

# UNIVERSITY OF PLANVIEW

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VISUALIZE AGILE DELIVERY



## REPORTING AND ANALYTICS (POWER BI) IN PLANVIEW ADAPTIVEWORK

### OVERVIEW

Reporting and Analytics Training for Planview AgilePlace 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 how to use AgilePlace analytics to further examine and understand the work that's flowing across your board, key ways to optimize your board and use analytics to help you measure and understand potential problems and improvement opportunities. This will allow you to take full advantage of the AgilePlace out of the box reporting for summarizing AgilePlace board data.

### LEARNING OBJECTIVES

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

- Understand the types of reports available in AgilePlace.
- Use analytics to measure and monitor the flow of value through boards.
- Understand the relationship between reports and board & card design.
- Understand how these relationships influence organizational insights.
- Provide interactive visualizations and business intelligence capabilities with Power BI.
- Simplify raw data into a very easily understandable format.

### 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 agile teams who want to leverage the Planview AgilePlace analytic capabilities to help them measure process performance, understand waste or inefficiencies and identify bottlenecks.

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## SUMMARY AGENDA

- Reports Overview
- Optimize Board Analytics
- Editing Board Layouts
- Create Reports with Power BI
- Deploy Power BI Reports
- Tableau Dashboards

## PREREQUISITES

- **Beginner level Planview platform knowledge required.**
- Participants should be experienced in creating and maintaining boards in AgilePlace.
- Understanding of Kanban Methodology and Lean Agile principles.
- Participants should have some experience in report creation.

## 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.

## COST

- Private on-site or virtual training is available, email [trainingrequests@planview.com](mailto:trainingrequests@planview.com) to receive a quote.

Ready to get started?  
Contact us for more information!  
[trainingrequests@planview.com](mailto:trainingrequests@planview.com)