Create Your Own Portfolio Dashboard

Presented by: Jacques Goupil

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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

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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

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Upcoming Webinars

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

Thursday, January 25th @ 12 - 1 PM EST

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.

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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**

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What do you see?

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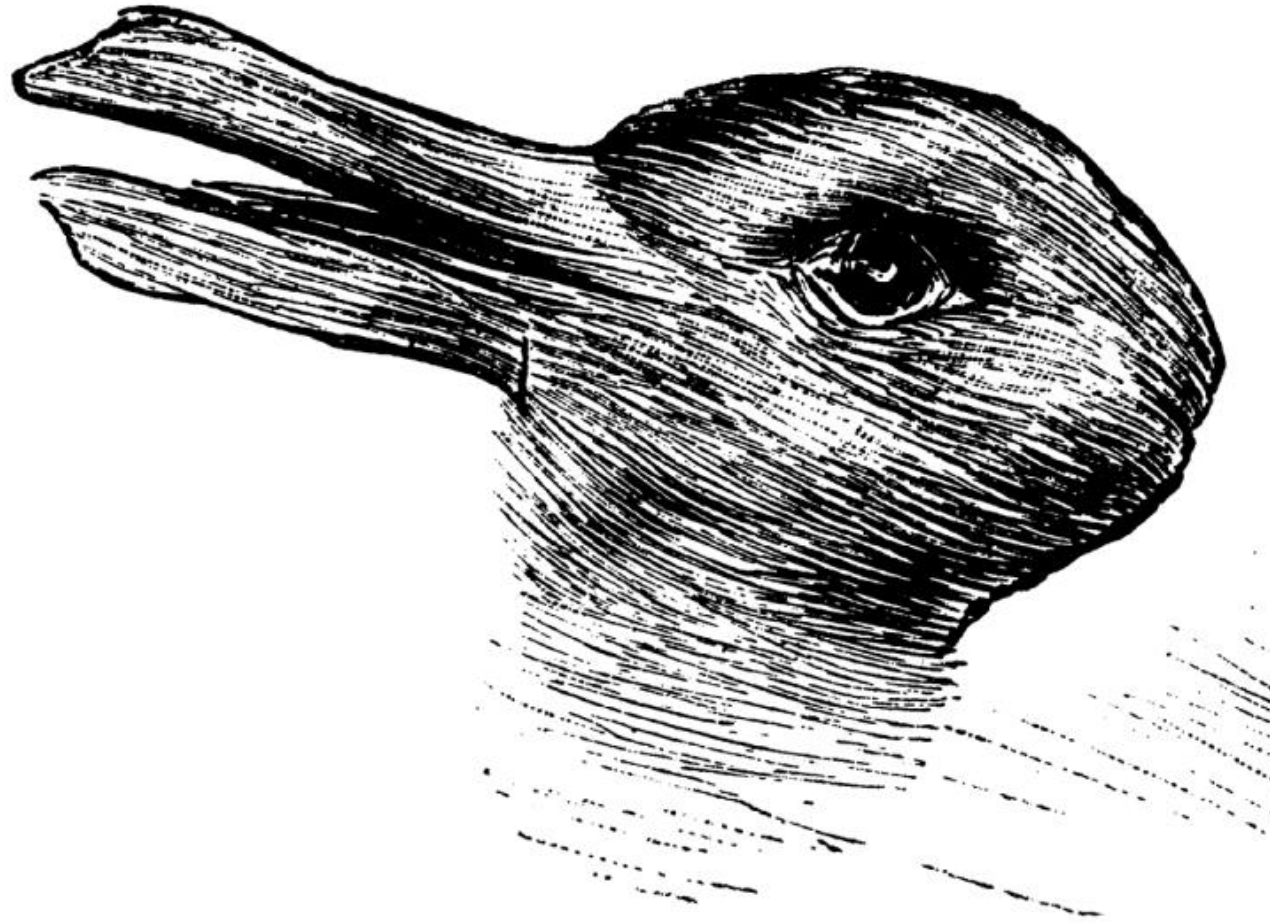
Report and Dashboards should be clear and easy to understand

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

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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**

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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
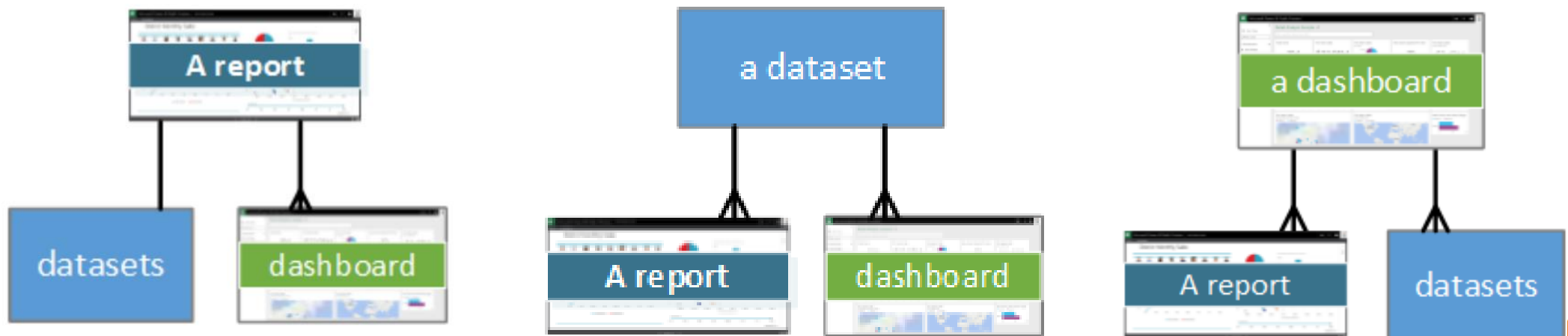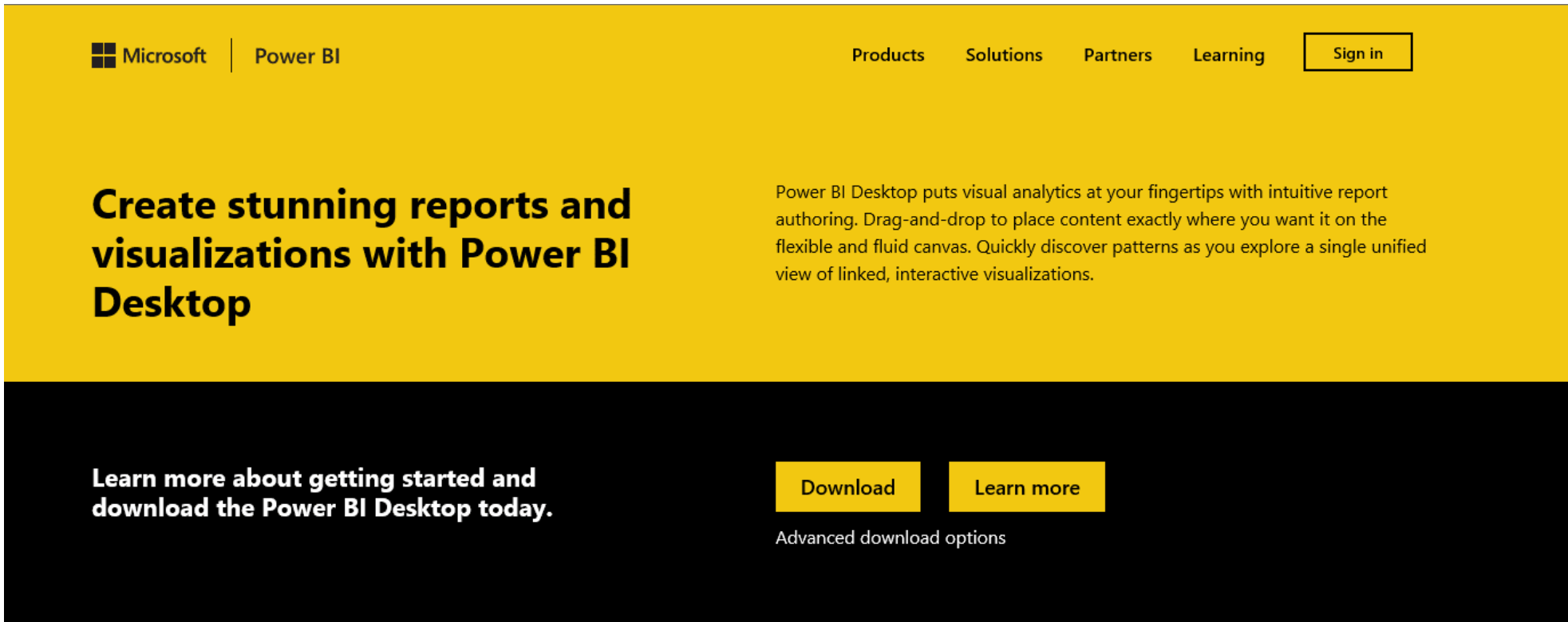
Download Power BI

Download Power BI Desktop

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

Connecting to Project Online Data
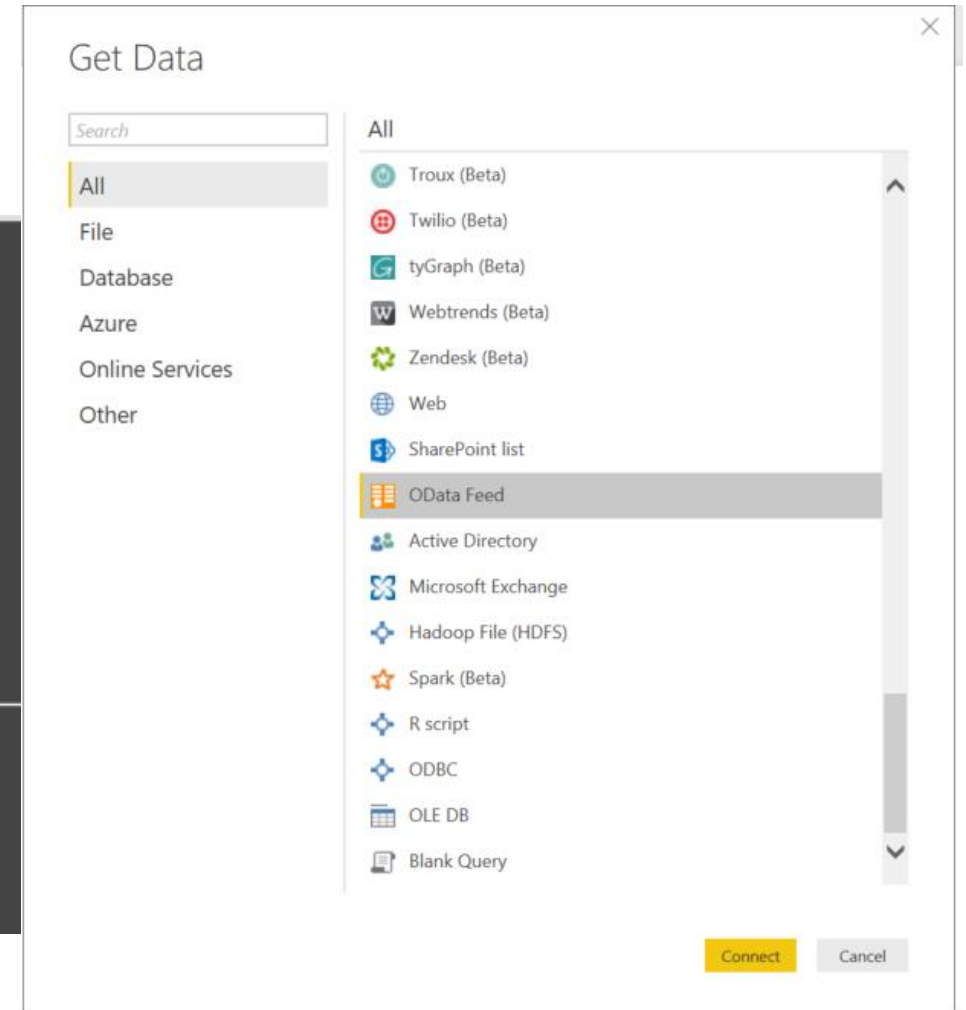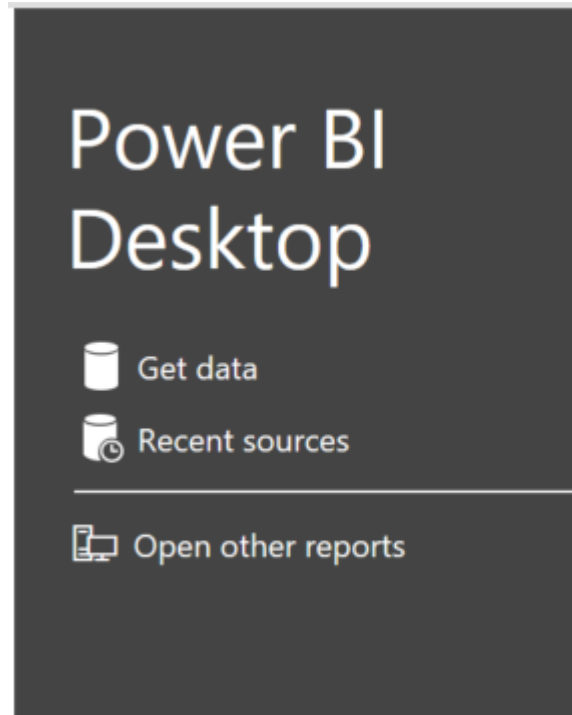
Connecting to Project Online Data

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**

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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**

OData feed

⦿ Basic   ○ Advanced

URL

https://ppmw.sharepoint.com/sites/pwademo/_api/ProjectData
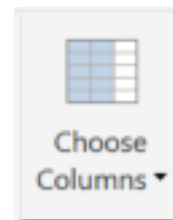
[OK]   [Cancel]

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Select the Tables

- Click on each Table
- Click load to pull in each available field from the selecte[d] tables or
- Click Edit to select only those fields you want to upload
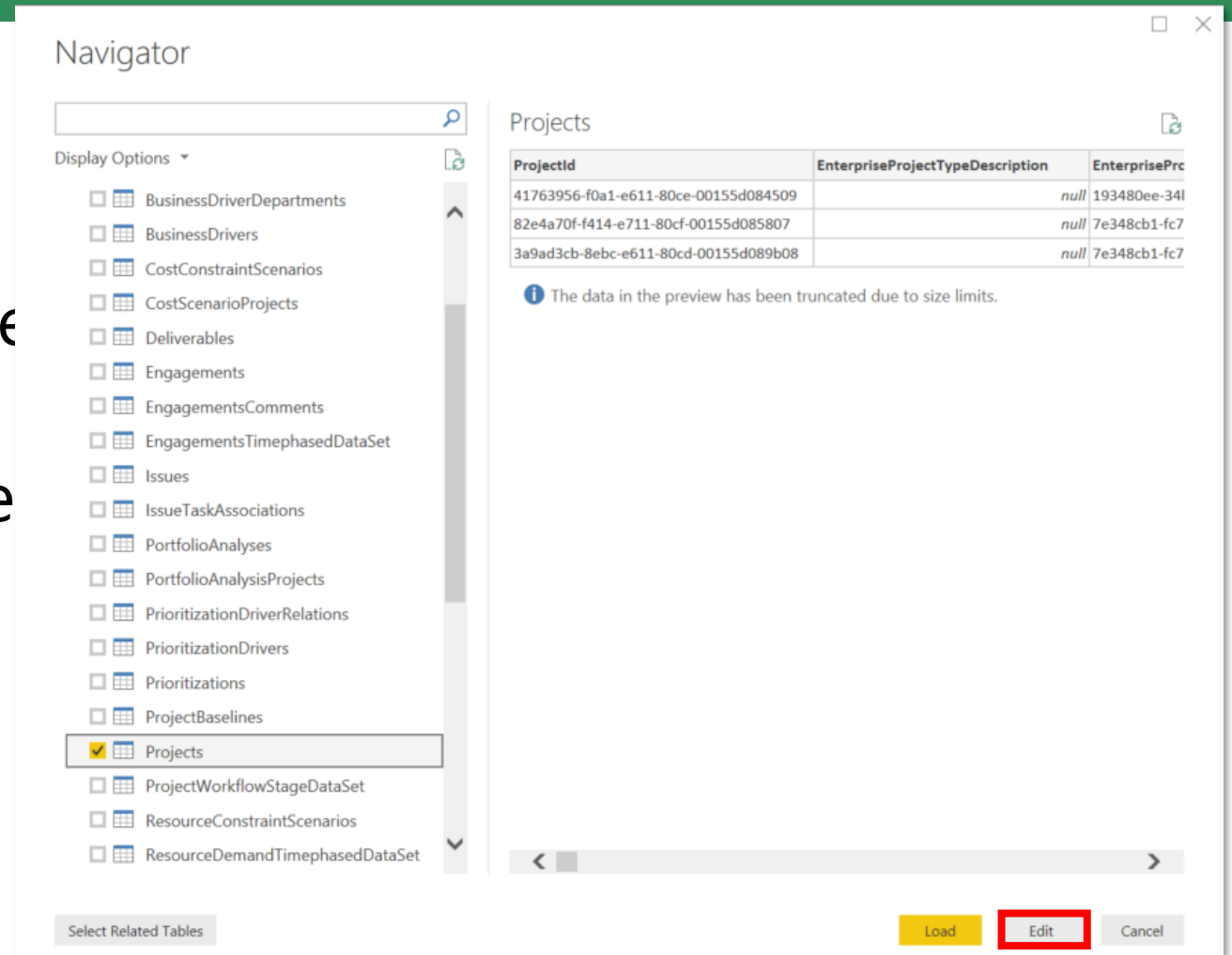
Editing the Tables

- Right click on a Column heading and select **Remove other columns**

- Select **Choose Columns** from the ribbon

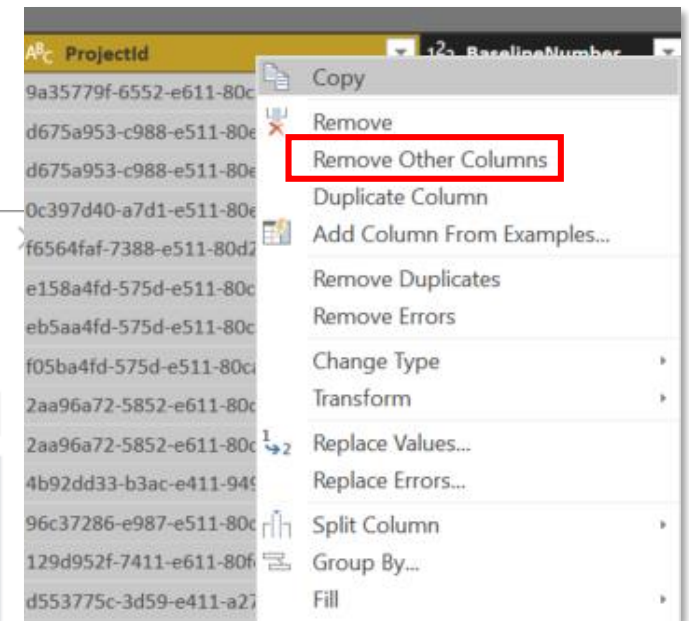- Select the columns you wish to include

Apply Query Changes

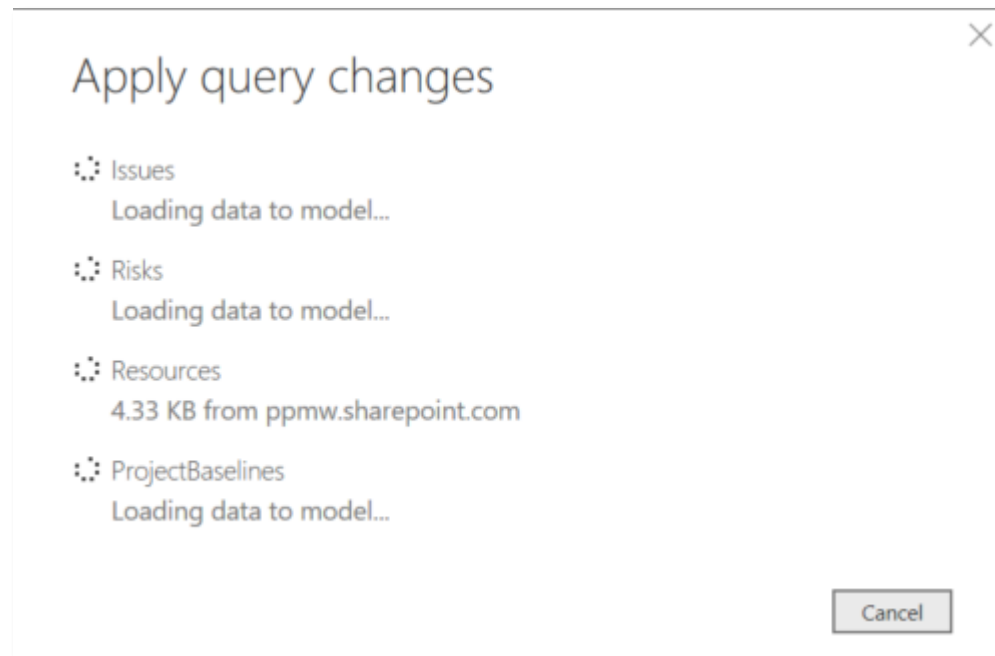Once all the columns have been selected from the tables Click Close & Apply.
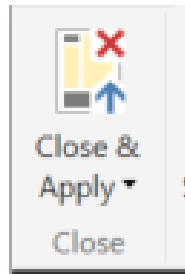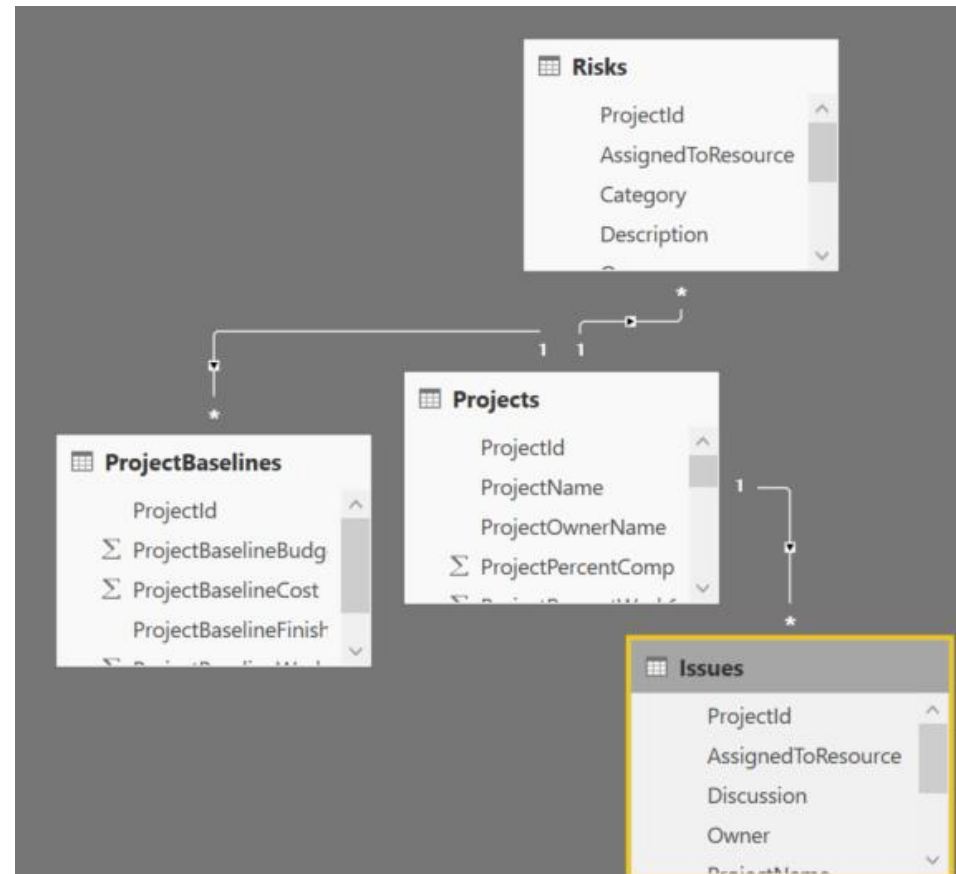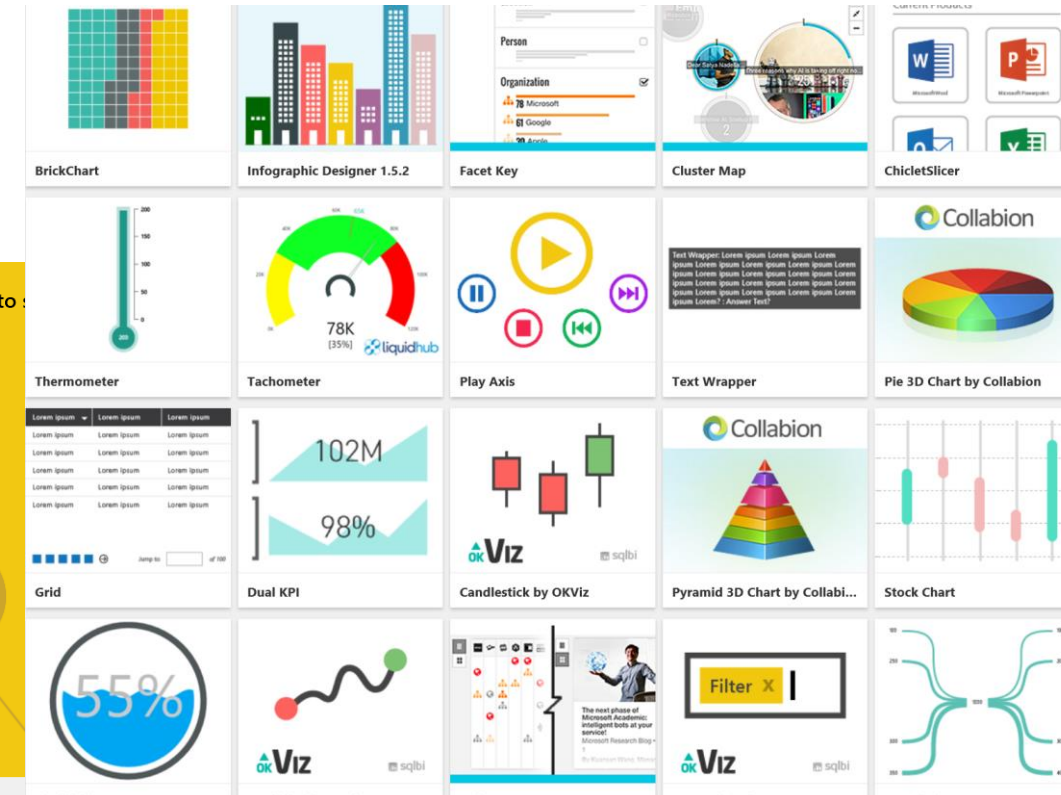
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Table Relationship

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

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Power BI Custom Visuals

- Download custom visuals for Power BI at
  https://app.powerbi.com/visuals/
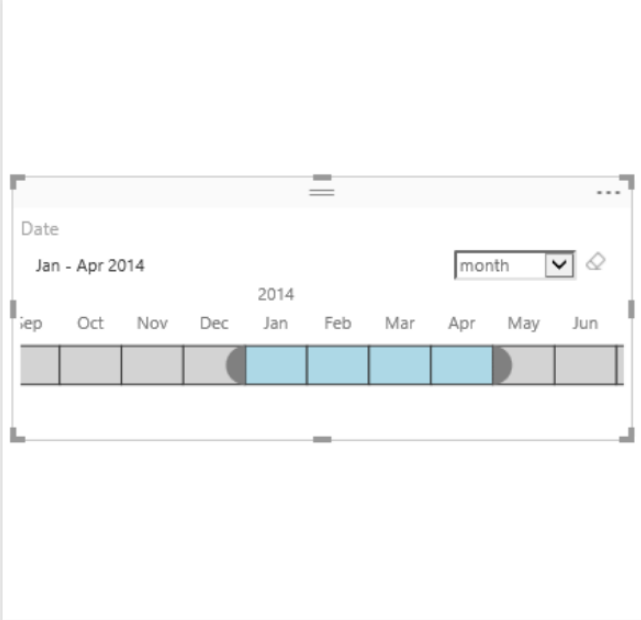
Download Custom Visuals

- Select the visual and download

Import Custom Visuals

To import custom visuals:

- Click on the ellipse
- Select Import a custom visual

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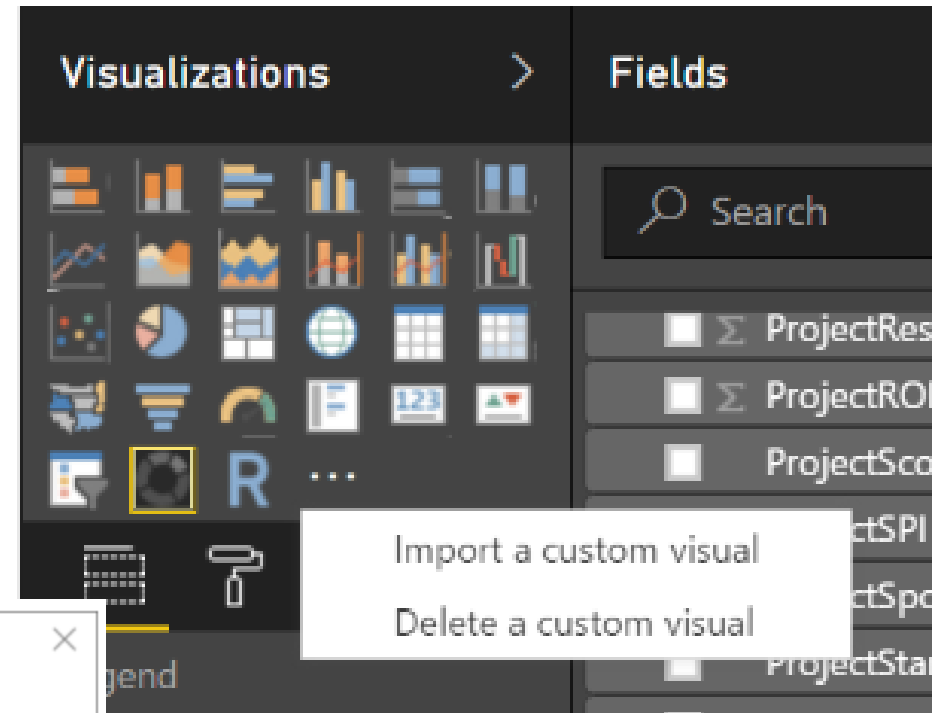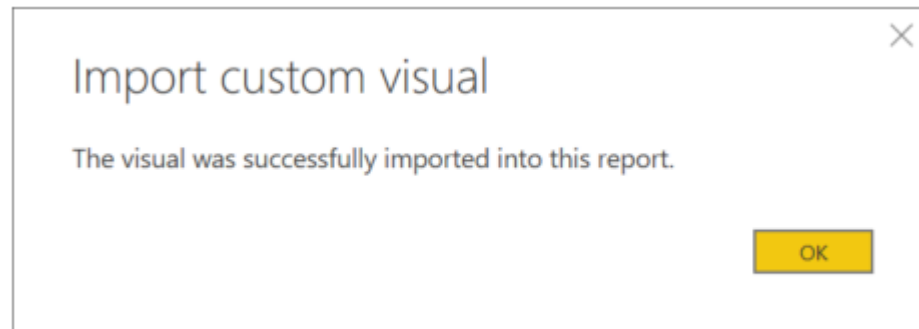
Building Power BI Reports

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
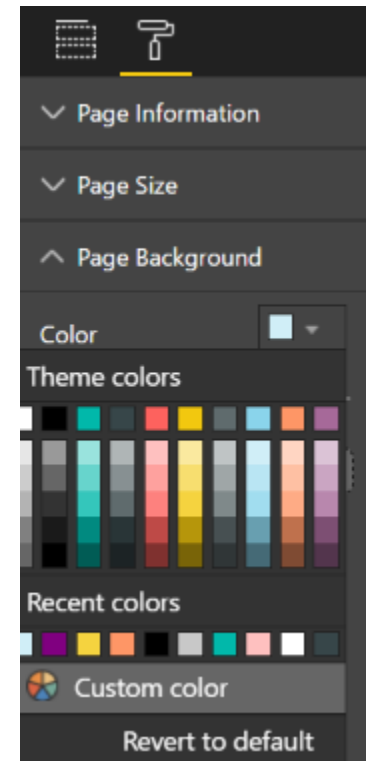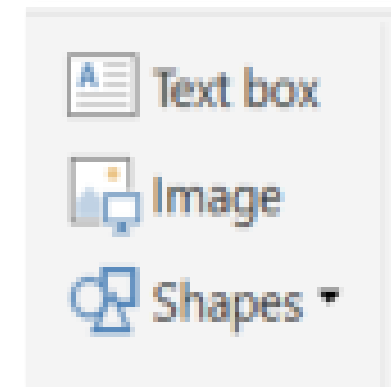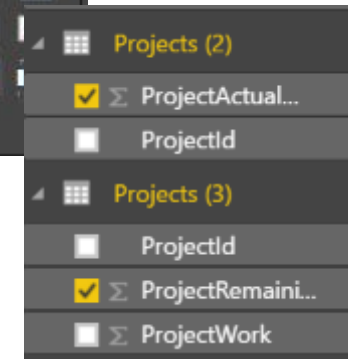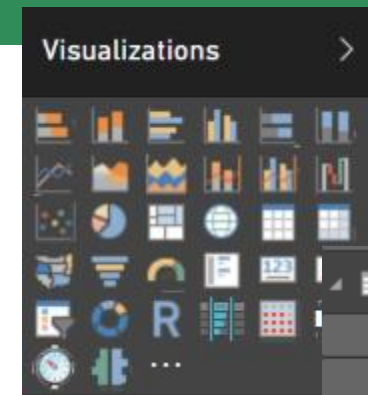
Save and Publish

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

laura.crawford@ppmworks.com

Sign in

Need a Power BI account?

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Publishing the Report

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

Publishing to Power BI

✔ Success!

Open 'Resource Engagements.pbix' in Power BI

Get Quick Insights

Go to the "view" tab, select "phone reports" to tailor a portrait view of your existing report for mobile viewers. Learn more

Got it

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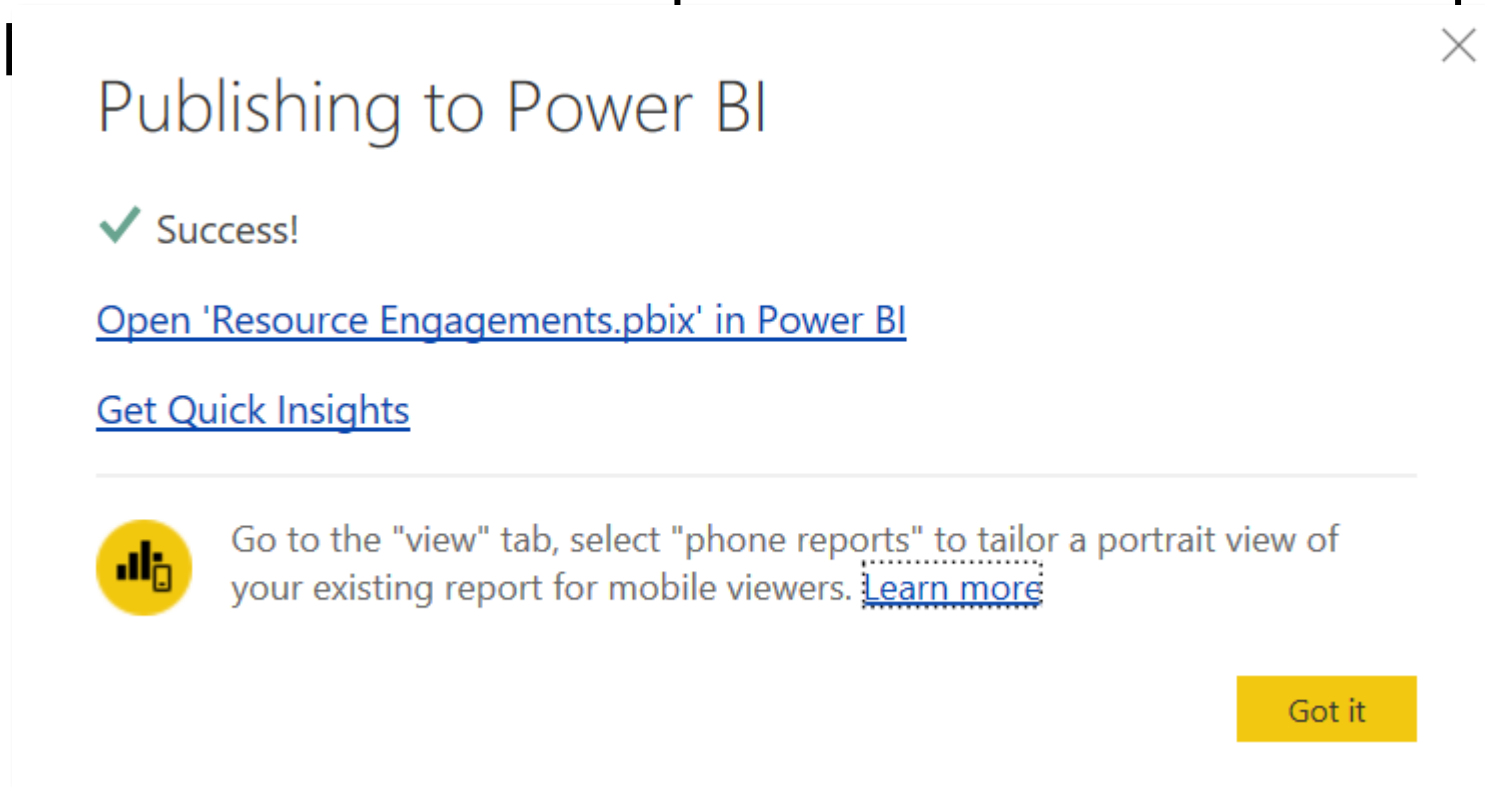
Create a New Dashboard

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

Pin to dashboard

Select an existing dashboard or create a new one.

Where would you like to pin to?

◯ Existing dashboard

◉ New dashboard

[   ]

Pin   Cancel

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Power BI Dashboard Demo

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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

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Power BI Service and Power BI Desktop
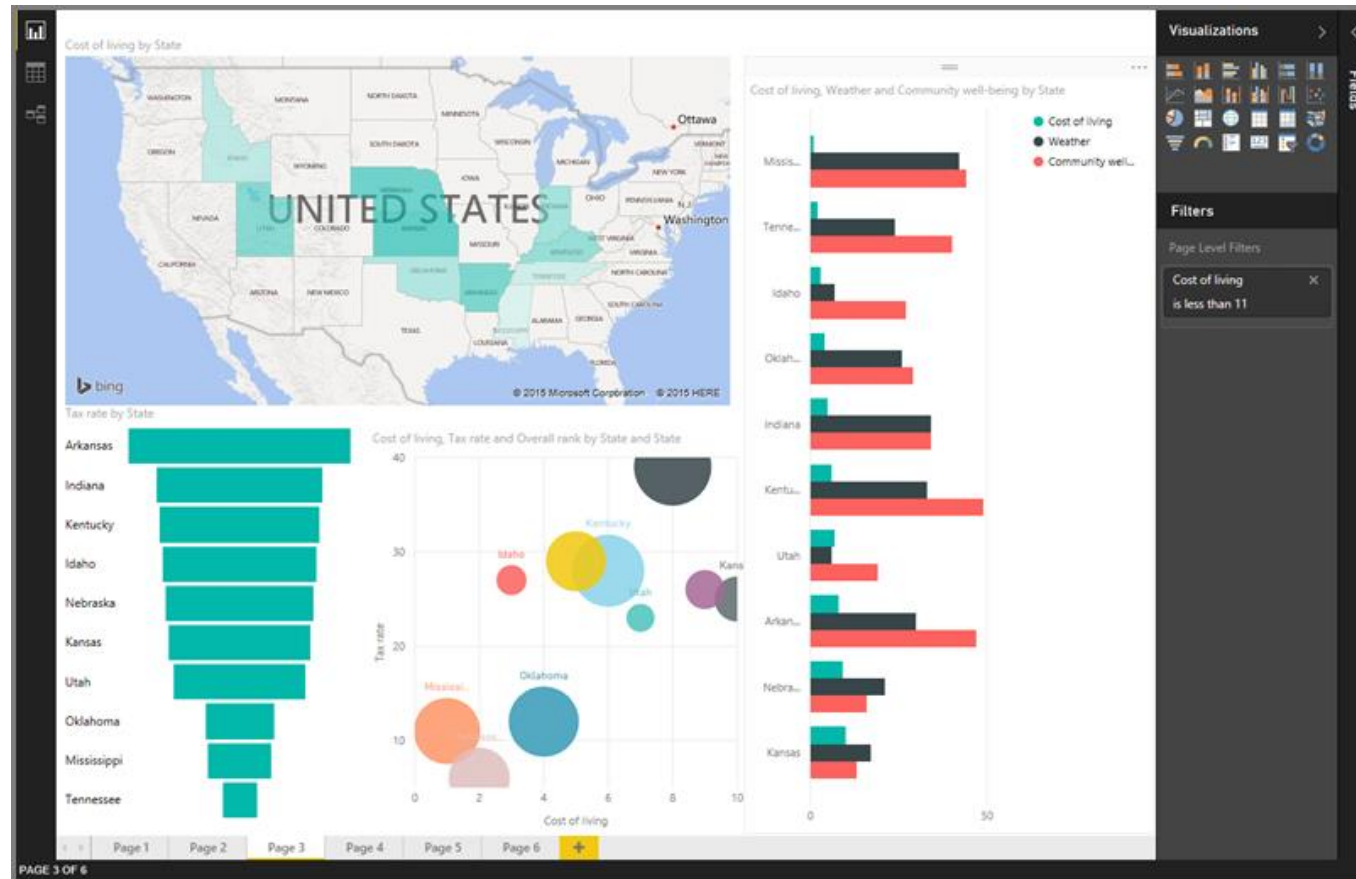
Power BI Desktop = Analysts
- create data connections, models, and reports

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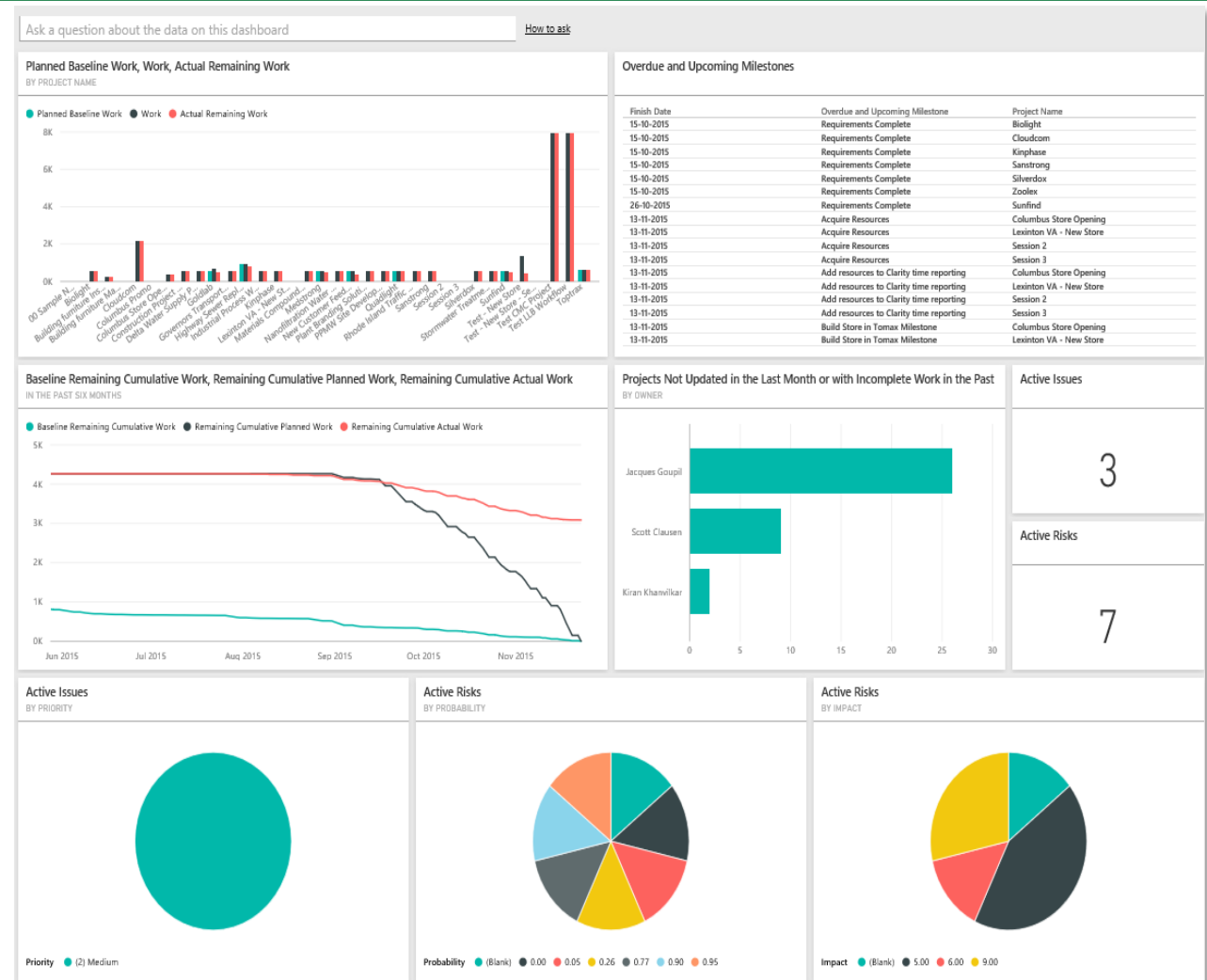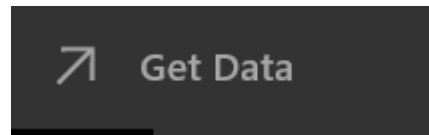
Power BI Content Pack
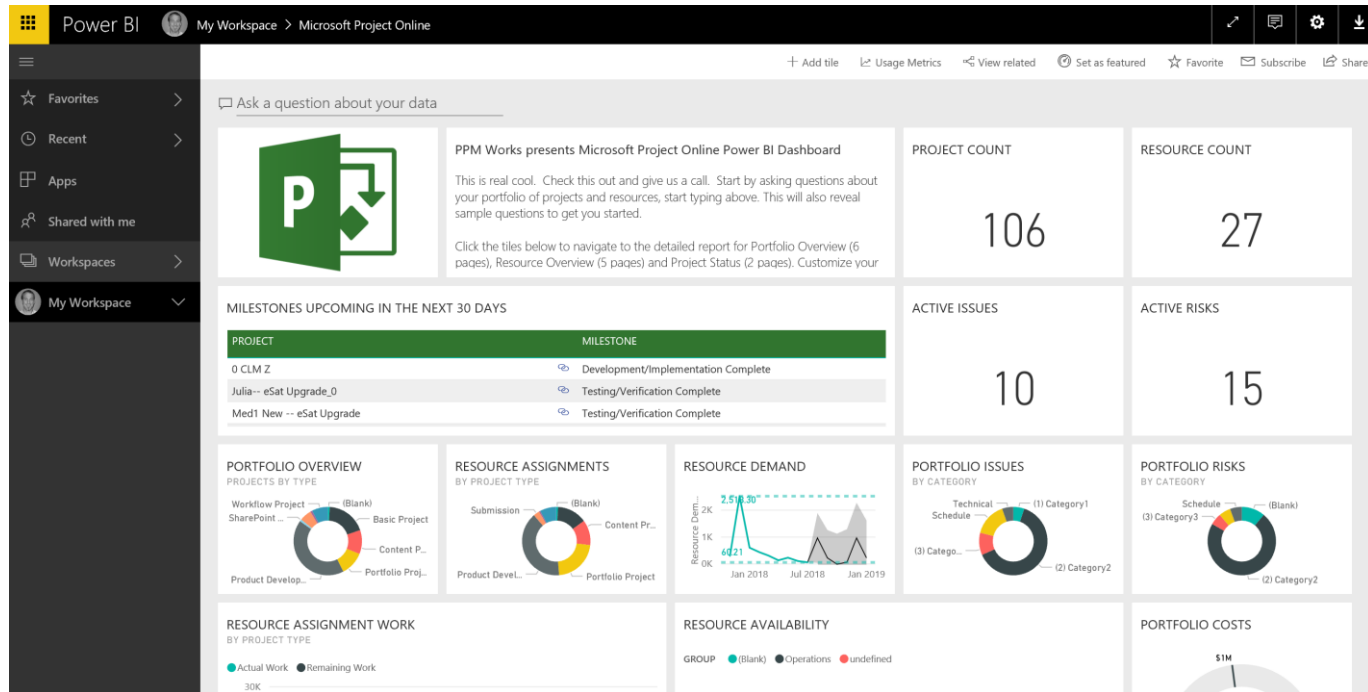
Did you know you can add SSRS to a Power BI Dashboard?

- **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
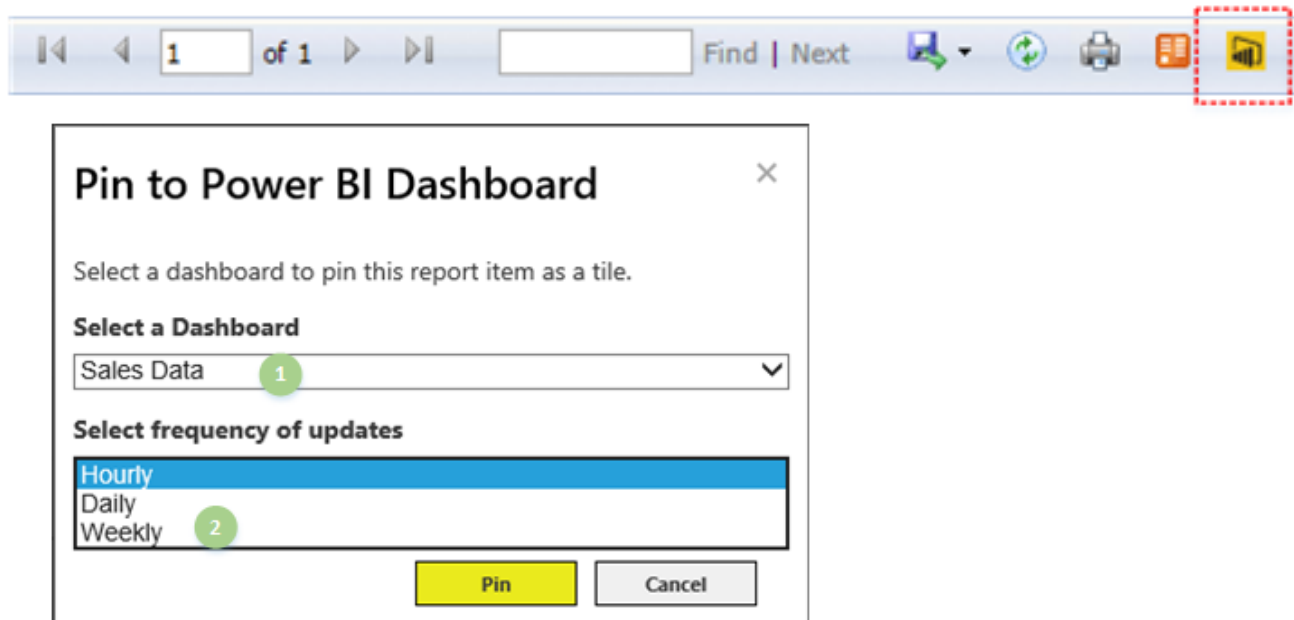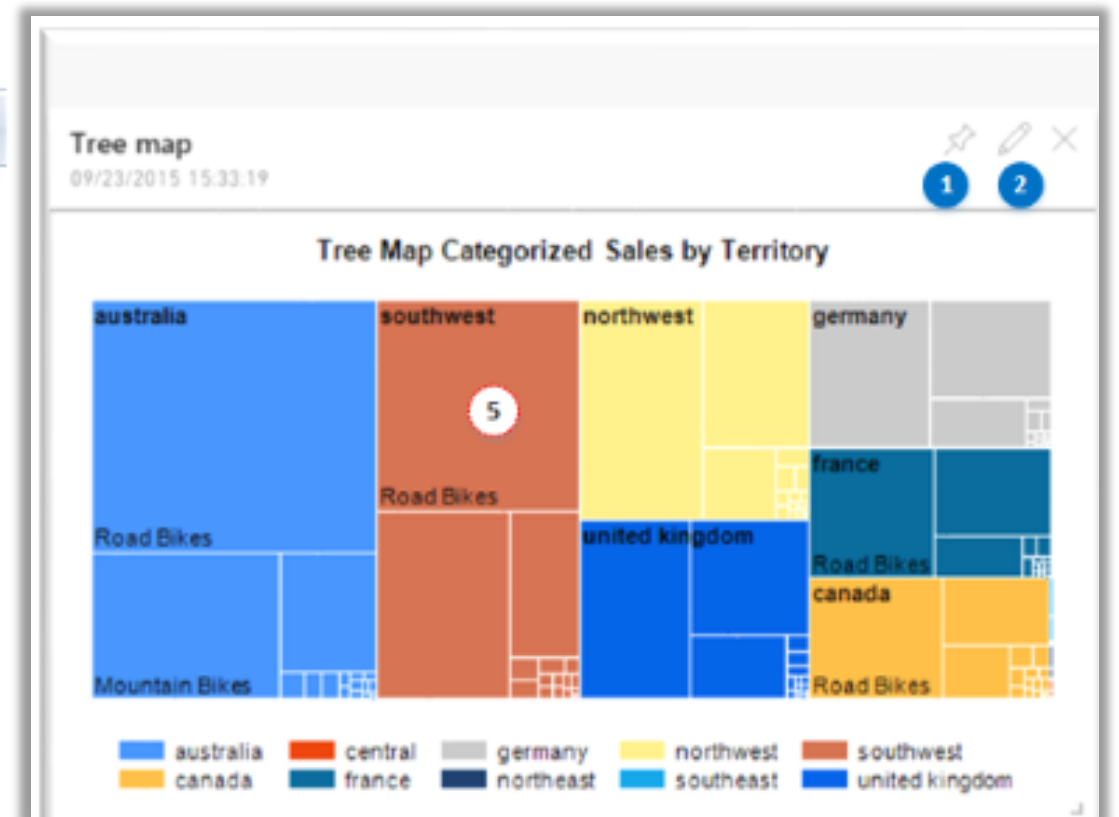
PPM Works Power BI – Dashboard in a Day

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

DESCRIPTION	PRODUCTS	ACTIVITIES	ADDITIONAL NOTES:
PPM Works will work with your organization to drive your business intelligence knowledge and understanding with the PPM Works Dashboard in a Day offering. 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. Together we will create a for your organization. **Power BI Datasets, Reports, and a Dashboard template**	• Microsoft Power BI and Project Online/Server	• Upfront Power BI Setup • Mentoring • Dashboard Session • Support	**Deliverables:** • ½ day hands on session with 5-10 attendees for hands on lab, demo's and Power BI overview • ½ day session prep with you and PPM Works • ½ day Power BI Training (optional) **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

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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
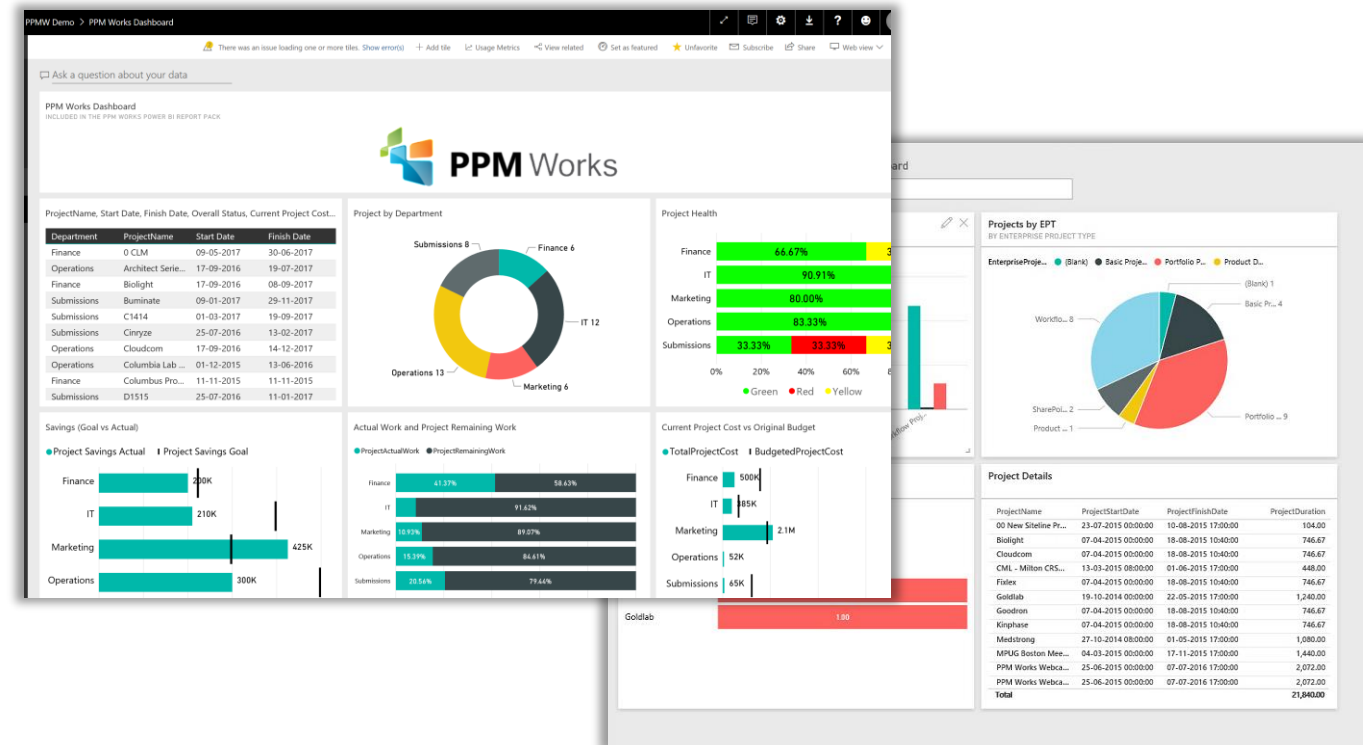
Microsoft Tips and Tricks and Immersion Sessions

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

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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

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Contact Us

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

Address: 30 Newbury Street, Boston, MA 02116

Phone: 888-858-3060

Email: info@ppmworks.com

Web: www.ppmworks.com

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PDU's for this Webinar

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

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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