It’s All About Reporting

February 23rd, 2016 @ 10:00 am – 11:00 am EST

Scott Clausen and Jacques Goupil

This session is being recorded. For a copy of the slides or today’s reporting samples please contact: reporting@ppmworks.com

Today's Speakers: PPM Works

- Over 25 years **experience** with Project Server/Online Implementations
- Provide **Industry Vertical Project Server Solutions** including BioPharma, Engineering, New Product Development, IT, EPMO, Hospital IT Management
- Project Server / Project Online **Integrations** and SAP, Oracle, and CRM
- **100% Client Satisfaction**
- Developed the Microsoft Project Server 2013 and 2010 **Certification Exams**
- Get Started today for $50/month per user & 1 hr/week PPM Works support

Jacques Goupil

Scott Clausen

For more information: www.ppmworks.com

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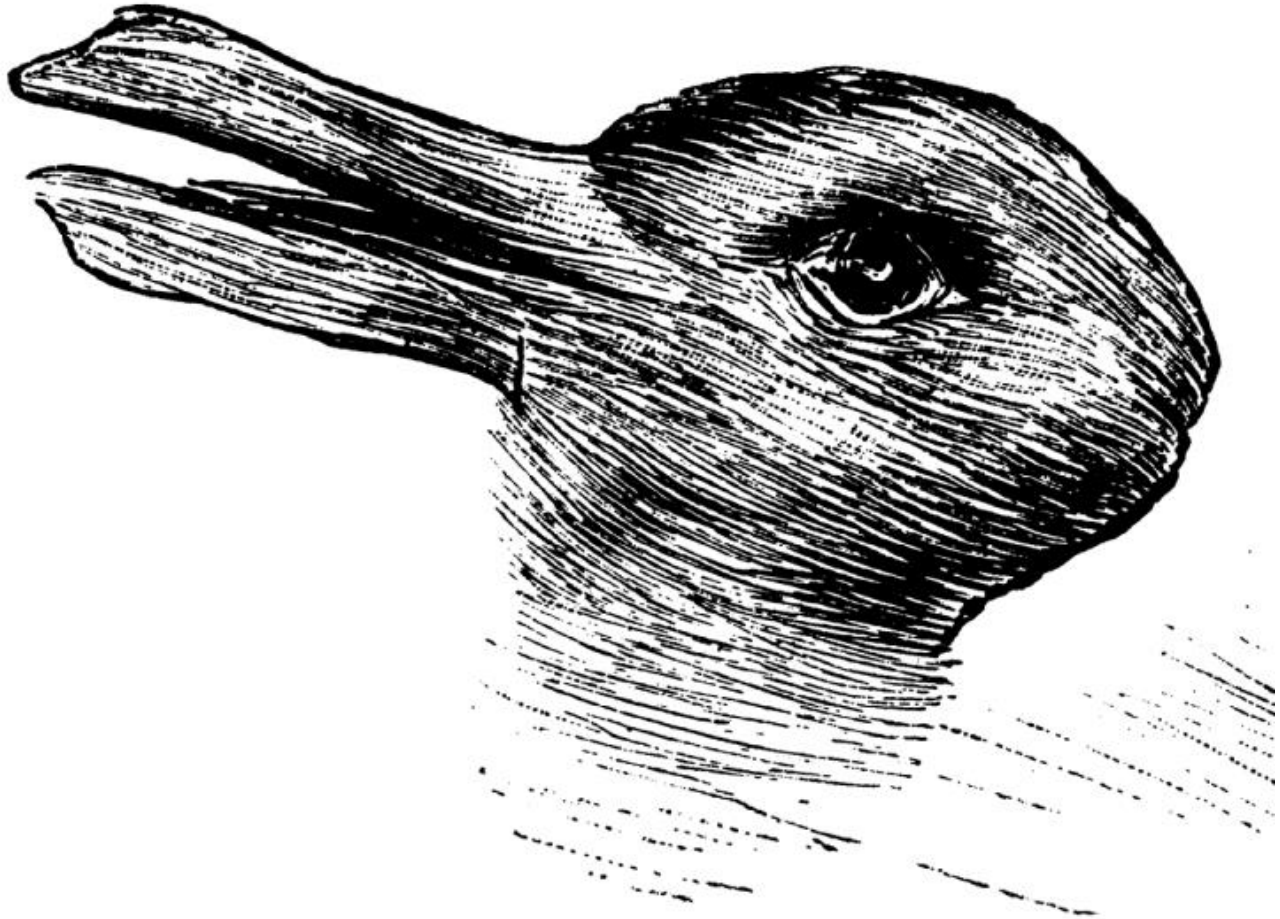
Goals of Today's Session

1. Understand the difference between Analysis vs Authored Reports
2. Gain a solid grasp of what tools are used for which reporting method
3. Review similarities/differences Project Server vs Project Online Reporting
4. Learn the best method for authoring reports (Power BI Desktop)
5. Walk away with your action plan to start creating your reports … today

What do you see?



© Provided by The Independent What do you see? A duck or a rabbit?

Report and Dashboards should be clear and easy to understand

We want our Reports to be clear, direct, and to the point

and Now -- Easy to Create

This test was used to determine how quick your cognitive skills are. The quicker you can see both and switch between then the more creative you tend to be and the easier you can find unique uses for common items.

Quick Understanding = Better Decisions + Informed Thinking

What reporting tools can I use with project data?

FEATURE	USE WHEN…	KEY CONSIDERATIONS
EXCEL Excel enables you to to analyze and explore data in interactive views, such as charts and tables. You can use Excel to create and share interactive reports, scorecards, and dashboards.	• Create reports quickly and easily using Project Web App data • View, sort, and organize small to medium datasets in spreadsheets • Create interactive dashboards that include slicers and timeline controls	• Excel is your tool for Project Online data • Ideal for small to medium data sets (up to a million records) • Supports the SQL Server tables, SQL Server Analysis Services cubes, and OData data sources that are used by Project Server and Project Online • Project Web App includes sample OData data connections for sample reports
		http://aka.ms/PWAExcel
ADVANCED EXCEL BI FEATURES Power Query, Power Pivot, Power View, and Power Map enable you to find and bring together data from a variety of sources and create powerful, interactive views and mashups in Excel.	• Increase your reporting capabilities in Excel • Discover, combine, & refine data (Power Query) • Create a Data Model and define hierarchies and KPIs (Power Pivot) • Create interactive views, mashups, and reports (Power View) • Create three-dimensional, geospatial views (Power Map)	• Sample reports in Project Web App use Power Pivot and Power View • Power Pivot supports millions of records in Excel • Power Map views are not yet supported in a browser window
		http://aka.ms/ExcelBI
EXCEL SERVICES Excel Services enables you to view, interact with, and refresh workbooks in a browser window.	• Share centrally managed workbooks that are published to SharePoint • View and explore workbooks in a browser window similar to using the Excel client • Display Excel content in SharePoint sites	• Supports refreshable data connections to the Project Web App database and OData sources • Data refresh requires Secure Store or Kerberos constrained delegation • Sample reports that are included with Project Web App use Excel Services and Secure Store • Supports Effective User authentication for Analysis Services data cubes

Project = on premises = in the cloud Microsoft

What reporting tools can I use with project data?

FEATURE	USE WHEN...	KEY CONSIDERATIONS
POWER BI FOR OFFICE 365 Power BI for Office 365 extends your business intelligence capabilities in the cloud.	• Set up scheduled data refresh for workbooks • View and use larger workbooks (up to 250 MB) in Power BI sites on Power BI for Office 365 • Use natural language queries to find and explore data using Power BI Q&A • Share and manage queries and data sources • Access on-premises data from the cloud • Download the Power BI Windows Store App to view workbook content on Windows tablets	• Available by subscription as an add-on or standalone service in the cloud. (Not available on premises) • Provides an infrastructure to set up connections to on-premises data http://aka.ms/PowerBI
SQL SERVER REPORTING SERVICES SQL Server Reporting Services enables you to develop and manage powerful reports.	• Use Power View for SharePoint to create reports in a SharePoint library (on premises) • Use Report Designer to create and share reports and data sources, and embed reporting into applications. (Typically, IT professionals and developers use this tool) • Use Report Builder to create reports and reusable report parts and shared datasets (Typically, IT professionals and power users use this tool)	• Office 365 SQL Server Integration Services OData add-on enables Reporting Services scenarios with Project Online • Requires SQL 2012 SP1 to use SharePoint 2013 features http://aka.ms/SSRSTools
VISIO SERVICES Visio Services lets you share and view Visio drawing (*.vsdx) and Visio web drawing (*.vdw) files.	• Create data-connected diagrams using your Project Web App data • Share diagrams or data-connected diagrams in a central location for viewing in a web browser	• Data refresh requires Secure Store or Kerberos constrained delegation • Requires SharePoint Server Enterprise or SharePoint Online

Project = on premises = in the cloud Microsoft

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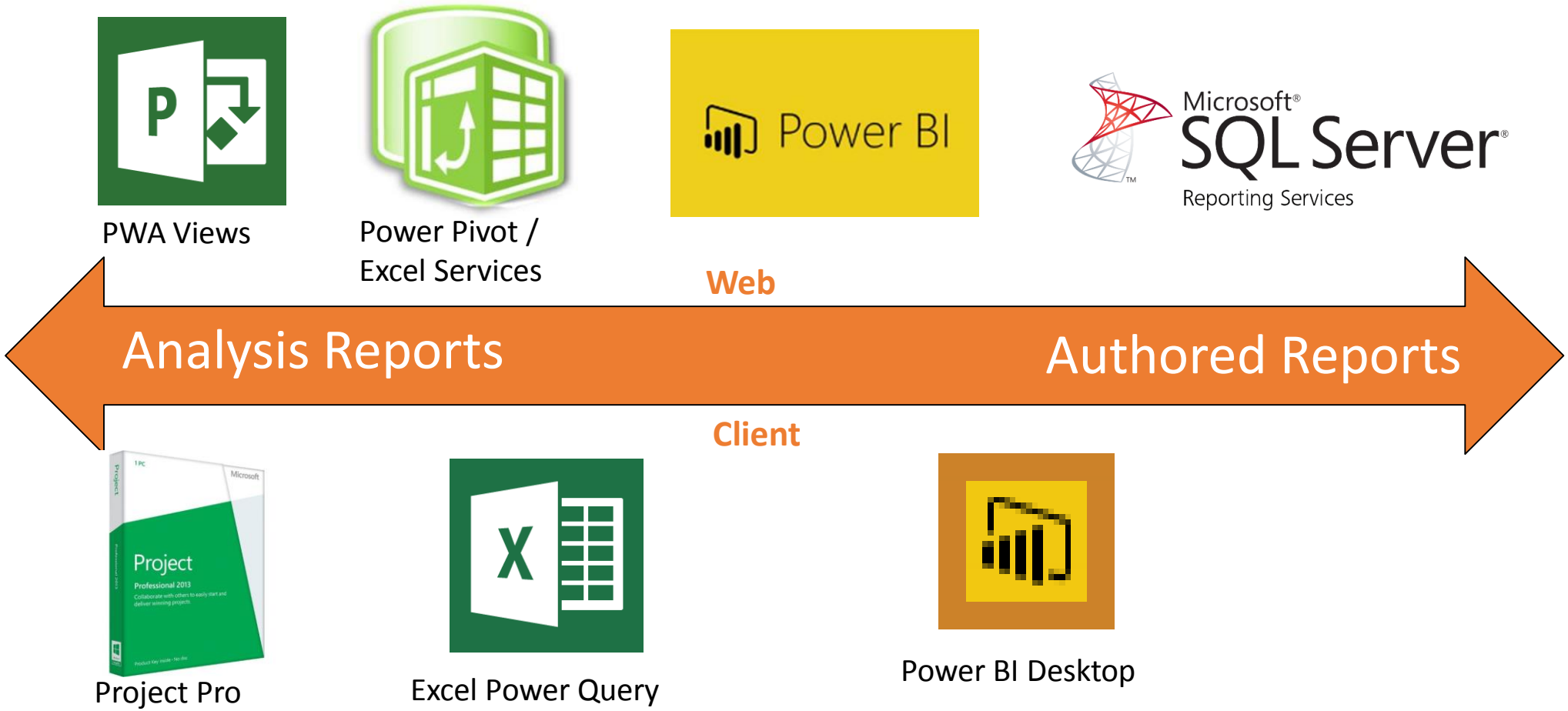
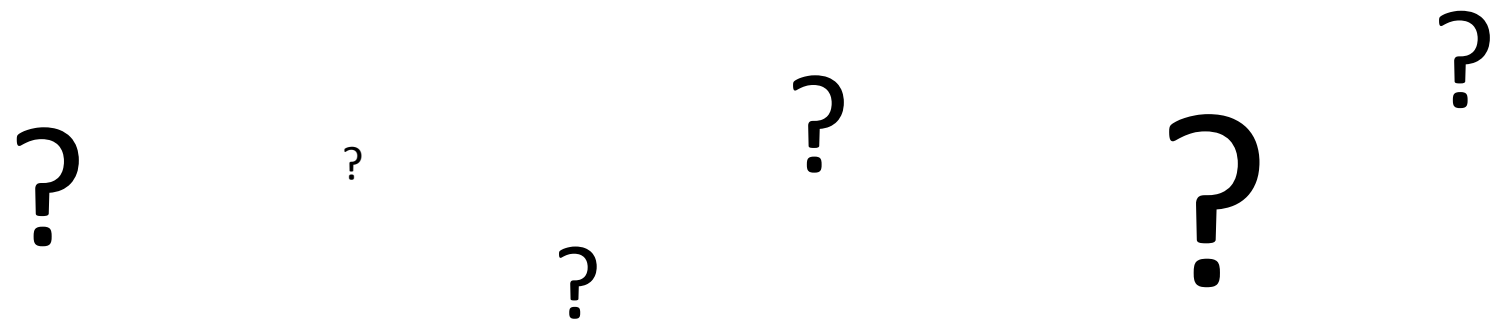
Analysis Reports vs Authored Reports



Project Server vs Project Online Reports

	Project Server (On Premise)	Project Online
PWA Views	✓	✓
Project Pro Views	✓	✓
Excel Power Query/Pivot	✓	✓
Excel Web – OLAP/SQL	✓	
Excel Web – ODATA		✓
Power BI	✓	✓
SQL Reporting	✓	✓

The #1 Question about Reporting Tools



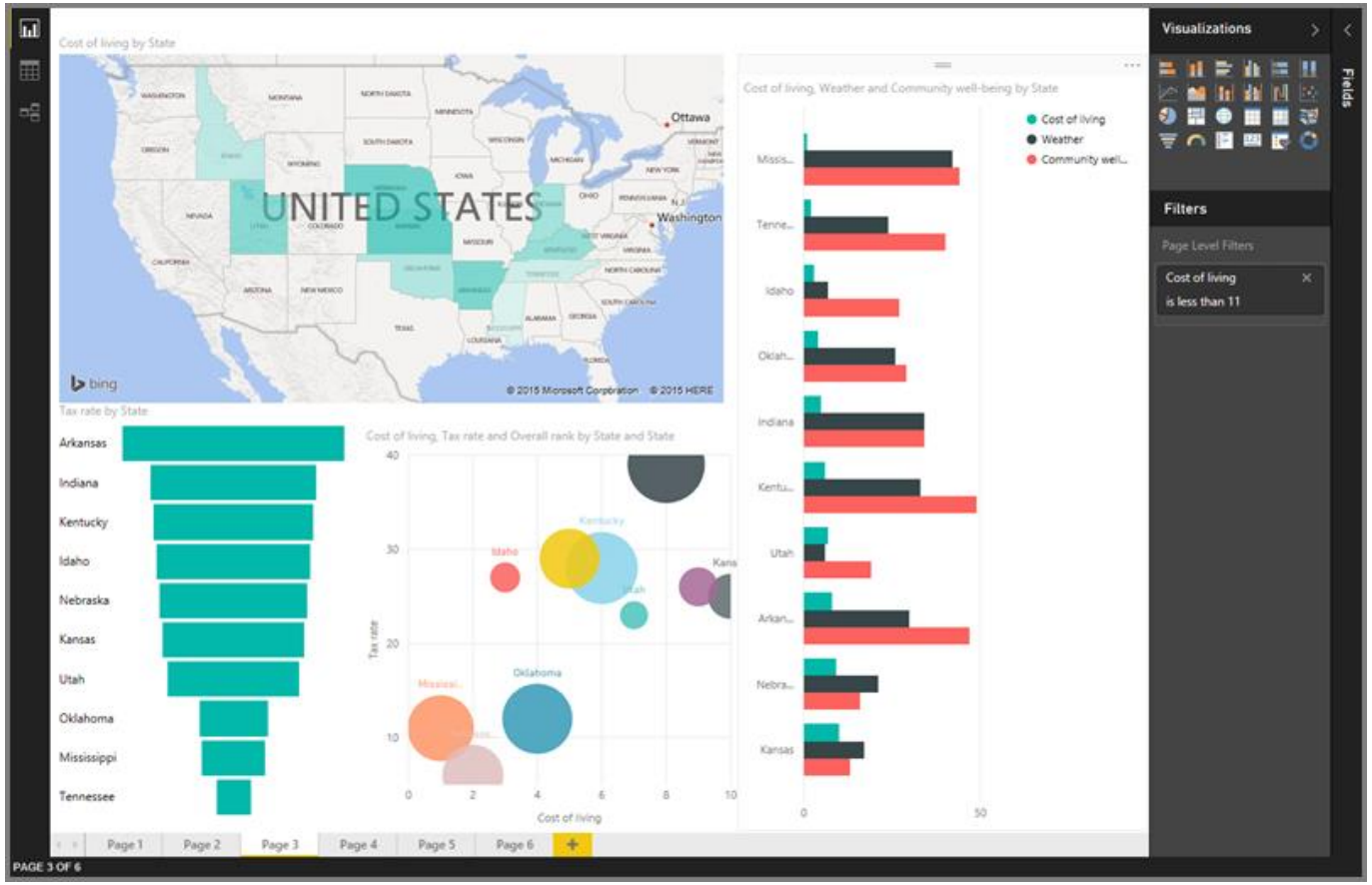
What reports can I create today?

Reporting Takeaways

After today's session - what types of reports will you be able to create?

- **Power BI (new or leverage the Content Pack)**
- **Excel Reports via Project Online**

Power BI service and Power BI Desktop



Power BI Desktop = Analysts

- create data connections, models, and reports

Power BI Service = Users

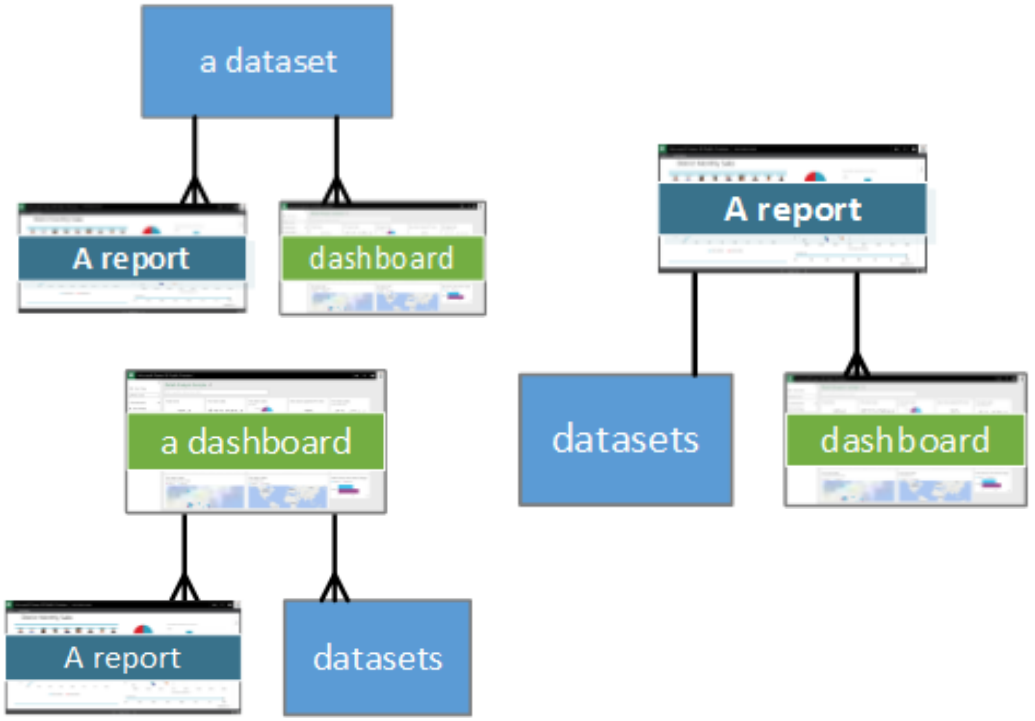
- interact and view Power BI Desktop Reports

https://powerbi.microsoft.com

Power BI Service

- The Power BI service is an online *Software as a Service* (SaaS) offering from Microsoft
- Power BI displays **dashboards** that are interactive - created and updated from many different data sources
- Four major building blocks of Power BI service are:

1. **Dataset**: something to import or connect to
2. **Reports** are generated from datasets created in Power BI, Excel, or Power BI Desktop and published to Power BI
3. **Tiles:** snapshot of your date ***pinned*** to a dashboard
4. **Dashboards:** collections of tiles that represent important business info



https://powerbi.microsoft.com/en-us/documentation/powerbi-service-basic-concepts/

Power BI Desktop

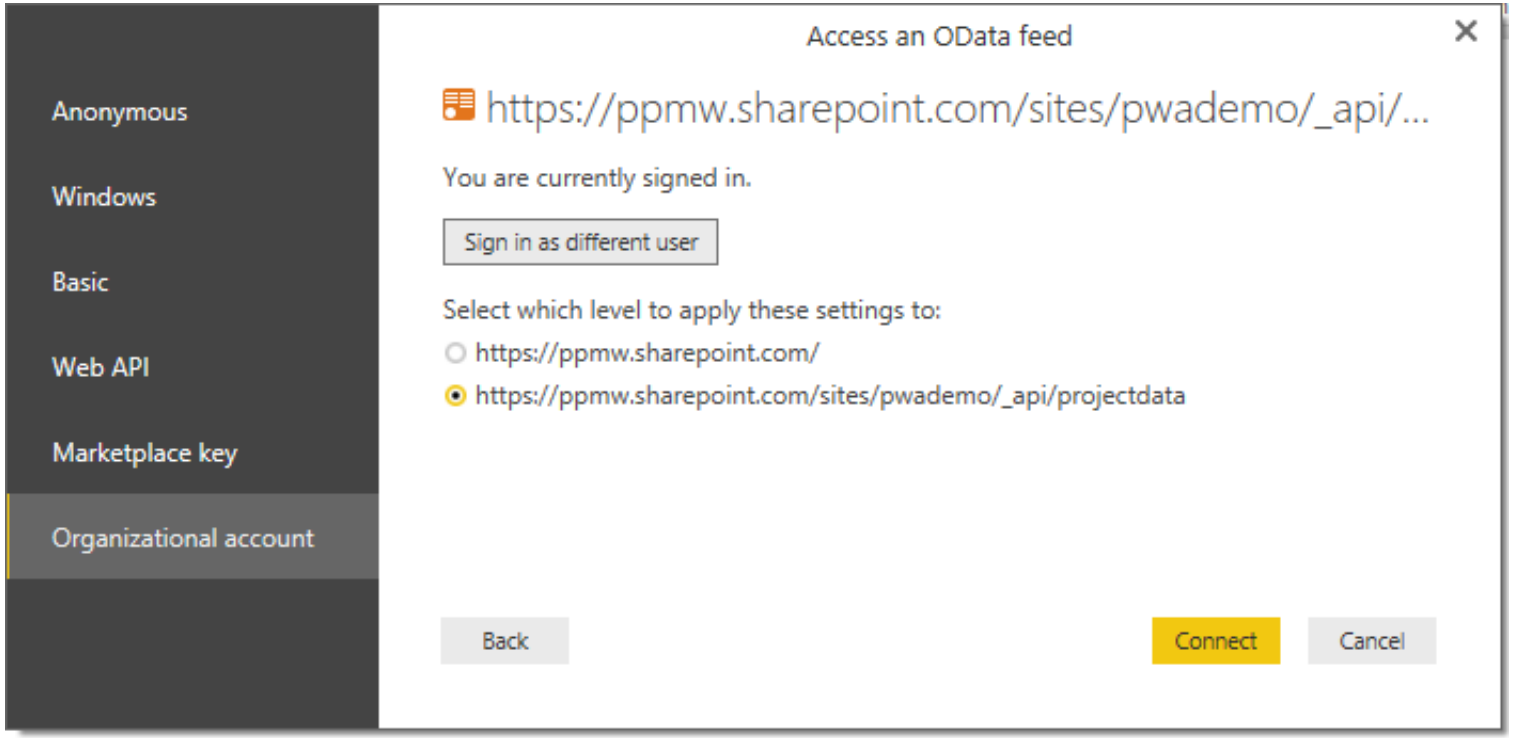
Power BI Desktop lets you create a collection of queries, data connections, and reports that can easily be shared with others

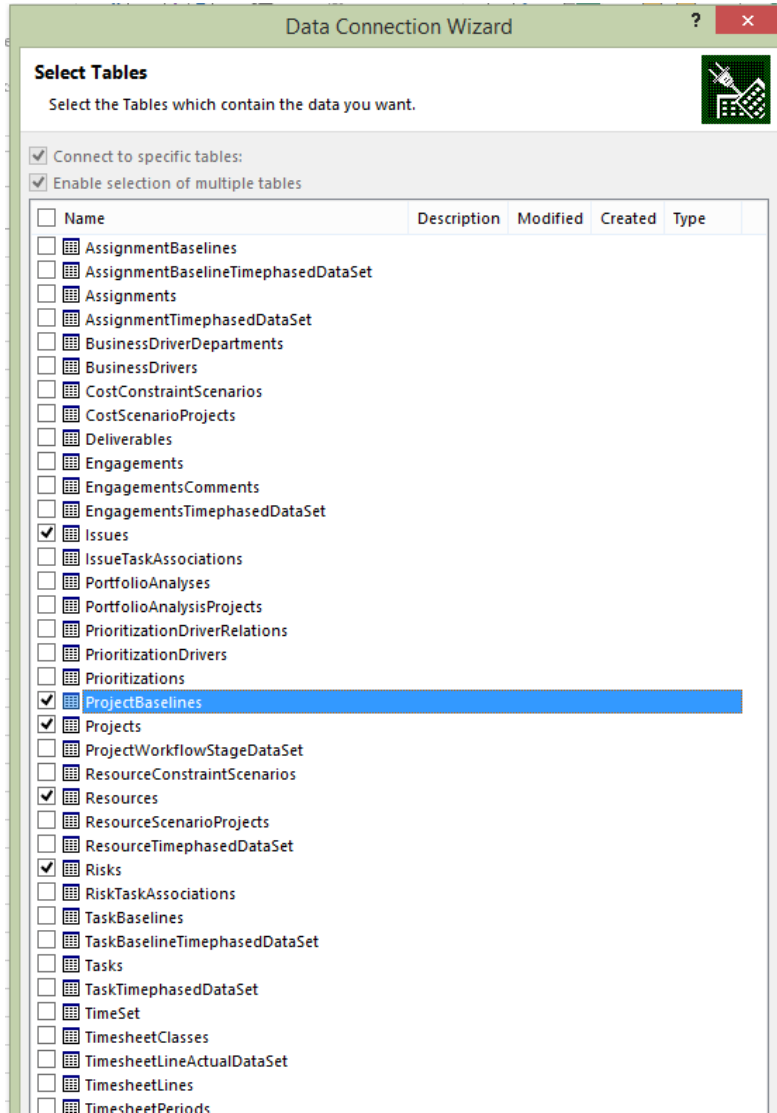
With Power BI Desktop you can…

1. **Connect to Data** (typically multiple data sources)
2. **Shape and Combine Data** (queries and data models)
3. **Build Report(s)**
4. **Share Your Work**

Connecting Power BI Desktop

https://<myO365domain>.onmicrosoft.com/sites/pwa/_api/projectdata





Creating a Power BI Report and Dashboard

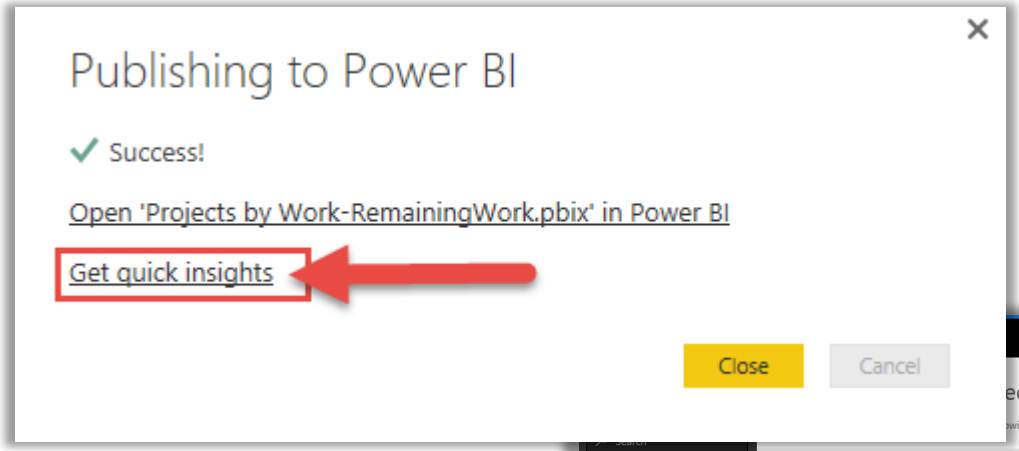
- **Demo**
  - **Creating a new Power BI Report / Dashboard**
  - **Power BI Desktop**
  - **Leverage the Content Pack**
  - **Adding Tiles through Q&A**

Power BI Desktop Benefits

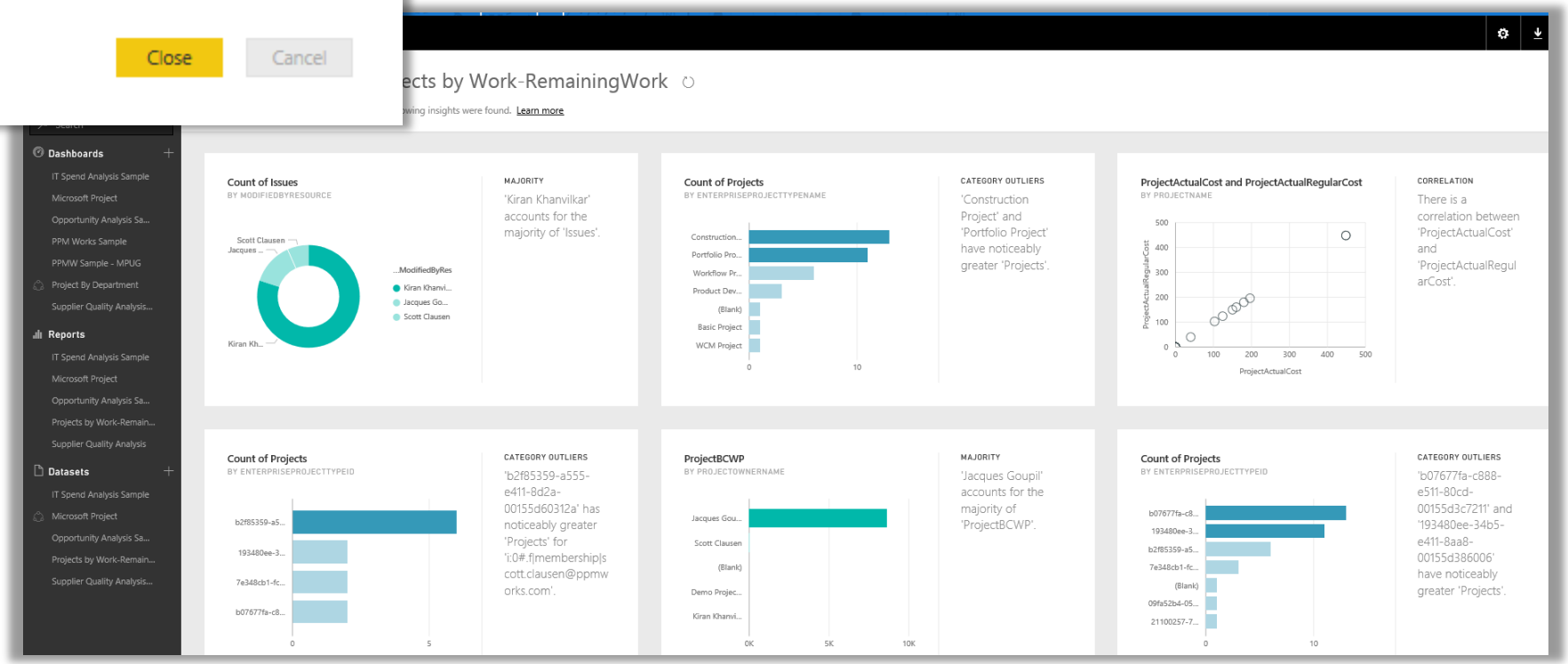
- **Simplify getting your data ready to consume**
- **Combine more than 1 Dataset into a Report**
- **Import Report into Power BI**
- **Get Quick Insights**

Download here: https://powerbi.microsoft.com/en-us/desktop/

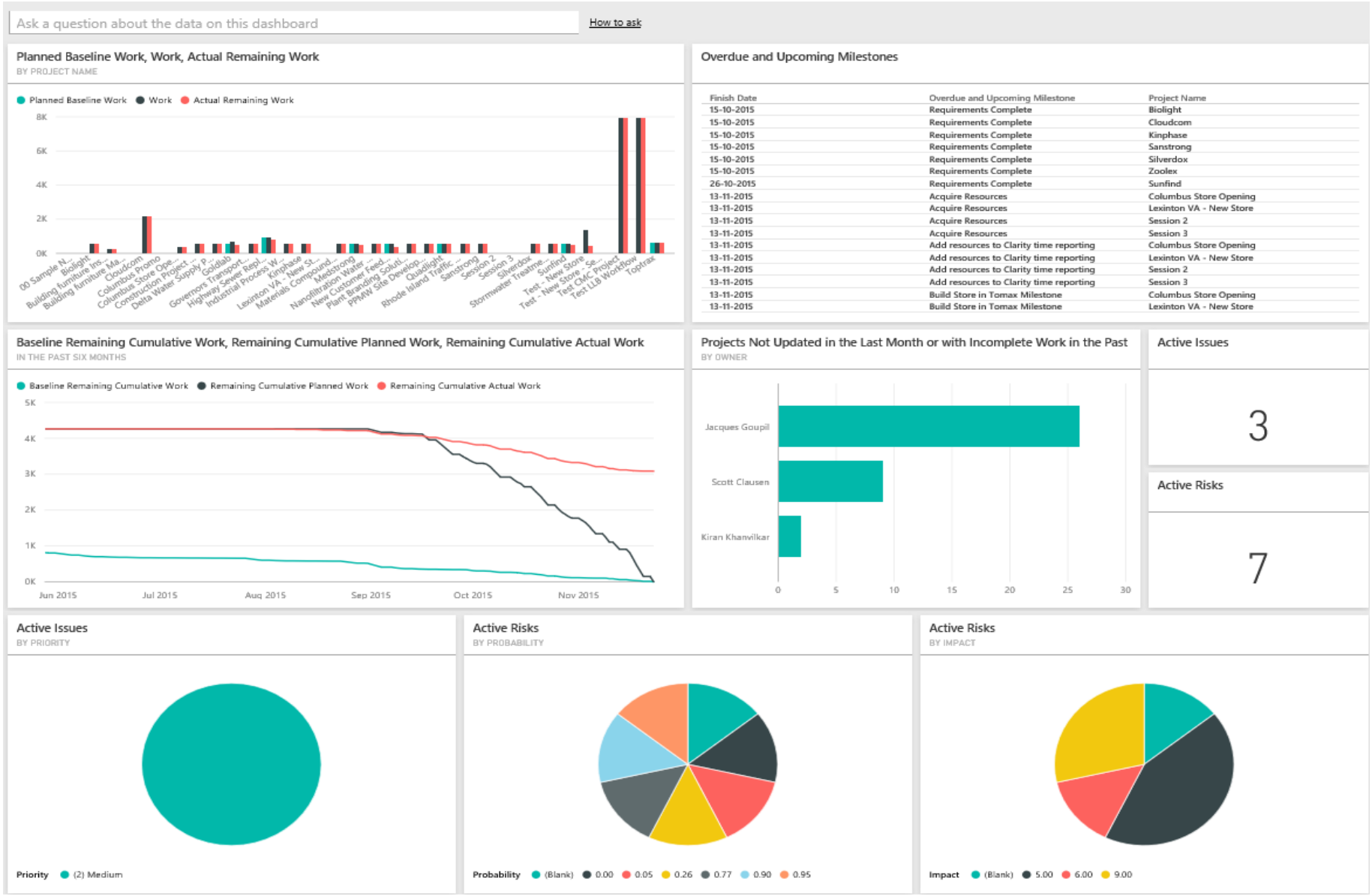
Publishing to Power BI



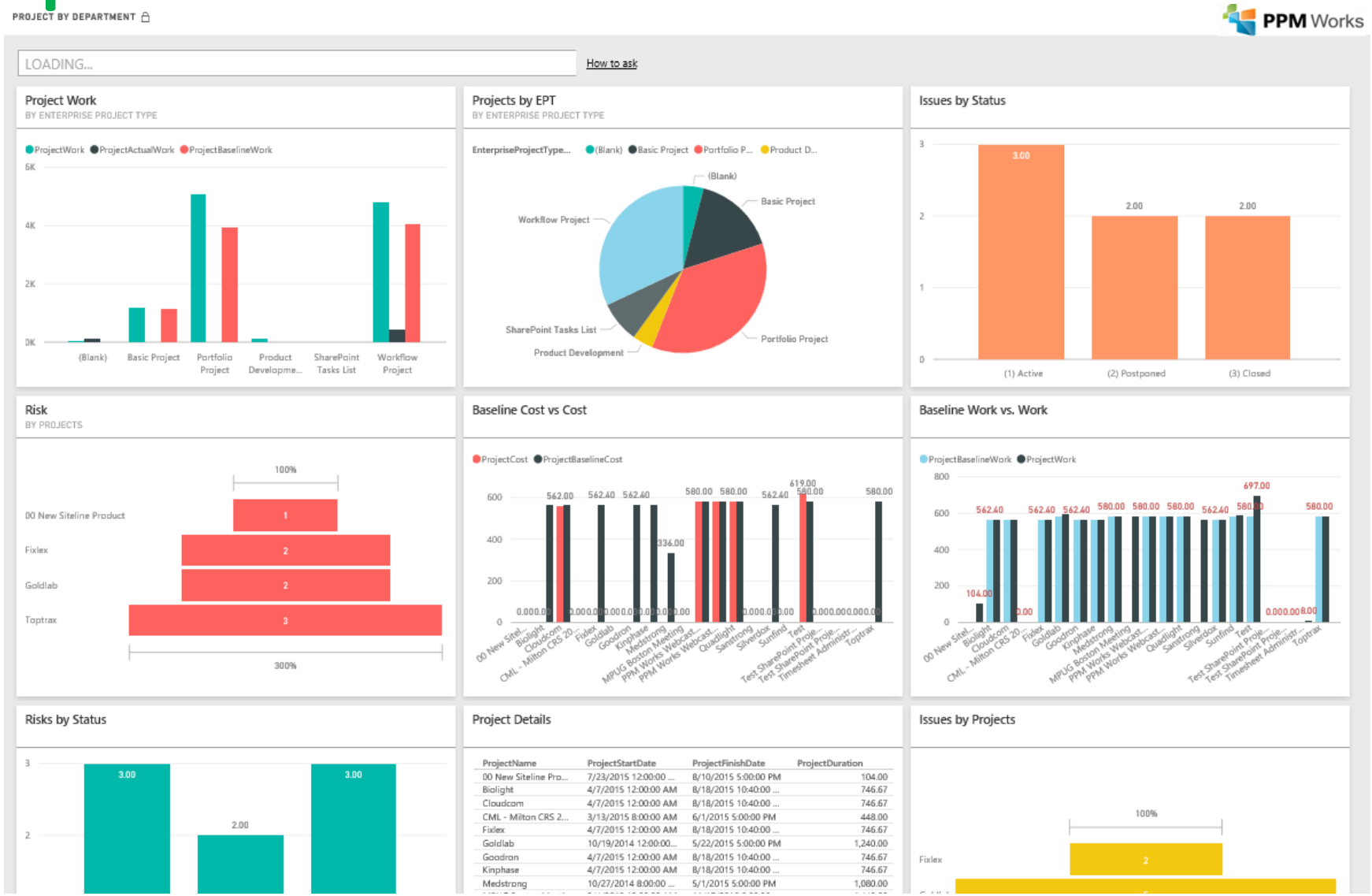
Get quick insights is a great 1st start for tiles/reports



Power BI Content Pack

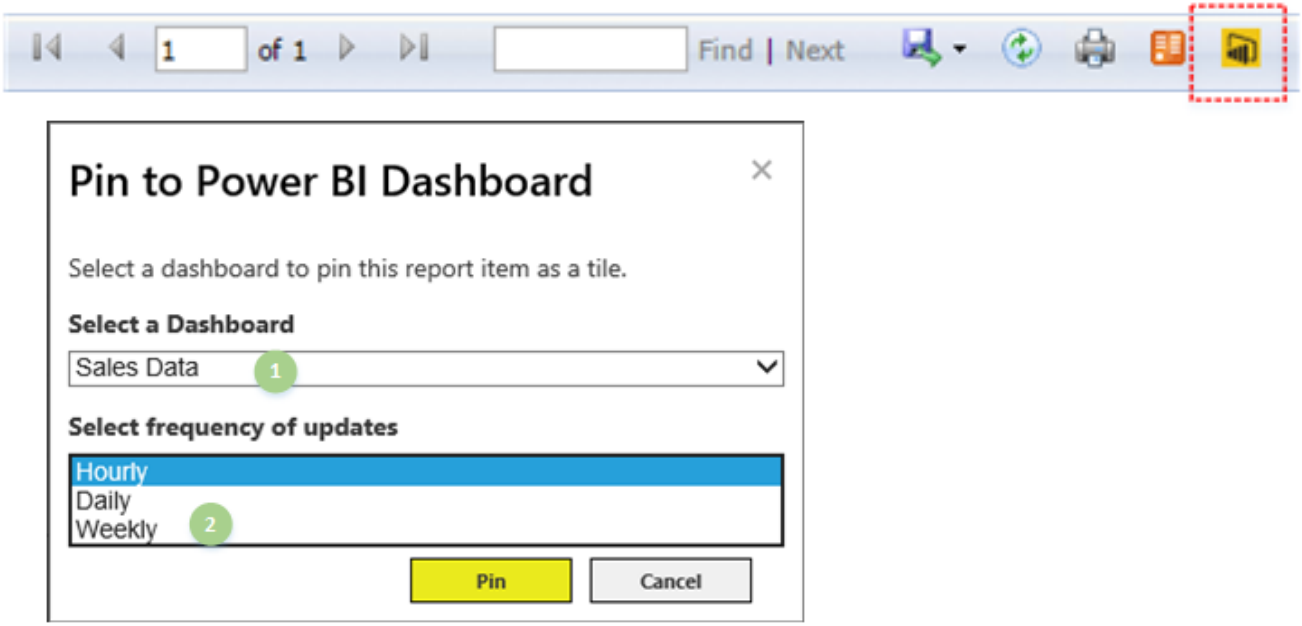


Sample Dashboards

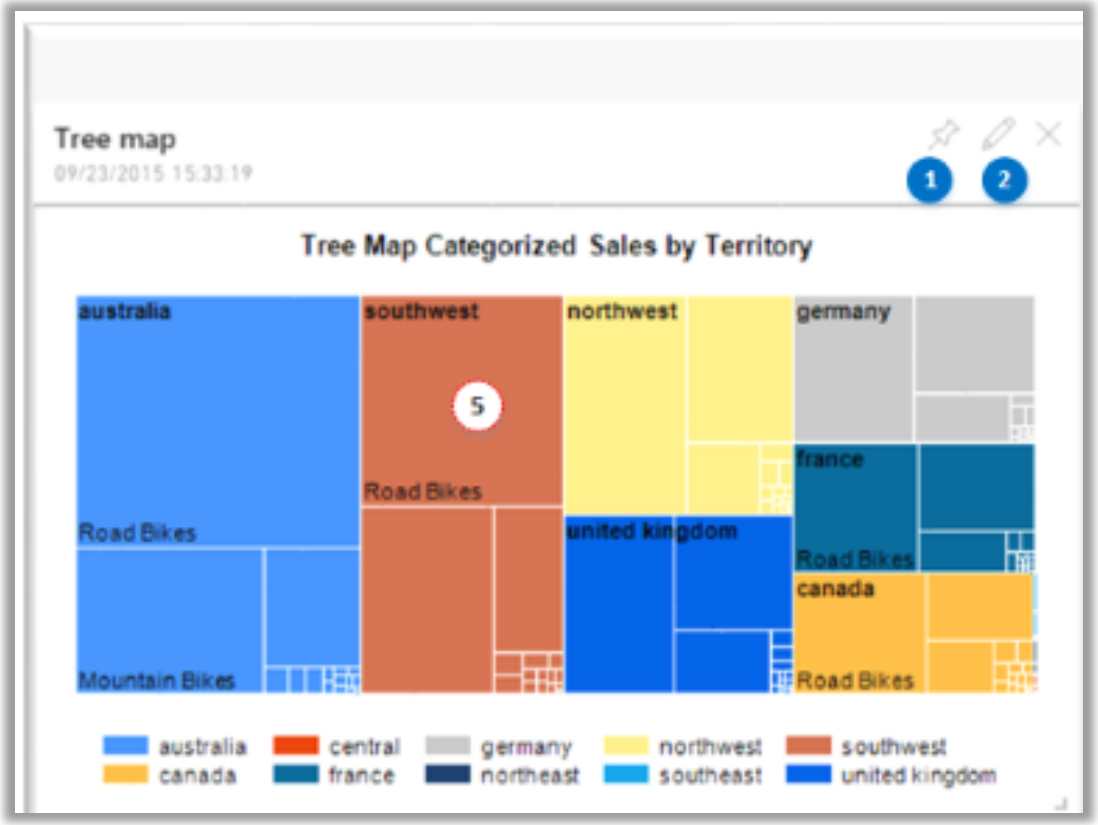


Did you know you can add SSRS to a Power BI Dashboard?

- **SQL Server 2016 Reporting Services** **after Admin integrates Report Server with Azure AD and Power BI**



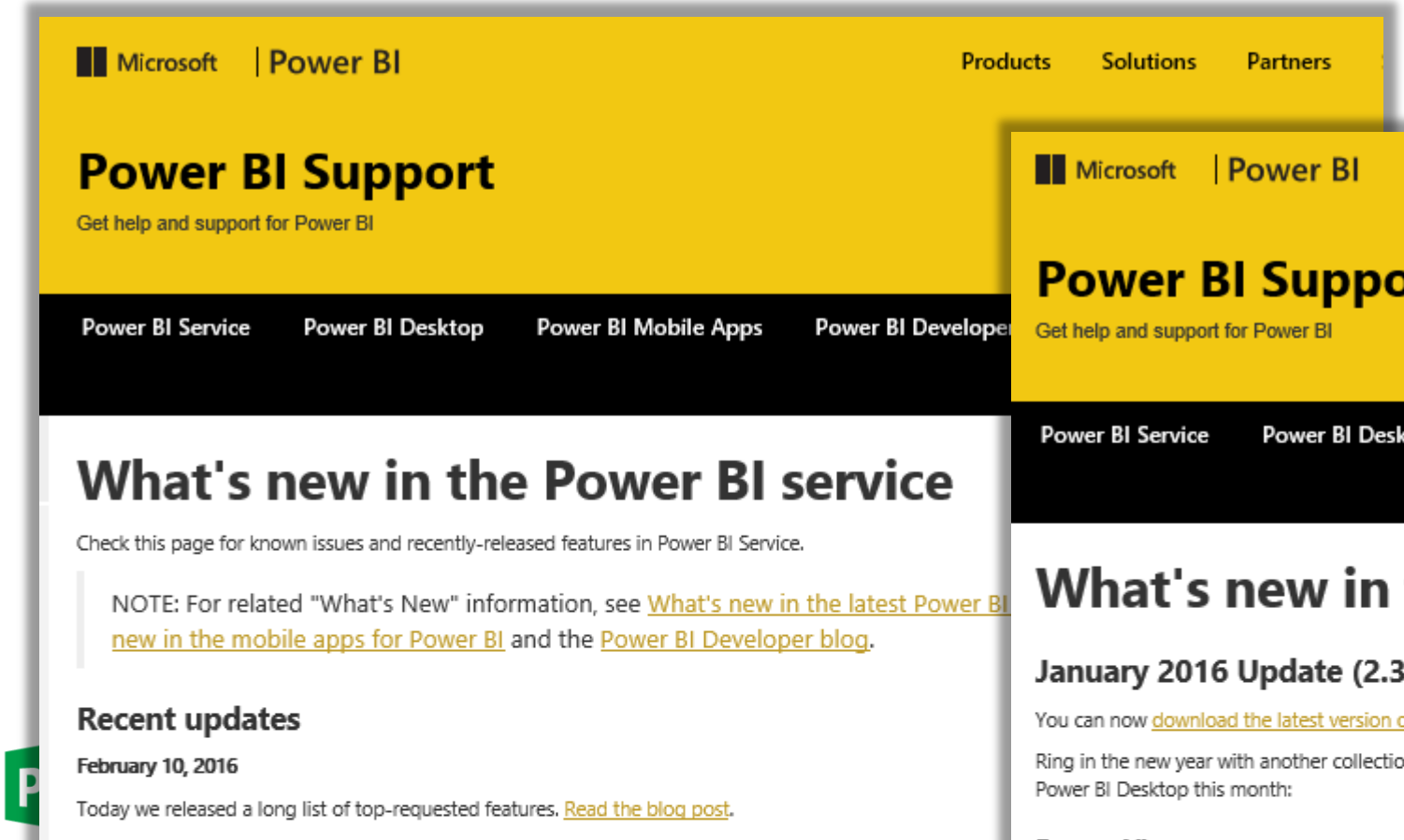
https://msdn.microsoft.com/en-us/library/mt604784.aspx

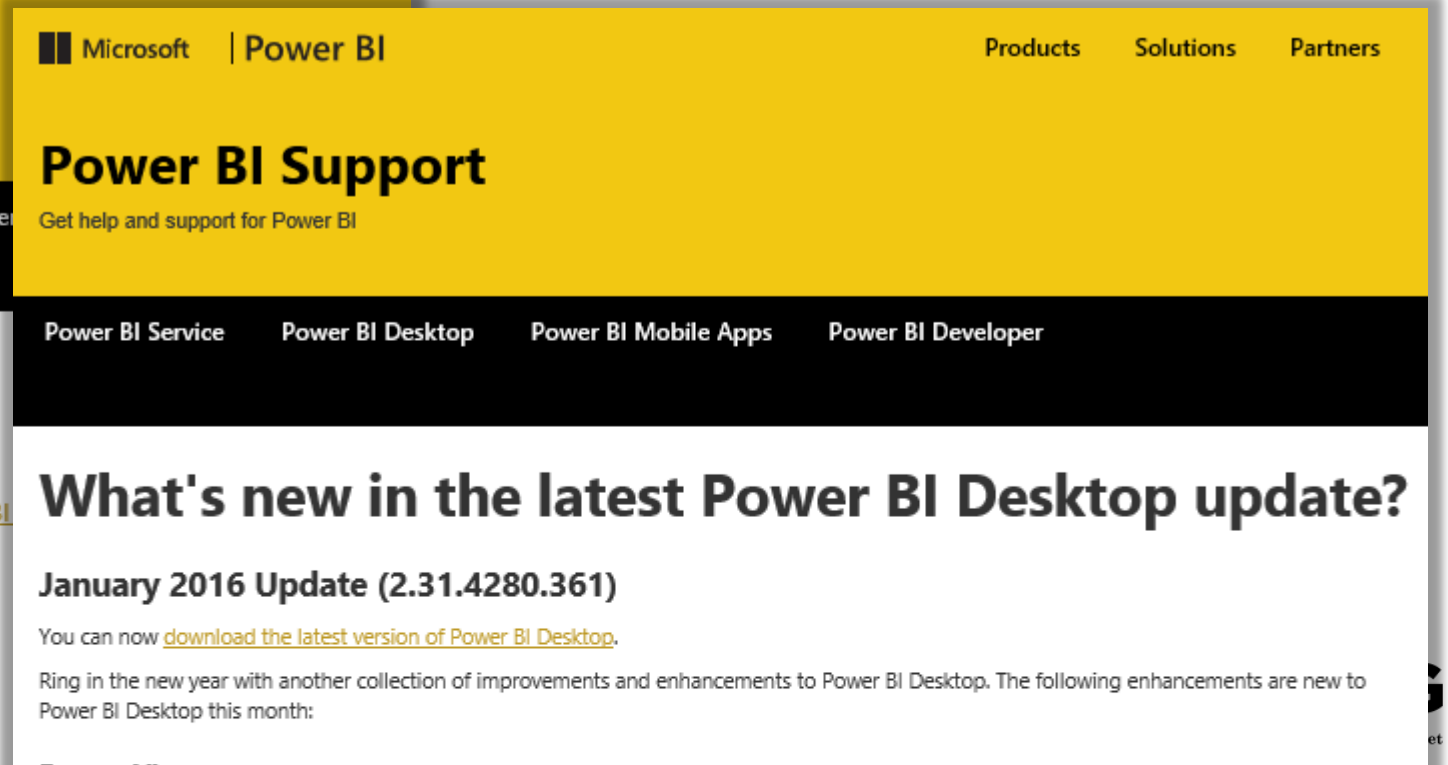


What's new in the Power BI service

- **Releases every couple weeks and monthly for Power BI Desktop**

https://powerbi.microsoft.com/en-us/documentation/powerbi-service-whats-new/

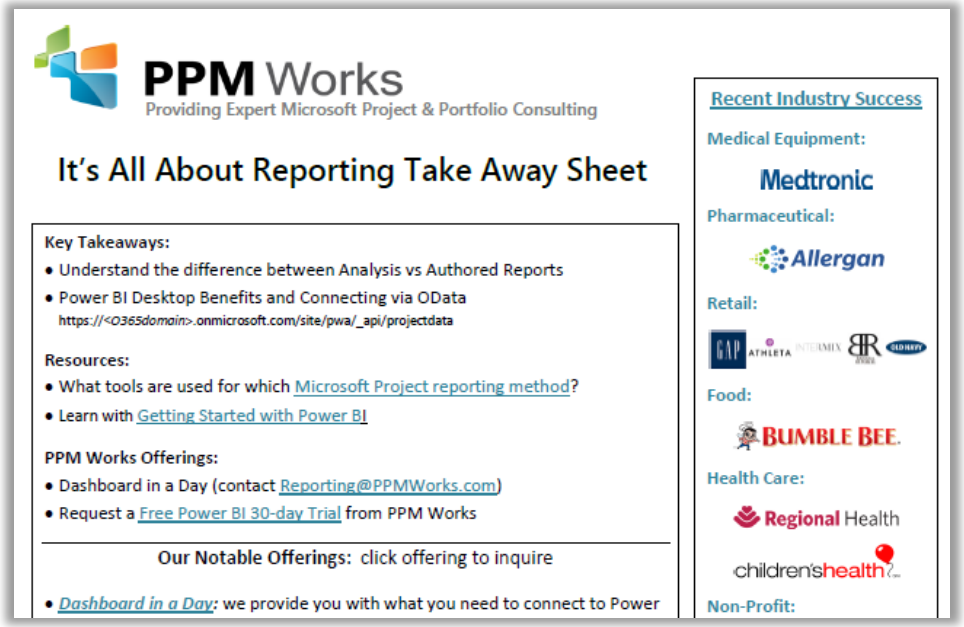




It's All About Reporting Take Away Guide

Dashboard in a Day and Free Power BI Trial

- **Dashboard in a Day** Contact Reporting@ppmworks.com
- **Free Power BI Trial** http://ppmworks.com/free-power-bi-office-365-trial



PPM Works
Providing Expert Microsoft Project & Portfolio Consulting

It's All About Reporting Take Away Sheet

Key Takeaways:
- Understand the difference between Analysis vs Authored Reports
- Power BI Desktop Benefits and Connecting via OData
  https://<O365domain>.onmicrosoft.com/site/pwa/_api/projectdata

Resources:
- What tools are used for which Microsoft Project reporting method?
- Learn with Getting Started with Power BI

PPM Works Offerings:
- Dashboard in a Day (contact Reporting@PPMWorks.com)
- Request a Free Power BI 30-day Trial from PPM Works

Our Notable Offerings: click offering to inquire

- *Dashboard in a Day*: we provide you with what you need to connect to Power

Recent Industry Success

Medical Equipment:
Medtronic

Pharmaceutical:
Allergan

Retail:
GAP ATHLETA INTERMIX BR OLD NAVY

Food:
BUMBLE BEE

Health Care:
Regional Health
children's health

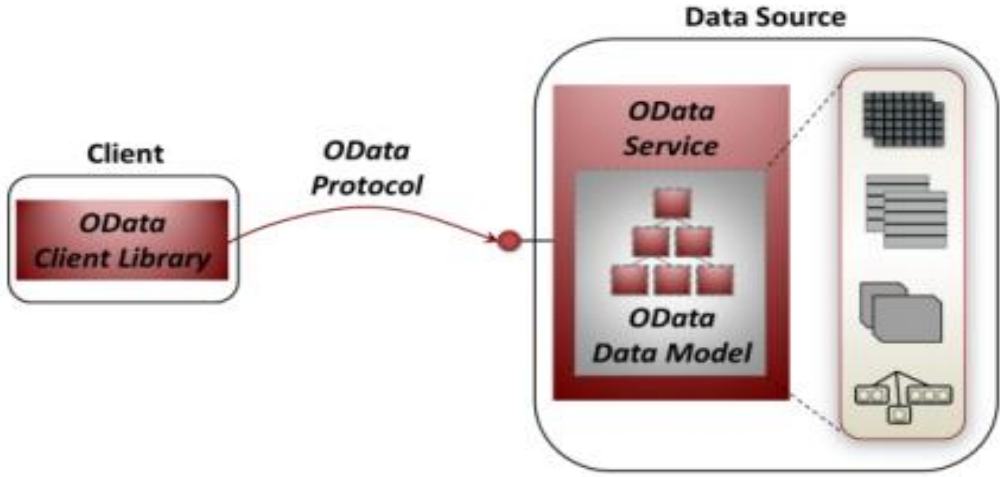
Non-Profit:

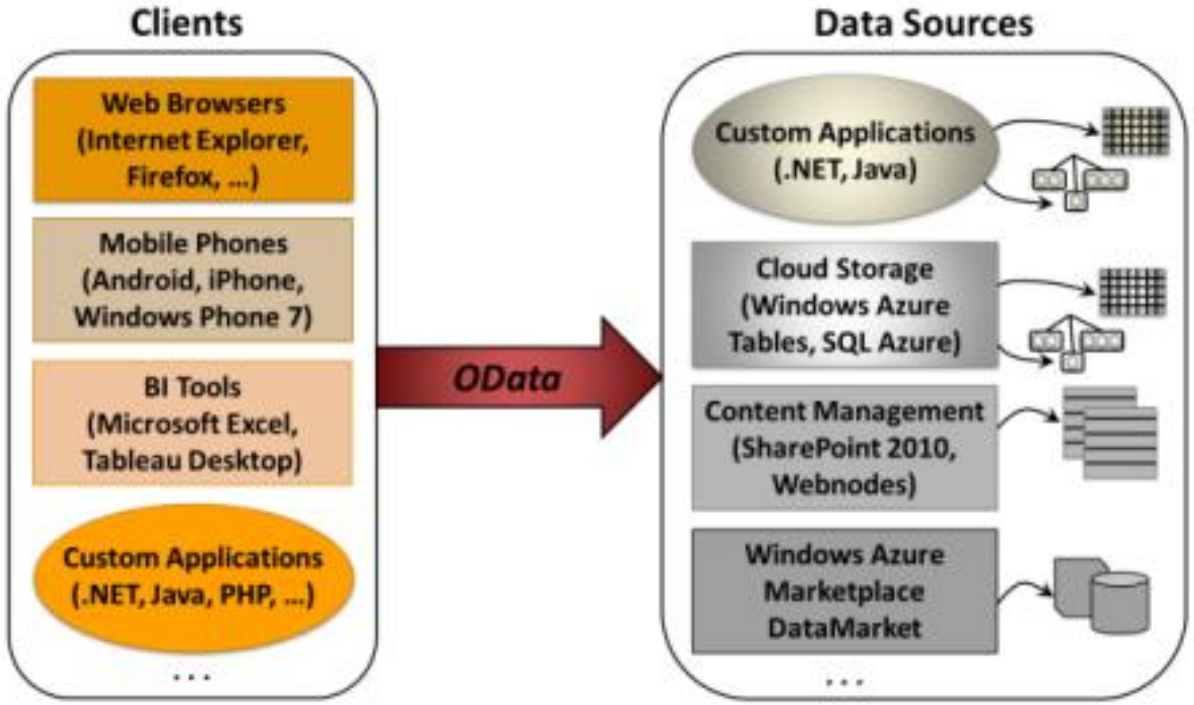
Power Reporting with Excel

Power Query, Power Pivot, and Power View

- Power Query and Power Pivot complement each other.
- Power Query is the recommended experience for discovering, connecting to, and importing data via Excel
- Power Pivot is great for modeling
- Explore and visualize with Power Map, Power View, PivotTables, and PivotCharts
- Interact with workbook in SharePoint or Power BI sites

Connect Project Online to Excel via OData





Microsoft

Project Online OData Feeds

AssignmentBaselines

AssignmentBaselineTimephasedDataSet

Assignments

AssignmentTimephasedDataSet

BusinessDriverDepartments

BusinessDrivers

CostConstraintScenarios

CostScenarioProjects

Deliverables

Issues

IssueTaskAssociations

PortfolioAnalyses

PortfolioAnalysisProjects

PrioritizationDriverRelations

PrioritizationDrivers

Prioritizations

ProjectBaselines

Projects

ProjectWorkflowStageDataSet

ResourceConstraintScenarios

Resources

ResourceScenarioProjects

ResourceTimephasedDataSet

Risks

RiskTaskAssociations

TaskBaselines

TaskBaselineTimephasedDataSet

Tasks

TaskTimephasedDataSet

TimeSet

TimesheetClasses

TimesheetLineActualDataSet

TimesheetLines

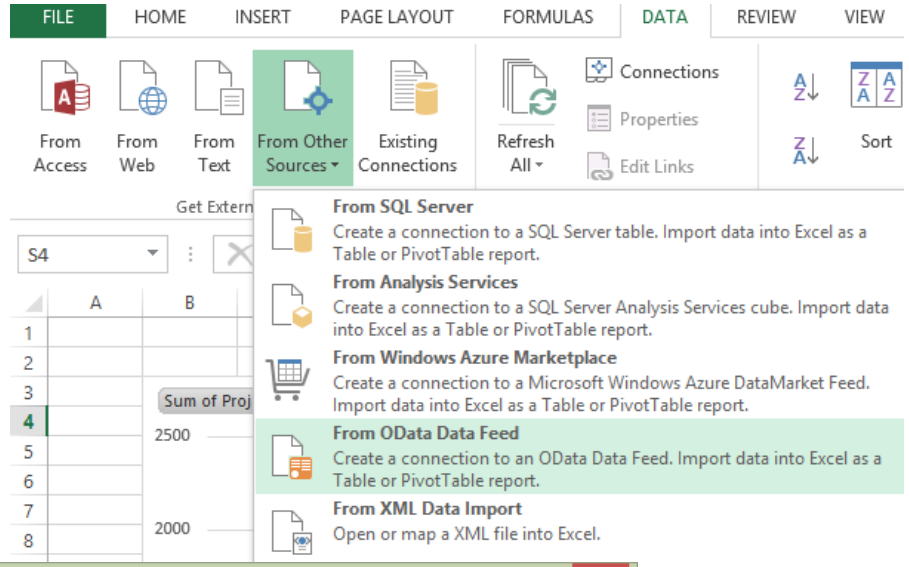
TimesheetPeriods

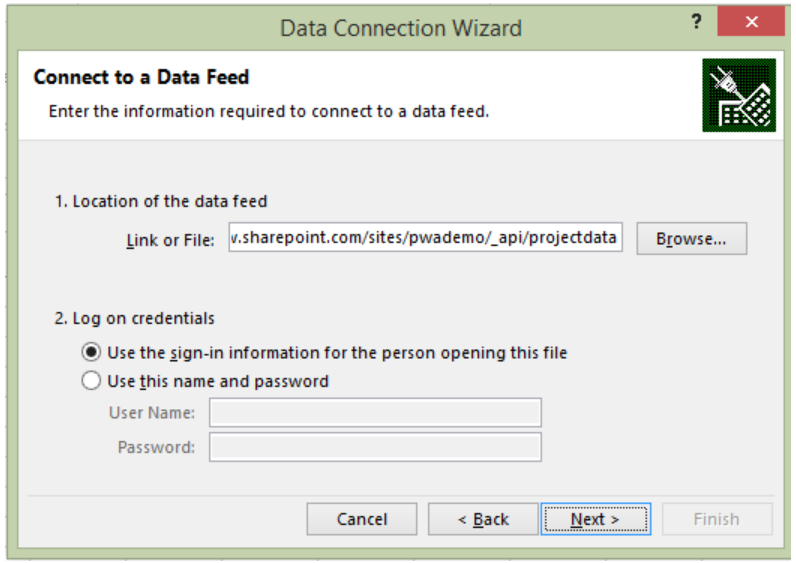
Timesheets

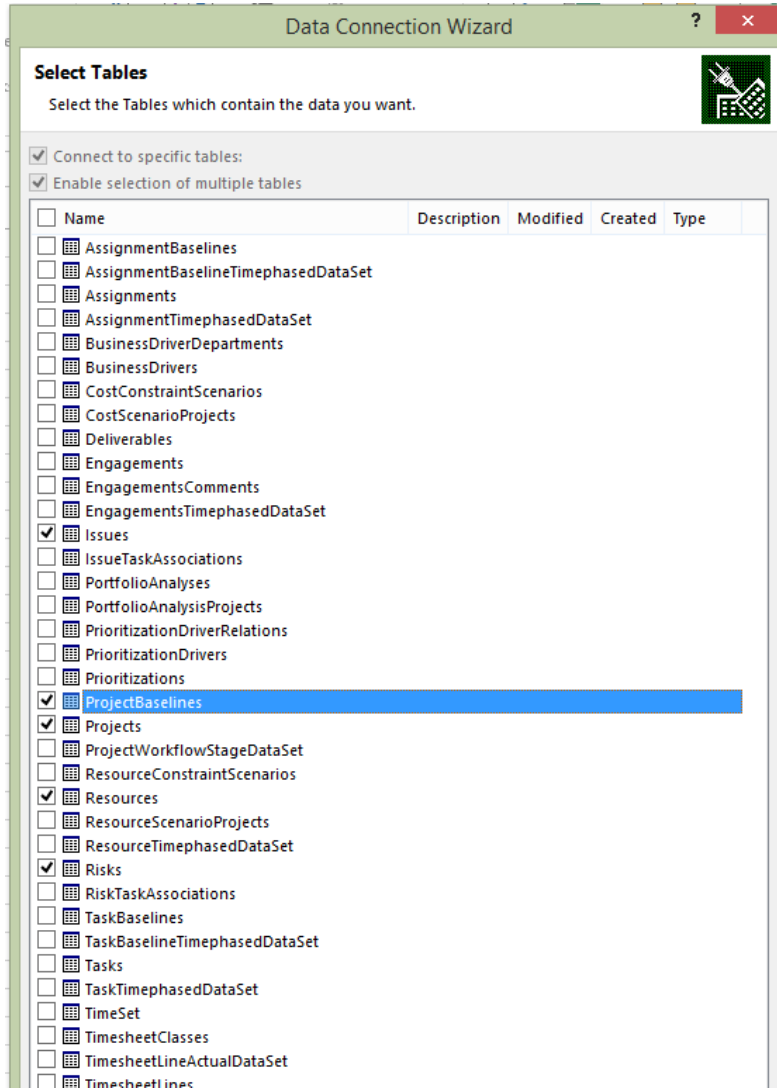
Engagements*

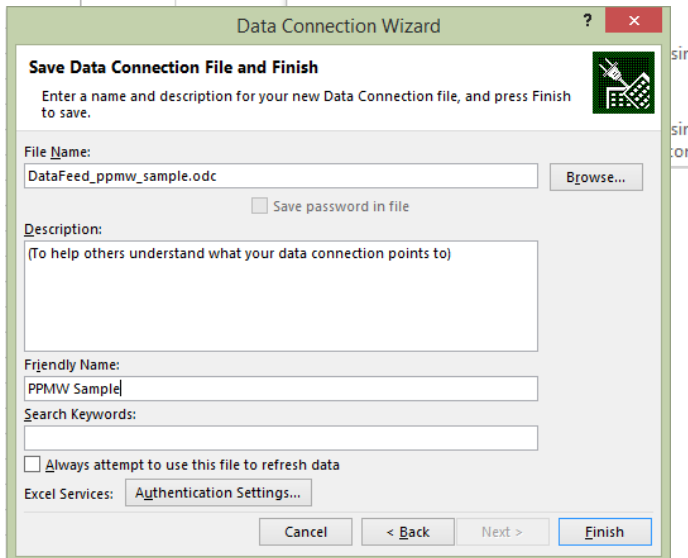
Connecting via Excel

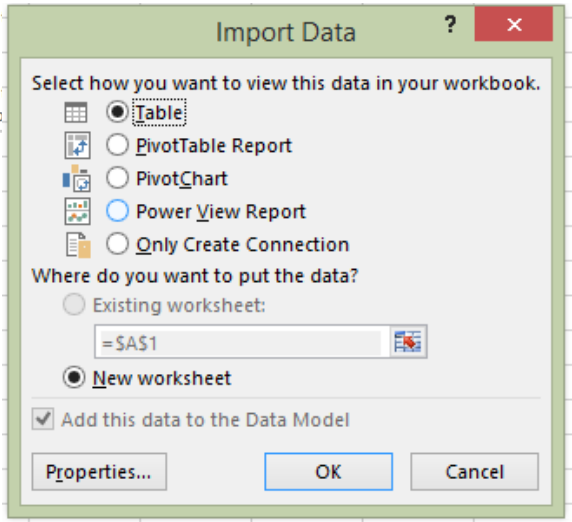
https://<myO365domain>.onmicrosoft.com/sites/pwa/_api/projectdata











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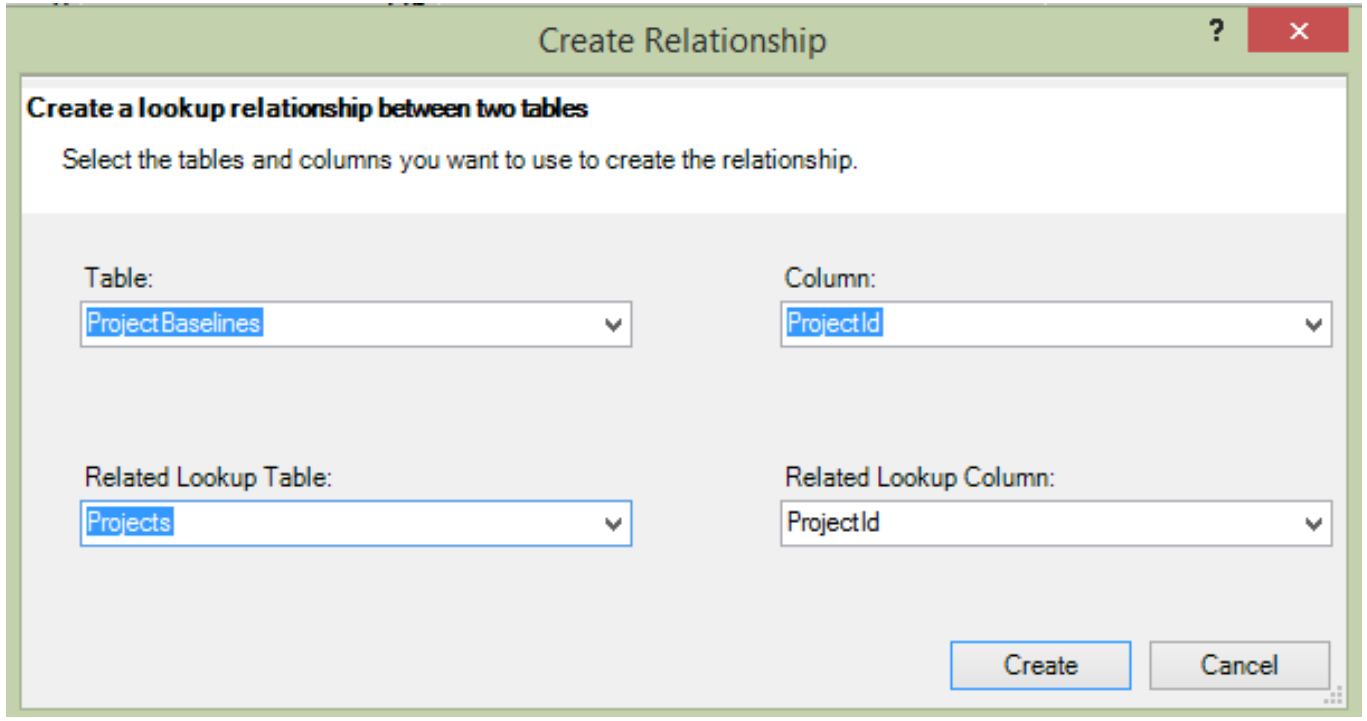
ce 2016 LIVE & ON DEMAND

Creating Relationships in Power Pivot

Manually performed via ‘Create Relationship’ button

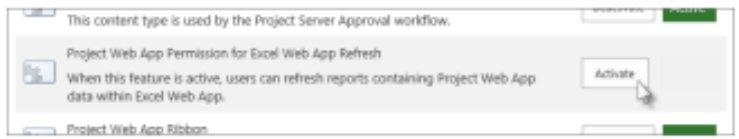


Grant reporting access in Project Online

MORE ARTICLES ABOUT: Project Online

Before you can use Project Online reports in Excel Online, the tenant administrator needs to activate this feature for the Project Online site collection.

1. Sign in to Office 365 with your admin account.
2. At the top of the page, select **Projects**. Or, select the app launcher, and then select **Projects**.
3. Select **Settings** > **Site Settings**.
4. Under **Site Collection Administration**, select **Site collection features**.
5. Scroll down in the list to **Project Web App Permission for Excel Web App Refresh**, and then select **Activate**.



TIP If you have more than one Project Online site collection, make a note about which one has **Project Web App Permission for Excel Online Refresh** activated. When you activate it on one site collection, it is activated for all site collections in your Office 365 tenant. However, if you ever want to deactivate it, you can only turn it off from the site collection where you activated it initially.

You should now be able to refresh your Project Online reports in Excel Online.

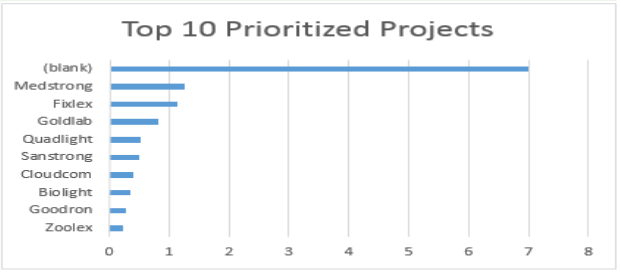
IMPORTANT Before using the default Project Online reports (**Project Overview**, **Resource Overview**, and **Project Overview Dashboard**), you may need to open each report in Excel 2013, refresh the data, and then save the report back to Project Online. This will update the report so that it is supported by Excel Online.

Sample Excel Reports

Project Summary

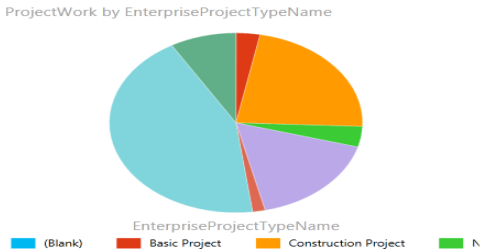
EnterpriseProjectTypeN...
- (blank)
- Basic Project
- Construction Project
- New Store
- Portfolio Project
- Product Development
- WCM Project
- Workflow Project

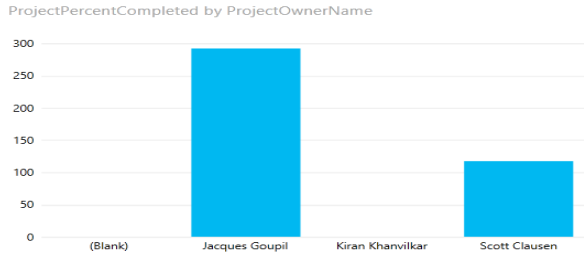
ProjectDepartments
- (blank)
- Finance
- Marketing
- Operations
- IT

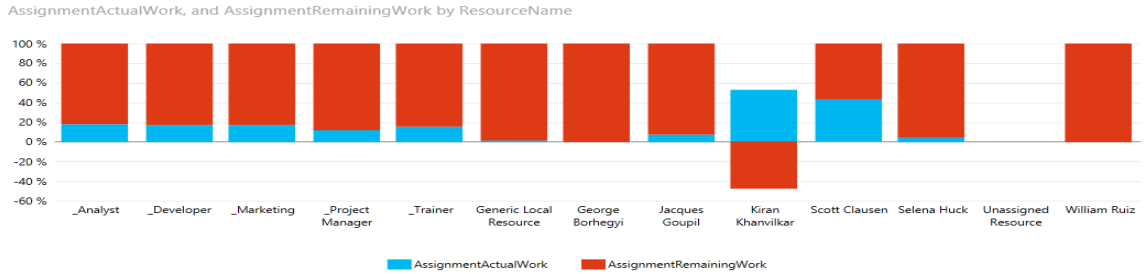


Projects	Priority	Work	Duration	% Completed	Health	On Track
Building furniture Installation		256	256	0		
Building furniture Manufacturing		0	168	0		
Construction Project Test		580	2840	0		
Delta Water Supply Plant		580	2928	0		
Governors Transportation Panel Report		580	2928	0		
Highway Sewer Replacement		904	2872	10		
Industrial Process Wastewater Treatment System		580	2928	0		
Materials Compounding Plant Renovation		580	2928	0		
Medstrong	127.16%	580	1080	7		
Nanofiltration Water Treatment Plant Addition		580	2928	0		
Plant Branding Solution		580	2928	0		
Rhode Island Traffic Study		580	2928	0		
Stormwater Treatment System		580	2928	0		
Waste Water Refinement Plant		1248	1480	27		

Project Work Analysis







contoso

TOTAL COST $ 22,175,212

TOTAL BENEFIT $ 56,167,239

2014 2015

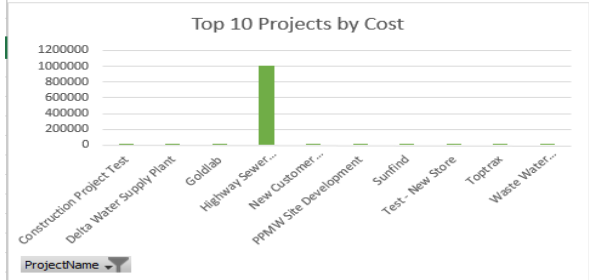
ProjectHealth
- Green
- Red
- Yellow

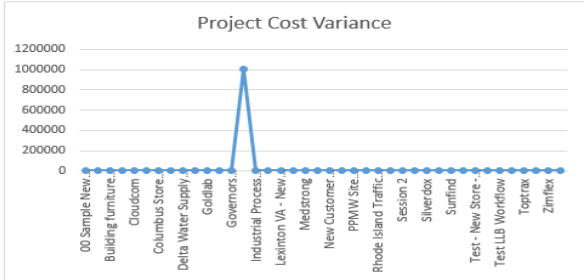
ProjectDepartments
- Finance
- IT
- Legal
- Operations
- Sales & Marketing

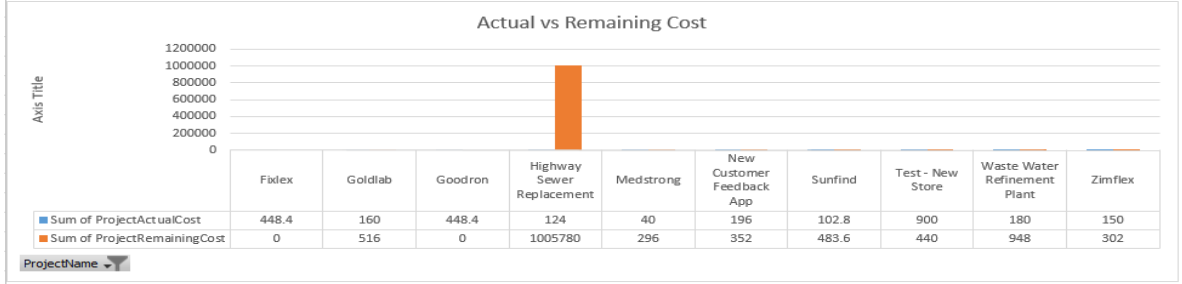
ProjectOwnerName
- Alex Darrow
- Glen John
- Jan Kotas
- Jim Kim
- MOD Administrator
- Robin Counts
- Sara Davis

ProjectName	ProjectOwnerNa	Health	Total Cost	Total Benefits
Finance				
Apparel ERP Upgrade	Sara Davis		$ 1,020,000	$ 3,170,000
Audit Tracking Solution	Alex Darrow		$ 1,020,000	$ 3,170,000
Currency Translator Upgrade	Sara Davis		$ 900,000	$ 1,500,000
Helmet with integrated sunvisor	Jan Kotas		$ 800,000	$ 1,330,000
Tax Checker	Alex Darrow		$ 850,000	$ 1,200,000
IT				
Content Filtering Design and Implementation	Sara Davis		$ 839,348	$ 3,265,005
Dynamics CRM Deployment EMEA	Glen John		$ 900,000	$ 1,800,000
E-commerce Portal Development	Glen John		$ 950,000	$ 2,900,000
General Ledger (GL) currency update	Robin Counts		$ 664,118	$ 2,220,997
Hub Upgrade	Glen John		$ 705,000	$ 2,291,000
Internal Software Database Audit	Sara Davis		$ 700,000	$ 3,230,000
Software Benchmarking Architecture Upgrade	Robin Counts		$ 650,000	$ 950,000
Software Development Plan	Jim Kim		$ 900,000	$ 1,210,000
Legal				
Acquisition Target Analysis	Jim Kim		$ 860,000	$ 1,800,000
Merger and Acquisition Deal Room	Sara Davis		$ 630,000	$ 1,920,000

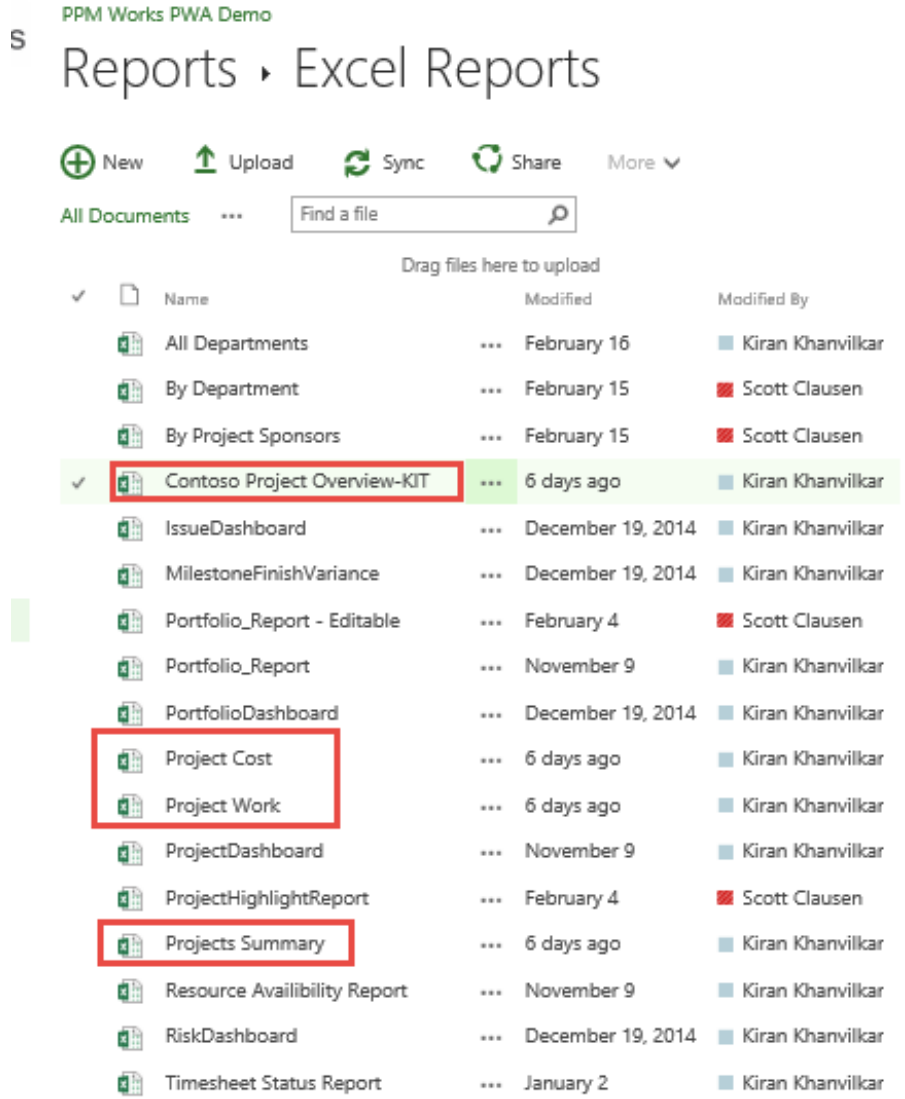
Cost Analysis







Excel Reports



Creating a Power Pivot Report

- **Demo** (if time permits)
  - **Creating a Power Pivot Report**
  - **Accessing it from PWA**
  - **Leverage established datasets**

Tips and Notes

When connecting to an Odata feed syntax:

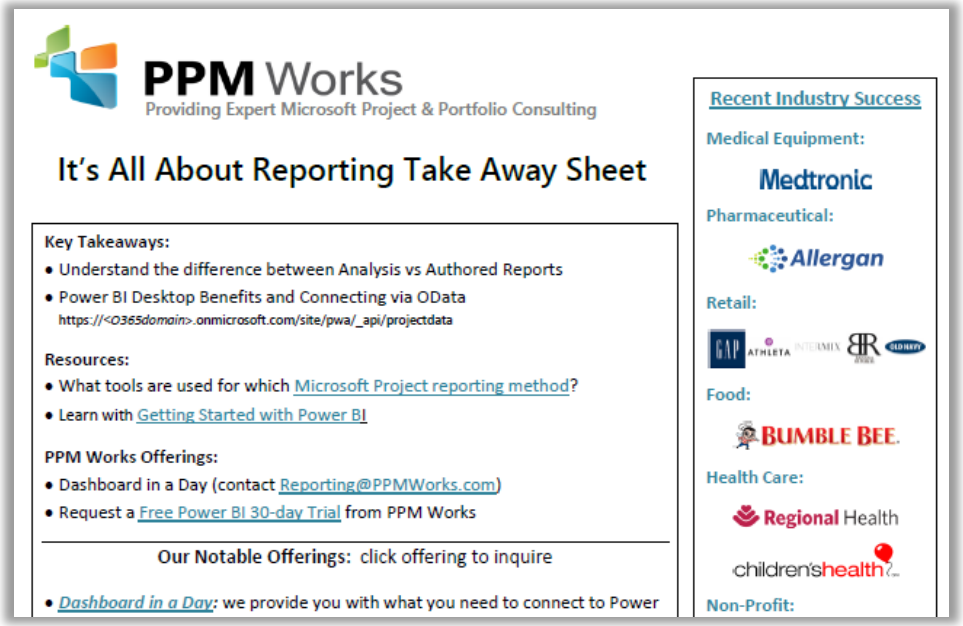
https://<myO365domain>.onmicrosoft.com/site/pwa/_api/projectdata

- Reduce data-sets and transform in the Query to improve performance
- If prompted use the Anonymous or OAuth2 authentication method (PoL)
- For On-Prem or Azure deployments use Windows authentication
- Avoid authoring in the browser – no download to .pbix available (for now)

It's All About Reporting Take Away Guide

Dashboard in a Day and Free Power BI Trial

- **Dashboard in a Day** Contact Reporting@ppmworks.com
- **Free Power BI Trial** http://ppmworks.com/free-power-bi-office-365-trial



PPM Works
Providing Expert Microsoft Project & Portfolio Consulting

It's All About Reporting Take Away Sheet

Key Takeaways:
- Understand the difference between Analysis vs Authored Reports
- Power BI Desktop Benefits and Connecting via OData
  https://<O365domain>.onmicrosoft.com/site/pwa/_api/projectdata

Resources:
- What tools are used for which Microsoft Project reporting method?
- Learn with Getting Started with Power BI

PPM Works Offerings:
- Dashboard in a Day (contact Reporting@PPMWorks.com)
- Request a Free Power BI 30-day Trial from PPM Works

Our Notable Offerings: click offering to inquire

- *Dashboard in a Day*: we provide you with what you need to connect to Power

Recent Industry Success

Medical Equipment:
Medtronic

Pharmaceutical:
Allergan

Retail:
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Food:
BUMBLE BEE

Health Care:
Regional Health
children's health

Non-Profit:

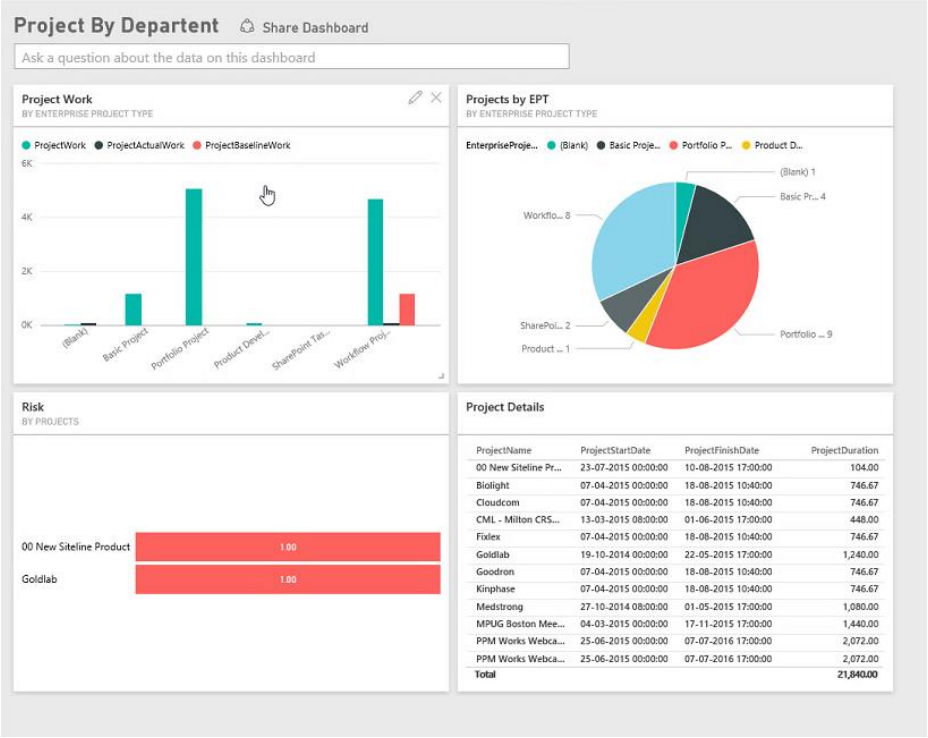
Report Pack Offering

Need Reports? Try our Report Pack.

Contact us at Reporting@ppmworks.com for more information.

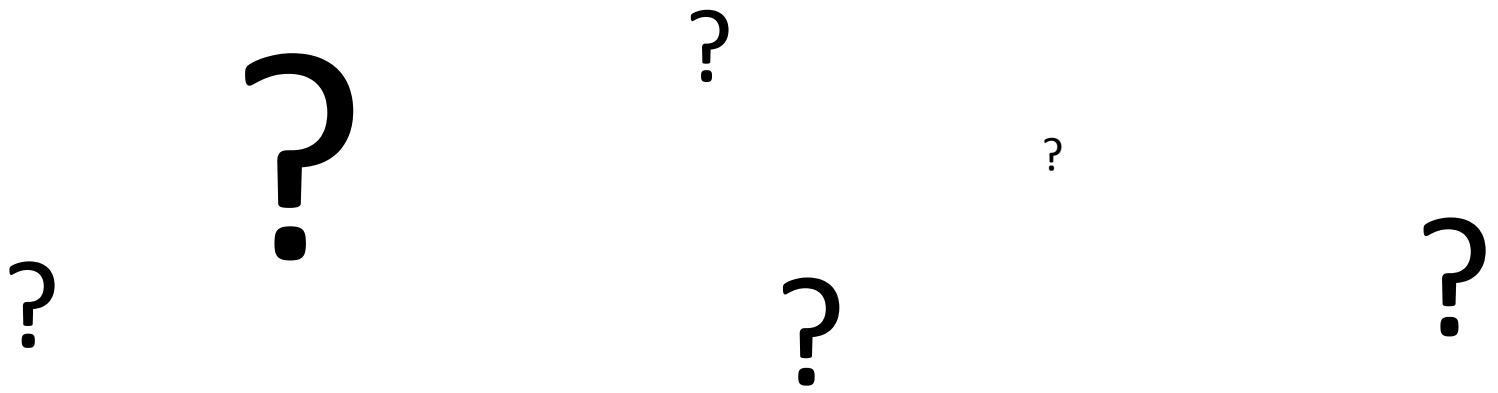
Reporting Tools:

- SSRS
- Power BI
- Custom Development
- Excel Services



Question and Answer Session

If your question does not get answered in the allotted time, please send to reporting@ppmworks.com or post to the MPUG blog



Why clients choose PPM Works

Our Strength is our Experience: Upgrades, Integrations, and Reporting

Our Passion for Success: we are honest and dedicated and your project comes 1st

Our Core Values: treat you as family and we are not satisfied until you are

- 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

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Call to Action

PPM Works

LinkedIn: *https://www.**linkedin**.com/company/**ppm-works-inc**-* and www.linkedin.com/in/jacquesgoupil/

Our Site: www.ppmworks.com

Blog: http://blogs.ppmworks.com

Calls to Action

1. Start incorporating these techniques today
2. Complete survey
3. Get your Reporting Take Away
4. Check out our Blogs / webcasts
5. Get LinkedIn with us (PPM Works)
6. Ask questions and **use the tool!**

Project