



Enterprise Computing Solutions - Education Services

TRAINING OFFERING

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IBM Planning Analytics: Analyze Data and Create Reports (V2.0.x) SPVC

CODE:	LENGTH:	PRICE:
J1357G	16 Hours	\$600.00

Description

Contains PDF course guide, as well as a lab environment where students can work through demonstrations and exercises at their own pace.

This course is designed to teach analysts how to use IBM Planning Analytics to analyze data to discover trends and exceptions, create and customize reports and templates, and contribute data to plans. Through a series of lectures and hands-on activities, you will learn how use Planning Analytics Workspace and Planning Analytics for Microsoft Excel to create analyses, enter data, create custom views and dashboards, and build formatted reports and forms.

Objectives

Understanding IBM Planning Analytics data
Creating books
Creating and saving views
Changing the way data is displayed
Displaying specific members by using sets
Adding calculations to views
Highlighting exceptions by using conditional formatting
Entering data
Experimenting with data by using sandboxes
Working with spreadsheets online by using websheets
Formatting for reporting
Exploring data by using visualizations
Creating dashboards
Examining performance by using scorecards
Exporting data
Introduction to IBM Planning Analytics for Microsoft Excel
Exploring data in Planning Analytics for Microsoft Excel
Create reports easily by using Quick Reports
Expanding and formatting members by using Dynamic Reports
Exploring TM1 functions
Creating Custom Reports
Entering Data in Planning Analytics for Microsoft Excel
Simplify tasks by using action buttons
Creating websheets

Audience

Analysts

Prerequisites

- Knowledge of your business requirements
- Basic knowledge of Microsoft Excel

Programme

Understanding IBM Planning Analytics data
Understanding models
Understanding cubes
Understanding dimensions
Understanding views
Understanding sets
Creating books
Creating books
Adding content
Creating new sheets
Saving, closing, and opening views
Creating and saving views
Compare two views of the same cube
Create new views
Save a view
Changing the way data is displayed
Move and filter dimensions
Show different levels of detail
Create an asymmetric view
Display cells as percentages
Add top or bottom filters
Show attributes for dimension members

Displaying specific members by using sets
Display existing sets
Add, remove, and reorganize members in a set
Find members by using searches and filters
View attributes
Save sets
Edit a set
Adding calculations to views
Add summary calculations
Add member calculations
Remove and rename calculations
Highlighting exceptions by using conditional formatting
Apply conditional formatting
Add an additional condition
Entering data
Distribute data to multiple cells by using data spreading
Enter and hold data using quick commands
Copy and paste and use calculations
Add a comment to a cell

Experimenting with data by using sandboxes• Creating sandboxes• Comparing sandboxes• Committing data and deleting sandboxes

Working with spreadsheets online by using websheets• Find and add websheets to your book• Explore websheets

Formatting for reporting• Creating a new view• Formatting the view for reporting

Exploring data by using visualizations• Examine different visualizations• Customize a visualization

Creating dashboards• Adding and reusing objects• Synchronizing objects• Navigating the book and perform tasks by using buttons• Changing the appearance of a view• Hiding information• Proven Practices for Dashboards

Examining performance by using scorecards• Reading scorecards• Adding scorecards to a book

Exporting data• Exporting a view to Microsoft Excel

Introduction to IBM Planning Analytics for Microsoft Excel• Examining report types

Exploring data in Planning Analytics for Microsoft Excel• Connect to a system, and add an Exploration• Display different dimension members• Modify and save the view

Create reports easily by using Quick Reports• Convert an Exploration to a Quick Report• Drag a view to add a Quick Report•

Synchronize reports by using cell referencing• Change members on rows or columns• Add columns or rows and apply styles• Apply custom formatting

Expanding and formatting members by using Dynamic Reports• Create and explore a Dynamic Report• Formatting the Dynamic Report• Rebuild the Dynamic Report

Exploring TM1 functions• Examine the TM1 functions in a Dynamic Report• Derive rows based on saved sets• Derive rows based on MDX• Create custom format definitions• Create custom columns• Add new sections and multiple Dynamic Reports to a single sheet

Creating Custom Reports• Create two custom reports• Combine the two reports

Entering Data in Planning Analytics for Microsoft Excel• Entering data in cube viewer• Entering data in Dynamic Reports• Entering data in Explorations and Quick Reports• Using Sandboxes to experiment with data

Simplify tasks by using action buttons• Enable action buttons• Add an action button to navigate to another worksheet• Edit an action button• Create an action button that rebuilds a worksheet

Creating websheets• Publish a worksheet• Manage websheets• Add the worksheet to a Planning Analytics Workspace book

Session Dates

On request. Please [contact us](#)

Additional Information

[This training is also available as onsite training. Please contact us to find out more.](#)