Microsoft Partner
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Dashboard in a Day

Presented by Jacques Goupil

PPM Works

October 24th, 2017

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

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- Microsoft Community Leader Award 2012-2016
- PDD Instructor and Speaker at PMI® MN 2010-2017 Conference, Project Summit 2013 - 2017, and Microsoft Project Conference 2012 - 2014
- 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 Online/2010/2013/2016 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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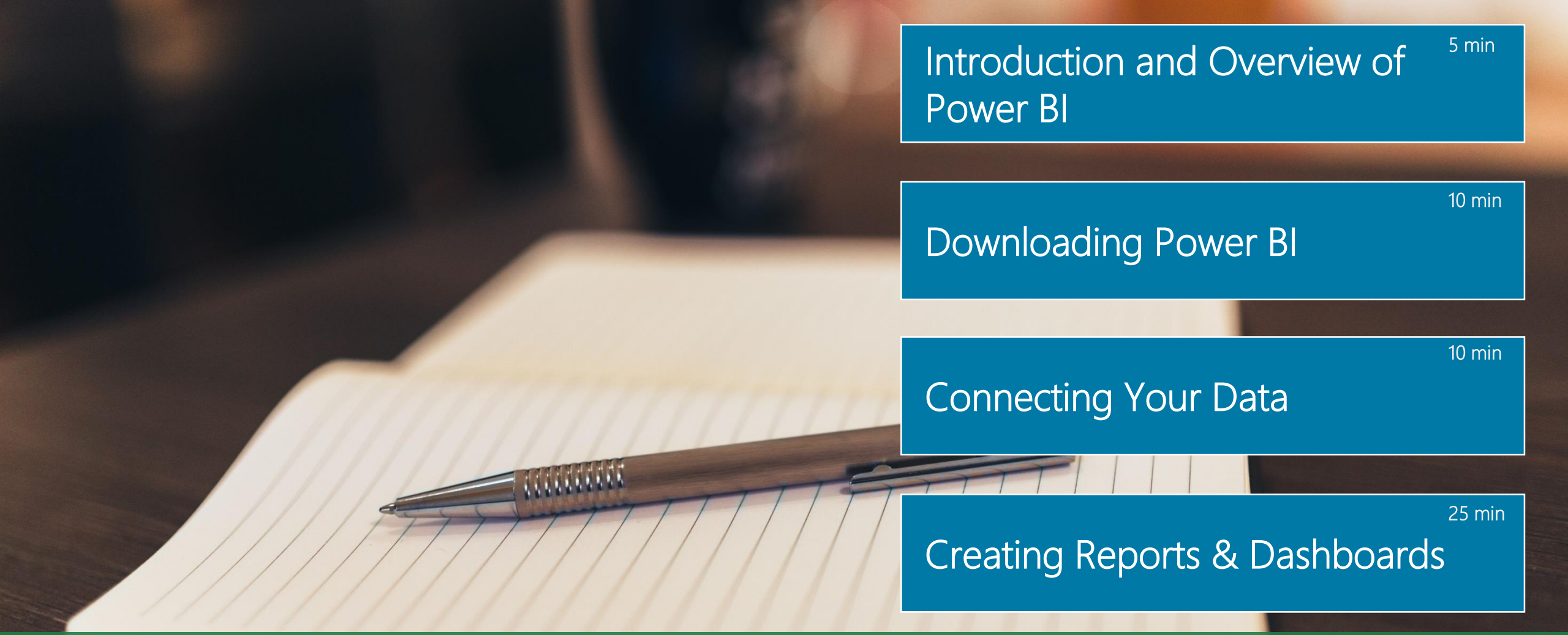

Agenda

- 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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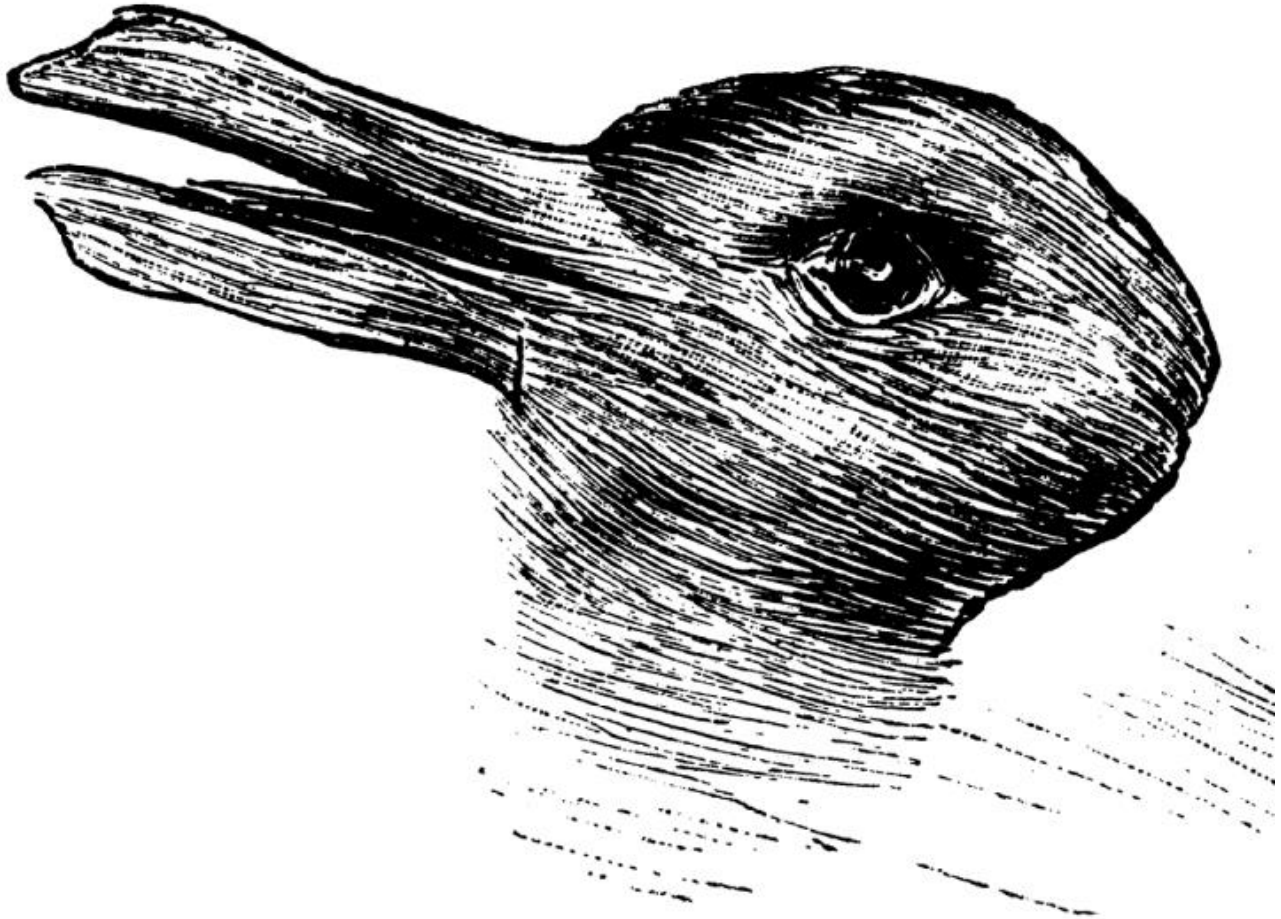
What do you see?



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

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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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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

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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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Power BI Overview

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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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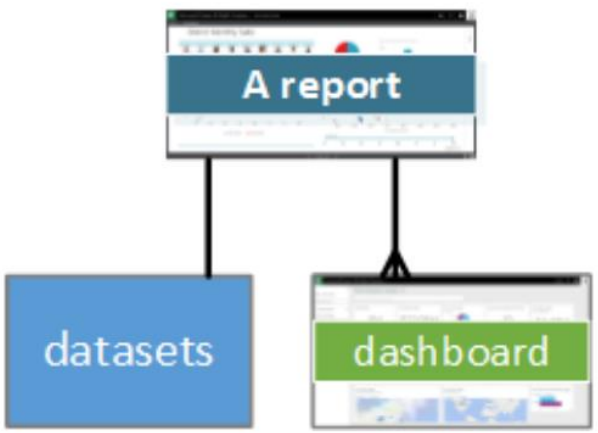
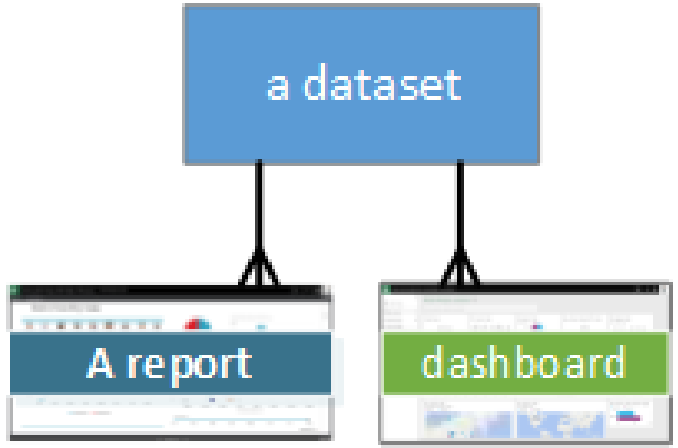
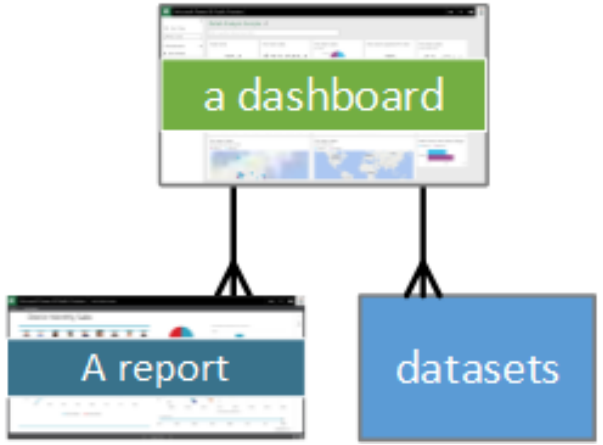
Building Blocks of Power BI

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







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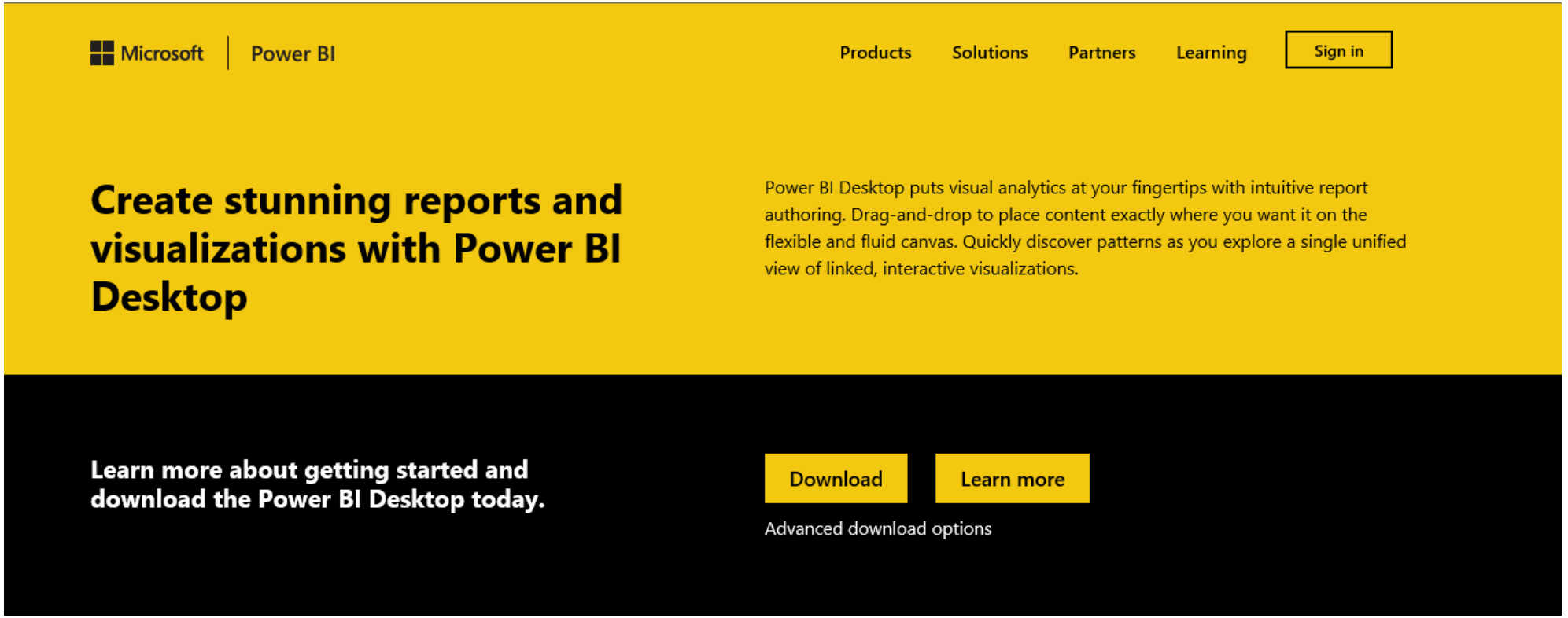
Download Power BI

Download Power BI Desktop

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



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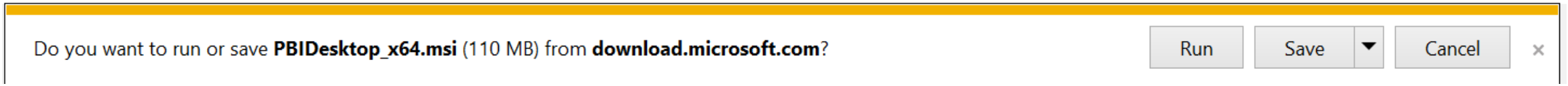
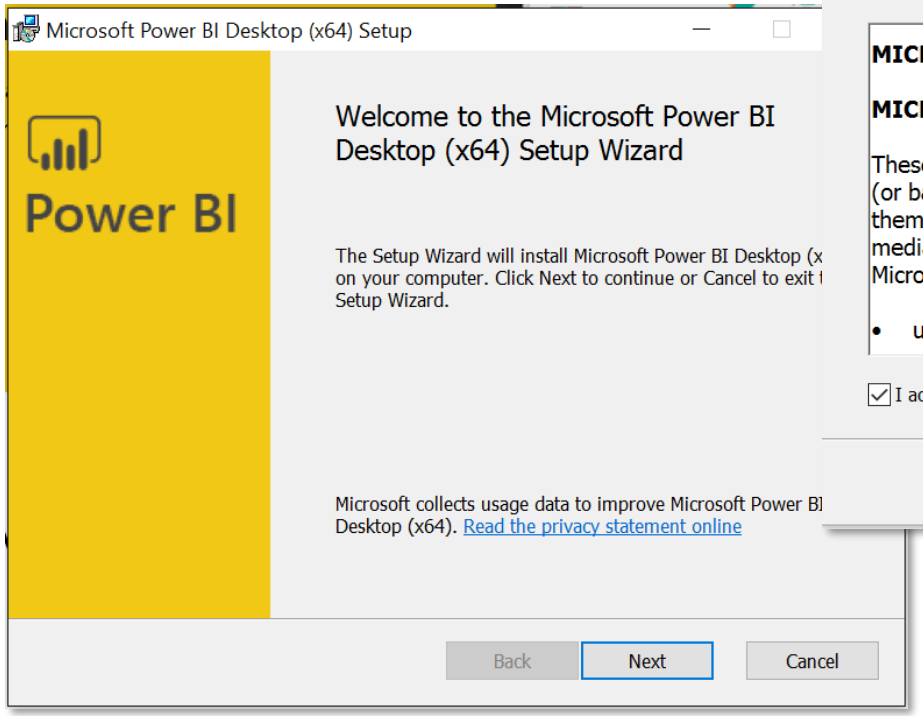
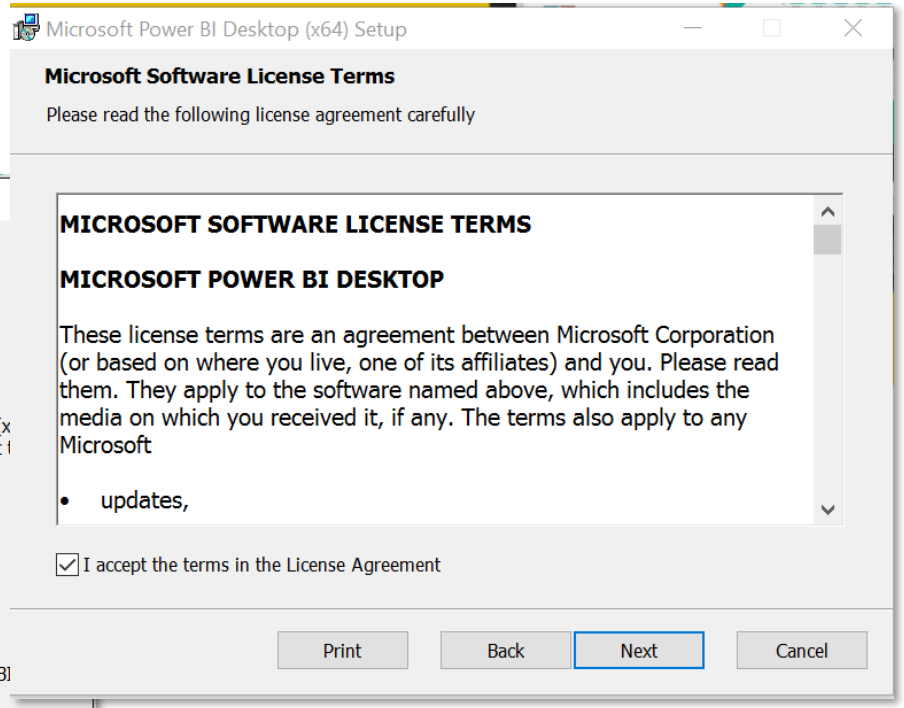
Download Power BI Desktop

- Select **Run** download the 64 bit version



- Click **Next**
- Accept the License Agreement
- Continue clicking through the install wizard





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Connecting to Project Online Data

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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

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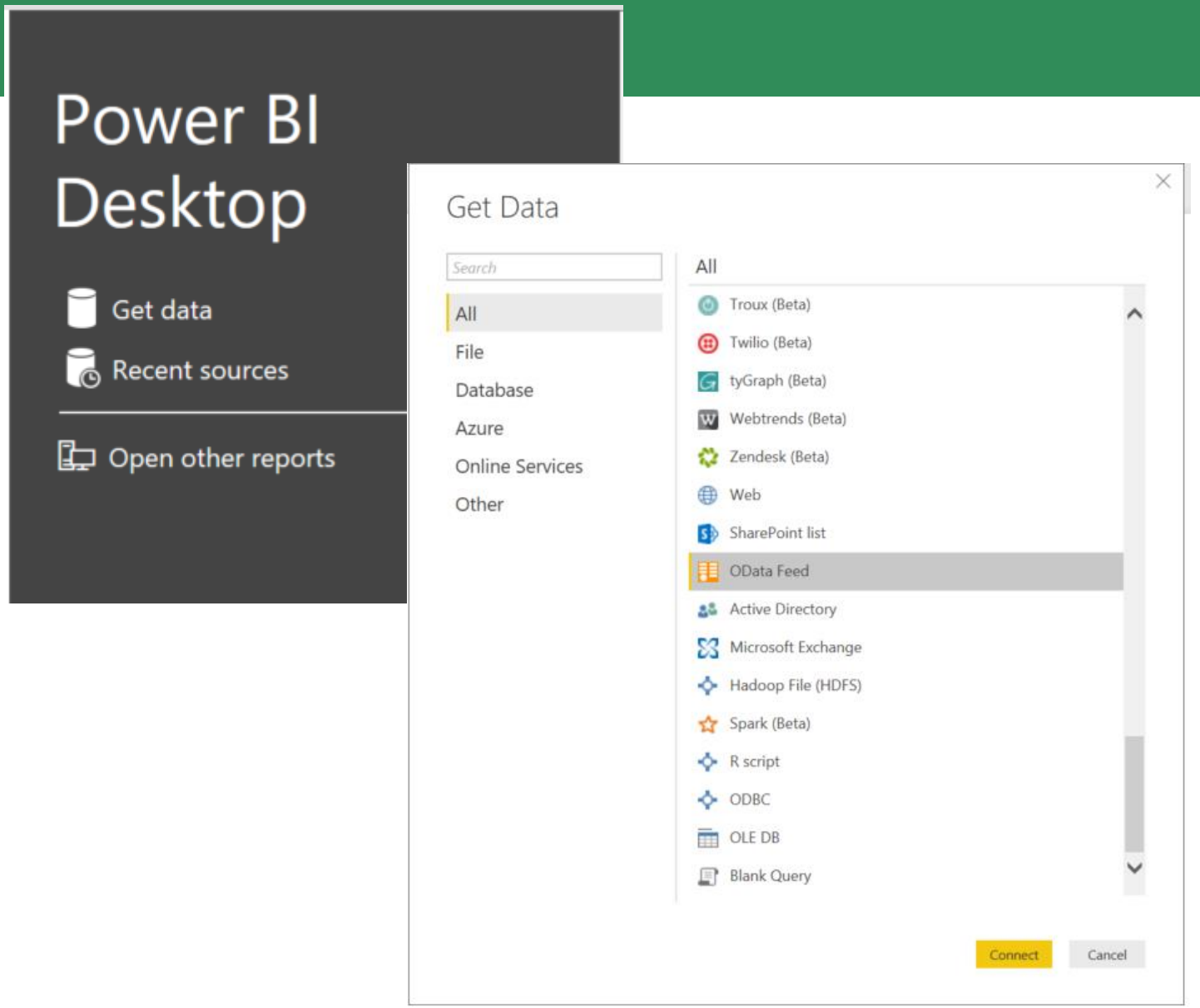
Get Data

- 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**

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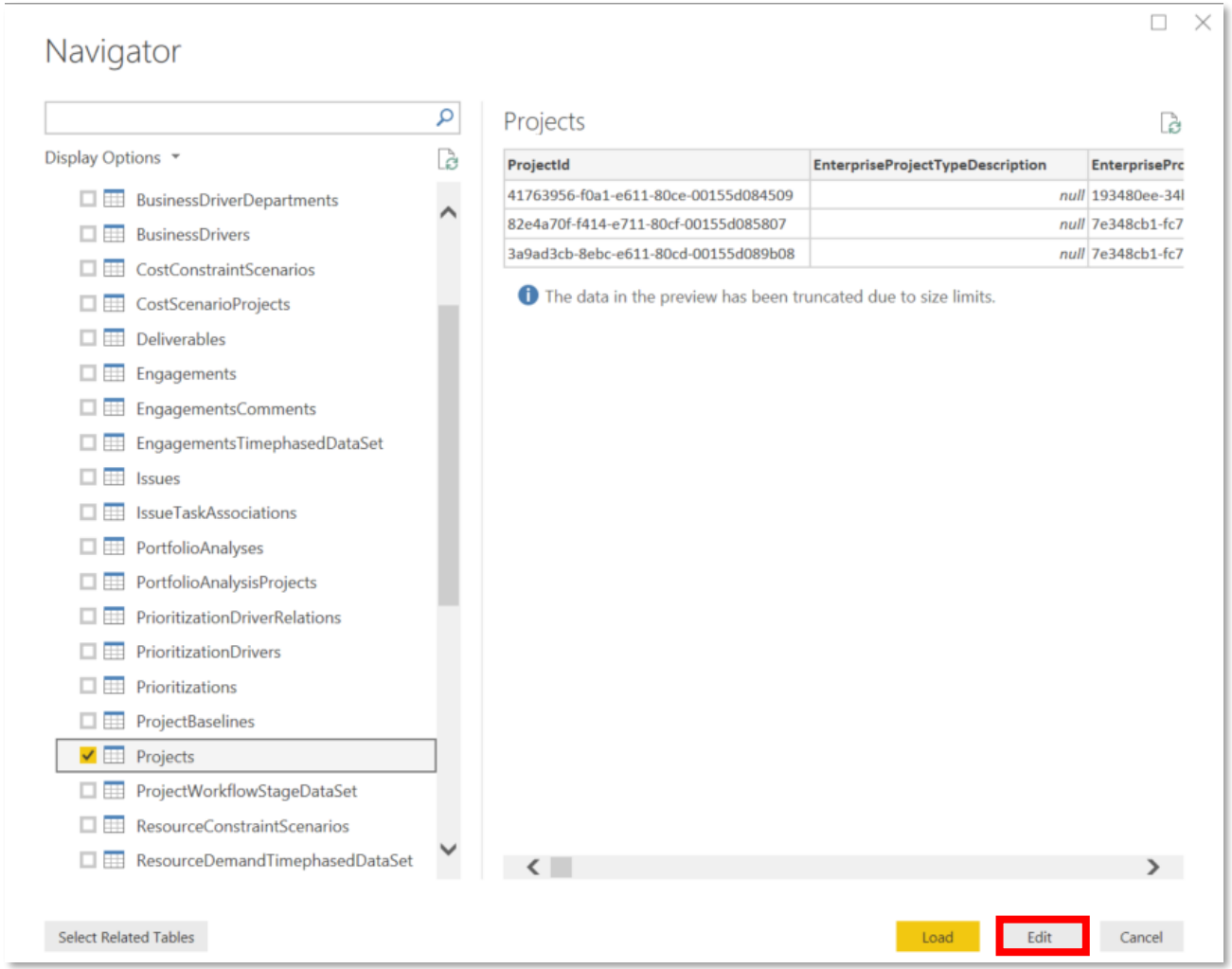
Select the Tables

- 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



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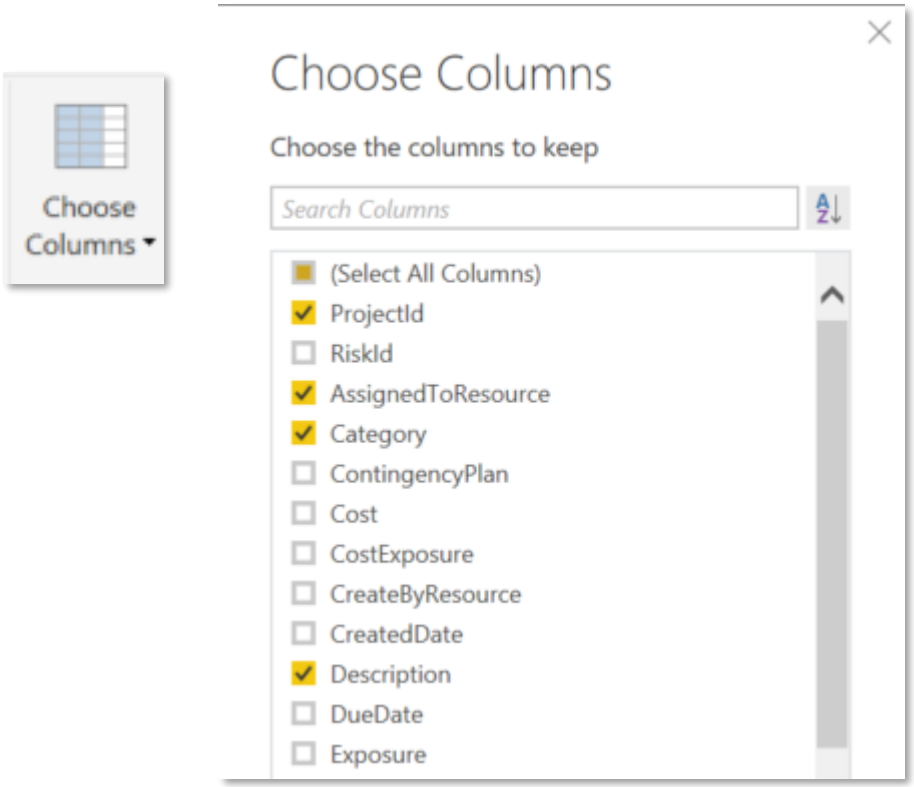
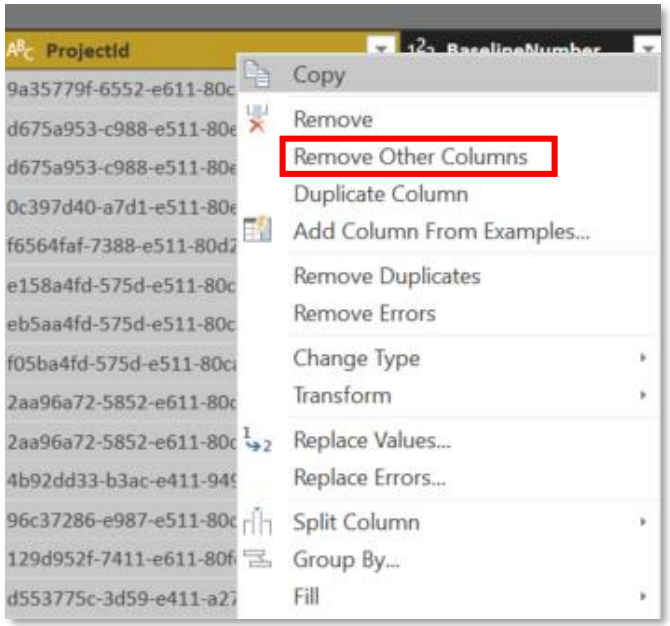
Editing the Tables

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





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Apply Query Changes

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

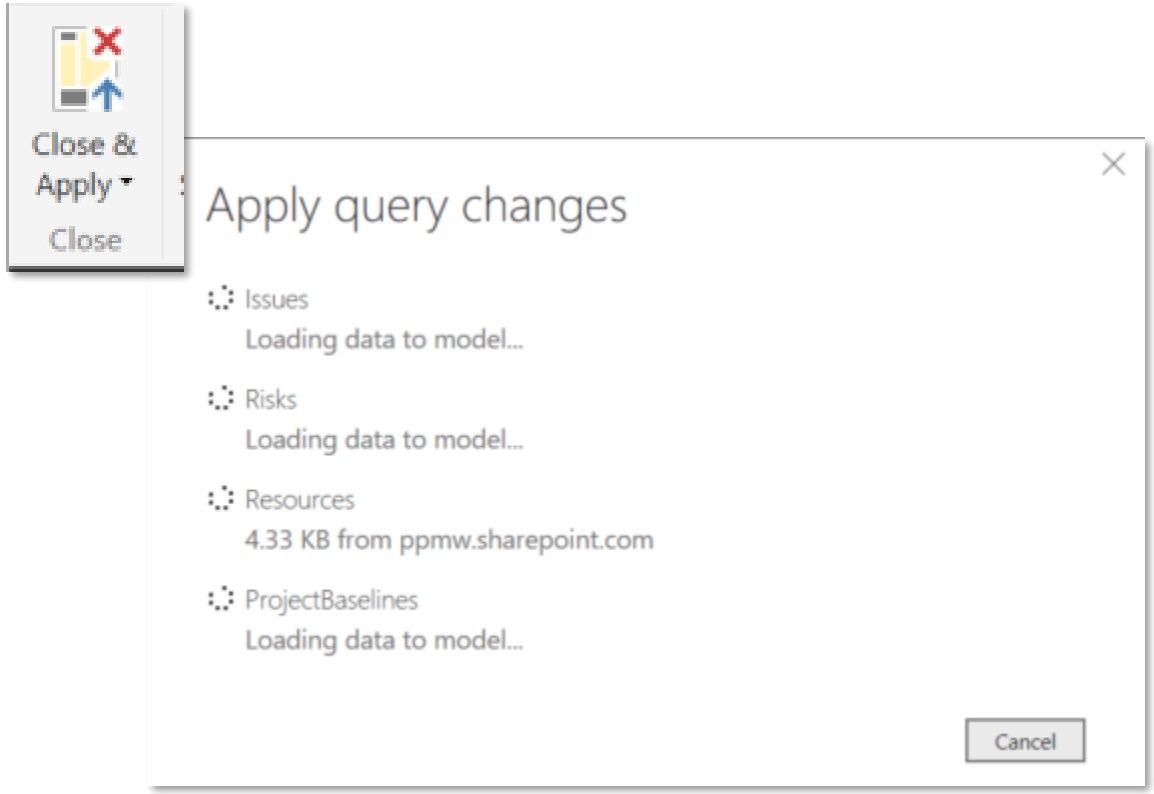

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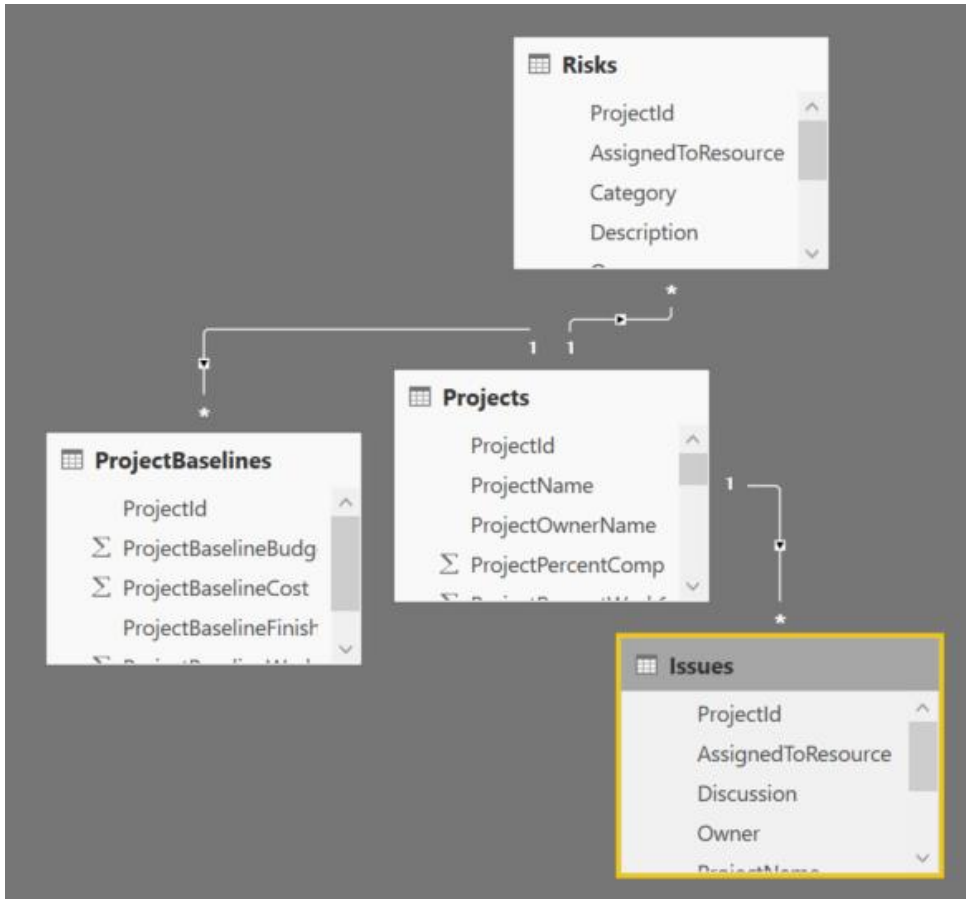
Table Relationship

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



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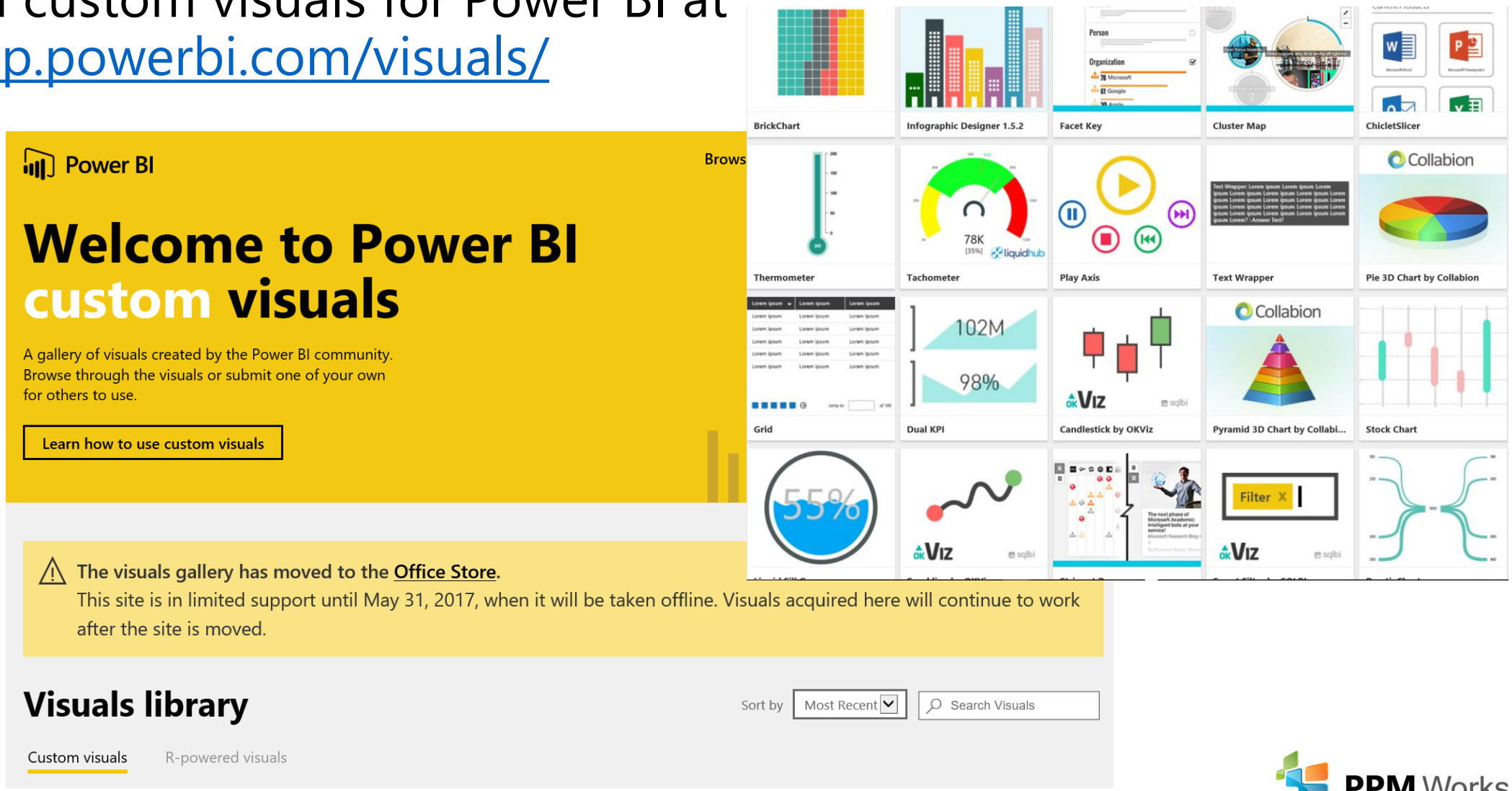
Power BI Custom Visuals

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



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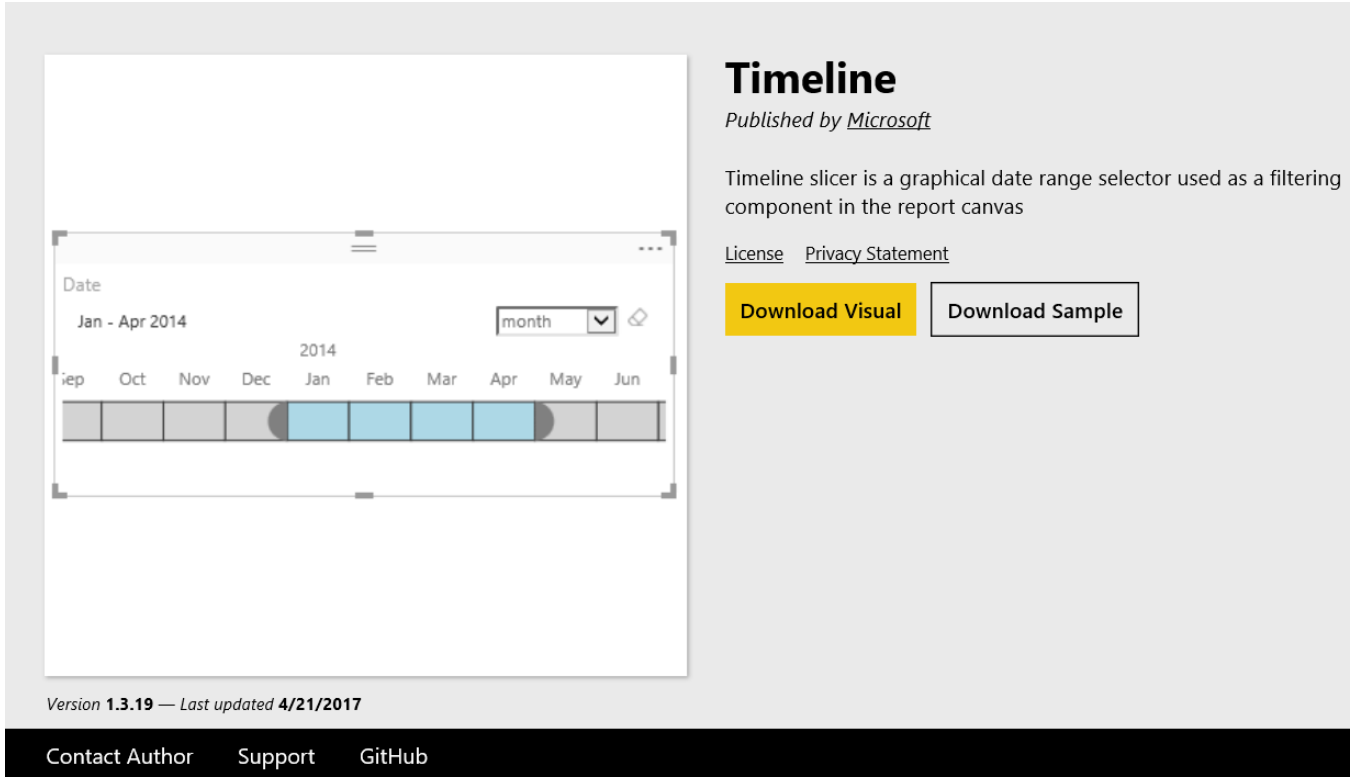
Download Custom Visuals

- Select the visual and download



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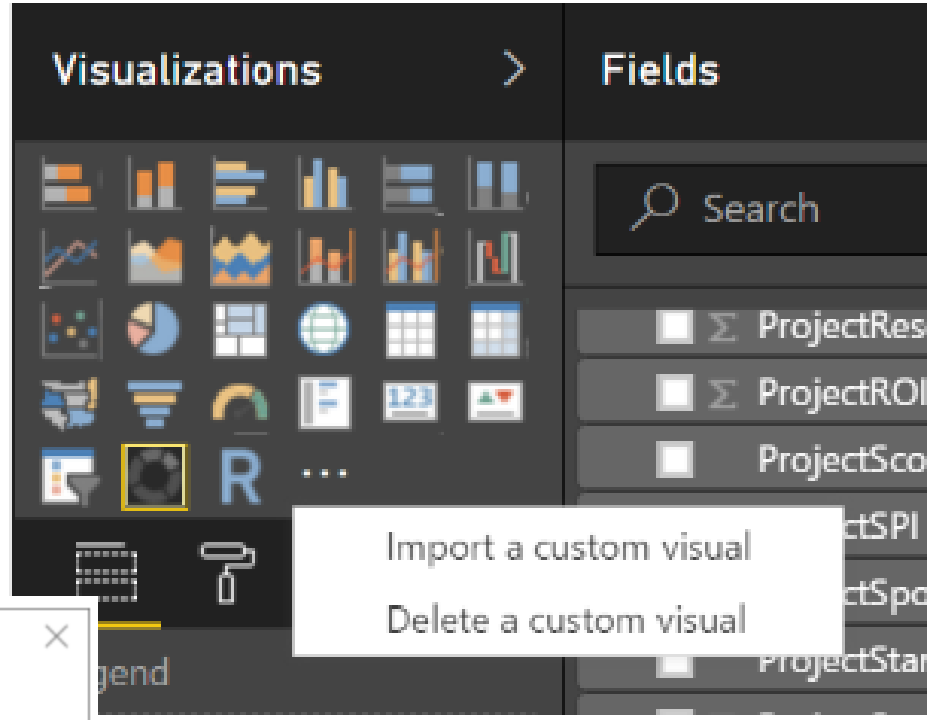
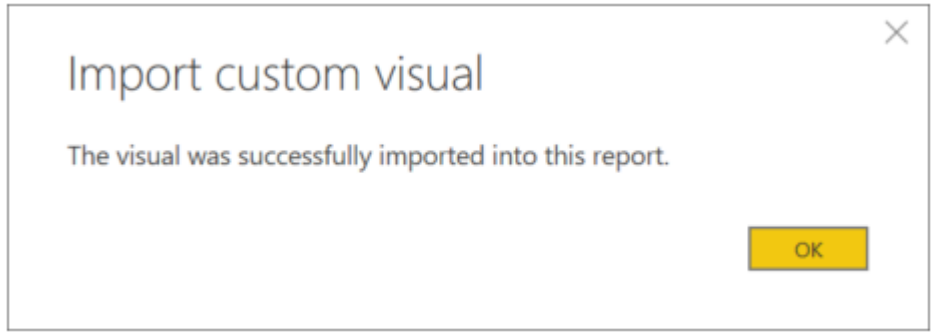
Import Custom Visuals

To import custom visuals:

- Click on the ellipse
- Select Import a custom visual





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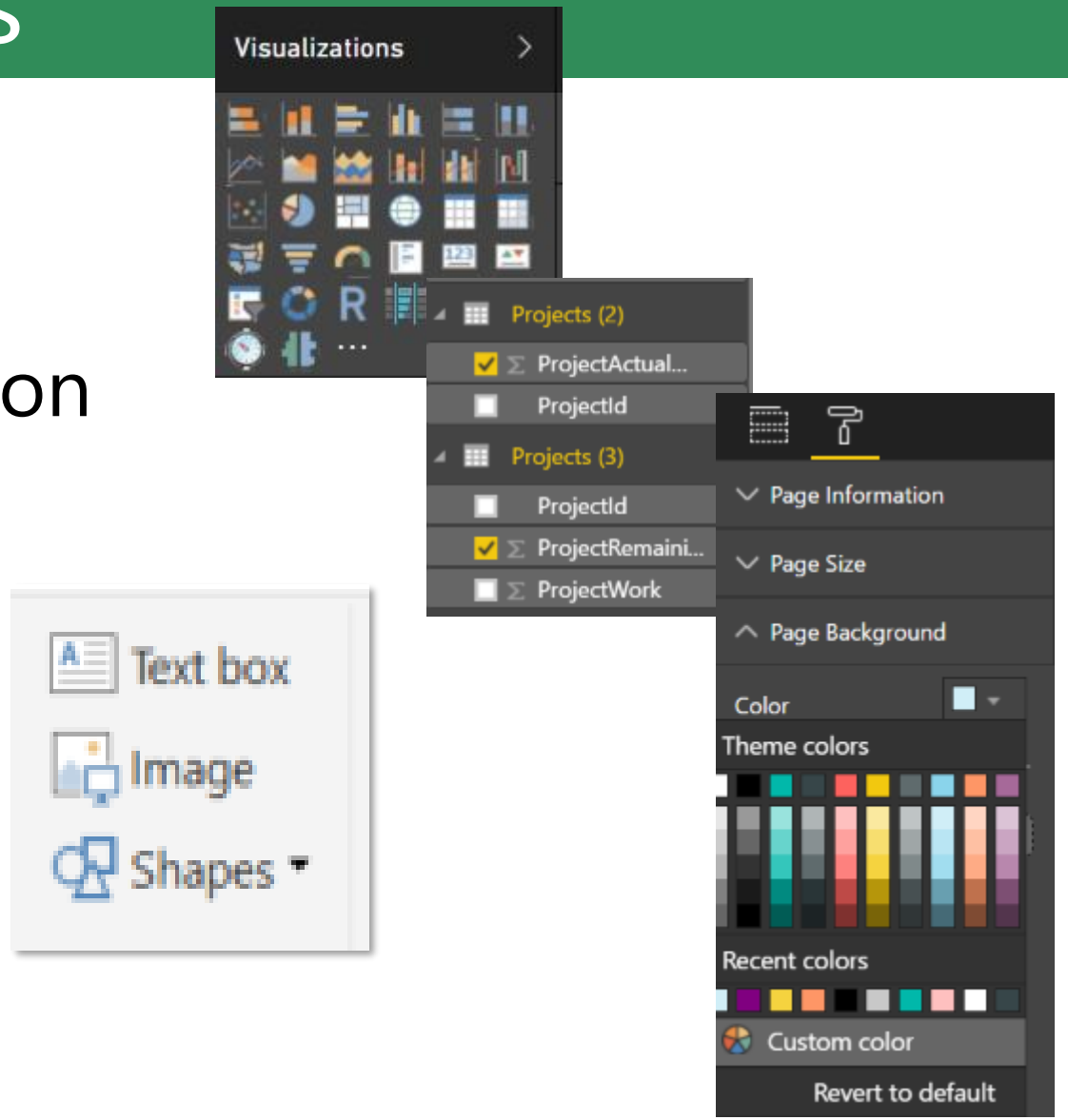
Building Power BI Reports

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



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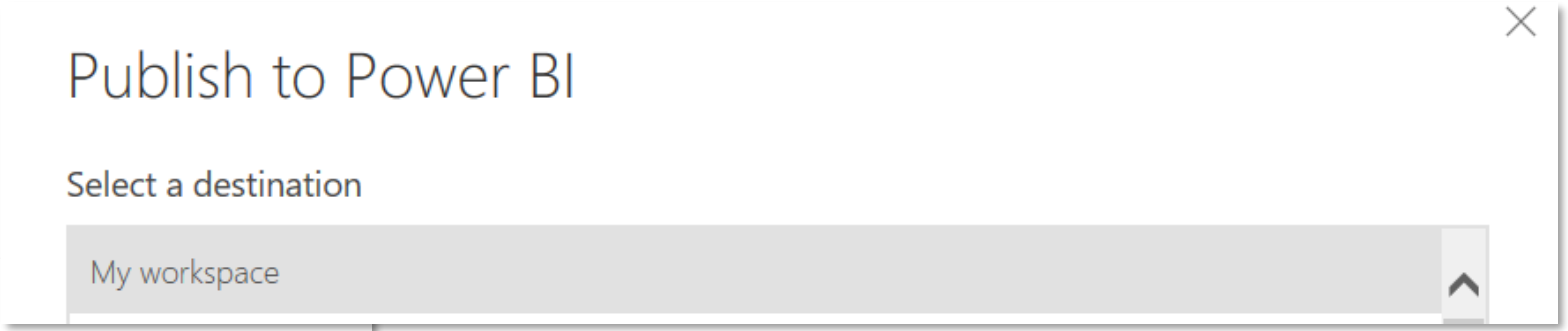
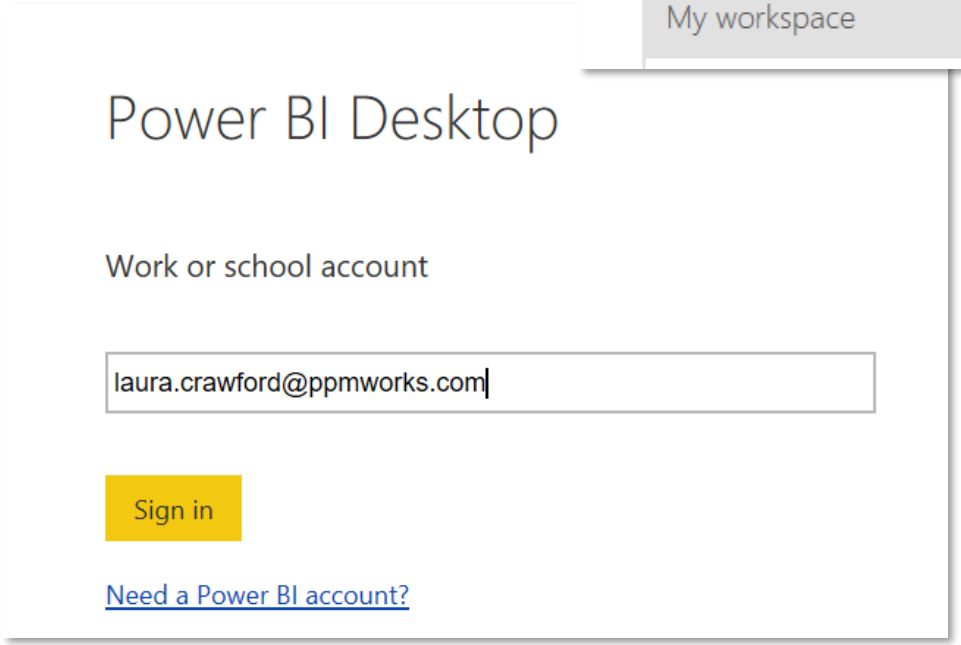
Save and Publish

To Publish your report:

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





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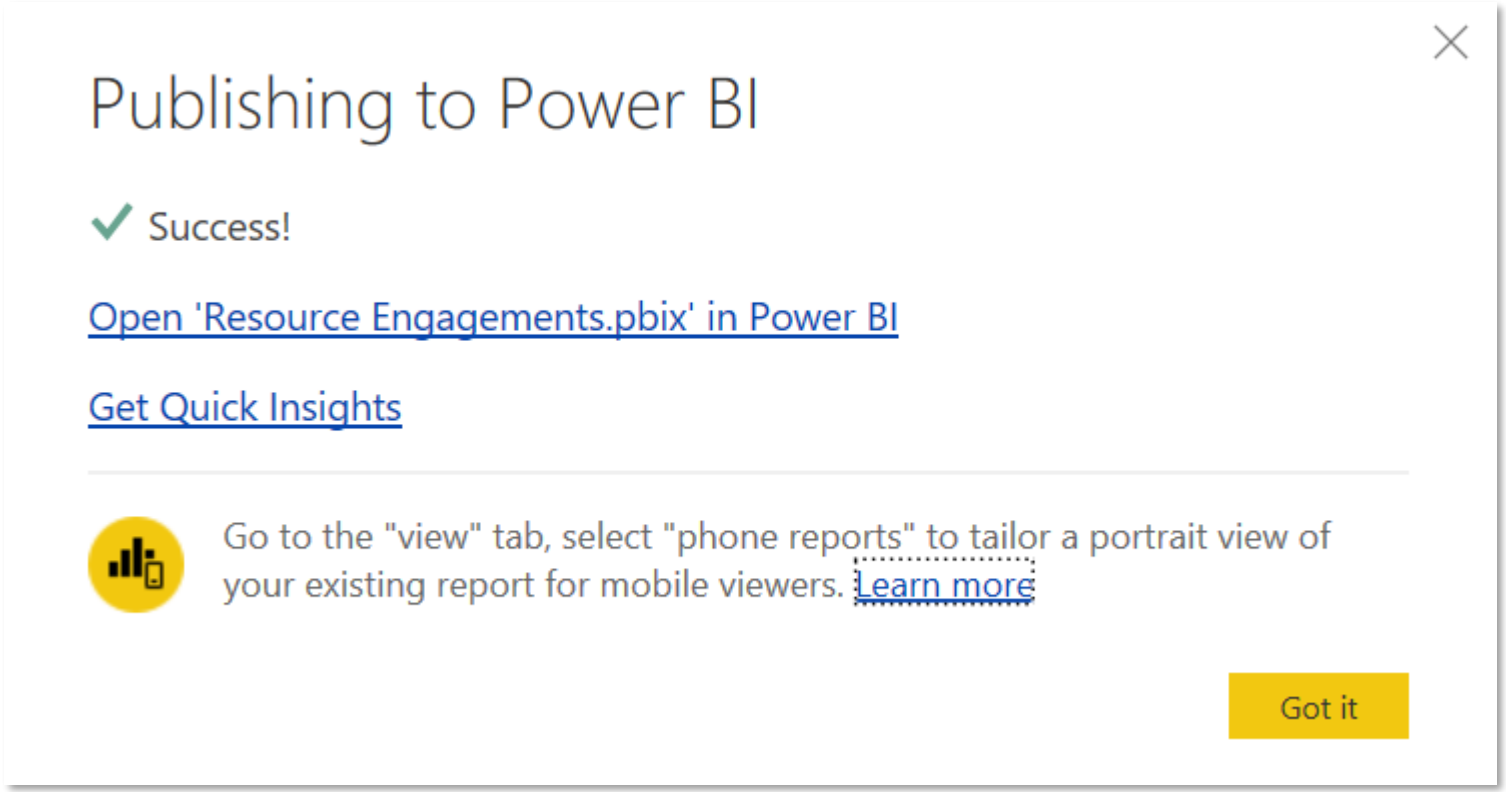
Publishing the Report

Once published a link to the report will be visible in Reports under the My Workspace section in Power BI



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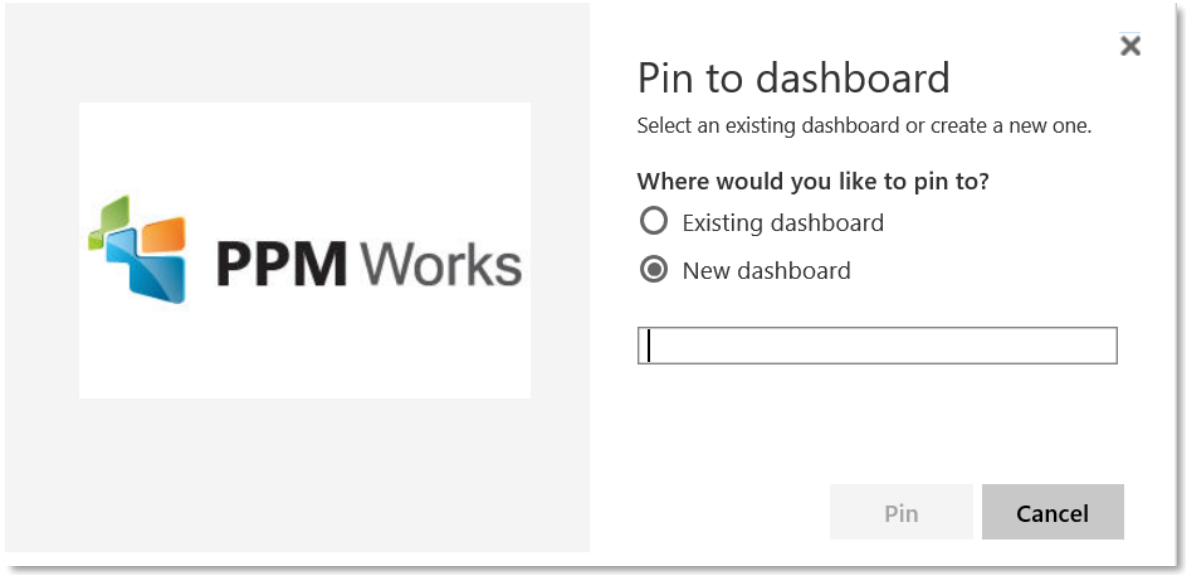
Create a New Dashboard

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



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Power BI Dashboard Demo

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Power BI Content Pack

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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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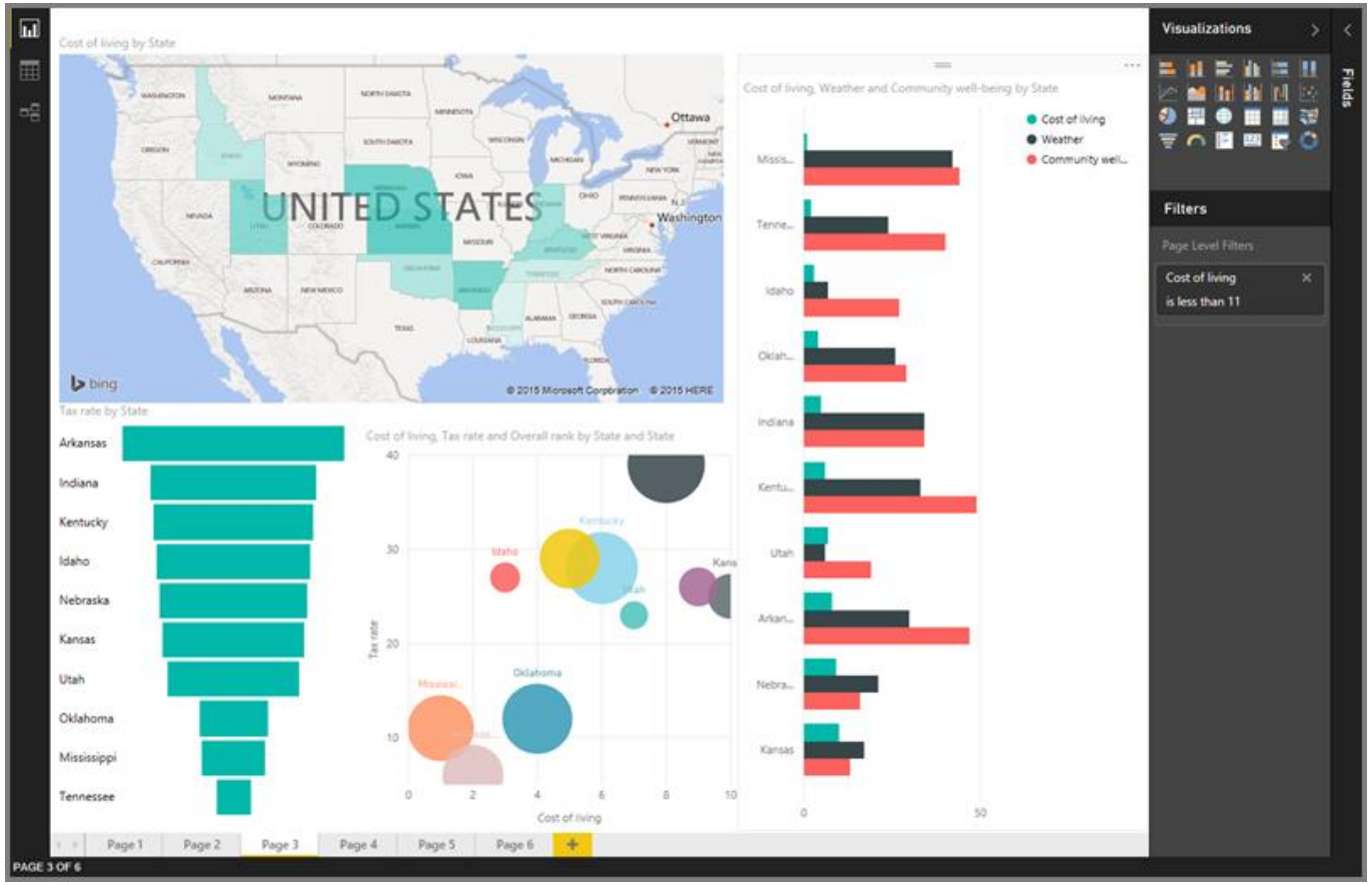
Power BI Service and Power BI Desktop



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

Project

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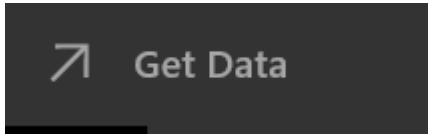
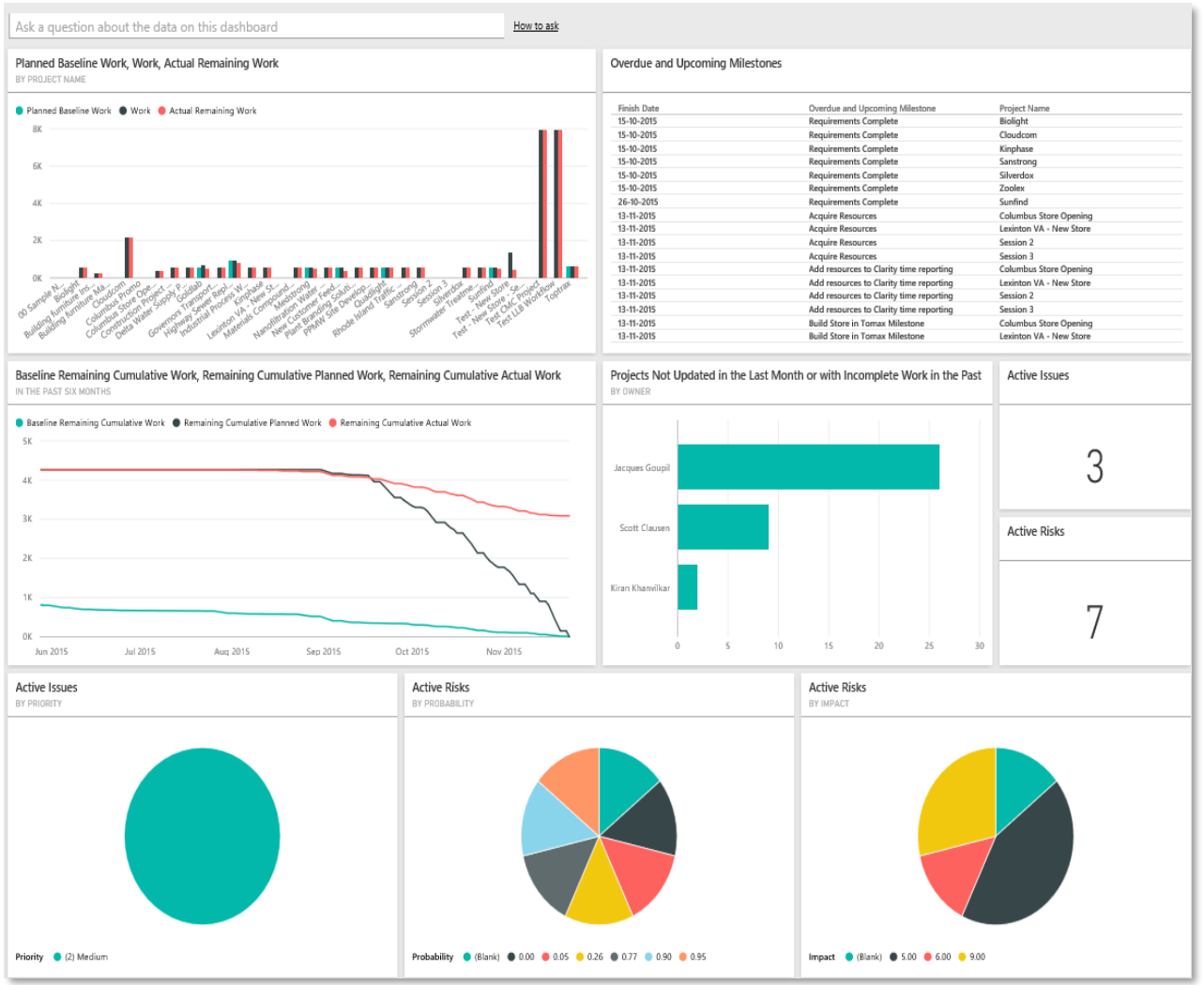
Power BI Content Pack

- 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 



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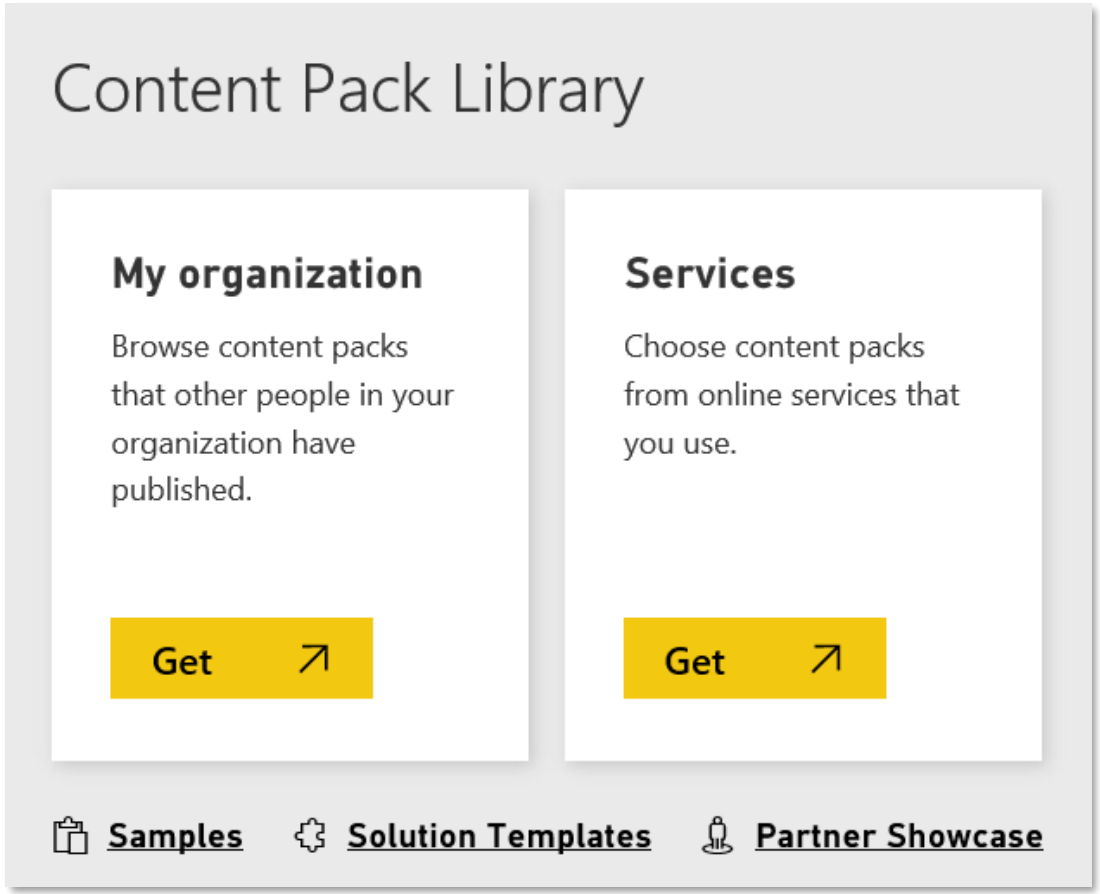
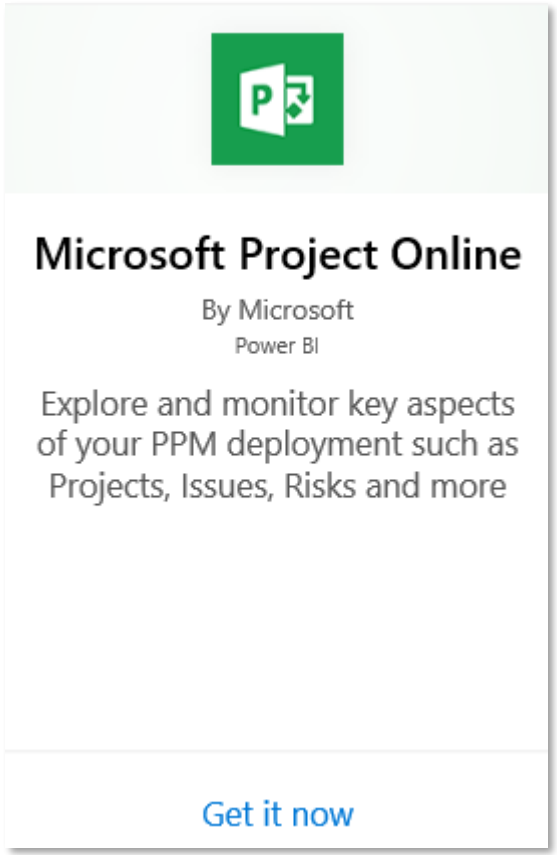
Power BI Content Pack

- Select Services to view all the SaaS providers
- Select Project Online to view all your project data in pre-configured dashboards and reports





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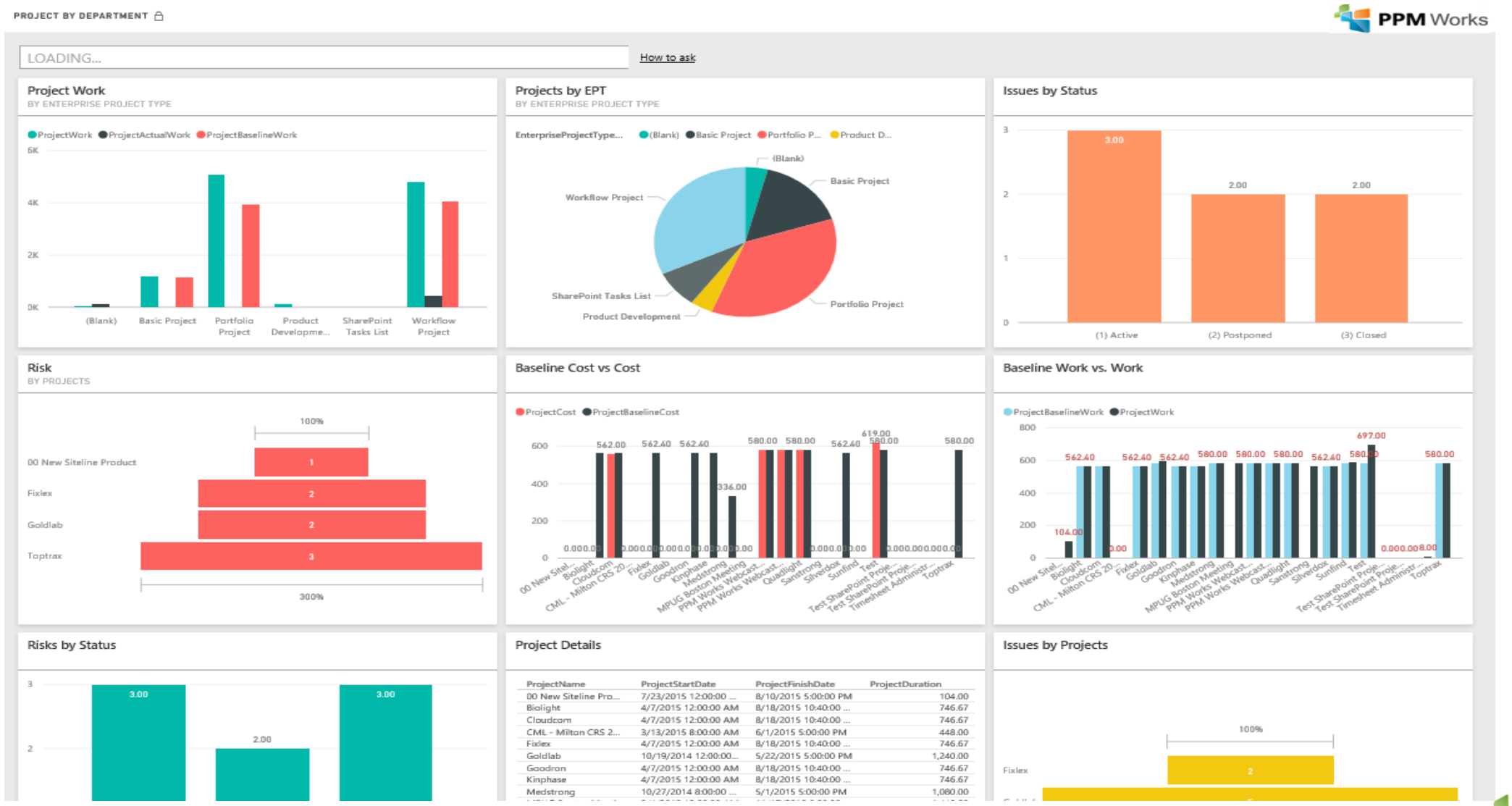
Power BI Content Pack



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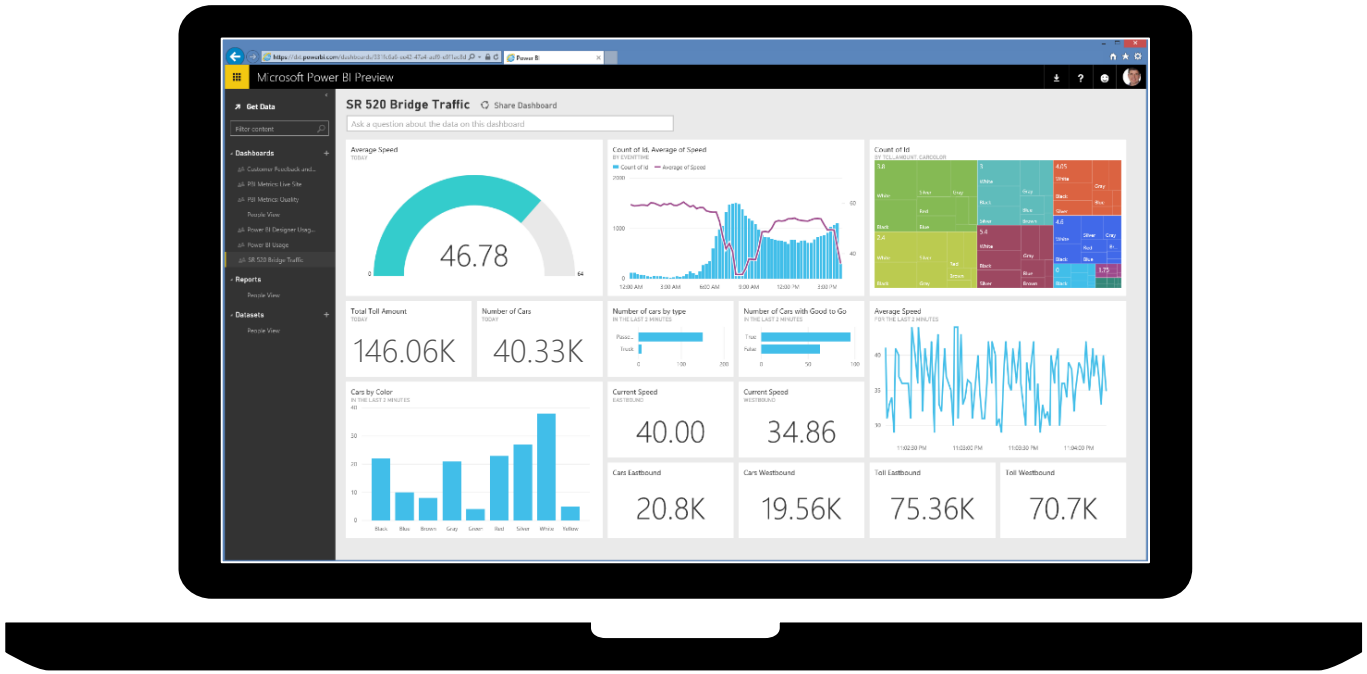
Live dashboards & reports



- Live dashboards provide a 360º view of your business
- Track your data in real-time with support for streaming data
- Drill through to underlying reports to explore in more detail
- Pin new visualizations and KPIs to monitor performance

Project

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Mobile apps

- Native apps for iPad, iPhone, Android and Windows devices
- Receive alerts to important changes in your data
- Share and collaborate with colleagues and take action

Windows iOS Android HTML5

Project

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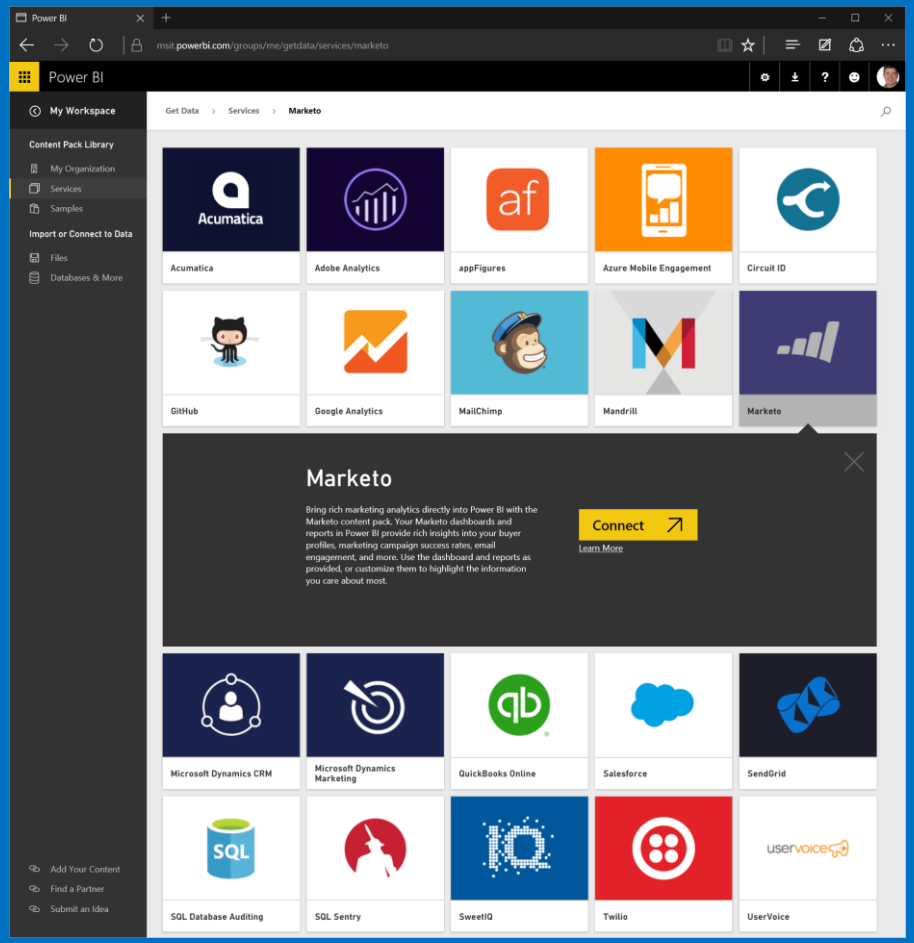
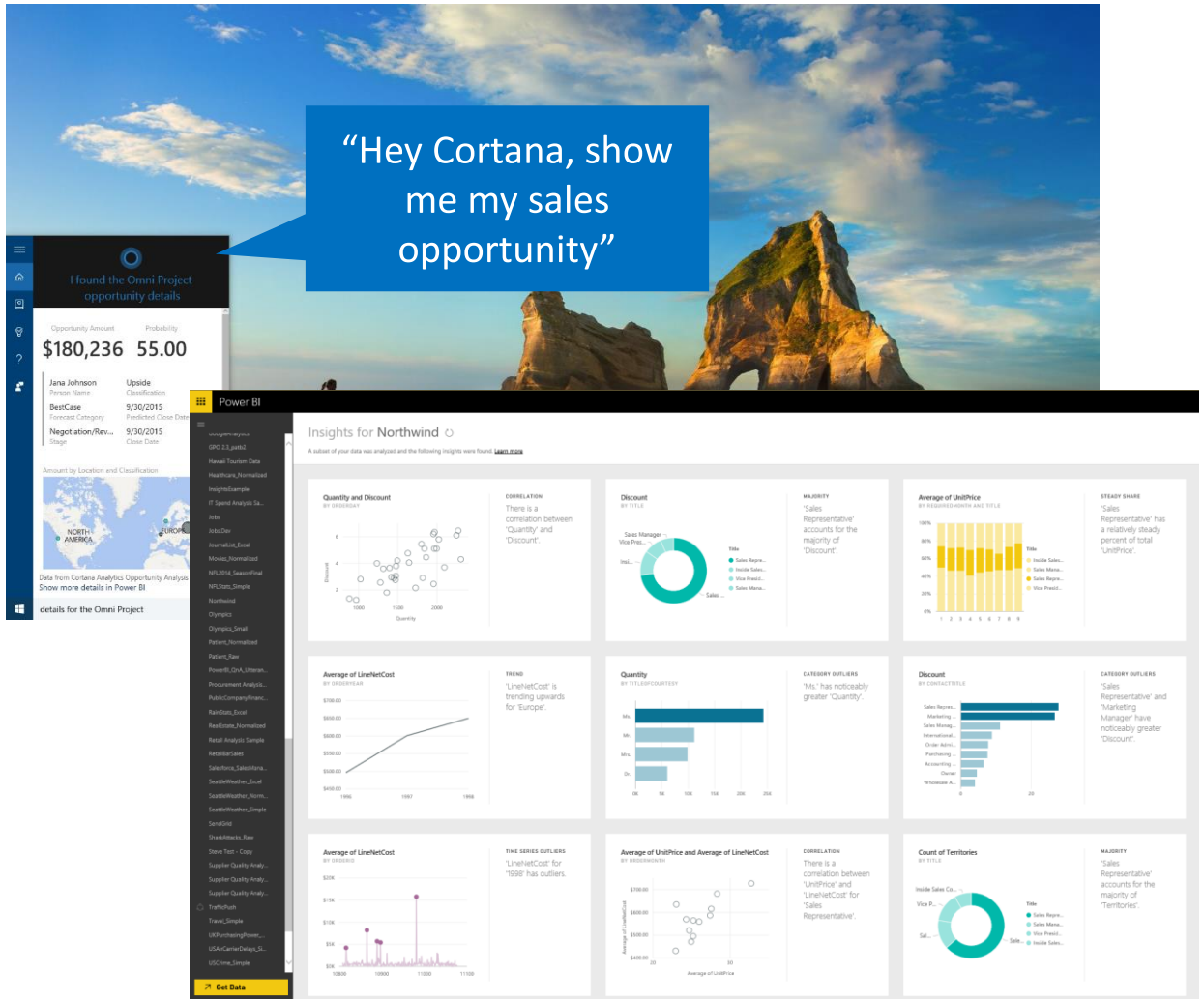
Get started quickly

Pre-built solutions include dashboards, reports, and data models available out-of-the-box for SaaS services or built by your organization



Marketo
QuickBooks
SendGrid
GitHub
Microsoft Dynamics CRM
zendesk
Visual Studio Online
UserVoice
twilio
MailChimp
Dynamics Marketing
appfigures
Google Analytics
CIRCUIT ID
SQL Sentry
comScore
Adobe Analytics
SweetIQ
Acumatica THE CLOUD ERP
Azure Audit Logs
salesforce
stripe
Microsoft Dynamics NAV
Azure Mobile Engagement
webtrends
Application Insights
Microsoft Windows Dev Center
SQL Database Auditing

Experience your data in new ways



- Natural language query—ask questions of your data more naturally
- Cortana integration—allows you to access your data from Windows 10
- Quick insights—auto discover patterns and insights in your data

Project

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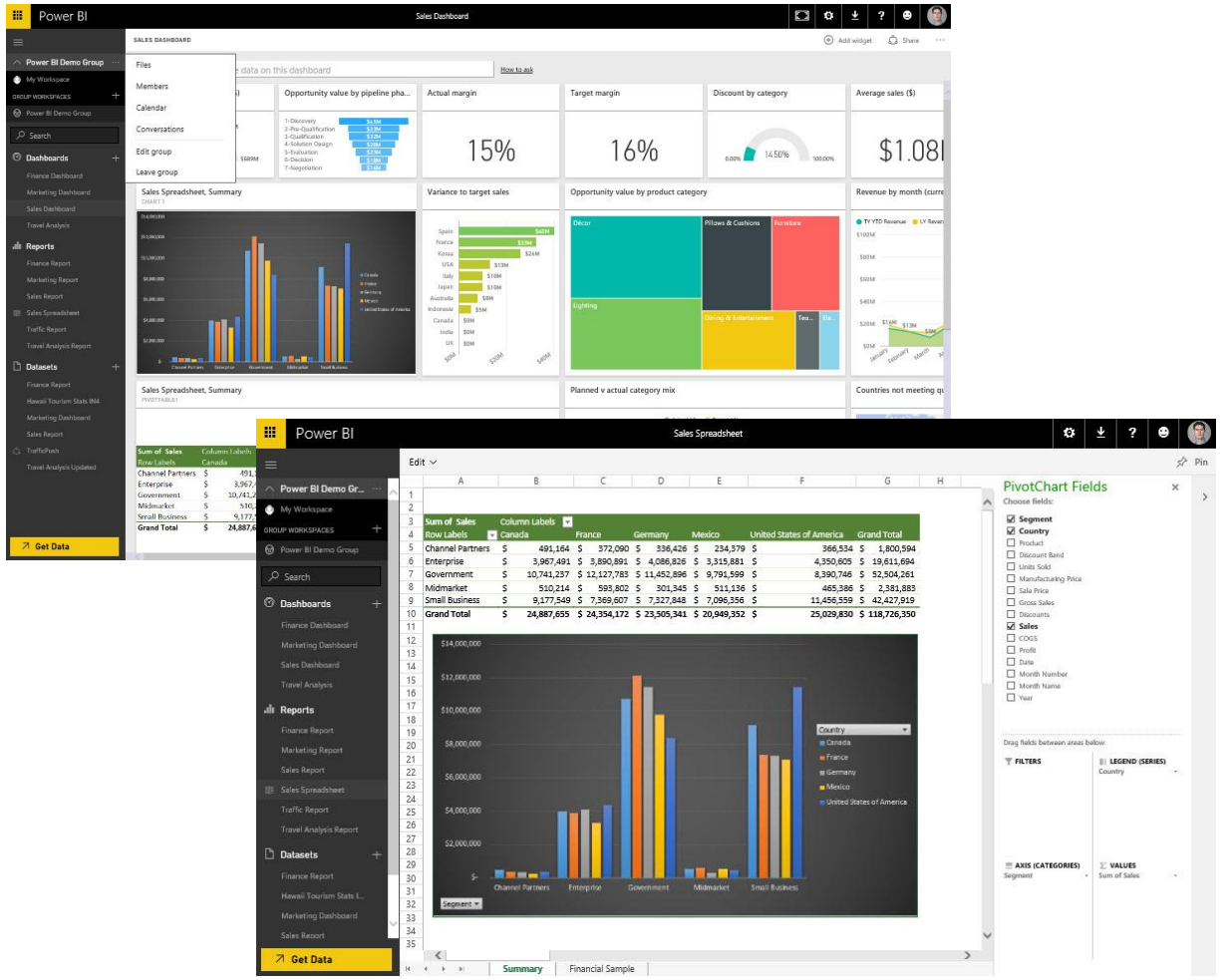
Seamless integration with Office 365



- Team collaboration through support for Office 365 Groups
- Seamless navigation to other workloads in Office 365
- Use Excel data and pin live charts to your Power BI dashboards
- View Excel spreadsheets through support for Excel Online

Project

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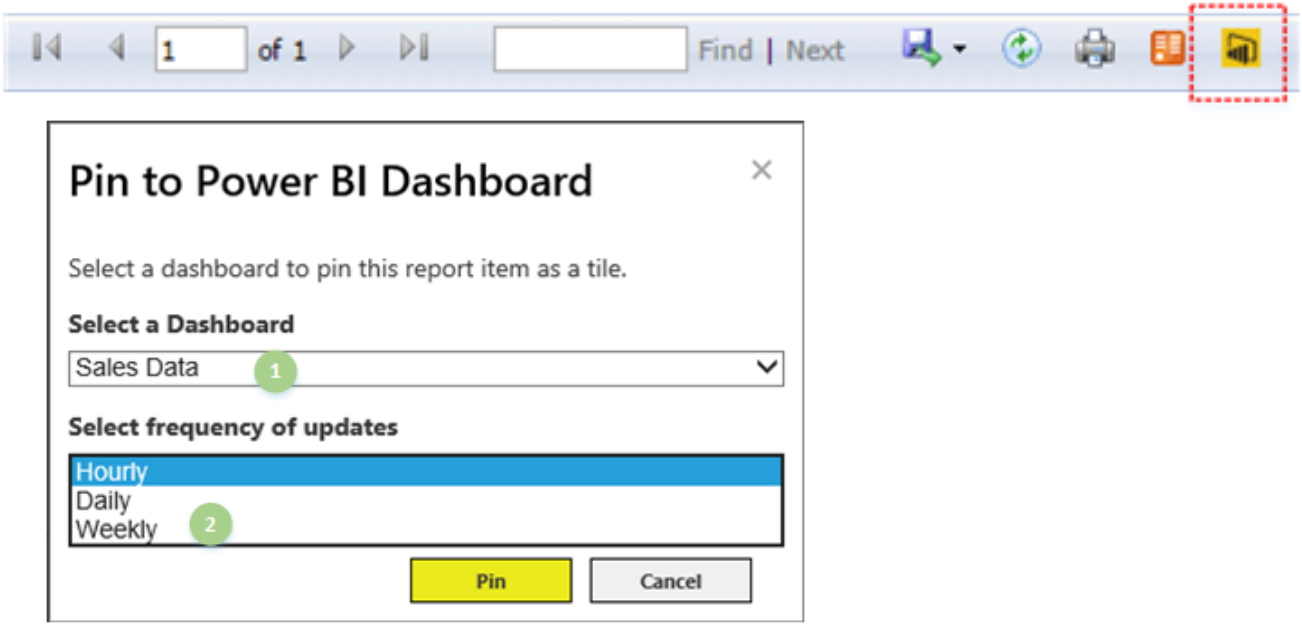
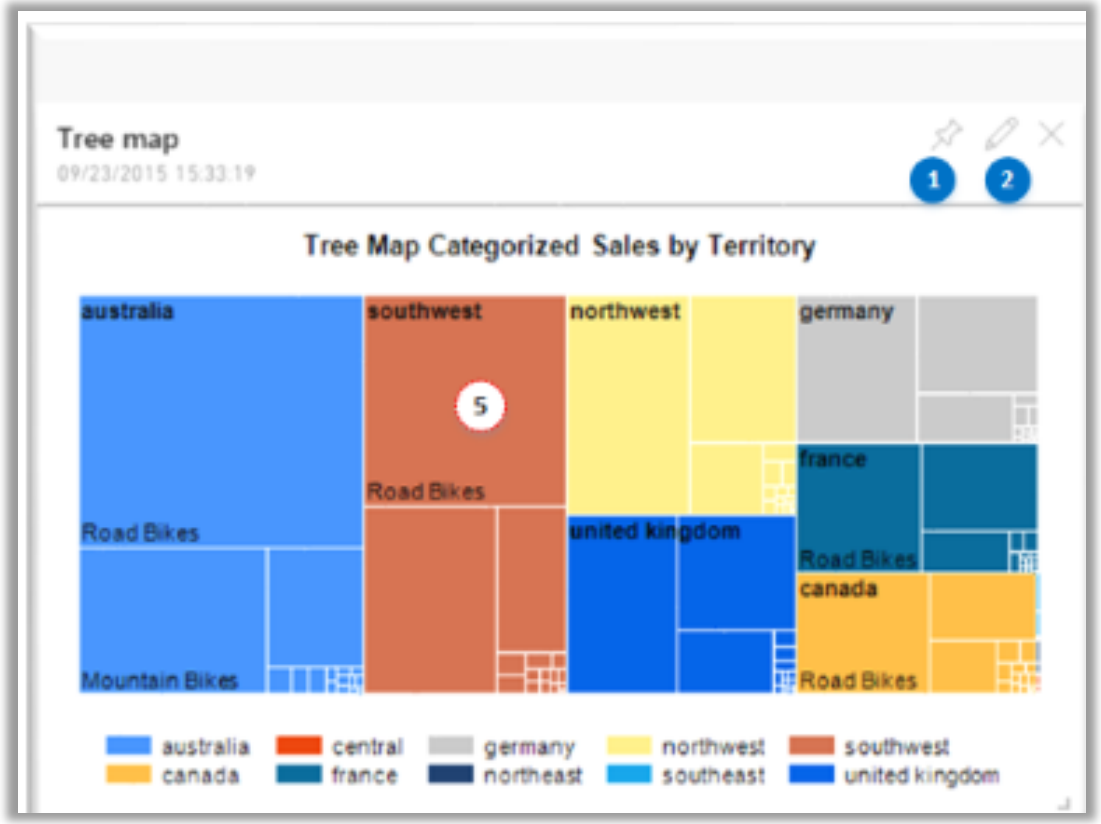
Did you know you can add SSRS to a Power BI Dashboard?

- **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



Project

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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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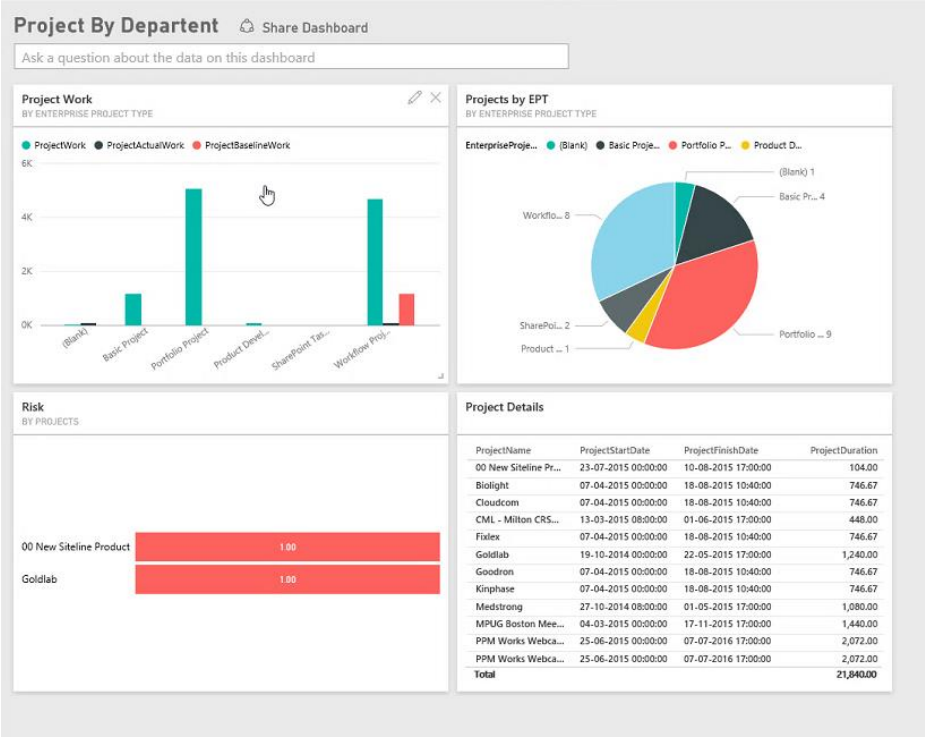
Report Pack Offering

Need Reports? Try our Report Pack.

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

Reporting Tools:

- SSRS
- Power BI
- Custom Development
- Excel Services



Project

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Question and Answer

Calls to Action

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Our Site: www.ppmworks.com
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