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START YOUR PLANVIEW LEARNING JOURNEY HERE

TRANSLATE STRATEGY INTO RESULTS

Planview® Portfolios

AD-HOC ANALYSIS (POWER BI AND SSAS) IN PLANVIEW PORTFOLIOS

OVERVIEW

Ad-hoc Analysis (Power BI and SSAS) training for Planview Portfolios teaches how organizations can perform dynamic analysis and create interactive reports on projects, resources, and financial data to meet the reporting needs of the organization.

This course provides mastery of online analytical process (OLAP) reporting and interactive navigation capabilities to easily understand current and trend-based business performance, change parameters, and add metrics with the click of a button. Power BI allows non-technical users to create analytics and dashboards by themselves, without the need for technical report development skills or a technical understanding of the data structure. Users can create interactive dashboards with drill down functionality in minutes. This will allow you to quickly provide answers to analytical queries that are multi-dimensional in nature for complex analytical and ad hoc queries.

LEARNING OBJECTIVES

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

- Understand Ad-hoc Analysis Concepts and Data Sources (Tabular Models & Column Set Models).
- Create and Deploy Reports with Power BI.
- Perform Ad-hoc Analysis using Microsoft Excel.
- Understand the data elements of the Tabular Models.

LEARNING LEVEL

Advanced

Designed for experienced learners seeking a high level of expertise in the subject. It delves into advanced theories, methodologies, and real-world applications, challenging participants to solve complex problems and develop specialized skills.

WHO SHOULD ENROLL

This course is ideal for advanced administrative users of Planview Portfolios who will be responsible for creating custom reports on behalf of their organization or business unit.

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SUMMARY AGENDA

- Overview of Ad-hoc Analysis
- Data Sources: Column Set Models, Tabular Models, OData
- Create Reports with Power BI
- Deploy Power BI Reports
- Ad-hoc Analysis with Excel: Download and Analyze Data

PREREQUISITES

- Intermediate level Planview platform knowledge required.
- Participants should have a good understanding of different attribute types (alternate structures, fields, sub-total columns, and calculated columns) available in Planview Portfolios
- Participants should be experienced in maintaining alternate structures and creating and maintaining the report tiles
- Participants should have some experience in report creation

COST

- Pricing for Public Training is $1,400 per person. Enroll in classes here.
- Private on-site or virtual training is available, email trainingrequests@planview.com to receive a quote.

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.

Ready to get started?

Contact us for more information!

trainingrequests@planview.com

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