



Microsoft Partner
Gold Project and Portfolio Management
Silver Collaboration and Content
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Project Online and Power BI – The Best of Both Worlds

Presented by Jennifer Ward
January 16, 2018



Agenda

Introductions 5 mins

Power BI – A Powerful Reporting Tool 5 mins

Where and How to Get Power BI 10 mins

Getting the Content Pack 10 mins

An Overview of the Tool 10 mins

Different Visualizations/Tips and Tricks 10 mins

Q&A 10 mins

Jennifer (Jenny) Ward



Senior PPM Specialist

With a well-rounded, 20-year career in IT and a focus on service delivery, Jenny has grown adept at prioritizing the challenges her clients face and responding effectively. Most recently, she spent 7 years as SharePoint and Project Server Administrator for a global data and telephony company, a role in which she acted as both technical and operational director of a Project Management support team. Not only is Jenny comfortable with installation, maintenance, reporting, and end-user training, but also front-end site design and execution.



Why PPM Works

- **Gold Microsoft Certified Partner** exclusively focused on **Microsoft Project, SharePoint, and Office 365**
- Some recent **Experience** includes Allergan, Medtronic, Plantronics, Shire, Synopsys and many more...



Medtronic



- We believe in **partnering** with you, **exceeding expectations** to build **long lasting success**.
- Our team's experience runs deep with Microsoft.
 - Over **225 Project Server implementations** and Trained **thousands** of students
 - Delivered **dozens** of Industry presentations (Microsoft Project Conference, Project Summit, PMI Conference)
 - Created **hundreds** of webcasts and blog articles
- We have contributed to the **new release of Microsoft Project and Project Server** for the past three cycles and share our expertise as volunteers for Microsoft, PMI, MPUG, and Project Summit.
- We **guarantee your success** and **our results** – we are not done until you are a satisfied client reference



Why Clients Choose PPM Works

Our Philosophy: We believe in honesty, integrity, and dedication – our passion for success drives our team. PPM Works core values start with family and health first to provide the most for our clients.

- Quality of Services are unmatched
- Trusted Experience
- Listening comes 1st
- Proven Methodology and Templates
- Competitive Pricing



Thank you for the information share today! You are so knowledgeable and a gifted presenter/teacher.



Program Manager, UnitedHealth Group

I wish we would have found PPM Works a long time ago - you make Microsoft Project understandable for all



Large Boston-based Pharma Co, Director of Training

I've attended several industry webcasts, conference sessions, and vendor meeting – this week's MPUG webinar certificate series on Microsoft Project (Online, Server, and Professional) was by far the best and I found it very useful – thank you.



Sr. Project Manager Consultant, Large Legal Firm



Project Online and Power BI – The Best of Both Worlds

Learning Objectives

- To have a high level understanding of what Power BI is and what it does
- To learn where to get Power BI, and what's needed to use it
- How to add the Power BI Content pack to your environment
- How to use Power BI desktop including:
 - Connecting to data sources
 - Opening Templates
 - Visualizations
 - Filters
 - Format
- Understand Power BI licensing and what you can do with it vs. without it

Power BI – A Powerful Reporting Tool

Microsoft Describes Power BI as:

A cloud-based business analytics service that gives you a single view of your most critical business data.

It Allows Organizations to:

- Present vivid, visually compelling dashboards to quickly analyze data
- Create rich, interactive reports with [Power BI Desktop](#)
- Access data with native [Power BI Mobile](#) apps.

Its benefits:

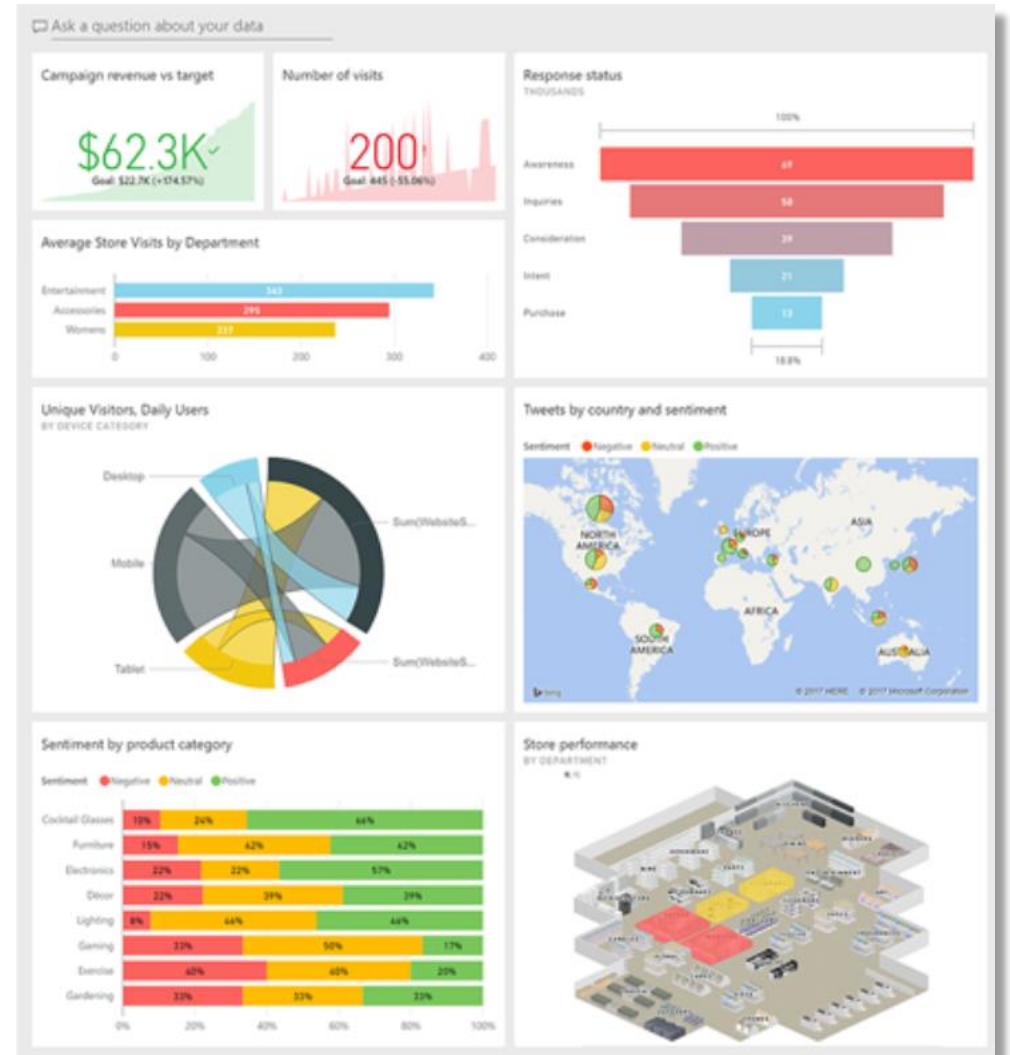
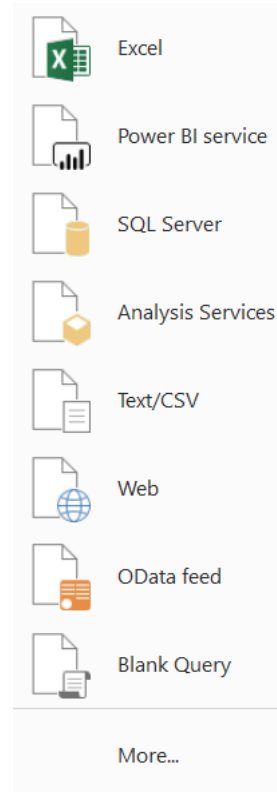
- It's easy to learn
- It's free
- It's fun

Power BI – A Powerful Reporting Tool

- You can pull data from practically anywhere:

- Google Analytics
- Excel files
- SQL Databases
- Text Files
- CSV Files

- Then with that data, create multiple reports



Where and How to Get Power BI

- What You'll Need:

- A Power BI login (free):

<https://powerbi.microsoft.com/en-us/>

- The Power BI Desktop App (free):

<https://powerbi.microsoft.com/en-us/desktop/>

- If you want to have access to the online Power BI Content Pack, you or your organization will also need to have a Power BI Pro license.

<https://powerbi.microsoft.com/en-us/pricing/>

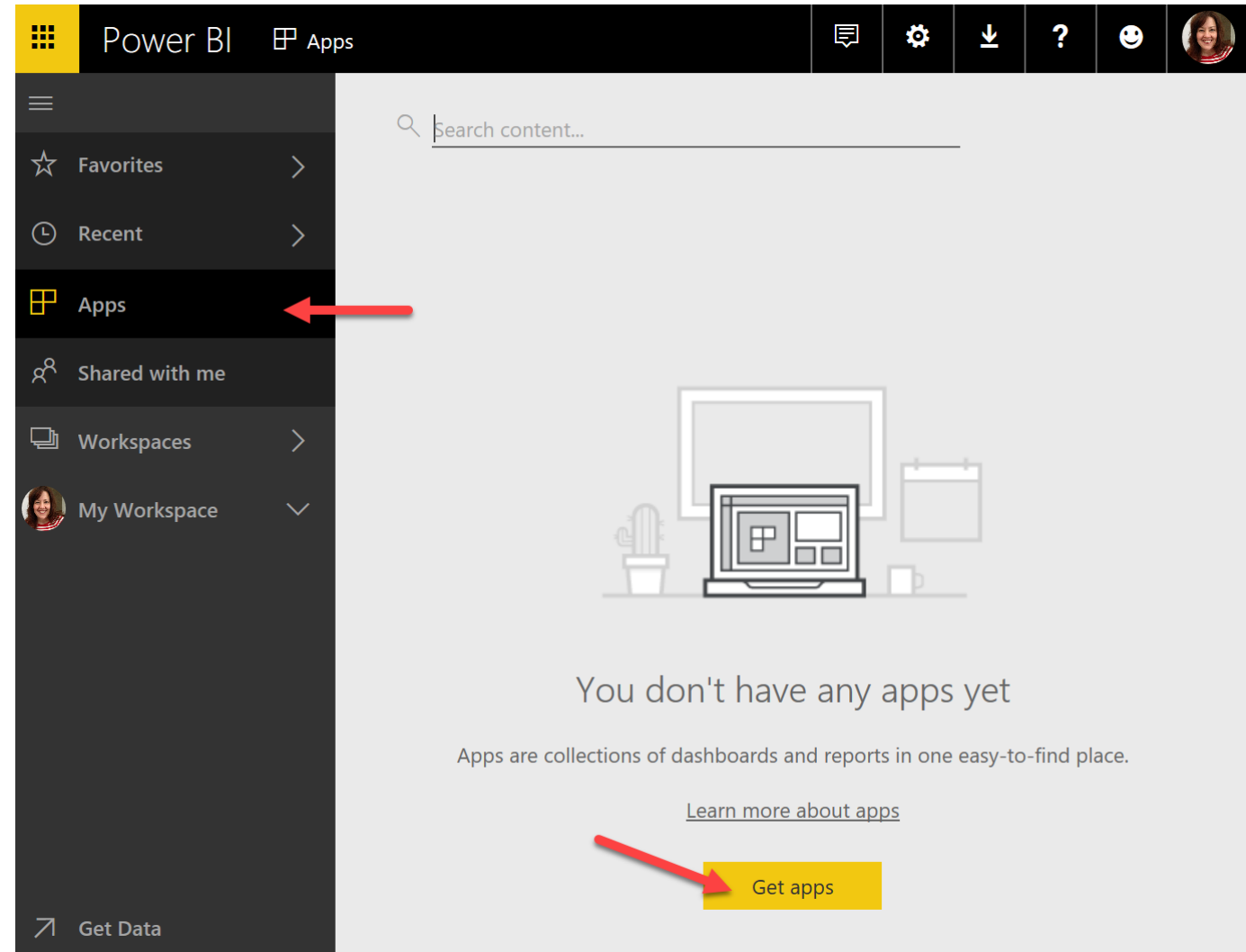
- What you might want:

- The Power BI Content Pack: <https://app.powerbi.com/groups/me/apps>

- The Power BI Mobile App: <https://powerbi.microsoft.com/en-us/mobile/>

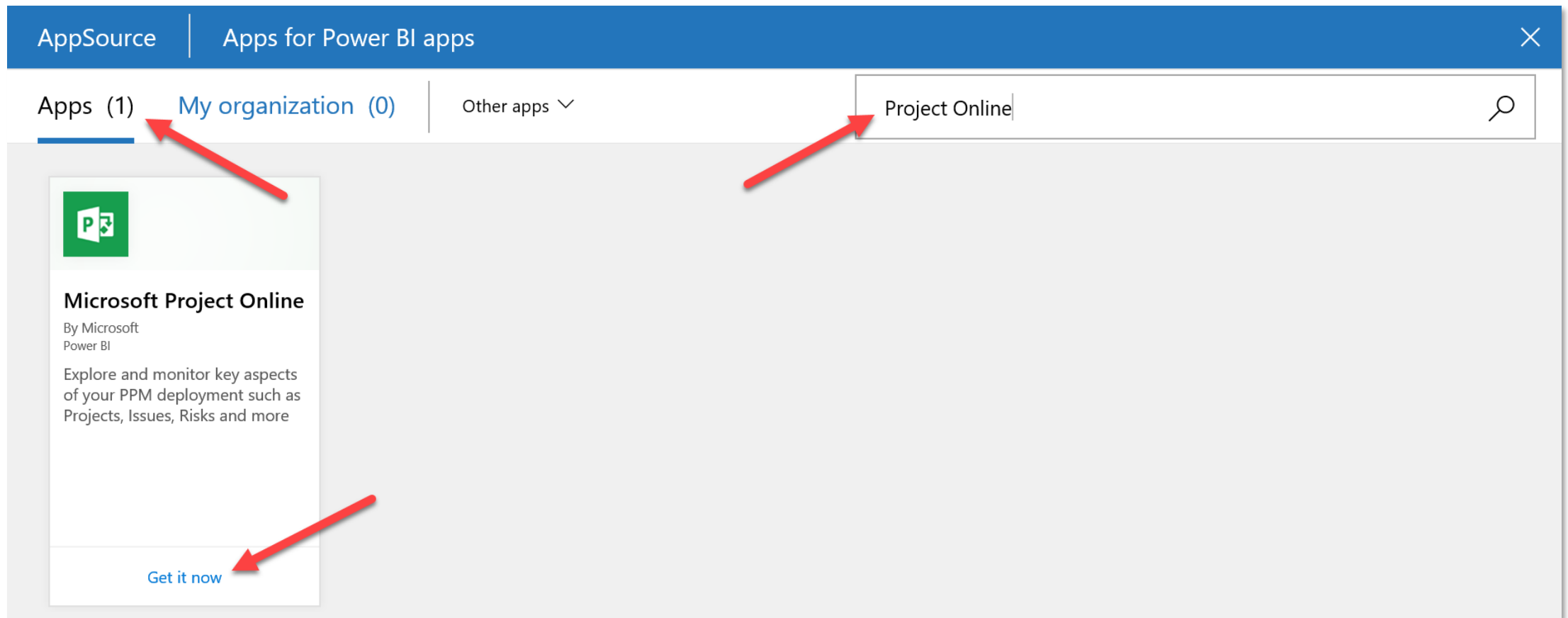
Getting the Content Pack

- Once you have your account and the desktop application installed, we can download a Content Pack to see the reports.
- Presuming you have a Power BI Pro license, we will start here: <https://app.powerbi.com/groups/me/apps>
- You'll click on *Apps* on the left bar, then the *Get Apps* button on the bottom (or top right if you already have some apps).



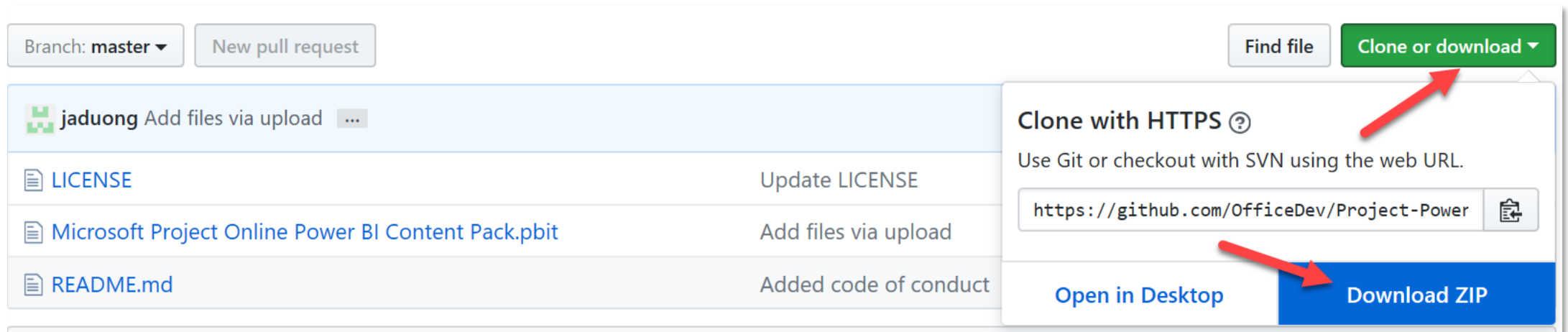
Getting the Content Pack

- From there you'll click on Apps in the top left, and type "Project Online" in the search bar. *Microsoft Project Online* will appear, and you can click "Get it now"



Getting the Content Pack

- Now we have the Power BI Content pack available in our Apps. But let's also download it to our computers, so we can play with it in Power BI Desktop and learn from it.
- <https://github.com/OfficeDev/Project-Power-BI-Content-Packs>

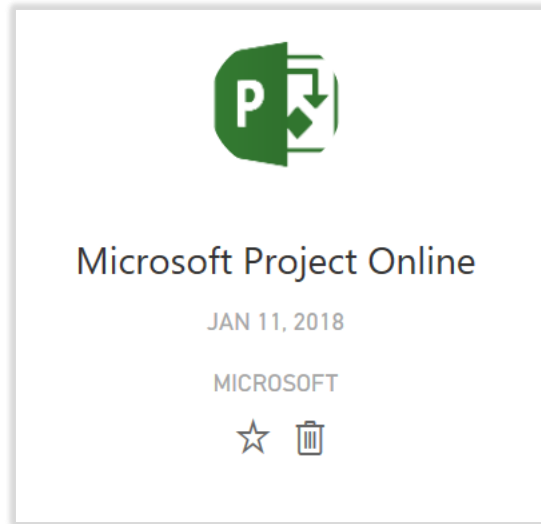


- Save it to a handy place so we can open it from Power BI Desktop later.

An Overview of the Tool



An Overview of the Tool – The Content Pack

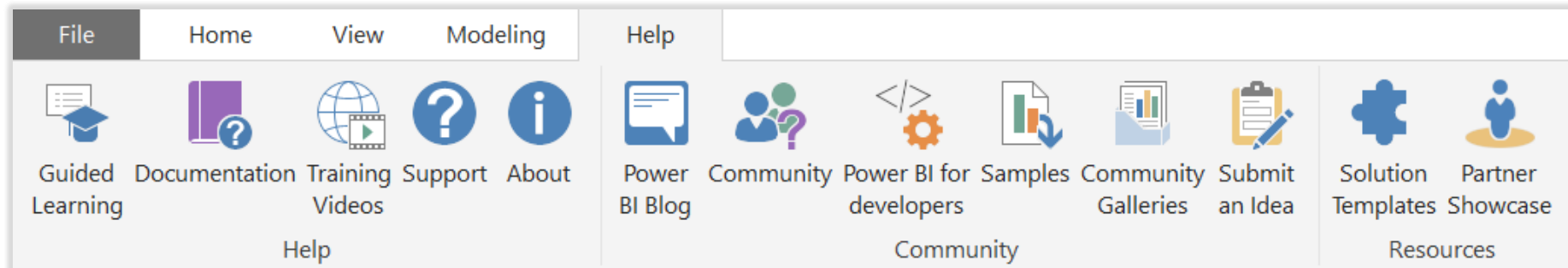


An Overview of the Tool – Power BI Desktop

1. Go to the location in which you saved the Content Pack Template to your PC
2. Unzip the file
3. Click through to the PBIT file, which will automatically open the file in Power BI Desktop
4. You'll then be prompted for your PWA URL, and the template will open.

Tips and Tricks

- Recent Sources – once you establish a data connection, it's accessible from Recent Sources.
- Toggling between visualizations – you can quickly and easily toggle between different visualizations to determine the best way to present your data.
- Filters – Where they are, and how to use them
- Format section – Where it is, and what you can do there
- The Help tab on the ribbon is your friend!



Question and Answer





LinkedIn: [Jennifer Ward](https://www.linkedin.com/company/ppm-works-inc-) and
<https://www.linkedin.com/company/ppm-works-inc->

Our Site: www.ppmworks.com

Blog: <http://blogs.ppmworks.com>

Calls To Action

1. Start incorporating these techniques today
2. Check out our Blogs / webcasts
3. Get LinkedIn with me (Jenny Ward)
4. Ask questions and **use the tool!**

Contact Us

We'd Love to Hear From You, Get In Touch With Us!

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