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o9 IBP Platform Technical Implementer Training Agenda

Course Name	o9 IBP Platform Technical Implementer Training
Targeted Audience	Technical Architects, Functional Leads, Solution Architects, Delivery Managers, Client Partners, IT Administrators, Customer Support Functions
Pre-requisites	Prior experience in implementing SaaS solutions, programming skills **o9 IBP Platform Functional Implementer Training**
Duration	3 days (9 AM to 5 PM CST)
Training Format	E-Learning and Instructor-Led Training

Course Description:

This course is designed to be a workshop-style technical training to provide implementation and modeling skills required for implementing a decision management solution using the powerful o9 Platform. The attendee will learn about the o9 Platform technical framework and will create a simple instance based on a case study. Hands-on exercises will include working with the Model Designer, Report Designer, and Layout Designer.

Course Contents:

E-Learning: (Details to be provided by o9 Education Services)

Technical Certifications can be accessed on the o9 Academy site. Courses and Certification Programs are self-enrolled by users. Completion of the entire program provides badges and e-certification from o9 Academy.

Instructor Led Workshop:

An o9 team member will deliver the session virtually using online meeting software.

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Day 1

Morning Session
- o9 Platform Technical Architecture Overview
- o9 Platform Modeling Constructs
- Model Designer, Report Designer, & Layout Design Overview
- Create a paper model for the "Candy&More Corporation" case study
- Create a working model using the o9 Platform based on the case study (hands-on workshop)

Afternoon Session
- Create Dimensions, Hierarchies, and Measures using Model Designer
- Upload Dimensional data & Fact data
- Integrated Business Programming Language (IBPL) concepts
- IBPL exercises and functions
- Create Named Sets

Day 2

Morning Session
- Create widgets using the Report Designer
- Create a pulse folder for storing collaboration data using the Model Designer
- Create workspaces and design the UI using the Layout Designer
- Review Model Designer, Report Designer, & Layout Designer
- Design Rules and Scopes – Calculated Measures, Regular Scope Statements, & Active Rules

Afternoon Session
- Create a Demand Planning workspace for DP team
- Create reports for post-game analysis, forecast accuracy, and inventory management
- Write a procedure for calculating forecast accuracy
- Design a plugin for calculating forward months of coverage
- Create an action button for the plugin and link it to a report
- Enhance reports with conditional formatting

Day 3

Morning Session
- UI reporting exercises
- Expand the Candy&More model through additional scope types and rules:
  - Cartesian scope used for inserting new intersections
  - Spread scope use for data disaggregation
- Create an Executive level workspace specifically for executives at Candy & More

Afternoon Session
- Develop higher level reports for executives to view aggregated data such as:
  - An inventory stockout report
  - A NLP report to view budget broken down by region
  - A KPI report showcasing the current outlook
- Finalize the layout of the Executive workspace with all newly created reports
- Add Data Security for Demand Planners and Executive roles
- Discuss Deployment Backups (FTBR vs Tenant Config Backup)
- Workshop summary, training evaluation, & wrap up