Manage jobs
- Moving data using Links
- Automating Cognos Planning
- Troubleshooting Planning
- Integrating with Cognos 8
- Integrating with other Cognos Products



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## Sample Topics Include

- Review Cognos Planning Contributor
- Review Cognos Planning Architecture
- Examine job management
- Identify authentication and authorization
- Add users from third-party authentication providers to Cognos 8 groups and roles
- Implement security for Analyst and Contributor
- Export data from Analyst for use in Contributor
- Integrate Contributor with Analyst
- Move data from Analyst to Contributor using a D-Link
- Move data from Contributor to Analyst using a D-Link
- Comparing D-Links to importing data in the Administration Console
- Review Contributor Admin, System, and Local Links.
- Examine Cognos Connection
- Create a portal page to group different types of content into a single view
- Access live data in Cognos 8 Studios
- Create and run agents based on Planning data in Event Studio
- Create a Planning Package
- Use published Analyst and Contributor data in PowerPlay
- Use published Analyst and Contributor data in Cognos 8 BI
- Use unpublished (real-time) Analyst and Contributor data in Cognos 8 BI
- Examine how to administer Cognos Connection
- Perform event-driven planning with Event Studio

Please contact us at [training@quebit.com](mailto:training@quebit.com) for more information.

# Cognos TM1 End User

## 1 day course

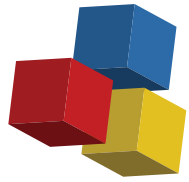
TM1 is a technology based on On-Line Analytical Processing or OLAP. With TM1, you can quickly view and understand large sets of Complex business data. Analysts and Managers can use TM1 Perspectives and Microsoft Excel, and Server Explorer to analyze their business performance.

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

**Prerequisites:** Knowledge of your organization's data and structure, as well as Microsoft Excel experience is recommended. You must also read the OLAP and Multidimensional Guide given prior to attending class.

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

- Use TM1 for model analyzes
- Explore model data
- Create spreadsheets
- Perform What If Analysis
- Organize and distribute results



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## Sample Topics Include

- TM1 Exploration
- Explore TM1 Interface
- Define a Cube
- View Data in A Cube
- Calculate a View
- Arranging Dimensions
- Saving Cube Views
- Creating Basic Subsets, Filtered, and Dynamic Subsets
- Designing Dynamic Views
- Spreadsheet Analysis
- Explore Spreadsheet Browser
- Take a Snapshot of a View
- Slicing a View
- Classic Slice
- Work With a Dynamic Slice
- Spreadsheet Functions
- Using Templates
- What If Analysis
- Adjusting Data
- Spreading Data
- Excluding Cells from Spreading
- Arrange and Distribute Results
- TM1 Applications
- TM1 Web
- Creating Views in TM1 Web

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# TM1 Developer Administration

## 3 day course

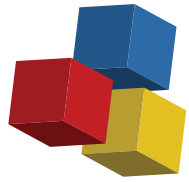
TM1 combines a powerful, multidimensional database engine, Microsoft Excel add-in, Server Explorer front end, Web Interface, Turbo Integrator, and Extract Transform and Load (ETL) tools. The combination of these utilities will allow developers and end users to access multidimensional data with speed 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.

**Prerequisites:** Completion of TM1 End User class is necessary. You should be familiar with TM1 concepts of views, cubes, and browsing data prior attending the TM1 Developer 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 TM1 Servers
- Create dimensions
- Build and populate cubes
- Add business rules
- Create Drill through to a cube and Relational store
- Add Application folders
- Implement Security



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## Sample Topics Include

- Understanding OLAP and TM1 Servers
- TM1 OLAP Concepts
- Strategies for Designing Cubes
- Defining and Creating Dimensions
- Create Dimensions from External Sources
- Defining the Source Data
- Identifying Variables in Source Data
- Mapping Variables to Elements
- Saving and Executing Processes
- Working with Multiple Hierarchies
- Turbo Integrator Tips
- Building and Populating Cubes
- Optimizing Dimension Order
- Cube Building Tips
- Adding Business Rules
- Creating Rules
- Adding Business Logic to Rules
- Optimizing Rules
- Using Functions in Rules
- Using TM1 Functions
- Sharing Data Between Cubes
- Troubleshooting Rules
- Drill Through and Application Folders
- Creating Cube Drill Through
- Creating Relational Store Drill Through
- Adding Application Folders
- Adding Files to Application Folders
- Implementing TM1 Security
- TM1 Security Schema
- Defining Security Groups and Assigning Users to Groups
- Assigning Access to TM1 Objects
- Levels of Object Security

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# TM1 Suggested Practices and Methodology

1/2 day WebEx session

Due to TM1 powerful functionality of being able to read large sets of data in a multidimensional manner, there are suggested practices and methodologies developers will need to follow.

**Overview:** Based on theory, you will be able to design and scale your models in a systematic way, as well as, extend and support to TM1 applications.

**Prerequisites:** TM1 Developer Administration course or equivalent experience is required. 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:

- Three Core Design Principles
- Design For Functionality
- Design For Maintainability
- Design for Performance



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## Sample Topics Include

- Design for Functionality
- Characterizing Your Solution
- Performance Management Building Blocks
- Attributes of Distributed Models
- Steps for Defining the Solution
- Optimizing the Solution and Maintaining TM1 ROI
- TM1 Implementation Methodology
- Design for Maintainability
- Basic Concepts
- Recommendations for Measures Dimension
- Goals of a Visual Diagramming Protocol
- Visual Implementation Diagram
- Adopt an Existential/Minimalist Design Philosophy
- Four Classes of Dimension
- The Time Dimension Debate
- Naming Conventions
- Slowing Changing Dimensions Problem
- Essentials of Procedural Coding
- Important Concepts of Modular Coding
- Categories of Comments
- Design for Performance
- Basic Concepts
- Server Techniques
- Database Techniques
- Spreadsheet Techniques
- Scaling "Up" Server Capacity Planning Guidelines
- Scaling "Out" Multi Server
- Configurations
- Dimension Ordering
- Calculations
- Advanced Application Tuning
- Performance Monitoring Tools
- Debugging Techniques

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# Cognos Finance Authoring

## 2 day course

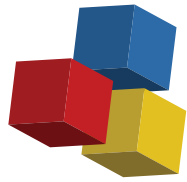
This course is intended for deemed report authors and consumers, administrators, model designers, data analysts, and business subject matter experts, who need to learn how to design and build reports for their business analysis.

**Overview:** Attendees will learn to create basic reports and input forms over Cognos Finance Windows. Users will be able to analyze financial data over the Windows application and Web Interface. Creation of Excel reports utilizing the Cognos Finance database will be included in this course. After reports are enhanced, attendees will learn different distribution methodologies for reports and forms.

**Prerequisites:** Knowledge of your organization's data and structure as well as Microsoft Excel experience is recommended.

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

- Start and log in to Cognos Finance
- Create basic reports and forms within the Cognos Finance Windows Application
- Add calculations and formatting to the report or form
- Construct a dynamic report and form
- Modify existing Reports
- Produce an Excel Report utilizing the Cognos Finance Database
- Analyze a Web report and Input form
- Distribute reports and forms throughout your organization



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## Sample Topics Include

- Define Cognos Finance
- Usages of Modules
- Cognos Finance Dimensions
- Report Creation Order
- Choose a Layout Design
- Hierarchy Command
- Generate Values
- Force Read and Generate
- Create Calculations
- Format Options
- Module Preferences
- Drill to External Details
- Attribute Reporting
- Advanced Calculations
- Available Text Macros
- Dynamic Libraries
- Dependency Reporting
- Create a basic Form
- Enter data into a form
- Insert external Data into a form
- Post data to the system
- Excel Integration
- Cognos Finance Web
- Drilling over the Web
- Exporting from the Web
- Print a Report or Form
- 24 Month Trend Analysis
- Outputting to Excel, PDF, HTML, XBRL, and PowerPlay Cube
- Email a report or form
- Batch Reporting
- Save Batch Reporting Libraries
- Print or Export Batch Reports

Please contact us at [training@quebit.com](mailto:training@quebit.com) for more information.

# Cognos Finance Administration

## 2 day course

This course is intended for Cognos Finance administrators, typically financial and business individuals, who will be maintaining and administering Cognos Finance for their company.

**Overview:** Attendees will be able to evaluate end user requirements in order to build an efficient and user-friendly, Cognos Finance application. You will learn different practices of building your metadata structure and importing data, as well as how to enhance your system with allocations, submission rollups, and currency translations.

**Prerequisites:** Knowledge of your organization's general ledger system and financial data sources, and requirements for financial reporting is recommended. The Cognos Finance Reporting and Input Techniques course is mandatory.

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

- Plan and create a new Cognos Finance System
- Populate a system with metadata and data
- Perform currency translations, allocations, and eliminate intercompany transactions
- Prepare for a new month and fiscal year within Cognos Finance
- Apply security to a Cognos Finance System



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## Sample Topics Include

- Define Cognos Finance
- Identify user requirements
- Design and Plan a system
- Create a System
- Define Dimensions
- Add Metadata and set options
- Add User Defined Functions
- Importing Ledger Definition Scripts and ASCII Files
- Populate system with data files and ODBC databases
- Create Map Files
- Verify Raw Data
- Create Currency Translations
- Perform Allocations
- Setup Intercompany Eliminations
- Transfer Data Module
- Submission Roll Up Module
- Extract Module
- Prepare For a New Month and Fiscal Year
- Back up and Restore database
- Maintain Submissions
- Update the System Remotely
- Metadata Exchange
- Apply Security
- Manage security
- Give Modular Activities
- Restrict Metadata Access
- Control User Access
- Share Security Information

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# Business Intelligence Roadmap & Table of Contents

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## Business Intelligence Roadmap

BI Administrator	BI Professional	Professional Author	Advanced Business Author	Business Author	Business Analyst	Business Consumer
Introduction to Cognos Connection (1/2 day)	Introduction to Cognos Connection (1/2 day)	Introduction to Cognos Connection (1/2 day)	Introduction to Cognos Connection (1/2 day)	Introduction to Cognos Connection (1/2 day)	Introduction to Cognos Connection (1/2 day)	Introduction to Cognos Connection (1/2 day)
Query Studio (1/2 day)	Query Studio (1/2 day)	Query Studio (1/2 day)	Query Studio (1/2 day)	Query Studio (1/2 day)	Analysis Studio (1 day)	
Analysis Studio (1 day)	Analysis Studio (1 day)	Report Studio Intro (1 day)	Analysis Studio (1 day)			
Event Studio (1/2 day)	Event Studio (1/2 day)	Report Studio Advanced (2 days)				
Report Studio Express (1/2 day)	Report Studio Express (1/2 day)					
Report Studio Intro (1 day)	Report Studio Intro (1 day)					
Report Studio Advanced (1 day)	Report Studio Advanced (1 day)					
Framework Manager (2 days)						
OLAP Modeling (2 days)						
Cognos 8 Admin (2 days)						

Report Studio Express and CAFE can be added onto any of the above licenses except for Business Consumer.

# Cognos 8 Introduction to Cognos Connection

*(Available in all Cognos 8 versions) 1/2 day course*

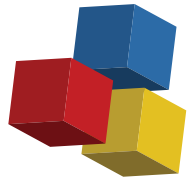
Cognos Connection is the web portal used to run reports, or create reports using Query Studio, Report Studio, or Analysis Studio. Cognos Viewer displays reports on the web.

**Overview:** Students will learn how to use Cognos 8 to view, save and print standard reports. Running reports, responding to prompts, saving prompt values, exporting to Excel and PDF, scheduling reports, and customizing Cognos Connection will be covered.

**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, attendees will be able to:

- Start and log in to Cognos 8
- Run standard reports
- Respond to prompts
- Export to Excel, PDF and other formats
- Print and email reports
- Customize Cognos Connection Home Page
- Schedule reports to run unattended



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## Sample Topics Include

- The Components of Cognos 8
- Cognos Connection
- Query Studio
- Analysis Studio
- Report Studio
- Cognos Viewer
- Framework Manager
- Event Studio
- The Cognos 8 Welcome Screen
- Public Folders
- My Folders
- Toolbar Icons/Actions Icons/Report Icons/Cognos Viewer Icons
- Navigating to the Location of Standard Reports
- Drill Through Reports
- Viewing/Saving as Excel
- Viewing/Saving as PDF
- List View, Details View
- Copying, Pasting, Deleting a Report
- Saving a Report View
- Saving Prompt Responses
- Scheduling Reports to Run Unattended
- Run with Options
- Options While a Report is Running (Wait or Save)
- Changing the Home Page

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# Introduction to Analysis Studio

*(Available in all Cognos 8 versions) 1 day course*

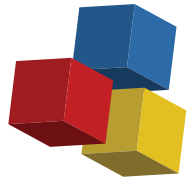
Analysis Studio enables the guided exploration of information that pertains to all dimensions of your business, regardless of where the data is stored. Analyze and report against online analytical processing (OLAP) and dimensionally aware relational sources.

**Overview:** Students will learn how to work with Analysis Studio packages. Calculations, ranking and nesting categories with Analysis Studio will be used within reports created by the students. Modifying, printing and saving reports will be covered.

**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, attendees will be able to:

- Start and log in to Cognos Connection
- Run standard reports created from Analysis Studio cubes
- Export to Excel, PDF and other formats
- Create new reports
- Modify existing reports
- Add calculation and ranking



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## Sample Topics Include

- The Components of Cognos 8
- What Functionality Does Analysis Studio Provide
- Opening Cognos Connection
- Public Folders/My Folders/Folder Icons
- Using Analysis Studio
- Analysis Studio Screen/Menus/Toolbars
- Analysis Studio Reports
- Dimensions, Items and Measures
- Analysis Report View
- Deleting a Row
- Drilling Down/Drilling Up
- Drilling Up and Down using the menus
- Changing the Measure
- Navigating to the Location of Standard Reports
- Running a Report with Options
- Viewing/Saving as Excel
- Viewing/Saving as PDF
- Create a New Report Using Drag and Drop
- Swapping Rows and Columns
- Filters
- Source Tree Limits
- Viewing more than the Source Tree Limits in the report
- Hiding Categories/Nested Categories
- Suppressing Zeros
- Calculations
- Rename a Column
- Custom Ranking
- Top and Bottom Filters
- Switching to Charts

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# Cognos 8 Query Studio

*(Available in all Cognos 8 versions) 1/2 day course*

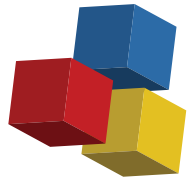
Query Studio is a web-based tool used for ad-hoc queries. This tool is used by the business user. Query Studio can create simple reports showing a region of sales with automatic summaries and the reports can be opened in Report Studio for further design changes.

**Overview:** Students will learn to use Query Studio to create ad-hoc reports. Topics covered will include building queries, sorting, grouping, filtering and calculation features. In addition, students will be introduced to charts, crosstab reports, and Query Studio advanced features.

**Prerequisites:** Knowledge of the use of a 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, attendees will be able to:

- Start and log in to Cognos Connection
- Understand the differences between Query Studio & Report Studio
- Create reports in Query Studio
- Edit a report, move columns, sort columns
- Create groups, expand and contract groups
- Create detail and summary calculations
- Create custom groups
- Change default summary and aggregation settings



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## Sample Topics Include

- The Components of Cognos 8
- What Functionality Does Query Studio Provide?
- Opening Cognos Connection
- Public Folders/My Folders/Folder Icons
- Query Studio Menus/ Toolbars
- Navigating Through Report Pages
- Types of Reports
- Removing Subtotals
- Removing Groups
- Saving a Report
- Previewing a Report
- Other View Options
- Printing a Report
- Filters - Concepts
- Filtering on a Text Item
- Removing a Filter
- Prompting
- Filtering by Searching/Filtering by Typing in a Value
- Filtering on a Number/Filtering with Dates
- Complex Filters/Summary Filters
- Calculations
- Formats
- Changing the Appearance of Reports
- Applying a Template
- Crosstab Reports
- Swapping Rows and Columns
- Nested Crosstabs
- Charts
- Collapsing and Expanding Groups
- Advanced Query Options
- Changing Summaries
- Custom Groups
- Drill Up and Drill Down

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# Cognos 8 PowerPlay Studio

## 1 day course

Users can analyze large volumes of data with slice and dice capabilities. Quickly explore information from multiple dimensions to get to low level data. Power Play has time trending and projection that lets users analyze what has changed over previous years, quarters, months, and other critical measures.

**Overview:** Students will learn how to work with PowerPlay cubes on the web. Modifying, printing and saving reports will be covered. Calculations, sorting and nesting categories with PowerPlay Web will be used with in reports created by the students.

**Prerequisites:** Cognos 8 Introduction and Report Studio Introduction or equivalent knowledge.

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

- Start and log in to PowerPlay for the Web
- Change PowerPlay rows, columns and measures
- Apply and remove filter
- Save reports as PDF and XLS files
- Print reports
- Add calculations to reports
- Sort and nest categories
- Display PowerPlay charts
- Suppressing Zeros
- Searching the Cube
- Custom Exception Highlighting
- The Nesting Levels Toolbar



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## Sample Topics Include

- PowerPlay Web Overview
- Dimensions, Categories and Measures
- The PowerPlay Screen
- The PowerBar
- The Dimension Line
- The Display Area
- The Dimension Viewer
- Drilling Down/Drilling Up
- Drilling Down and Up Using the Flyout Menus
- Returning to the Top Level
- Changing/Swapping Rows and Columns
- Filters
- Changing the Measure
- Suppressing Zeros
- Calculations
- Nested/Hiding Categories
- Showing Top Four Rows
- Switching to Charts (and Split Views)
- Report Building Using Drag and Drop
- Viewing Measures as Percentages
- Changing Report Settings
- Searching the Cube
- Custom Exception Highlighting
- The Nesting Levels Toolbar

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# Report Studio Introduction

*(Available in all Cognos 8 versions) 1 day course*

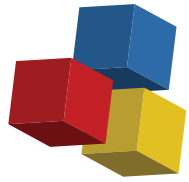
Report Studio is a Web-based tool that professional report authors use to build sophisticated, multiple-page, multiple query reports against multiple databases. With Report Studio, you can create any report that your company requires, such as sales, inventory, statements and dashboard reports.

**Overview:** Students will learn to use Report Studio to create new reports in Cognos 8. Aggregation, summaries, grouping and sorting will be covered. Students will create filters and prompts, add detail and summary calculations, format reports, and create list and crosstab reports.

**Prerequisites:** Cognos 8 Introduction and Report Studio Introduction or equivalent knowledge.

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

- Understand the components of Cognos 8
- Navigate the Report Studio interface
- Create and modify reports
- Understand aggregation
- Sort, group, and add summaries
- Create filters and prompts
- Add detail and summary calculations
- Format reports
- Create crosstab reports



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## Sample Topics Include

- Overview of the Report Studio screens
- Modifying a Report
- Creating a Report
- Grouping
- Aggregation
- Filters
- Calculations
- Saving the Report as a New Report
- Grouping
- Aggregation
- Spanning
- Sections
- Filters - Concepts
- Creating filters
- Parameters and Prompts
- Building a Prompt
- Selecting Multiple Items in the Same Prompt
- Calculations
- Adding a Calculation
- Adding Aggregate Totals to a Footer (Totaling a Column)
- Grouped Summary Footers (Average and Count)
- Formatting Reports
- Data Formats
- Text Formats
- Adding Headers and Footers
- Adding a New Page
- Adding Graphics
- Adding Borders
- Renaming Columns
- Creating Crosstab Reports
- Crosstab Reports
- Converting a List Report into a Crosstab
- Nested Crosstabs
- Crosstabs with Totals

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# Report Studio Advanced

*(Available in all Cognos 8 versions) 1 day course*

Report Studio is a Web-based tool that professional report authors use to build sophisticated, multiple-page, multiple-query reports against multiple databases. With Report Studio, you can create any report that your company requires, such as sales, inventory, statements and dashboard reports.

**Overview:** Students will learn to use Report Studio to create dashboard-styles reports with multiple objects per page and briefing book-style reports with multiple pages. They will also learn how to create prompted reports, conditional formatted reports and advanced visualizations with charting. Advanced Aggregation, summaries, filtering and calculation will also be covered.

**Prerequisites:** Cognos 8 Introduction and Report Studio Introduction or equivalent knowledge.

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

- Review of Cognos 8
- Create several different types of prompts
- Create advanced calculations
- Aggregation and changing the properties
- Create advanced filters
- Add detail and summary calculations
- Using Function
- Advanced formatting including conditional formatting



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## Sample Topics Include

- Review Report Studio Basics
- Review List Exercise
- Review Crosstab Exercise
- Reviewing the Online Help documentation
- Advanced Filters Overview
- Application (Before vs. After Aggregation) for Filtering
- Using Predefined Filter
- Viewing the SQL to Read a Predefined Filter
- Report Studio AND vs. OR
- Summary Filter
- Using Functions
- Advanced Prompt
- Parameters and Prompts
- Building a Multi-Select Prompt
- Creating a Prompt on the Same Page as the Report
- Cascading Prompts
- Deleting a Prompt
- Creating a Dynamically Generated Prompt
- Search Within a Prompt
- Advanced Calculation
- Adding vs. Concatenating
- Edit a Concatenated Column
- Basic Summary Calculation
- Advanced Summary Calculation
- If Then Else
- Charts and Chart Types
- Creating a Bar Chart
- Creating a Combined Chart
- List Report and a Chart on the Same Page
- Creating a Crosstab with a Chart
- Advanced Formatting
- Set Padding
- Table Style
- Conditional Formatting

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# Report Studio Express Mode Multi-Dimensional

*(Available in all Cognos 8 versions) 1/2 day course*

Report Studio Express is a Web-based multi-dimensional tool that report authors use to build reports from a cube. In Report Studio Express, you can create multi-dimensional reports that contain, filters, page layers and set drill options.

**Overview:** Students will learn to use Report Studio Express mode to create new reports, calculations and prompts. Add detail and summary calculations, format reports, and create list and crosstab reports.

**Prerequisites:** Cognos 8 Introduction and Report Studio Introduction or equivalent knowledge.

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

- Start and log in to Cognos Connection
- Run standard reports created from Analysis Studio cubes
- Export to Excel, PDF and other formats
- Create new reports
- Modify existing reports
- Add calculation and ranking



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## Sample Topics Include

- Overview and Menus in Express Mode
- Cognos 8 Overview
- What Functionality Does Report Studio Express Provide
- Opening Cognos Connection
- Express Mode Screen
- Express Mode Menus
- Express Mode Toolbar
- Changing to Express Mode
- Creating a Report in Express Mode
- Drill Down
- Drill Up
- Insert Members
- Double Click Options
- Options: Quick Tip
- Context Filtering
- Page Layers
- Formatting Backgrounds
- Formatting Styles
- Space and Breaking
- Adding Text
- Adding Borders
- Set Alignment
- Apply Color
- Remaining Columns
- Set Padding
- Table Style
- Filters
- Calculations
- Saving the Report as a New Report

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# Framework Manager

*(Available in all Cognos 8 versions) 2 day course*

Framework Manager is used by the Cognos 8 administrator to develop the model and packages that manage the data that can be read by Query Studio, Report Studio, Analysis Studio, or CAFE.

**Overview:** Students will learn best practice modeling in Framework Manager. They will learn to create models that perform well and provide valid results while being intuitive to use and easy to maintain.

**Prerequisites:** Knowledge of the use of web browser to access the corporate intranet environment is assumed. Familiarity with Microsoft Windows and basic navigation. Knowledge of SQL and database concepts. Knowledge of OLAP cubes and dimensional modeling. Familiarity with the Cognos 8 reporting and administration is desired.

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

- Start and run Framework Manager.
- Work with data sources and connections
- Use the Import Metadata Wizard
- Work with Query Subjects and Query Items
- Use the diagram window and work with Relationships
- Add filters and calculations
- Working with Query Subjects and Query Items
- Understanding cardinality
- Customizing Packages



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## Sample Topics Include

- Cognos 8 Overview
- The Components of Cognos 8
- Understanding Cognos 8 Architecture
- Understanding Framework Manager Workflow
- Goals of a Framework Manager Modeler
- Using Framework Manager with Source Control Systems
- Creating a New Model / New Data Source
- Select Data Source Objects with the Import Metadata Wizard
- Framework Manager User Interface
- Using the Project Viewer Window
- Using the Query Subject
- Definition Window
- Using the Properties Window
- Using the Object Diagram
- Using the Relationship Definition Window
- Publishing Models using the Create Package Wizard
- Best Practice Modeling Techniques
- Differences between Operational and Reporting Data Design
- Understanding Star-Schema Design
- Understanding Cognos 8 Auto-Aggregation Behavior
- Understanding Cardinality and the Stitch Query
- Understanding when Determinants are necessary
- Understanding Dimensionally Modeled Relational
- Organize Models with Layered Namespaces
- Guidelines for the Database View
- Organizing Metadata by Data Source
- Setting Usage Property
- Control the Aggregate Calculation Applied to Fact Items
- Preparing the Business View
- Creating Additional Namespaces
- Preparing the Dimension/Presentation View
- Presenting with Star-Schema Groupings
- Publishing Packages

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# OLAP Modeling (Transformer)

*(Available in all Cognos 8 versions) 2 day course*

OLAP description: Transformer is the administrator's tool used to build Power cubes. A point and click interface provides a front end for cube creation. Transformer models are saved with the extension PYI. Model files can also be saved in a text based modeling language with the extension MDL. This model description language can be edited directly, and is useful for importing models between versions of Transformer.

**Overview:** Students will learn how to work with Transformer to create Cognos PowerCubes. Datasources, dimensions, levels, measures, security, and cubes will be created by the students and published to the Cognos 8 server for reporting.

**Prerequisites:** Knowledge of the use of web browser to access the corporate intranet environment is assumed. Familiarity with Microsoft Windows and basic navigation. Knowledge of SQL and database concepts. Knowledge of OLAP cubes and dimensional modeling. Familiarity with the Cognos 8 reporting and administration is desired.

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

- Start and run Cognos Transformer
- Add and work with Data Sources
- Define dimensions and levels in the Dimension Map and Diagram
- Create new measures and measure folders
- Customize views with security
- Create and publish cubes



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## Sample Topics Include

- Building PowerPlay Cubes
- What is Transformer?
- How Are Cubes Built?
- Analyzing Reporting Requirements
- Understanding Data Sources
- Designing a Dimension Map
- The Importance of Prototyping
- Basic Cube Building with Transformer
- Starting a New Model
- Identifying Data Classes
- Building Dimensions
- Adding Measures
- Starting a New Model Using Data Sources
- Creating Model Components
- Structural and Transactional Queries
- Showing Query Scope
- Linking Data Sources
- Working with Dimensions
- Fiscal, Lunar and Other Calendars
- Showing Measure Scope
- Allocated/ Calculated Measures
- Currency Conversion
- Measure/Time-State Rollup
- Excluding Measures and Dimensions from Cubes
- Password Protecting Cubes
- Working with Dimension Views
- Working with Access Manager
- Enabling Authentication in the Model
- Optimizing Performance

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# Cognos 8 Administration

## 2 day course

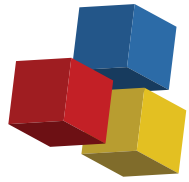
Cognos 8 Business Intelligence delivers the complete range of BI capabilities on a single, service-oriented architecture. Author, share, and use reports that draw on data across all enterprise sources for better business decisions.

**Overview:** Students will gain deep practical knowledge of the tasks necessary to maintain the Cognos 8 system. They will learn will about the architecture and components of the system and installation options. Students will also learn how to monitor the health of the system, secure the environment, and manage data sources and content. They will also learn how to enable auditing and customize the Cognos 8 experience for their environment.

**Prerequisites:** Knowledge of the use of web browser to access the corporate intranet environment is assumed. Familiarity with Microsoft Windows and basic navigation. Basic knowledge of Microsoft IIS and Microsoft SQL Server is assumed.

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

- Start and run Cognos Configuration and Cognos Administration Console
- Monitor the health and performance of the system
- Manage data sources
- Create import and export packages for backup and disaster recovery
- Apply security to control user permissions and capabilities
- Enable auditing to track user's usage patterns
- Create Skins to customize the user experience



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## Sample Topics Include

- Understanding Cognos 8 Architecture
- Components of Cognos 8 BI
- Cognos 8 BI services
- Installation options
- Environment settings and understanding URLs ports
- Content Store/Service settings
- Security Sources
- Mail Server/Log settings
- Monitoring Server Health using metrics
- Manage dispatchers and services
- Discuss server performance tuning
- Manage schedules and monitoring activities
- Managing Security in Cognos 8
- Define authentication and authorization in Cognos 8 BI
- Configure a security sources
- Cognos 8 roles and groups
- Set permissions/Define Capabilities
- Managing Datasources
- Managing connections
- Manage Deployment Packages
- Creating an Export/Import package
- Setting up Auditing and Logging
- Creating the Auditing DataStore connection
- Exploring the Cognos Audit package
- Controlling the Log detail level
- Examine the log message facility
- Examine Cognos Connection personal preferences
- Manage user profiles
- Create a custom template option
- Assigning a default Analysis per package and changing member limits
- Set up drill-through definitions

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# CAFE

*(Available in all Cognos 8 versions) 1 day course*

Built for use with existing versions of Microsoft Excel. Its single, intuitive interface for all exploration and analysis functions integrates seamlessly with the existing Excel workspace.

**Overview:** Students will learn to use Cognos Analysis for Excel (CAFE) to create ad-hoc reports. Topics covered will include building reports, sorting, filtering and calculation features. In addition, students will be introduced to CAFE formula mode.

**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, attendees will be able to:

- Start and log in to Cognos Analysis for Excel
- Create new reports in Exploration mode and Formula mode
- Modify existing reports
- Add calculation
- Create filters
- Nest items in columns and rows



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## Sample Topics Include

- Running Analysis Studio Reports Through Cognos Connection
- Navigating to the Location of Standard Reports
- Running a Report
- Viewing as Excel
- Saving as Excel
- Viewing as PDF
- Saving as PDF
- Printing the Report
- HTML View
- Creating a New Analysis Studio Report
- Creating a New Report Using Drag and Drop
- Adding Rows
- Adding Columns
- Filtering on a Measure
- Swapping Rows and Columns
- Filters
- Using the Overview Context Filter
- Source Tree Limits
- Increasing the limit of 20 viewable items
- Hiding Categories
- Sorting
- Exercise
- Creating reports in Formula mode
- Adding Columns
- Filtering
- Changing the Measure
- Adding Excel Calculations
- Opening a Report
- Deleting Rows
- Drilling Up
- Drilling Down
- Drilling Up and Down using the menus

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## Notes

## Notes



## QueBIT offers Performance Management Training

### Contact Information

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

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