



# IBM Solutions

eCapital University™  
Training Course Catalog



## Training with eCapital

### **eCapital's Training Philosophy**

Effective training is a critical part of any software implementation. In order to help our clients quickly meet their project goals and ROI benchmarks, eCapital offers an array of training options designed to train teams quickly and effectively in a manner that meets their individual needs.

eCapital's training programs center on comprehensive classroom sessions led by certified technical trainers who bring extensive hands-on experience across the Cognos product line to the classroom.

Our programming is developed to move at a pace that maps to the experience and the skill set of the individuals. All users, from novice to experienced, will learn the skills they need to be successful. Learners get hands-on practice with planning, reporting and modeling tools. All labs adhere to IBM best practices and prepare students to work on real-world implementations.

eCapital University training is offered on schedules designed to meet your organization's needs. Contact us to discuss your specific needs.



# eCapital University

## Training Delivery Options

### An Array of Training Options to meet your Company's needs



**Private instructor-led training onsite at your location:** Optimal for small or large groups needing to be trained on the same content or for highly customized training needs, this in-person training offers the efficiency of content tuned to your specific environment so your team walks away understanding not only the solution, but how the solution will work in your environment. The program encourages open discussion and lots of questions and answers. The training can be paced to the learning trajectory of your team.



**Public instructor-led training in our eCapital University training room:** Regularly offered training classes are offered in our state of the art training facility located in Minneapolis, Minnesota. These classes bring together learners from multiple organizations for in-person instruction and hands-on training.



**Instructor-led online training** – Offered for remote learners who may not be able to travel to a training location.



**Self-paced virtual training** – Helpful for learners with tight schedules, or for ongoing refresher training or as a first step in new employee training.



# IBM COGNOS BI/Cognos Analytics

**This category of classes teaches learners to effectively create metadata models, and create reports to better utilize and understand the information available from various data sources.**

**Modeling classes:** show technical staff how to create connections from Cognos to legacy databases and files, and how to create modeled packages using star schemas that reflect your organizational structure.

**Reporting classes:** teach users to create and maintain professional reports, based on relational or dimensional models, or on dimensionally-modeled relational (DMR) packages.

**Fundamental to advanced level classes are available.**



# IBM COGNOS BI/Cognos Analytics Training

Classes are offered across the 8.x, 10.x and 11.x versions

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# Report Studio Authoring Fundamentals

This three day, instructor led course is designed for professional report authors to learn report building techniques using relational data models, and methods of enhancing, customizing, and managing professional reports.

Attendees will participate in hands-on demos and workshops that illustrate key concepts while learning how to use the product.

**Duration:** Three days

**Delivery:** Instructor led

**Knowledge Level:** Beginner to Intermediate report authors

**Course Objectives:** Learn to build list, crosstab and chart reports. Learn how to sort, group, section and aggregate data. Build filters to narrow report output and create prompts to ask users questions at run-time. Learn to create drill-through definitions to link reports with related data. Create report-level calculations and apply conditional formatting based on language, Boolean and string variables. Learn about output types such as HTML, PDF, Excel and CSV.



## Report Studio Authoring Advanced

This two-day instructor led course is designed for professional report authors to learn advanced report building and maintenance techniques using relational data models. Attendees will participate in hands-on demos and workshops that illustrate key concepts while learning how to use the product.

<b>Duration:</b>	Two days
<b>Delivery:</b>	Instructor led
<b>Knowledge Level:</b>	Intermediate to Advanced report authors
<b>Course Objectives:</b>	Learn to manually build queries before associating them with report containers. Learn to create unions and joins in reports. Edit SQL statements to form custom queries. Build complex filters and prompts. Combine data containers based on relationships from multiple queries. Distribute reports through bursting. Enhance reports with use of HTML script. Create reports using an external data file.



# Report Studio Multi-Dimensional Authoring

This two-day instructor led course is designed to guide professional report authors in building on their experience with Report Studio by applying dimensional techniques to reports. Through interactive demos and workshops, participants will learn how to author reports that navigate and manipulate dimensional data structures using the specific dimensional functions and features available in Report Studio.

<b>Duration:</b>	Two days
<b>Delivery:</b>	Instructor led
<b>Knowledge Level:</b>	Intermediate to Advanced report authors
<b>Course Objectives:</b>	Explore the OLAP dimensional structure and the use of dimensions, hierarchies, levels and members. Differentiate between relational and dimensional report authoring styles. Identify sets and tuples. Understand default and root members. Learn to filter using slicers and tree prompts. Explore drill-up and drill-down functionality based on hierarchical structures.





# Query Studio: Build Ad-Hoc Reports

This one-day instructor led course is designed for business authors who want to learn how to create, modify and organize ad hoc reports. This course covers how to use different report capabilities, how to graphically display data, and how to create reports with a consistent look and feel through the use of templates. The course also covers basic administrative tasks, such as scheduling reports and delivering reports in different formats (e.g. HTML, PDF, Excel).

**Duration:** One day

**Delivery:** Instructor led

**Knowledge Level:** Beginner report Authors or Analysts

**Course Objectives:** Learn to create list, crosstab and chart reports. Calculate and sort report data. Highlight report data using conditional styles. Focus scope of a report using filters. Apply formatting to report objects. Schedule and manage reports.



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## Analysis Studio

This one-day instructor led course teaches business authors to navigate and analyze data in Analysis Studio. Through a combination of lectures and hands-on workshops, attendees will discover trends, identify opportunities, and learn how to make better business decisions.

Participants will learn techniques such as ranking, filtering, asymmetrical crosstabs, and graphing to help them analyze large volumes of data (whether OLAP or dimensionally modeled relational metadata). They will also learn to manage reports through IBM Cognos Connection.

<b>Duration:</b>	One day
<b>Delivery:</b>	Instructor led
<b>Knowledge Level:</b>	Beginner report authors or analysts
<b>Course Objectives:</b>	Learn to insert data objects into a report. Define and create sets. Employ drill-up and drill-down functionality to different levels of detail. Use charts to display data graphically. Nest multiple data items in rows or columns of crosstabs. Apply filters, calculations and rankings in reports.



# Workspace Advanced

(only in versions 10.2.2 and earlier)

This two-day instructor led course develops the skills participants will need to use IBM Cognos Workspace Advanced to create effective reports with relational and dimensional data. Through interactive demos and workshops, this course will present topics related to creating reports with IBM Cognos Workspace Advanced for the business author.

**Duration:** Two days

**Delivery:** Instructor led

**Knowledge Level:** Beginner report authors

**Course Objectives:** Explore available report templates. Define report layouts, add query items and use calculations. Examine both relational and dimensional packages. Sort, aggregate, group and section data in reports. Learn about conditional formatting and RAVE visualizations. Use charts and graphs and integrate external data.



# Framework Manager: Design Metadata Models

This five-day instructor led course provides participants with introductory to advanced knowledge of metadata modeling concepts, and how to model metadata for predictable reporting and analysis. Participants will learn the full scope of the metadata modeling process, from initial project creation, to publishing of metadata to the Web, enabling end users to easily author reports and analyze data.

**Duration:** Five days

**Delivery:** Instructor led

**Knowledge Level:** Intermediate to Advanced IT modelers

**Course Objectives:** Create a baseline project (empty to begin) and add metadata from relational data sources. Add folders, namespaces, query subjects, query items, calculations and filters to be used in packages. Learn to add additional modeling to reflect dimensional hierarchical structures. Explore relationships, cardinalities and data traps in resulting SQL. Build star schemas, time dimensions and determinants. Model in layers with database and presentation views.



## Cognos Disclosure Management

This three-day instructor led course is designed to teach accounting professionals to create, manage, and administer financial reports and workflows. Through a series of lectures and hands-on exercises, participants will create and generate a report and configure the CDM application. Dashboards, views, and the yearly rollover are also covered.

**Duration:** Three days

**Delivery:** Instructor led

**Knowledge Level:** Beginner to Intermediate report authors or analysts

**Course Objectives:** Create CDM reports by creating object hierarchies, populating objects with data, importing and exporting objects and adding shared objects. Create data source connections and add content to Microsoft Excel objects. Configure workflow templates and create custom groups and checklists. Use views, roll a report forward, and cascade a report. View fixed dashboards and create custom dashboards. Administer security based on groups and roles.



# IBM COGNOS TM1/Planning Analytics

This category of classes teaches learners to create, maintain and effectively work with dimensional models, and to create reports and forms to better understand and utilize the information available from various data sources. Students learn to use TM1/Planning Analytics as a modeling tool, a direct data entry tool for planning and forecasting purposes, and as a reporting and analysis platform.

**Modeling classes:** The courses were developed to teach developers how to create a new model and add dimensions, cubes, processes, chores, and applications that reflect an organization's business structure. Security is covered at the model level, cube level, dimension level and row level..

**Analysis/Reporting classes:** Analysis/reporting classes teach users to interact with existing models. The creation and use of dimension subsets, cube views, snapshots, slices and active forms is covered. Web functionality is also covered in TM1 Web and TM1 Applications. For the newer Planning Analytics releases, the new interfaces are covered including Planning Analytics Workspace (PAW) and Planning Analytics for Excel (PAX).

**Fundamental to advanced level classes are available.**



# IBM COGNOS TM1/Planning Analytics Training

Classes are offered for versions from 10.2 to 2.0 (Planning Analytics)

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# TM1: Design and Develop Models in Architect

This five-day instructor led course is designed to teach modelers how to build a basic cube model in TM1 using the Architect tool. Through a series of lectures and hands-on exercises, students will learn how to set up and verify dimensions, cubes, and views, manually enter data into these structures, and define the data that users can see. Students will also learn how to transfer data into the TM1 model, including the use of TurboIntegrator processes. This course is ideal for users who already have models built with Architect and need a high degree of customization, or whose model complexity has evolved past Performance Modeler capabilities.

<b>Duration:</b>	Five days
<b>Delivery:</b>	Instructor led
<b>Knowledge Level:</b>	Intermediate to Advanced modelers and developers
<b>Course Objectives:</b>	Learn to create new TM1 models and add dimensions, cubes, processes and chores. TM1 web-based applications are defined and security is discussed at the model, object and row levels.





# TM1: Design and Develop Models using Performance Modeler

This five-day instructor led course is designed to teach modelers how to build a complete model in TM1 mainly using the Performance Modeler tool. Through a series of lectures and hands-on exercises, students will learn how to create and customize dimensions and cubes, import and link data, and build and maintain applications.

<b>Duration:</b>	Five days
<b>Delivery:</b>	Instructor led
<b>Knowledge Level:</b>	Intermediate to Advanced modelers and developers
<b>Course Objectives:</b>	Learn to create new TM1 models and add dimensions, cubes, processes and chores. TM1 web-based applications are defined and security is discussed at the model, object and row levels.



# TM1: Analyze and Share Data

This three-day instructor led course is designed to teach analysts how to use TM1 to analyze data to discover trends and exceptions, create and customize reports and templates, and contribute to plans. Through a series of lectures and hands-on exercises, participants will learn how to create analyses and enter data in Microsoft Excel and on the Web, create custom views of the data, and build reports and forms in Microsoft Excel that communicate with TM1.

**Duration:** Three days

**Delivery:** Instructor led

**Knowledge Level:** Beginner to Intermediate power users

**Course Objectives:** Learn to interact with existing TM1 models by building dimension subsets and cube views based on current analysis/reporting requirement. Use integration with Microsoft Excel to build snapshots, slices, Active Forms, and build Flex views and Exploration views through the CAFE interface. Learn to analyze and enter data through TM1 Web and TM1 Applications.



# IBM Planning Analytics: PAW and PAX Workshop Planning Analytics Workspace and PA for Excel (version 2.0)

This two-day instructor led course is designed to teach analysts how to use Planning Analytics to analyze data to discover trends and exceptions, create and customize reports and templates, and contribute to plans. Through a series of lectures and hands-on exercises, participants will learn how to create analyses and enter data in Microsoft Excel and on the Web, create custom views of the data, and build reports and forms in Microsoft Excel that communicate with Planning Analytics models.

**Duration:** Two days

**Delivery:** Instructor led

**Knowledge Level:** Beginner to Intermediate power users

**Course Objectives:** Learn to analyze and report on Planning Analytics data through workbooks and dashboards in Planning Analytics Workspace, and create Exploration, Quick, Dynamic and Custom reports through the Planning Analytics for Excel interface.

