

UNIVERSITY OF PLANVIEW

START YOUR PLANVIEW LEARNING JOURNEY HERE

TRANSLATE STRATEGY INTO RESULTS



FASTTRACK ANALYTICS IN PLANVIEW PORTFOLIOS

OVERVIEW

FastTrack Analytics training for Planview Portfolios introduces the skills to configure the out-of-the-box FastTrack Analytics reports to meet the reporting needs of the organization.

This course provides an understanding of the core activities required to adjust the attributes displayed in analytics and reports, manage report parameters, modify the look and feel of reports, and how to expand the reporting Framework to include additional attributes and to create new persona reports based on the FastTrack Analytics. This will allow you to take full advantage of pre-defined reports summarizing and visualizing data from your Portfolios application.

LEARNING OBJECTIVES

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

- Configure the FastTrack Analytics reports, controlling report data points, report parameters and report look and feel.
- Create new reports using Persona capability, which allows customers to extend the catalog with new reports tailored to their specific reporting needs.
- Enable additional attributes in the reporting Framework (Milestone and Attribute Dates and Lifecycle Step Analysis).
- Understand the FastTrack Analytics Catalog and the scope of data from.
- Planview Portfolios which is available for display and analysis in the 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 class is ideal for users of Planview Portfolios who will be responsible for generating out-of-the-box reports on behalf of their organization or business unit.

FASTTRACK ANALYTICS IN PLANVIEW PORTFOLIOS

SUMMARY AGENDA

- FastTrack Analytics Overview
- Configuration Principles
- FastTrack Analytics Configuration
- Attributes
- Report Appearance
- Personas
- Advanced Attributes and Options

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.**
- Complete the Introduction to Planview Portfolios: Concepts and Navigation e-Learning course.
- Complete the Introduction to Planview Portfolios: Analytics and Reporting e-Learning course.
- Participants should have a good understanding of different attribute types (alternate structures, fields, sub-total columns, and calculated columns) available in the Planview Portfolios application.
- Participants should be experienced in maintaining alternate structures and creating and maintaining the report tiles.

COST

- Pricing for Public Training is \$1,000 per person. [Enroll in classes here.](#)
- 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