

IBM PLANNING ANALYTICS: ANALYZE DATA AND CREATE REPORTS (V2.X)

Course Code: 900025

Learn how to use IBM Planning Analytics to analyze data to discover trends and exceptions, create and customize reports and templates.

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.

What You'll Learn

- 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
- Creating websheets
- AI Forecasting
- Apps and Plans
- Decision Optimization Overview

Who Needs to Attend

Analysts.

Prerequisites

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

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VIRTUAL CLASSROOM LIVE

\$2,470 CAD

2 Day

Virtual Classroom Live Outline

Module:1

- Understanding IBM Planning Analytics data

Module:2

- Creating books

Module:3

- Creating and saving views

Module:4

- Changing the way data is displayed

Module:5

- Displaying specific members by using sets

Module:6

- Adding calculations to views

Module:7

- Highlighting exceptions by using conditional formatting

Module:8

- Entering data

Module:9

- Experimenting with data by using sandboxes

Module:10

- Working with spreadsheets online by using websheets

Module:11

- Formatting for reporting

Module:12

- Exploring data by using visualizations

Module:13

- Creating dashboards

Module:14

- Examining performance by using scorecards

Module:15

- Exporting data

Module:16

- Introduction to IBM Planning Analytics for Microsoft Excel

Module:17

- Creating websheets

Module:18

- AI Forecasting

Module:19

- Apps and Plans

Module:20

- Decision Optimization Overview

Mar 5 - 6, 2026 | 9:30 AM - 5:30 PM EST

May 28 - 29, 2026 | 9:30 AM - 5:30 PM EST

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ON-DEMAND

\$15 CAD

On-Demand Outline

Module:1

- Understanding IBM Planning Analytics data

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