

UNIVERSITY OF PLANVIEW

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REPORTING AND DASHBOARDS (POWER BI) IN PLANVIEW IDEAPLACE

OVERVIEW

Reporting and Dashboards (Power BI) Training for Planview IdeaPlace is an immersive, interactive class that introduces the skills to configure the out-of-the-box reports to meet the reporting needs of the organization.

This course provides an understanding of the IdeaPlace embedded visual reporting and insights engine, Power BI. Learn which reports are available, the core activities required to create and modify your reports, as well as how to access and view various types of dashboards. This will allow you to take full advantage of pre-defined reports summarizing and visualizing data from your IdeaPlace application.

LEARNING OBJECTIVES

At the end of this course, you will learn the following skills:

- Understand the types of reports available in IdeaPlace.
- Work with the Management Console to create and manage dashboards and reports.
- Quickly access your data and build meaningful reports.
- Run your report and save, print, or download to a different format.
- Use OData to query and update data.
- Provide interactive visualizations and business intelligence capabilities with Power BI.
- Simplify raw data into a very easily understandable format with Tableau dashboards and worksheets.
- Utilize the embedded series of Excel-based reports.

LEARNING LEVEL

Intermediate

Intended for learners who have mastered the basics and are ready to delve deeper into the subject. It explores more complex concepts, techniques, and applications, allowing participants to enhance their knowledge and practical skills.

WHO SHOULD ENROLL

This course is ideal for team members who will be responsible for generating out-of-the-box reports in Planview IdeaPlace to support ideation management programs of all sizes.

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SUMMARY AGENDA

- Reports Overview
- Working with the Management Console
- OData Queries
- Create Reports with Power BI
- Deploy Power BI Reports
- Excel-based Reports
- Tableau Dashboards

FORMAT

- Two (2) half-day sessions in a virtual classroom, or one (1) full-day sessions in an onsite classroom.
- All instructor-led classes are delivered hands-on in a virtual training environment.

PREREQUISITES

- **Beginner level Planview platform knowledge required.**
- Experienced in creating and maintaining challenges in IdeaPlace.
- Participants should have some experience in report creation.

COST

- Private on-site or virtual training is available, email trainingrequests@planview.com to receive a quote.

Ready to get started?
Contact us for more information!
trainingrequests@planview.com