

Planning Analytics Foundations: Reporting & Analysis + PAFÉ

Course Code: AKPAF

This three-day course is designed for individuals who are new to Planning Analytics. The material is tailored towards students who are participating in the budgeting and forecasting process or use planning analytics for reporting and analysis.

Why Take This Training:



Understand Planning Analytics

If you are currently using Planning Analytics this training will solidify your knowledge on how to leverage this powerful tool.



Enhance Modelling Skills

Take your Excel modelling skills to the next level by learning about cube technology to find and analyze insights more efficiently.



Multi-Dimensional Modelling

Learn about the differences between spreadsheets, relational and OLAP databases to enhance your ability to work with planning/forecasting data.



Verifiable CPD/CPE Credits

After the completion of this course, you will be issued a certificate that you can put towards professional development requirements.

Who Should Take This Training:

Finance Professionals

Learn about multi-dimensional modelling, how it compares to Excel and get hands-on experience building a simple income statement.

IT Professionals

Learn how Planning Analytics has an advantage over other OLAP and Cube technologies as a part of your tech stack and data architecture.

Why ActionKPI?

We have built this training program based on our extensive years of experience and deployment of complex Planning Analytics models across various industries. We are passionate about teaching our established best practices and learnings from our work with our clients.

We are recognized by IBM as:

- Gold Partners
- The 2024 North American Award Winner in Digital Labour for Planning Analytics



Day 1: Fundamentals

This module provides an overview of IBM Planning Analytics (TM1), how it compares and contrasts to Microsoft Excel and other OLAP Technologies, and the core components that constitute a Planning Analytics model. Students will get hands-on building out a simple Income Statement model to solidify their understanding of how multi-dimensional planning works.

Unit 1:

The Importance of Multi-Dimensional Modelling; An Overview of Planning Analytics

- What is the difference between a Relational & OLAP Database?
- What makes Planning Analytics a unique OLAP database?
- How does Planning Analytics compare to Excel?
- How can Planning Analytics make my day-to-day work more effective?
- What are the core components of a Planning Analytics Model?

Unit 2:

Building an Income Statement Model in Planning Analytics

- Build the foundations of an Income Statement Cube
- Understand what a dimension is, and why it is important
- Build the core dimensions of the Income Statement - Time, General Ledger / Accounts, Department, Scenarios

Unit 3:

Load Financial Data & Perform Analysis

- Load data via Turbo Integrator
- Create cube views and perform analysis
- Create a KPI using a business formula (Planning Analytics cube rules)

Day 2: PAW Reporting

This module covers the most important interface for Planning Analytics; PAW (Planning Analytics Workspace). Using a prebuilt model, students will build a forecasting workbook containing input templates, summary views and charts, and then conduct ad-hoc analysis to understand variances, KPIs and financial performance.

This will equip students with the skills required to extract and analyze data within Planning Analytics Workspace and enable them to set up easy-to-use screens, input templates, charts and dashboards that can be used in presentations, month-end meetings, and day-to-day activities.

Unit 1: PAW Reporting Overview

- PA Reporting Options
- PAW Roles
- Navigating Planning Analytics Workspace
- PAW Books
- Dimension Sets
- Create a Personal Folder

Unit 2: Creating a Forecasting Workbook

- Create a Revenue Entry Template
- Create an Expense Entry Template
- Create a Payroll Entry Template
- Create a P&L Dashboard
- Create a Welcome page with navigation buttons

Unit 3: Data Entry and Analysis

- Enter Data Manually
- Enter Data Through Consolidation Typing
- Enter Data Through Keyboard Shortcuts
- Enter Data Through Spreading Methods
- Base vs Sandbox Data Entry
- Using Snap Commands
- Perform Ad-Hoc Analysis

Day 3: PAFE Reporting

This module introduces Planning Analytics for Excel (PAfE); Planning Analytics' Excel interface that allows users to connect to multiple models to perform both writeback and analysis. Students will create an Excel workbook that includes the five available report types in PAFE; Explorations, Quick Reports, Dynamic Reports, Custom Reports and Universal Reports. Attendees will learn the pros and cons of each report, interact with each (filtering, data entry, spreading, sandboxes, etc), and learn how to publish them to Planning Analytics Workspace (PAW).

Note that the PAW Reporting module covers some concepts that are essential in PAFE and is therefore a pre-requisite for the PAFE module.

Unit 1: PAFE Reporting Overview

- What is Planning Analytics for Excel (PAfE)?
- The PAFE Ribbon
- The Task Pane
- Explore the PAFE Interface

Unit 2: Creating PAFE Workbook

- Types of PAFE Reports
- Create an Exploration from a View
- Create an Exploration from Scratch
- Create a Quick Report
- Create a Custom Report
- Create a Dynamic Report
- Create a Universal Report

Unit 3: Data Entry and Publishing to PAW

- Explore Data Entry Options
- Publishing to PAW or Spreadsheet Services