PowerPlanner Best Practices

Quick Start

The fastest and easiest way for beginners to get started with PowerPlanner is to make a copy of the example model, and import your own company figures and master data into the base tables, then extend this model with any extra dimension columns, data or calculations.

Read the manual and study examples

It's strongly suggested for beginners to read the user manual available at our webpage and study the structure and formulas in the example model.

Use a snowflake schema

Extract dimensions and dimension levels in separate tables. Use the separate dimension table corresponding to the dimension level in pivot tables, instead of the dimension columns in the fact table. Use the same dimension tables in all fact tables that contain the specific dimension (e.g. use the related version table in all pivot tables where version is used).

Reconnect after any changes in model

Always reconnect to the model in PowerPlanner after making any changes in the model (changes in table structure, or changes in formulas).

Use matching types

Use matching data types in table relationships.

Remove redundant columns

Remove redundant or unused columns from the data tables in the PowerPivot model in Excel or from the SQL table to reduce loading times.

Use filter for in-table dimensions or avoid them

If you don't set any filter for columns which are not linked to external tables they will be set empty when writing back.

Avoid integers at writeback

Don’t use Integer columns for writeback. Only types supporting fractions (float, real, numeric or decimal) are allowed. Also make sure there is enough precision for fractions (leave at least 5 digits for fractions).

Avoid calculated dimension columns at writeback

Don’t use calculated dimension columns (columns with a DAX formula specified) as dimensions or filters in PivotTables you intend to use for writeback.

Instead of using =RELATED columns re-arrange your model in a snowflake schema to avoid using these columns.

Avoid calculated measures at writeback or use Goal-seeking

Don’t writeback to calculated measures, use Goal-seeking to a non-calculated measure or write to a non-calculated measure. (Writing to the SUM or AVG of a non-calculated measure is also supported).

Avoid hiding columns

Be careful when hiding columns in the PowerPivot model, because when you copy a version hidden columns will be filled with NULL values.

Use version table and column

Adding a table for the version dimension and extending fact tables with related version column is a practical way for dealing with multiple versions and scenarios. Versions then can be simply copied with the copy member function.

Merge similar data tables

It's suggested to merge all fact tables with similar data but for different time periods versions etc. into a single table separated by version, time etc. (e.g. merge sales actual and sales plan versions into a single table with the correct version column).

Handling different granularity in versions

If different versions (e.g. plan and actual) data have different granularity (level of detail) (e.g. sales plan is not detailed by customer or product), you can leave them in separate tables (including version column), and consolidate them using a calculated measure (adding the 2 measures). Another way to manage this is to merge them in the same table and fill the undefined dimensions with a dummy value such as 'NA', but this is a more complicated approach.

Handling different granularity in plan areas

Different plan areas (e.g. sales, COGS, Fixed costs, etc.) can have different granularity (dimensions used). It's suggested to always include the common dimensions (e.g. **account**, version, time, currency, profit center, etc.) so that plan areas can be easily consolidated in

the P&L. If the account dimension is used in the table of the plan area, the measure for the plan area can be simply added to the calculated P&L measure.

Comparisons

The easiest way to make comparisons is to make copy of the original measure and use the built-in PivotTable measure display option to show difference between the item and the previous item (e.g. in the version or time column).