



Microsoft Partner
Gold Project and Portfolio Management
Silver Collaboration and Content
Silver Business Intelligence

Create Your Own Portfolio Dashboard

Presented by: Jacques Goupil

11/28/2017

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PPM Works

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- Microsoft Community Leader Award 2012-2017
- PDD Instructor and Speaker at PMI® MN 2010-2017 Conference, Project Summit 2013 - 2017, and Microsoft Project Conference 2012, 2014, 2016
- Board Member of the Boston YMCA, and Boston & South Florida MPUG Chapters
- Lead SME and writer for the MCTS Exam 70-178, Managing Projects
- MPUG Project Certification Instructor
- Life-long trainer and consultant with strong background in project management, specializing in developing and improving PM processes for clients and training
- Volunteer with the YMCA, enjoy traveling with family, and training for races
- PMI® member since 2004

Agenda

Introduction and Overview of
Power BI

5 min

Downloading Power BI

10 min

Connecting Your Data

10 min

Creating Reports & Dashboards

25 min

Question and Answer

10 min

Upcoming Webinars

www.ppmworks.com/events

Creating Custom Dashboards in Project Professional 2016

Thursday, December 7th @ 12 - 1 PM EST

Learn how to create custom dashboards and reports in Project Pro 2016, while also learning how to prepare and optimize the project plan to maximize the report outputs. This webinar will focus on editing existing reports, creating new custom reports and dashboards and understanding how to interpret the data. You will also learn how to leverage the Organizer to share reports with all of your team members.

Create Custom Tables and Views in Project Professional

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Did you know there are eleven new filters in Project Professional 2013 and 2016? Join PPM Works experts as we show you how to create custom tables and views in Project Professional and utilize the new filters to quickly optimize Project views. You will learn how to leverage the Organizer to copy table and views to other projects or share them with others on your team.

Best Practices for SharePoint Project Site Template Development

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We will show you how to advance project collaboration within your organization by expanding upon the standard Project Online/OnPrem SharePoint Project Site Template. Learn all the Best Practices of using SharePoint in your company from the experts at PPM Works.

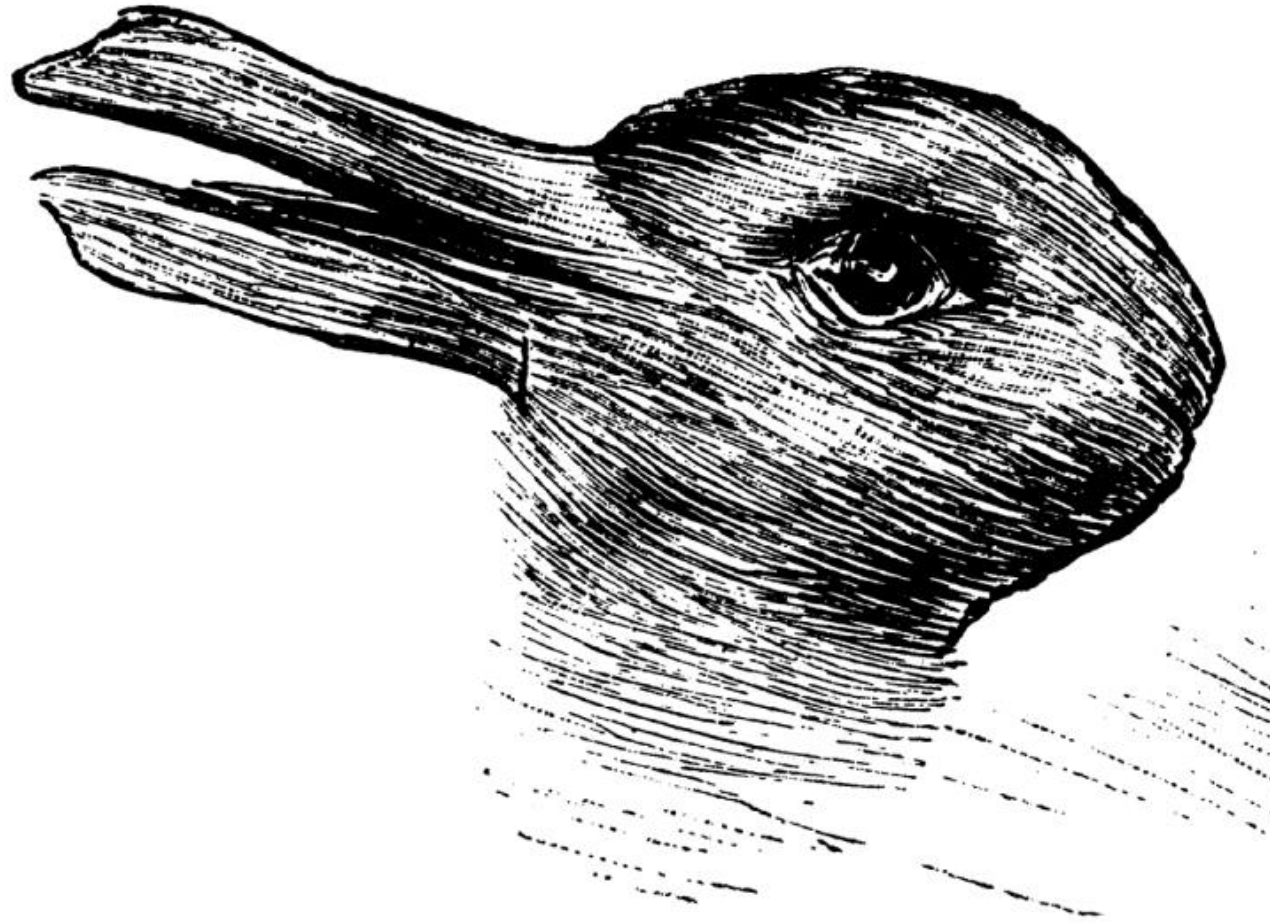
Learning Objectives: Goals of Today's Session

- 1. Set up a free Power BI trial**
- 2. Easily attach and connect directly to your data**
- 3. Visualize your project data and analyze it quickly**
- 4. Walk away with your action plan to start creating your dashboards ... today**

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

- Power BI (new or leverage the Content Pack)**
- Out of the Box Dashboard**

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

Duck



Rabbit

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

A man with curly brown hair, wearing a blue checkered button-down shirt over a grey t-shirt, is standing outdoors and looking down at a tablet computer he is holding with both hands. He is positioned in front of a stone wall and a glass door. In the background, there are trees, a white car, and a building with a blue door. The scene is brightly lit, suggesting daytime.

Power BI Overview

Power BI Desktop

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

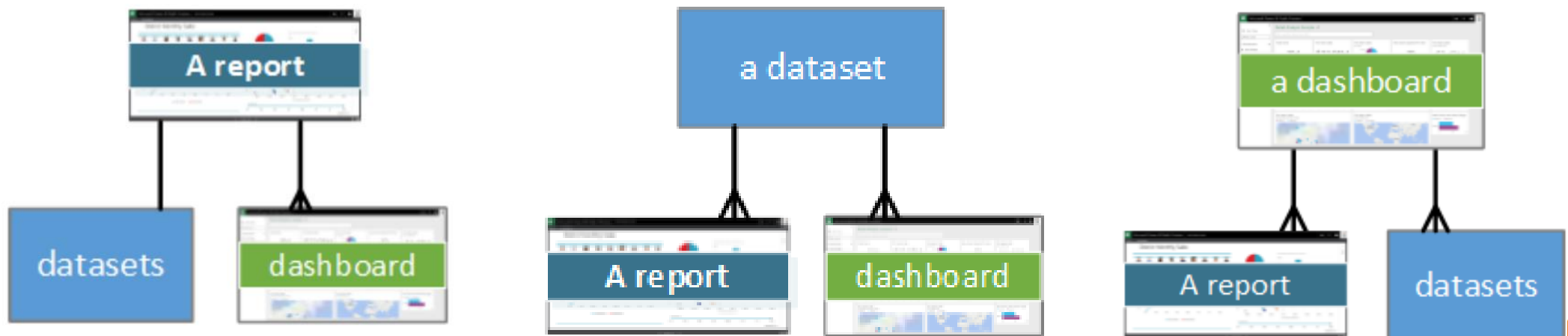
With Power BI Desktop you can...

- 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**

Building Blocks of Power BI

There are 5 basic building blocks of Power BI:

- **Visualizations** – visual representation of data such as a chart or graph
- **Datasets** - a collection of data that you import or connect to
- **Dashboards** – combination of reports on a single page that can be shared
- **Reports** – are one or more pages of visualizations that come from a single dataset
- **Tiles** – a single visualization found in a report or on a dashboard

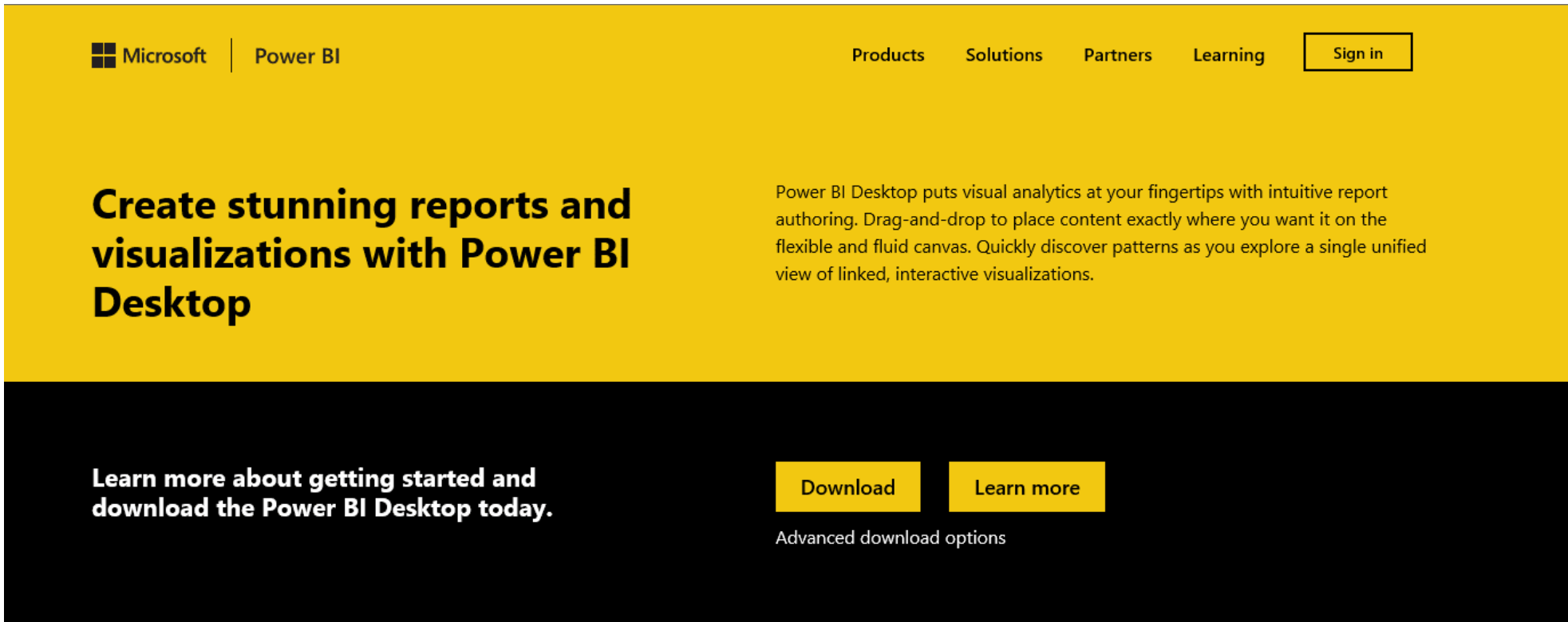




Download Power BI

Download Power BI Desktop

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



The screenshot shows the Microsoft Power BI Desktop download page. The header is yellow with the Microsoft logo, 'Power BI' text, and navigation links for 'Products', 'Solutions', 'Partners', 'Learning', and a 'Sign in' button. The main content area is yellow and features the headline 'Create stunning reports and visualizations with Power BI Desktop'. To the right of the headline is a paragraph describing the software's capabilities. The bottom section is black and contains a call to action to 'Learn more about getting started and download the Power BI Desktop today.', two yellow buttons labeled 'Download' and 'Learn more', and a link for 'Advanced download options'.

Microsoft | Power BI

Products Solutions Partners Learning Sign in

Create stunning reports and visualizations with Power BI Desktop

Power BI Desktop puts visual analytics at your fingertips with intuitive report authoring. Drag-and-drop to place content exactly where you want it on the flexible and fluid canvas. Quickly discover patterns as you explore a single unified view of linked, interactive visualizations.

Learn more about getting started and download the Power BI Desktop today.

Download Learn more

Advanced download options



Connecting to Project Online Data

Connecting to Project Online Data

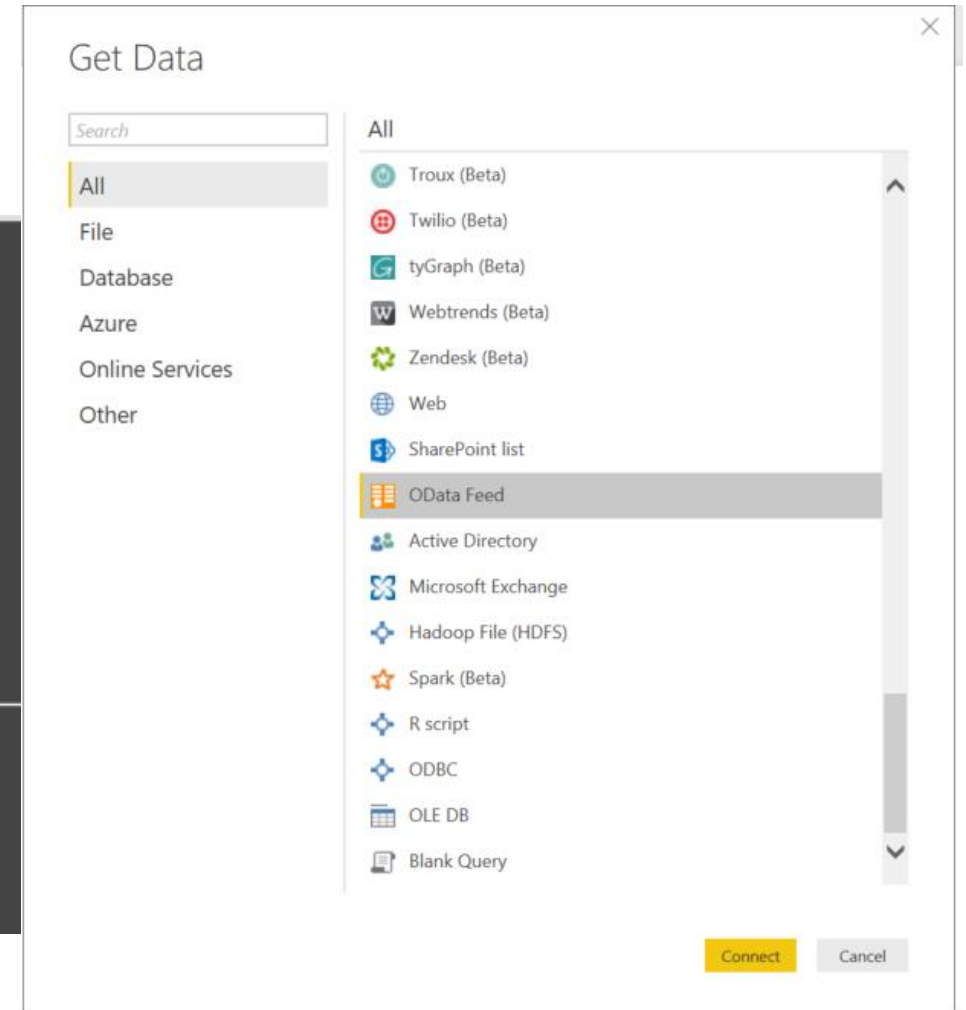
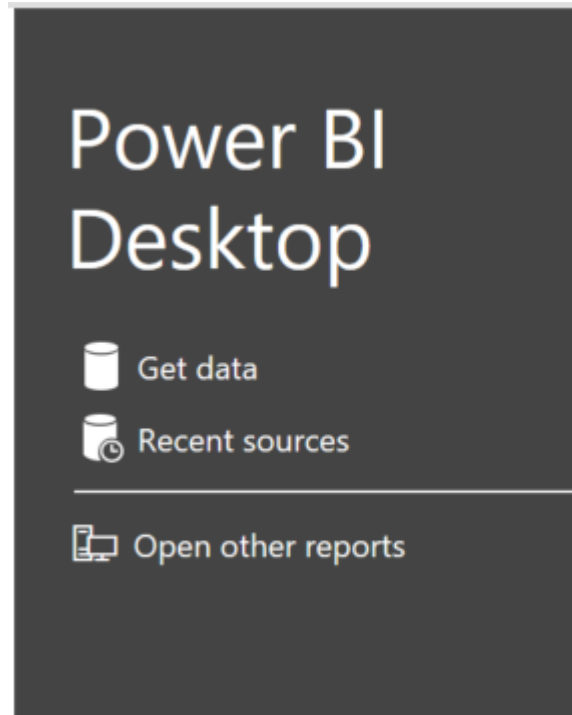
Power BI Desktop will launch after installing

- Log in to Office 365
- Select Project to navigate to Project Online by clicking on Project
- Copy the URL



Get Data

- Select **Get Data**
- Scroll down to **OData Feed**
- Click **Connect**



Get Data

You will need to enter in the URL or harvest it from Project Online

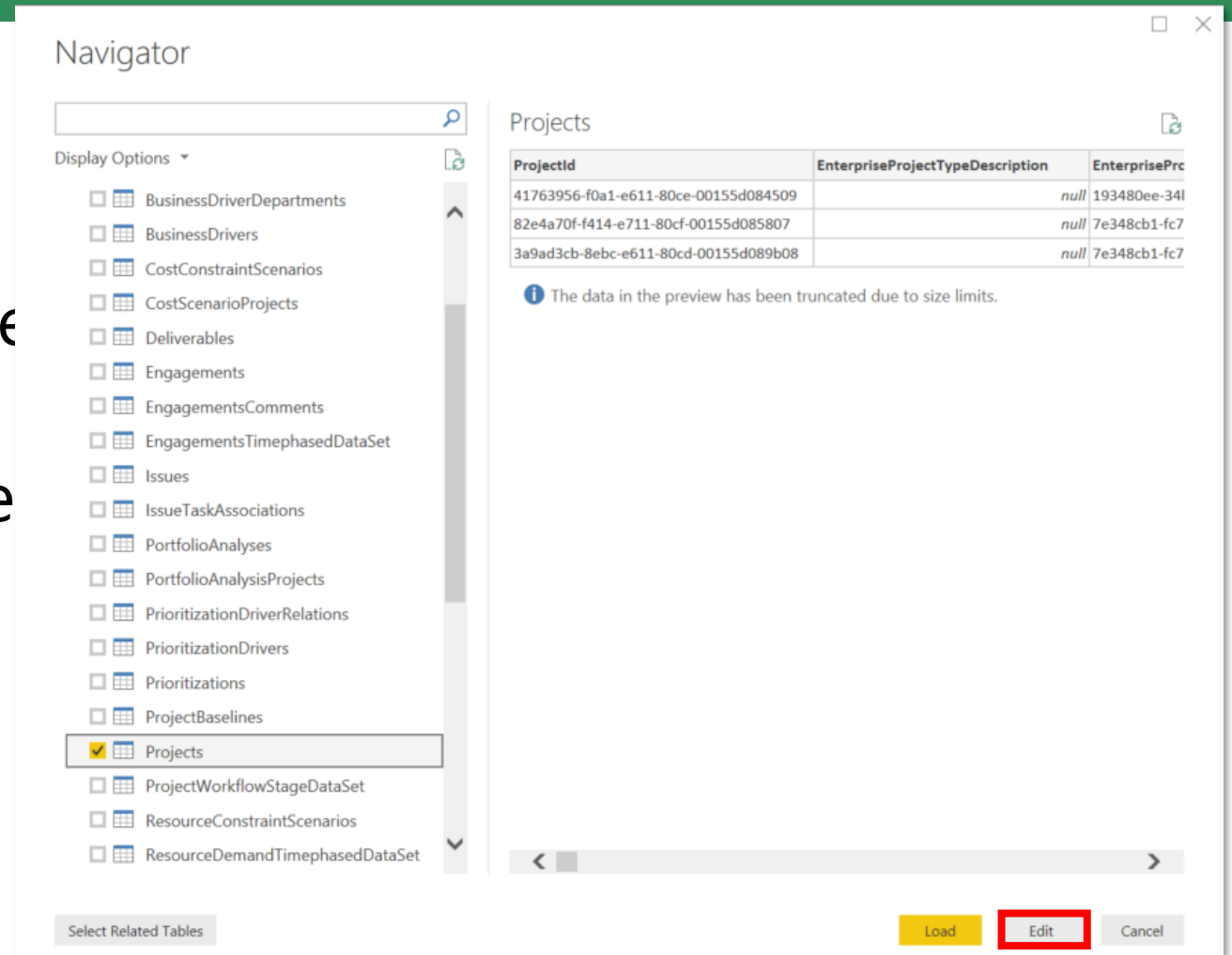
1. Paste the URL you copied from Project Online
2. Remove everything after PWA and add **_api/ProjectData**
3. Click **OK**



The screenshot shows a dialog box titled "OData feed" with a close button (X) in the top right corner. Inside the dialog, there are two radio buttons: "Basic" (selected) and "Advanced". Below these is a label "URL" followed by a text input field containing the URL "https://ppmw.sharepoint.com/sites/pwademo/_api/ProjectData". At the bottom right of the dialog are two buttons: "OK" (yellow) and "Cancel" (gray).

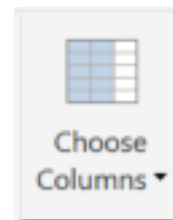
Select the Tables

- Click on each Table
- Click load to pull in each available field from the selected tables or
- Click Edit to select only those fields you want to upload



Editing the Tables

- Right click on a Column heading and select **Remove other columns**
- Select **Choose Columns** from the ribbon
- Select the columns you wish to include

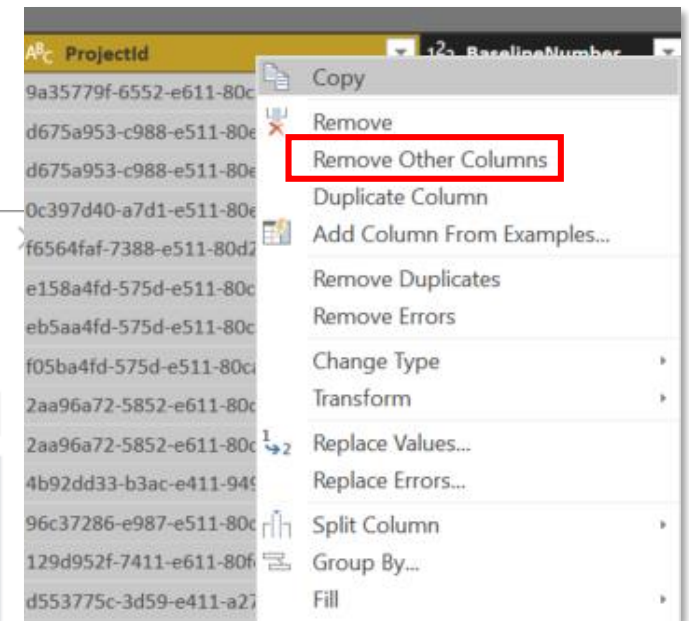


Choose Columns

Choose the columns to keep

Search Columns

- ☐ (Select All Columns)
- ☒ ProjectId
- ☐ RiskId
- ☒ AssignedToResource
- ☒ Category
- ☐ ContingencyPlan
- ☐ Cost
- ☐ CostExposure
- ☐ CreateByResource
- ☐ CreatedDate



Apply Query Changes

Once all the columns have been selected from the tables Click Close & Apply.

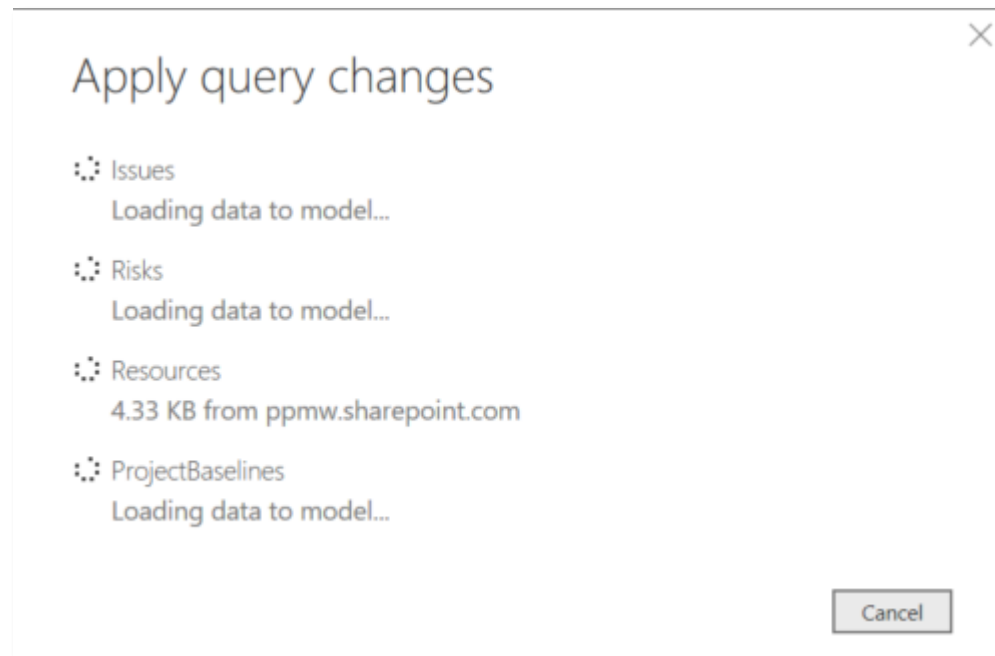
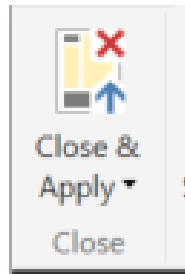
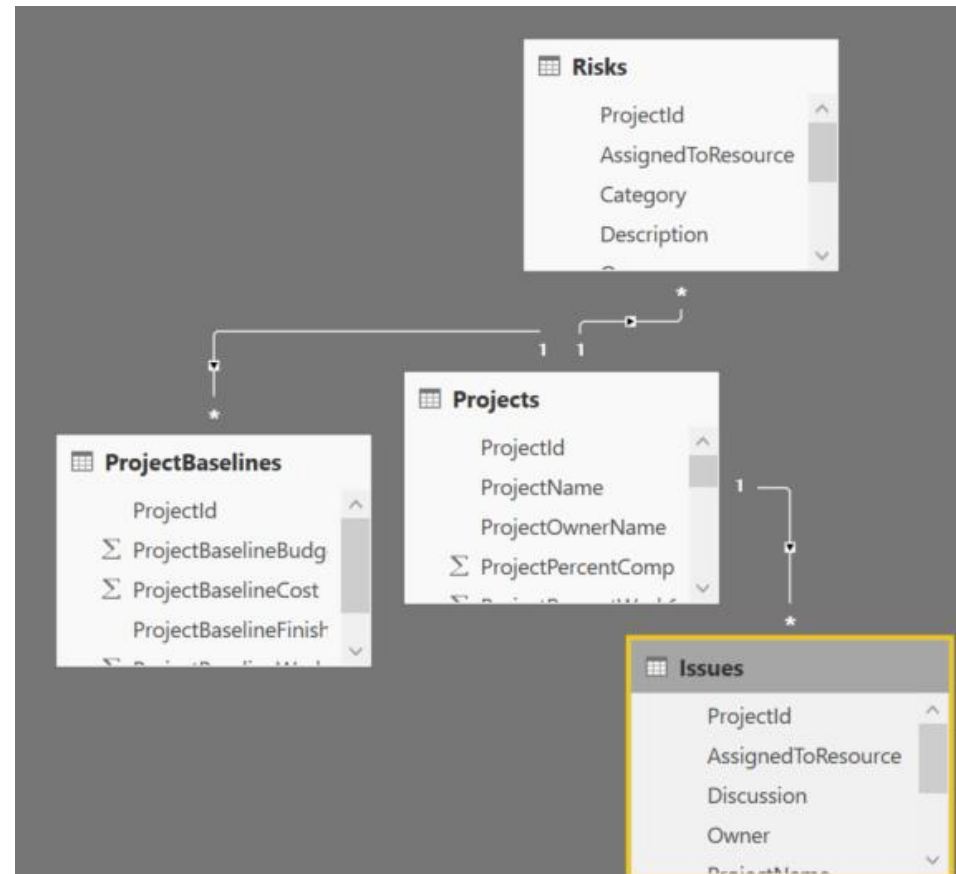


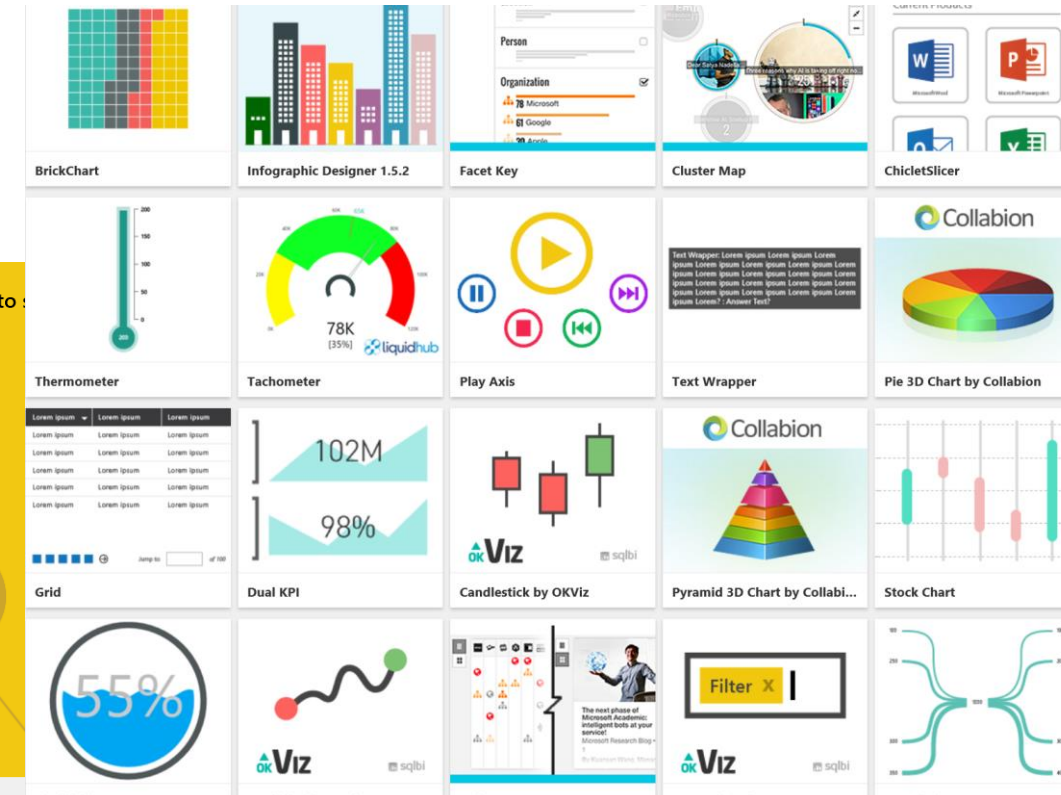
Table Relationship

No need to create relationships between tables, Power BI does that for you.



Power BI Custom Visuals

- Download custom visuals for Power BI at <https://app.powerbi.com/visuals/>




Power BI

Browse gallery How to use How to

Welcome to Power BI custom visuals

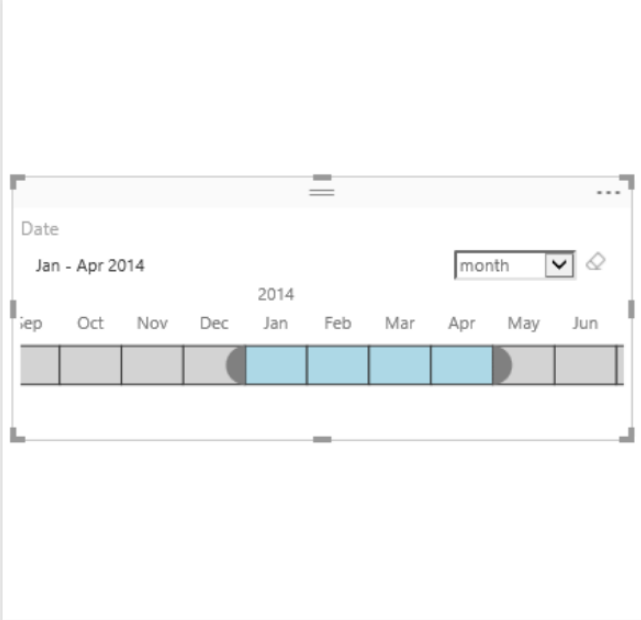
A gallery of visuals created by the Power BI community. Browse through the visuals or submit one of your own for others to use.

[Learn how to use custom visuals](#)

 The visuals gallery has moved to the [Office Store](#). This site is in limited support until May 31, 2017, when it will be taken offline. Visuals acquired here will continue to work after the site is moved.

Download Custom Visuals

- Select the visual and download



Timeline
Published by Microsoft

Timeline slicer is a graphical date range selector used as a filtering component in the report canvas

[License](#) [Privacy Statement](#)


[Download Visual](#) [Download Sample](#)

Version 1.3.19 — Last updated 4/21/2017

[Contact Author](#) [Support](#) [GitHub](#)

Introducing new visuals

WE'RE BRINGING YOU NEW MATRIX AND TABLE VISUALS



Convert your old matrix and table visuals by selecting them on the canvas, then clicking the icons in the Visualizations gallery.

With these new visuals you can:

- Cross-highlight data in other visuals with a click of any value or header
- Drill down into your row or column data, using buttons on the visual or right-clicking rows or columns
- Add data bars to understand and clarify your data

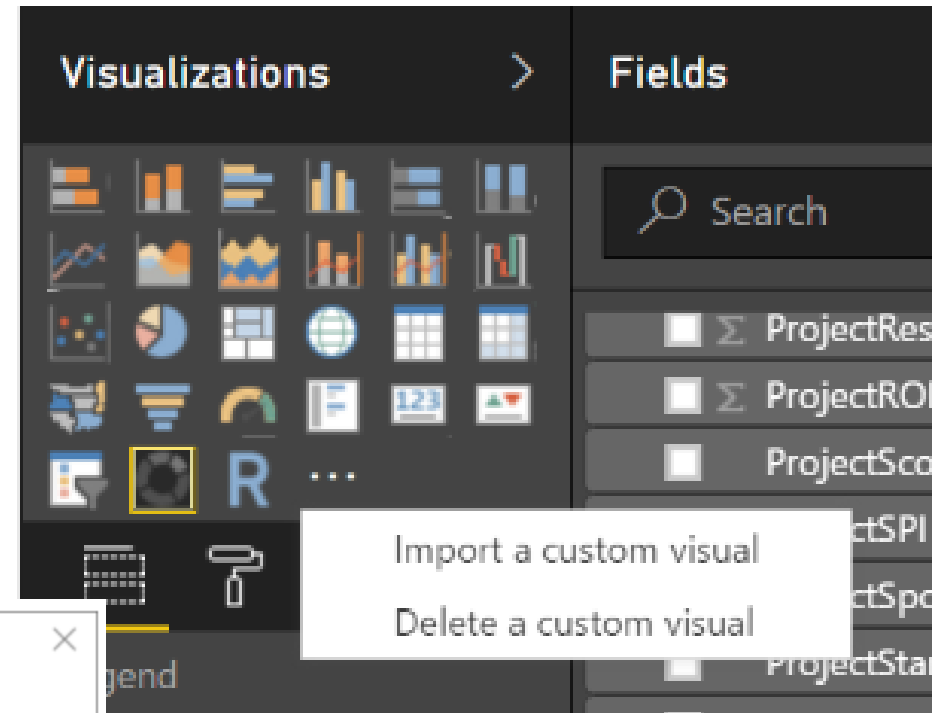
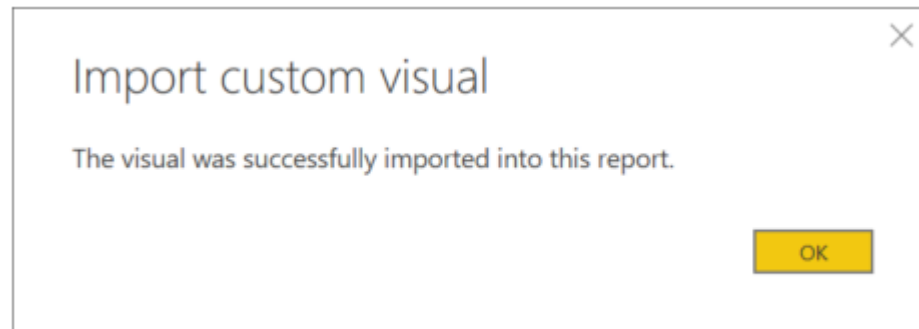
[Learn more about new matrix and table visuals](#)

[Got it](#)

Import Custom Visuals

To import custom visuals:

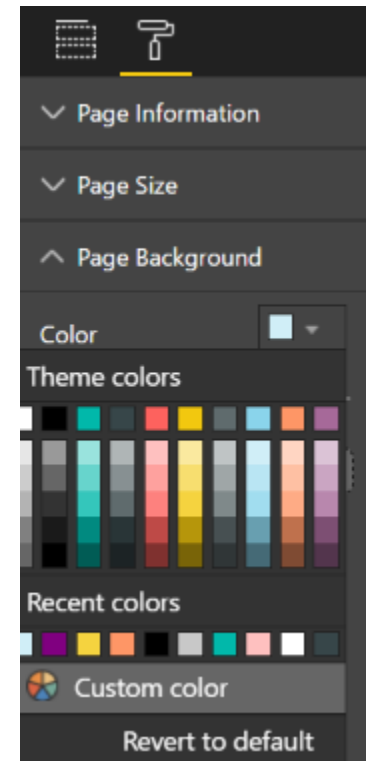
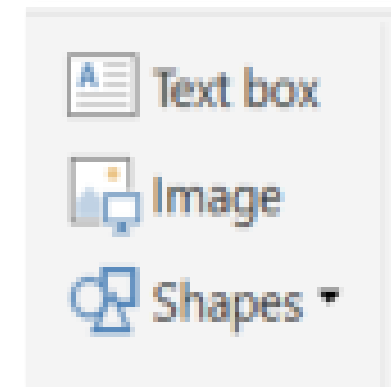
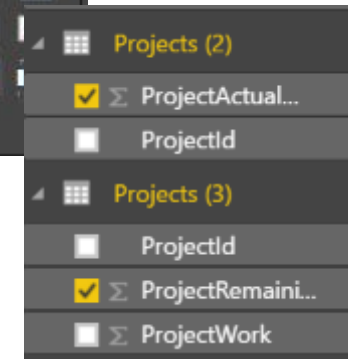
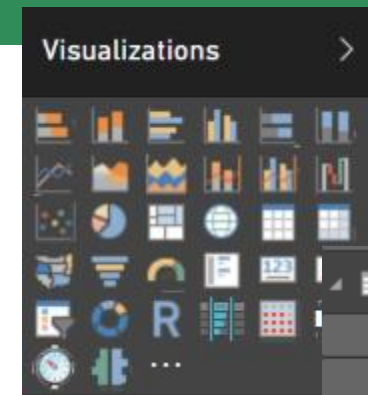
- Click on the ellipse
- Select Import a custom visual



Building Power BI Reports

You are ready to begin building!

- Select a visualization
- Select the data for the visualization
- Change the background color
- Change the data color
- Click Image to upload your logo



Save and Publish

To Publish your report:

- Click **Save**
- Click **File | Publish**
- Select **My Workspace**
- Sign in

Publish to Power BI

Select a destination

My workspace

Power BI Desktop

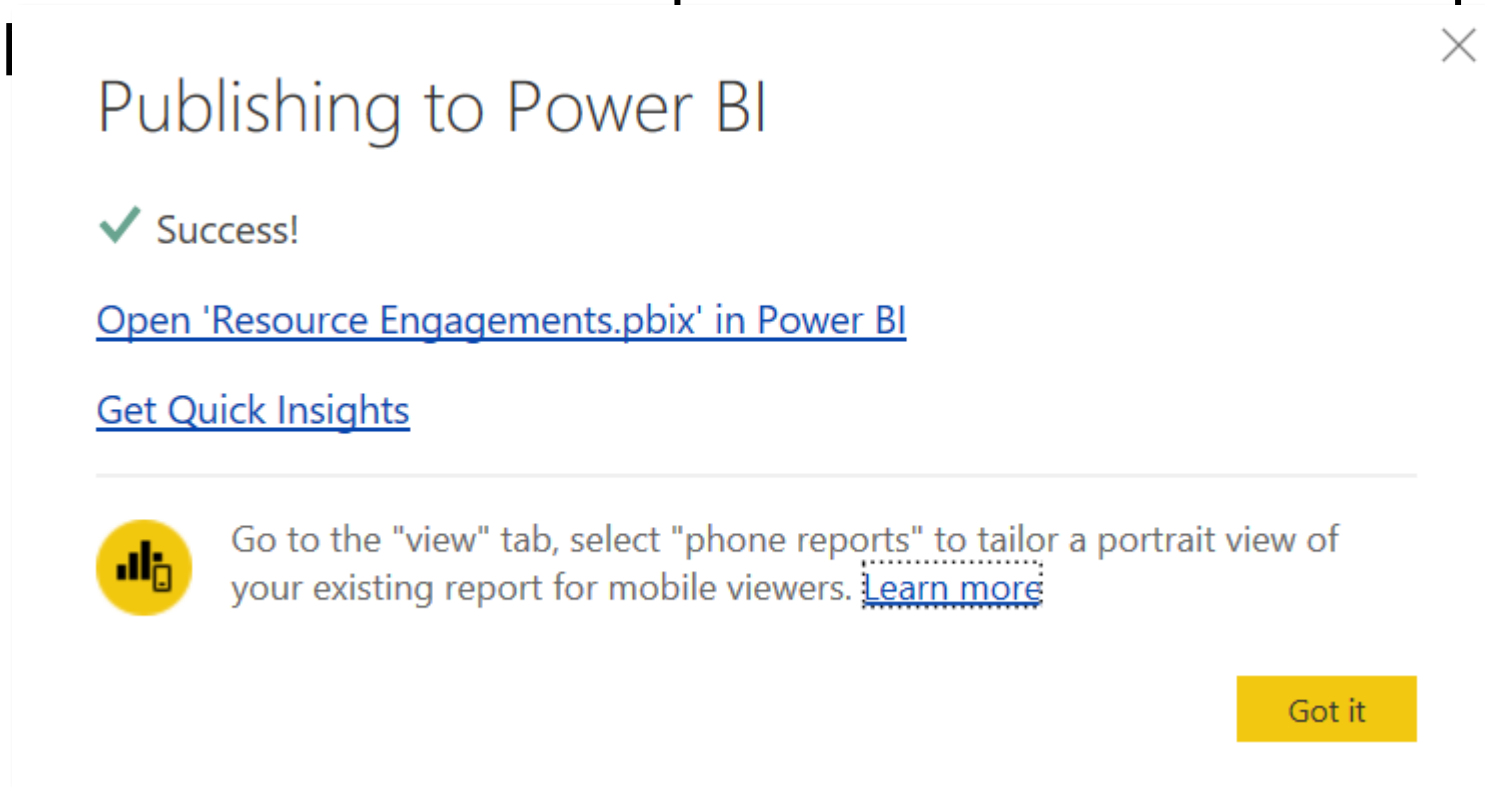
Work or school account

[Sign in](#)

[Need a Power BI account?](#)

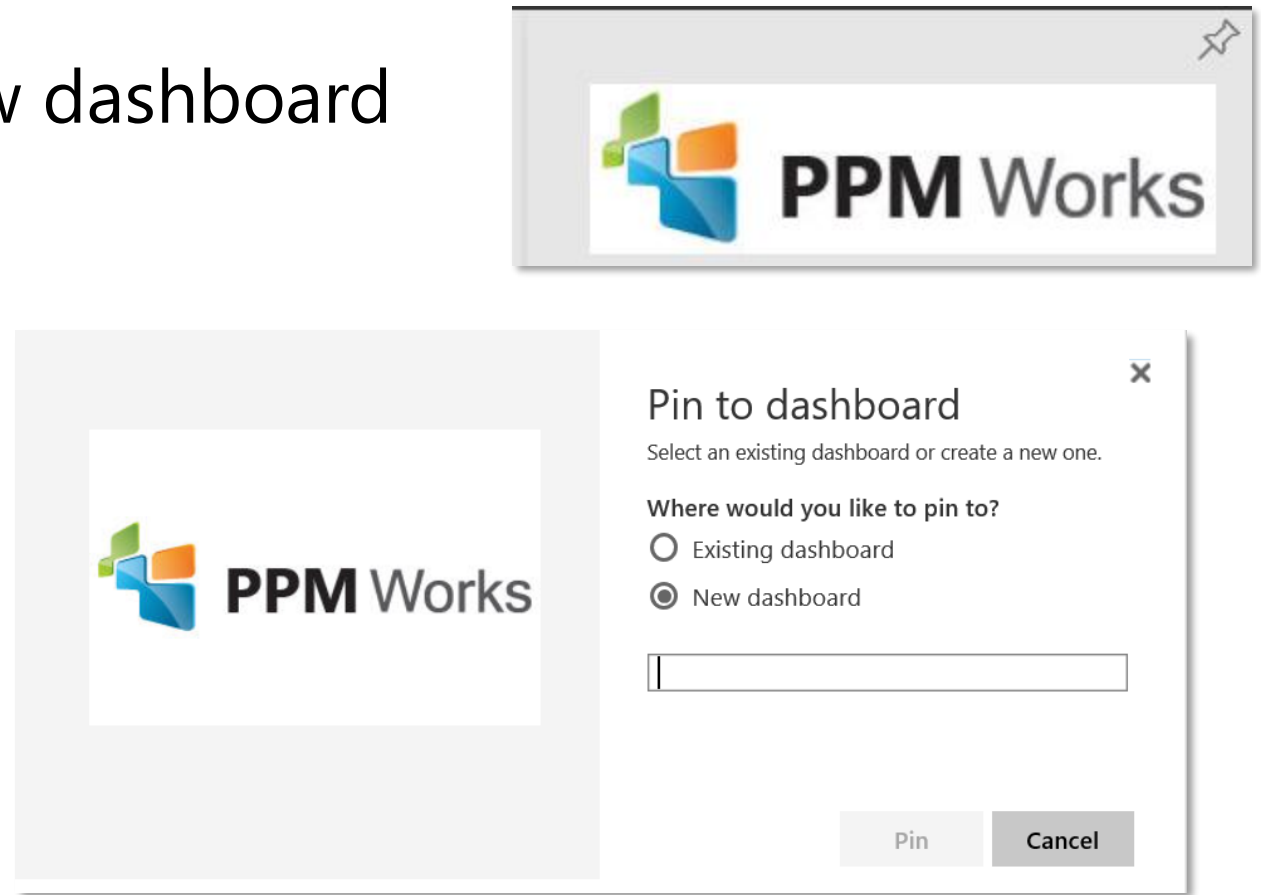
Publishing the Report

Once published a link to the report will be visible in Reports under the I



Create a New Dashboard

- Pin Tiles to an existing or new dashboard
- Click on the Pin icon
- Select New dashboard
- Give your dashboard a name
- Click Pin



A man with dark skin and short black hair is lying back on a grey couch, smiling broadly at a laptop. He is wearing a blue denim jacket over a grey sweater. In his right hand, he holds a silver pen, pointing it towards the laptop screen. The laptop screen displays a Power BI dashboard with various charts, including a bar chart and a line chart, and a list of images on the right side. The background is a blurred indoor setting.

Power BI Dashboard Demo

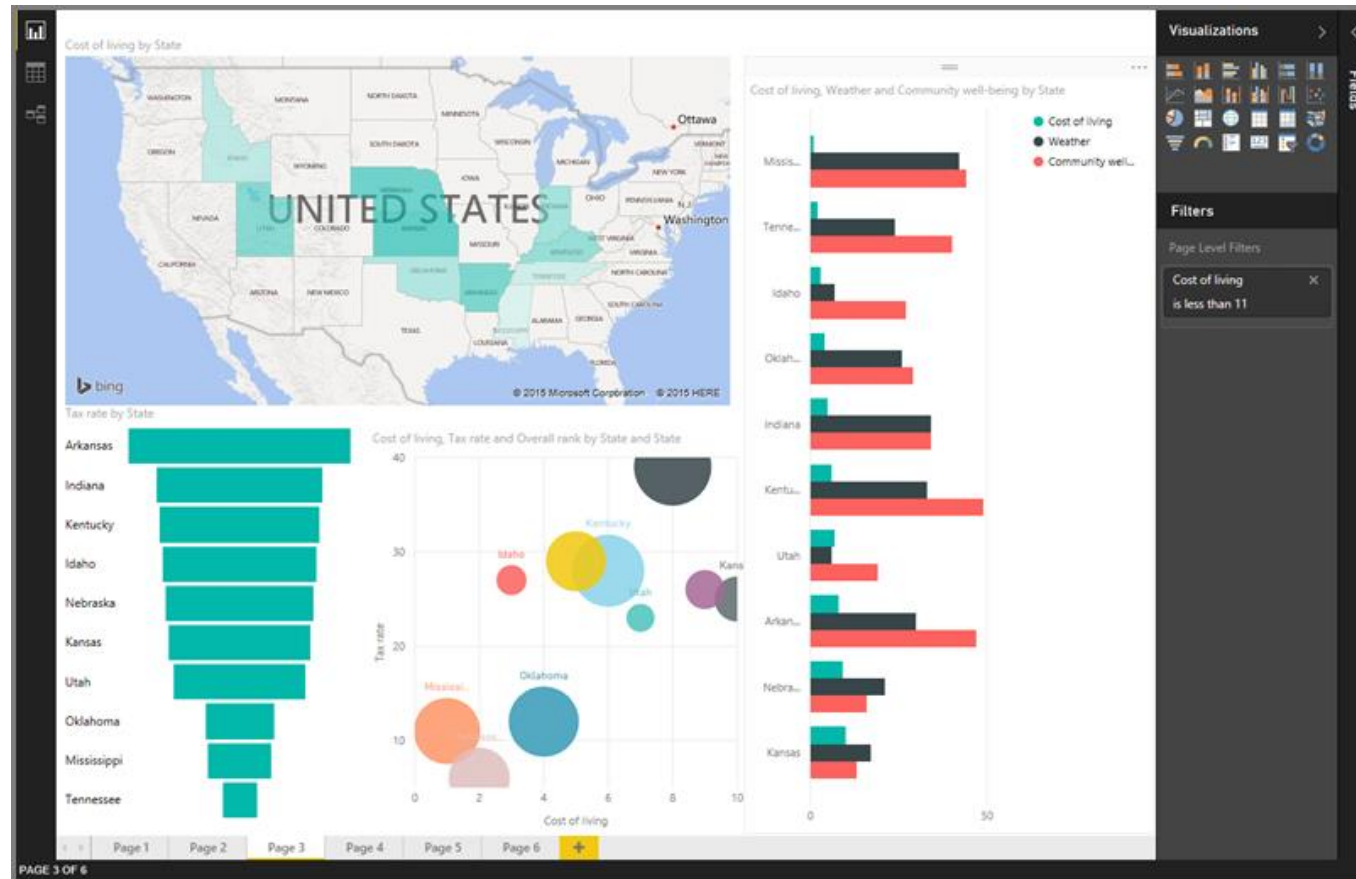
A man and a woman are sitting at a desk, looking at a laptop screen. The woman is on the left, wearing a light pink shirt, and the man is on the right, wearing a dark vest over a plaid shirt. They are both smiling and appear to be working together. The background is a bright, modern office with large windows.

Power BI Content Pack

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
- Connects to content packs
- Enables you to publish reports from Power BI

Power BI Service and Power BI Desktop



Power BI Desktop = Analysts


- create data connections, models, and reports

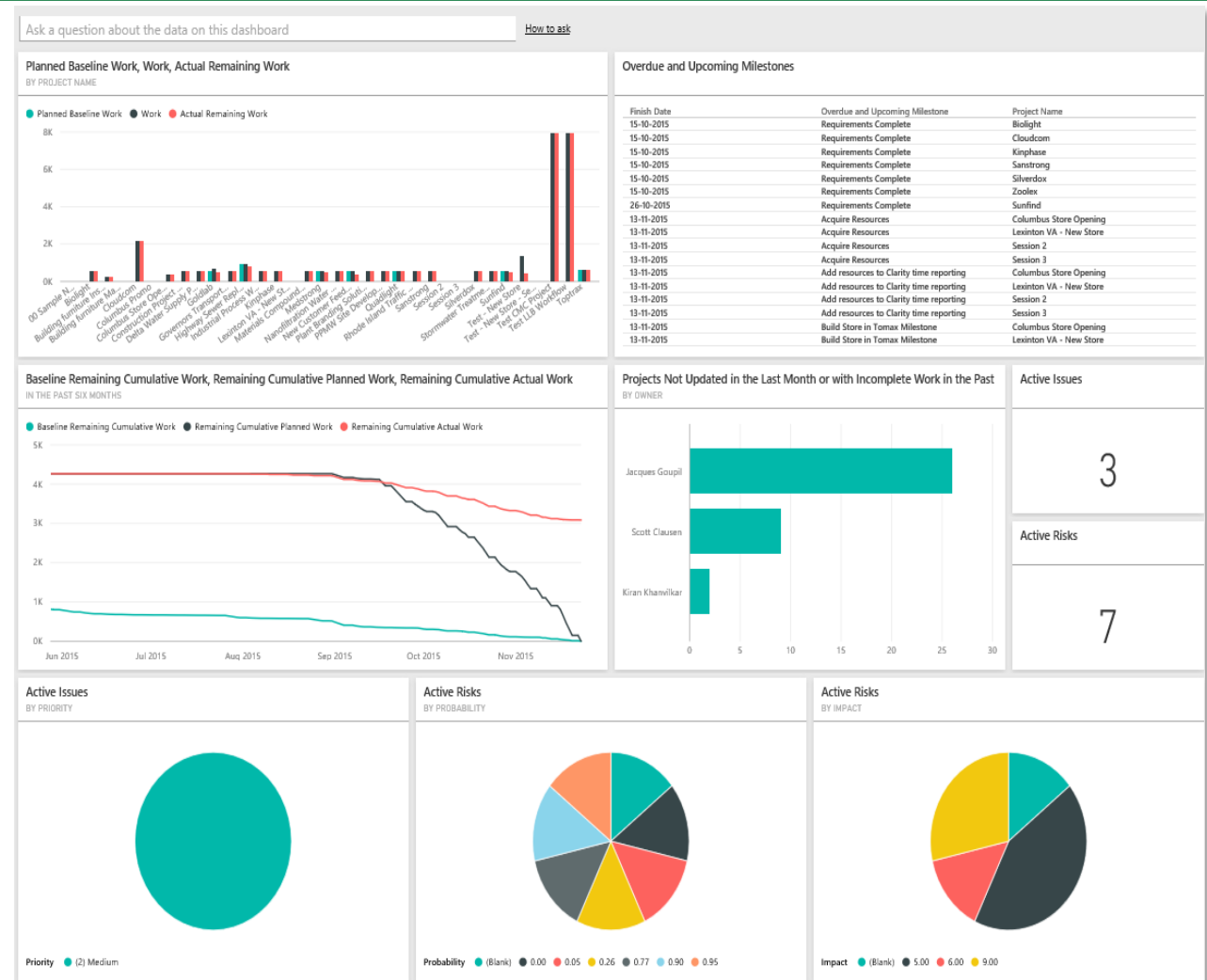
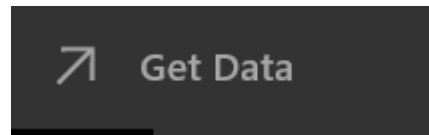
Power BI Service = Users

- interact and view Power BI Desktop Reports

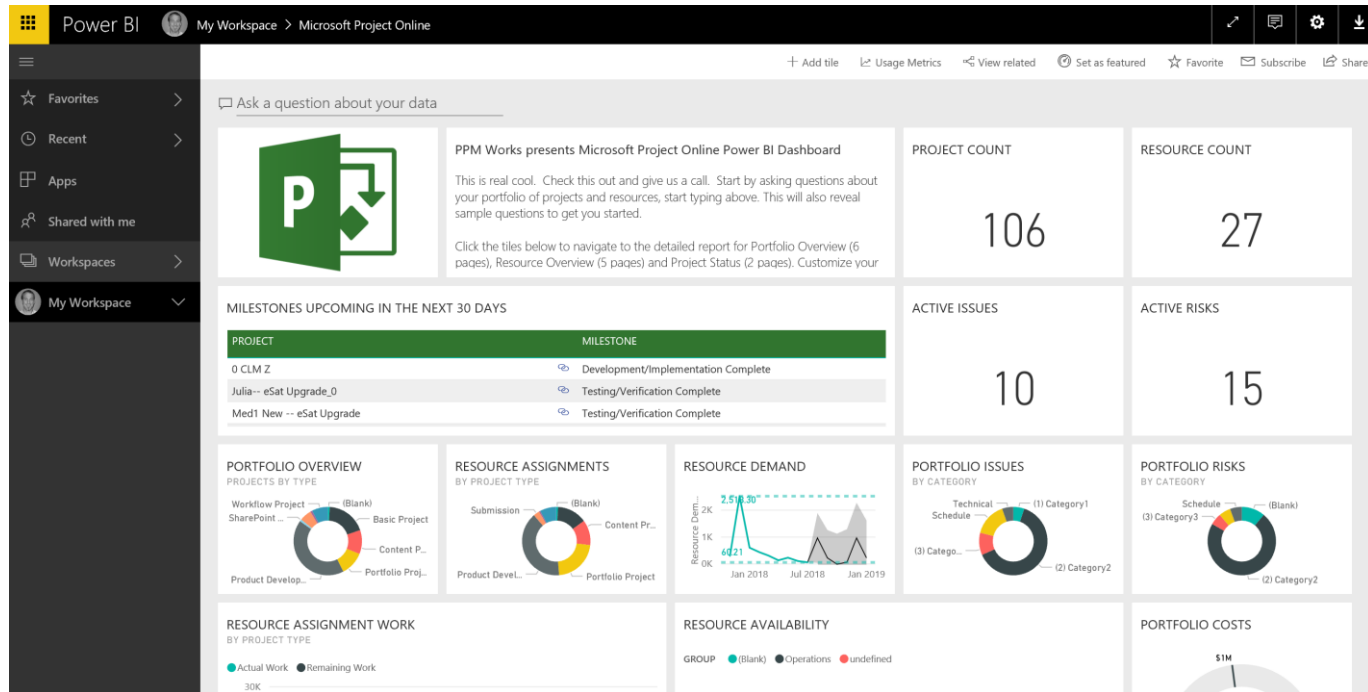
<https://powerbi.microsoft.com>

Power BI Content Pack

- A content pack is a set of pre-configured visuals and reports on specific sources
- Enables you to get started quickly
- Available from SaaS providers
- Provides Dashboards, Reports, and data models
- Click on 

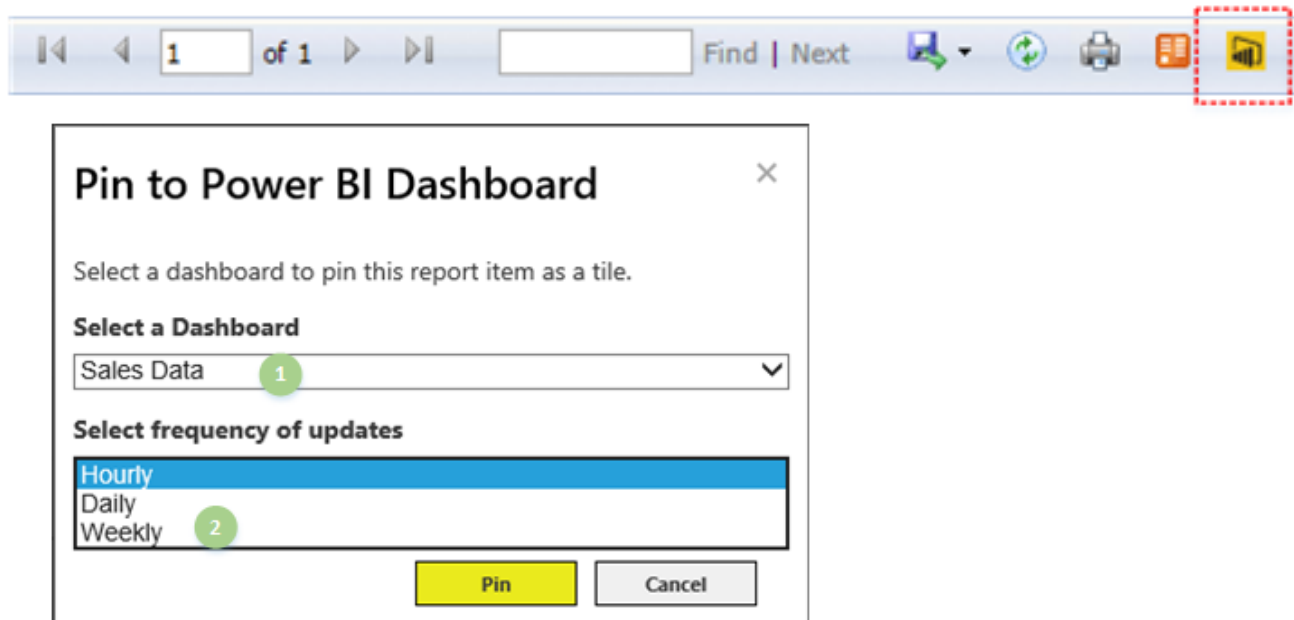


Power BI Content Pack

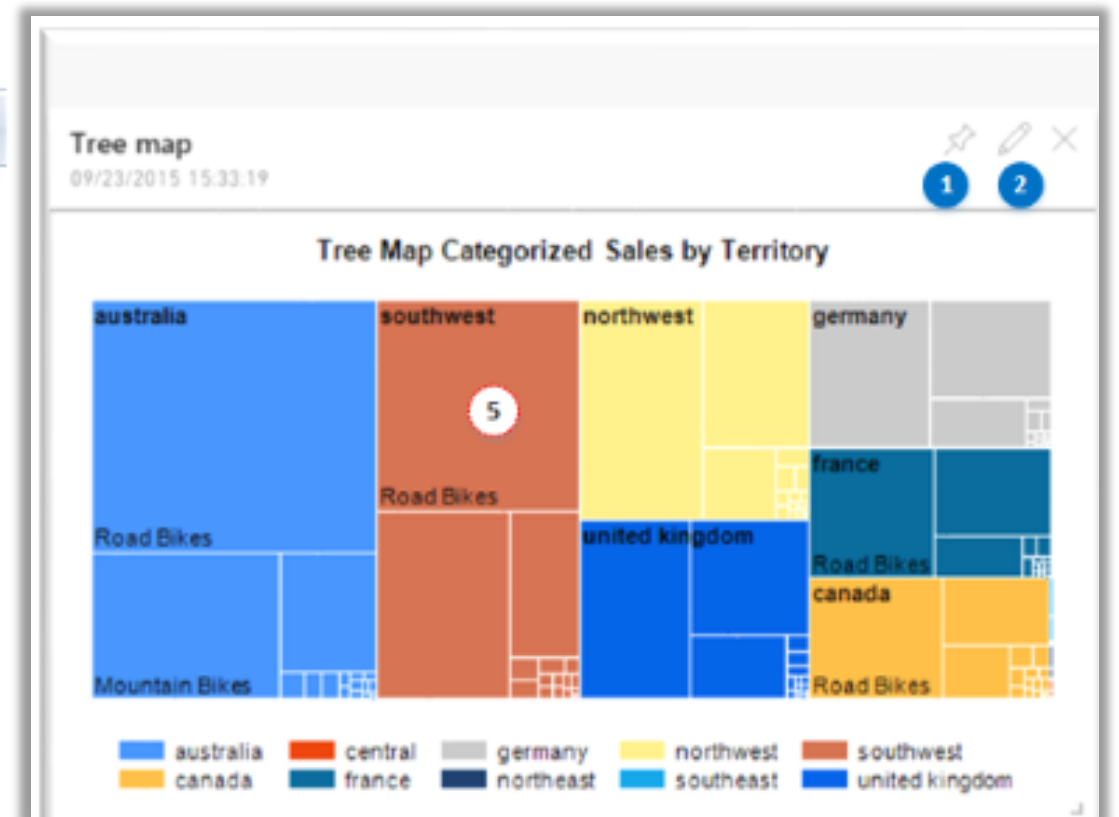


Did you know you can add SSRS to a Power BI Dashboard?

- **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>



PPM Works Power BI – Dashboard in a Day

Qualified Clients: Current Microsoft Project Online/Server 2013 users or plan to migrate to Project Online/Project Server 2013

DESCRIPTION	PRODUCTS	ACTIVITIES	ADDITIONAL NOTES:
<p>PPM Works will work with your organization to drive your business intelligence knowledge and understanding with the PPM Works Dashboard in a Day offering.</p> <p>You will learn how to connect Project Online with Power BI and Office 365, through a mentoring and hands on training with your business analysts focuses on how to get started with Power BI.</p> <p>Together we will create a for your organization. Power BI Datasets, Reports, and a Dashboard template</p>	<ul style="list-style-type: none">Microsoft Power BI and Project Online/Server	<ul style="list-style-type: none">Upfront Power BI SetupMentoringDashboard SessionSupport	<p>Deliverables:</p> <ul style="list-style-type: none">½ day hands on session with 5-10 attendees for hands on lab, demo's and Power BI overview½ day session prep with you and PPM Works½ day Power BI Training (optional) <p>Target audience: Business Analyst, Project Online/Server Admins, and BI Professionals interested in using Data Visualizations to improve upon existing business intelligence and broaden access and consumption of actionable insights</p>

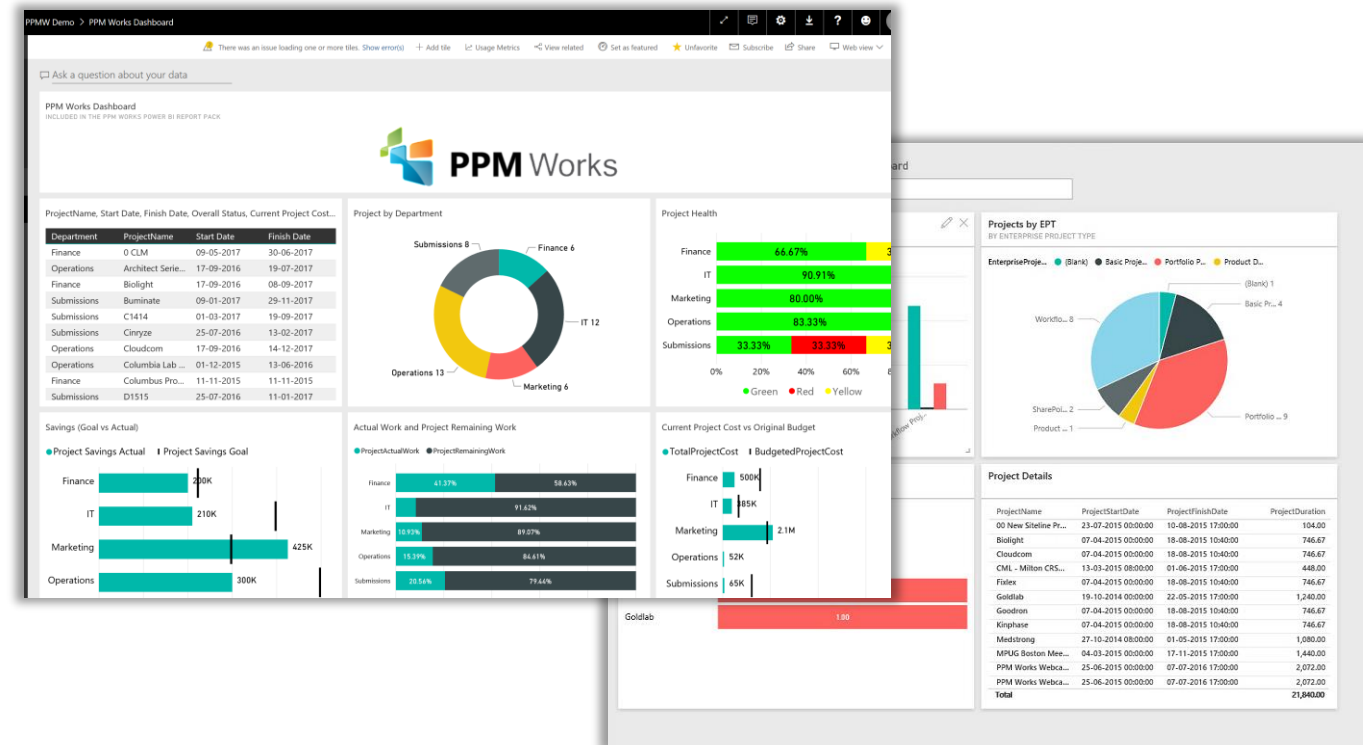
Report Pack Offering

Need Reports? Try our Report Pack.

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

Reporting Tools:

- SSRS
- Power BI
- Custom Development
- Excel Services



Microsoft Tips and Tricks and Immersion Sessions



Microsoft Tips and Tricks and Immersion sessions bring the experts to you and your team. This offer provides you with the opportunity to have your team work hand and hand with a PPM expert funded by Microsoft.

Tips and Tricks and Immersion sessions:

1. hands-on 2-3 hours onsite event for up to 10-15 participants
2. interactive, experiential and fun

Contact CIE@ppmworks.com for more information

Call to Action

1. Get started today and contact us at
info@ppmworks.com

Link in with us:

www.linkedin.com/in/jacquesgoupil

www.linkedin.com/company/ppm-works-inc/

2. Register for a Tips and Tricks or Immersion Session

Act now, Microsoft provided funds end mid-December 2017

info@ppmworks.com

3. Register your PDUs

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Question and Answer

Live Audience: Use the **Q&A** panel to submit your questions



If you are listening to the recording, please email questions to info@ppmworks.com

Contact Us

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

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PDU's for this Webinar

PPM Works is a PMI® Registered Education Provider (R.E.P.). We offer PDU's for this presentation.

To claim your PDU please email **info@ppmworks.com** with your PMI number and reference this presentation.

About 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...



- 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