IBM Planning Analytics v2.1.x: Analyze Data and Create Reports

Duration: 2 Days Course Code: P8467G

Overview:

Learn how to explore, analyze, and report on data using IBM Planning Analytics Workspace and related clients.

This course teaches learners how to explore, analyze, and report on data using IBM Planning Analytics Workspace and related clients. Participants learn core Planning Analytics concepts- such as models, cubes, dimensions, views, and sets- and apply them to create interactive reports, dashboards, and formatted outputs.
The course combines conceptual instruction with guided, hands-on exercises that allow learners to practice real-world tasks, including creating books and views, formatting reports, entering and spreading data, applying calculations and conditional formatting, working with sandboxes, publishing websheets, and exploring forecasting results.
These exercises reinforce best practices and help learners build confidence using Planning Analytics features in practical business scenarios.
The course reflects the current Planning Analytics Workspace v2.1.x environment while preserving content that remains valid from earlier v2.x releases.
The course emphasizes effective analysis, reporting, collaboration, and planning techniques that learners can immediately apply in their own Planning Analytics implementations.

Updated 28/6/2026

Target Audience:

This course is destinated to Business Analysts.

Objectives:

- **After completing this course, learners should be able to:**
- Explain how models, cubes, dimensions, and views relate
- Control how data is displayed using view actions and snap commands
- Add summary and member calculations to views
- Understand refresh behavior and recalculation timing
- Work with websheets in books
- Build interactive dashboards with widgets and selectors
- Export and share Planning Analytics content
- Run and interpret AI forecasts responsibly
- Understand Decision Optimization integration at a high level

Prerequisites:

Participants should have the following:

- A general understanding of business analytics or performance management concepts
- Basic familiarity with IBM Planning Analytics terminology
- Experience navigating web-based applications

Testing and Certification

- None

Follow-on-Courses:

- IBM Planning Analytics v2.1.x: Design and Develop Models in Planning Analytics Workspace

Content:

Unit 1: Introduction and First Steps

- Explain how models, cubes, dimensions, and views relate
- Create and manage books
- Build and save views
- Identify and manage benched dimensions
- Create asymmetric views using targeted selecting
- Control how data is displayed using view actions and snap commands

Unit 2: Managing Views and Data

- Use static and dynamic sets effectively
- Add summary and member calculations to views
- Apply conditional formatting to highlight exceptions
- Enter and spread data correctly
- Interpret cell colors and data states
- Understand refresh behavior and recalculation timing

Unit 3: Formatting, Reports, and Dashboards

- Use sandboxes for safe experimentation
- Work with websheets in books
- Apply formatting best practices for reports
- Use visualizations to explore data
- Understand visualization limitations and requirements

Unit 4: Advanced Features

- Build interactive dashboards with widgets and selectors
- Configure synchronization correctly
- Create and interpret scorecards
- Export and share Planning Analytics content
- Understand Excel-based reporting options

Unit 5: Websheets, Forecasting, Applications and Plans, and Decision Optimization

- Publish and manage websheets
- Run and interpret AI forecasts responsibly
- Understand forecast quality indicators
- Work with applications and plans
- Understand Decision Optimization integration at a high level

Additional Information:

This course has labs provided by IBMOfficial course book provided to participants

Further Information:

For More information, or to book your course, please call us on Head Office Tel.: +974 40316639

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