

Dashboard in a Day

Presented by Jacques Goupil

October 24th, 2017



PPM Works

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



Introduction and Overview of
Power BI

5 min

Downloading Power BI

10 min

Connecting Your Data

10 min

Creating Reports & Dashboards

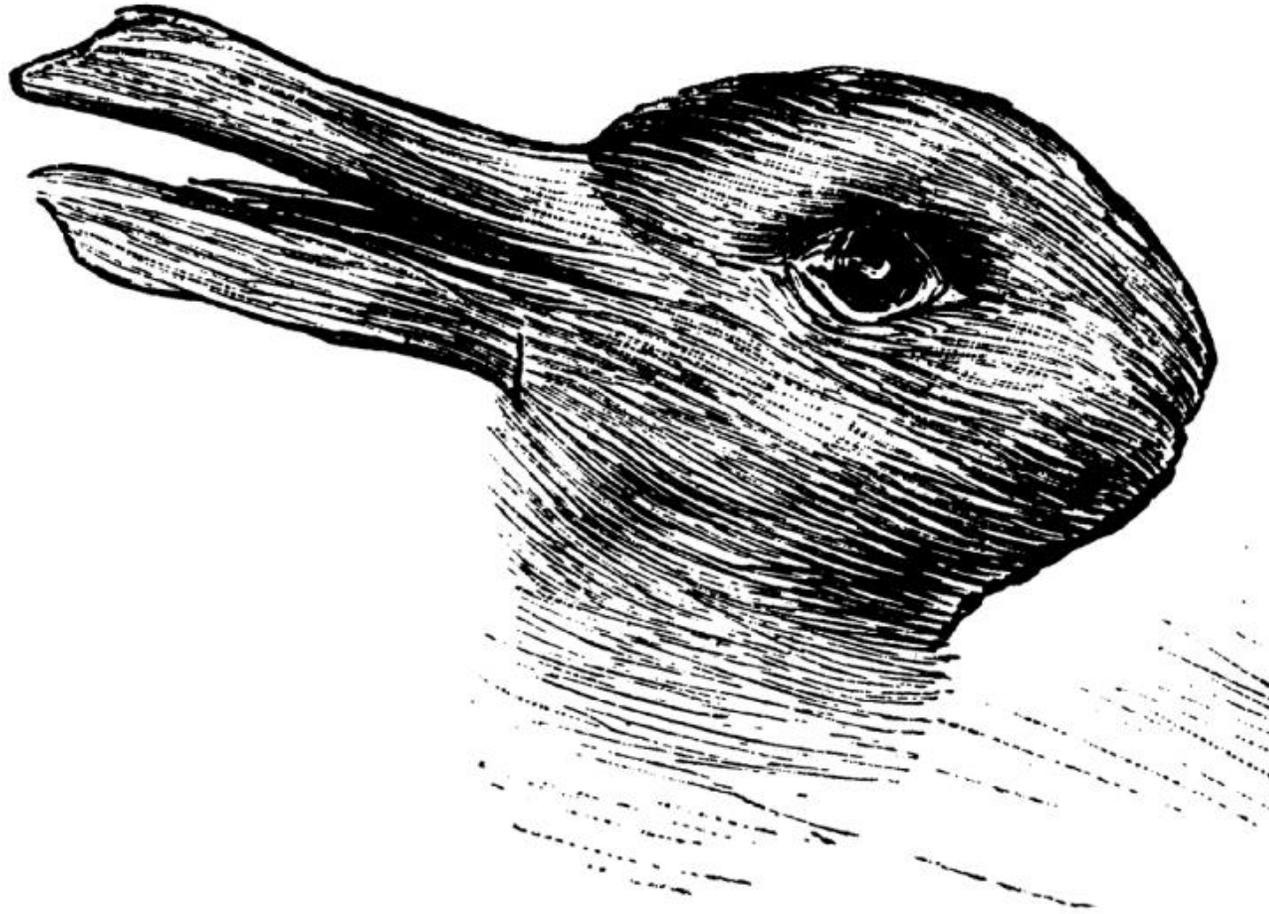
25 min

Agenda

Question and Answer

10 min

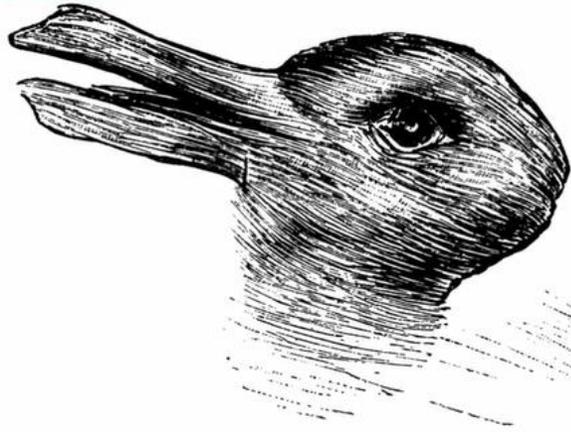
What do you see?



© 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

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

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**

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. The background is blurred, showing a street scene with trees and a car. A dark green banner is overlaid at the bottom of the image.

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

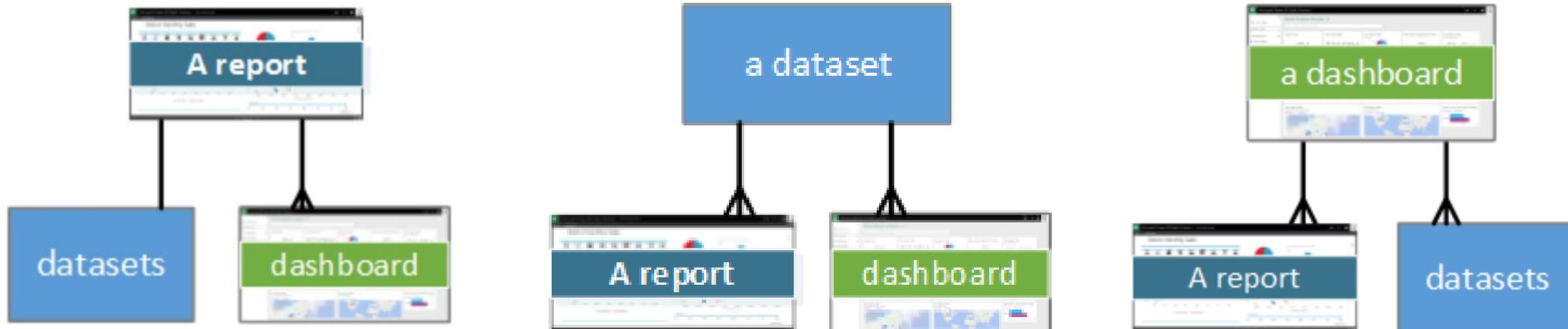
With Power BI Desktop you can...

- 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

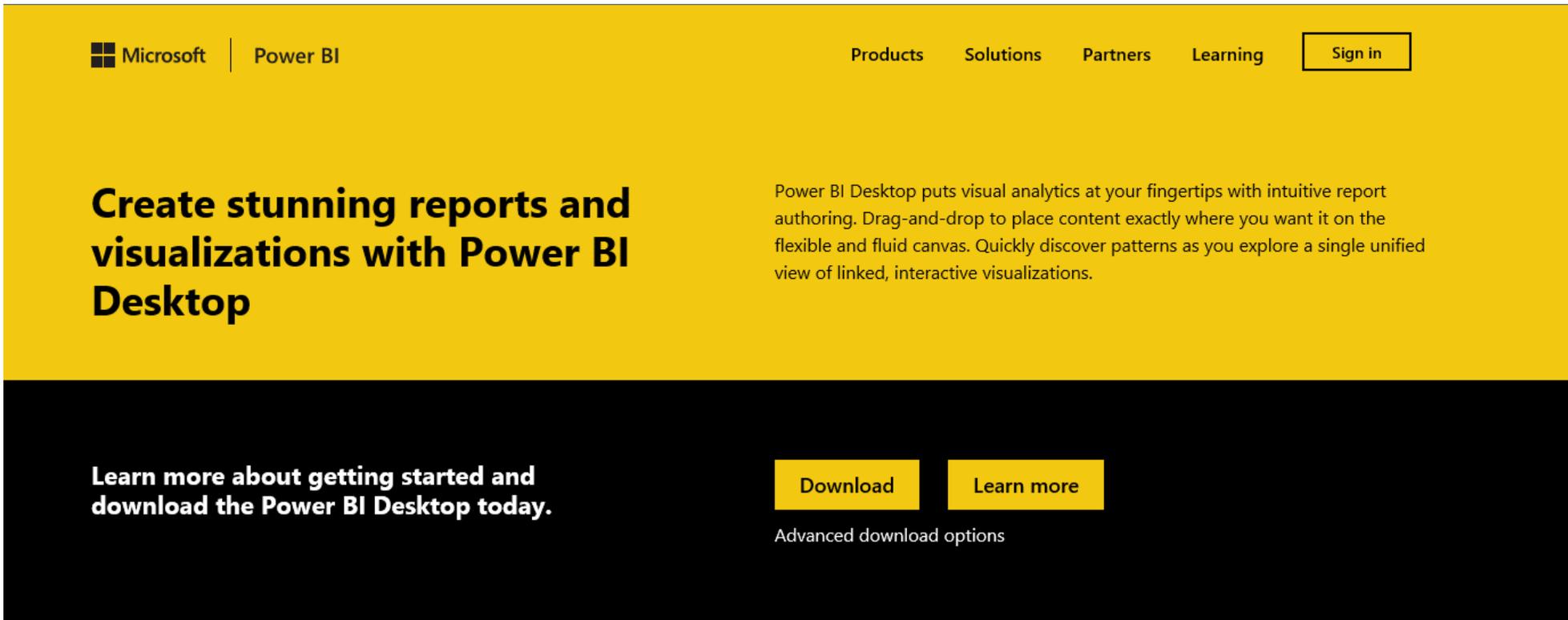




Download Power BI

Download Power BI Desktop

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



The screenshot shows the Microsoft Power BI Desktop landing page. The top navigation bar is yellow and contains the Microsoft logo, "Power BI", and links for "Products", "Solutions", "Partners", "Learning", and a "Sign in" button. The main content area is split into two columns. The left column features the headline "Create stunning reports and visualizations with Power BI Desktop" in bold black text. The right column contains a paragraph: "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." Below this, there are two yellow buttons: "Download" and "Learn more". At the bottom left, a dark grey banner contains the text "Learn more about getting started and download the Power BI Desktop today." Below the "Download" button, the text "Advanced download options" is visible.

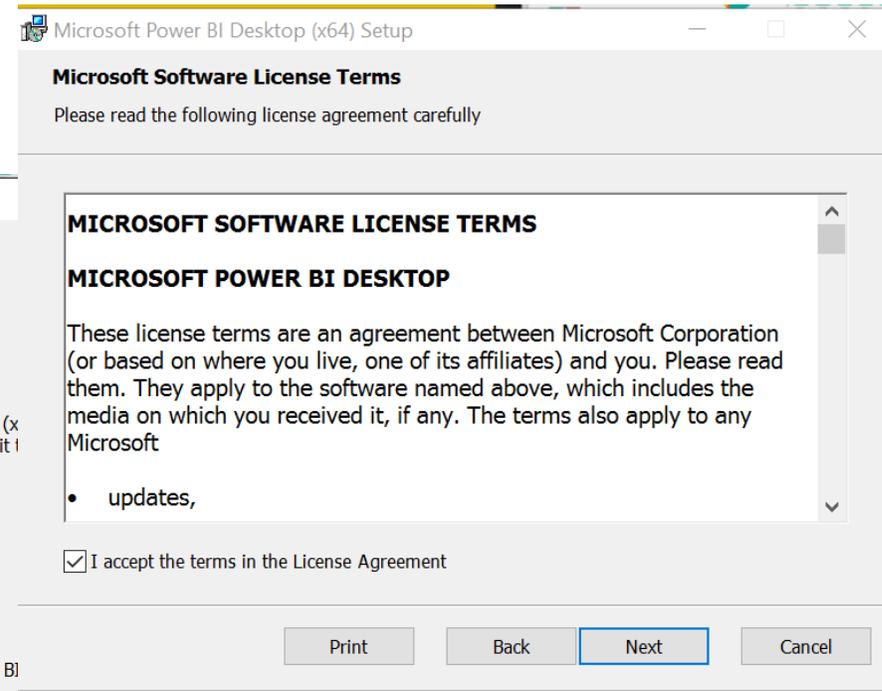
Download Power BI Desktop

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

Do you want to run or save **PBIDesktop_x64.msi** (110 MB) from **download.microsoft.com**?



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





Connecting to Project Online Data

Connecting to Project Online Data

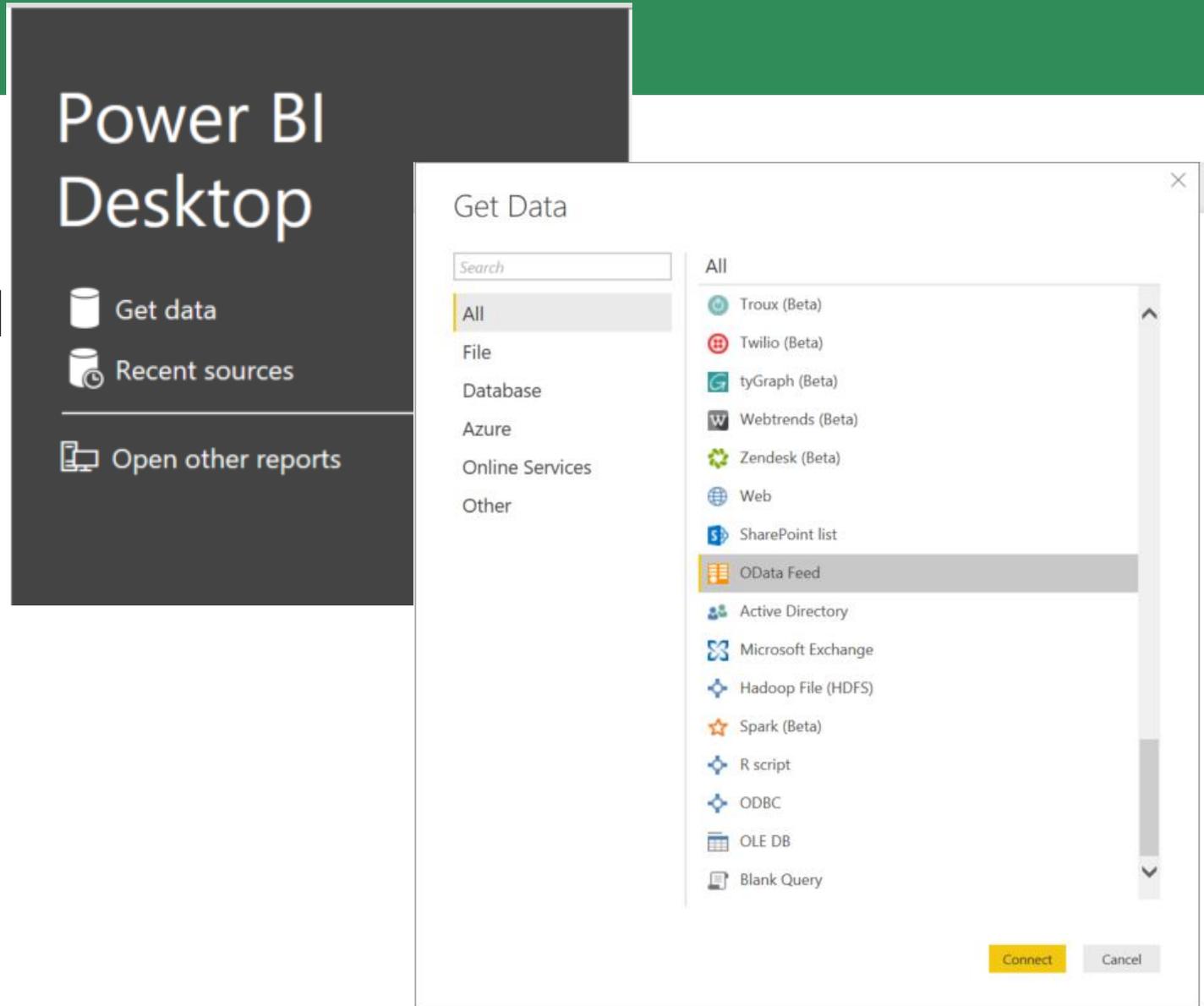
Power BI Desktop will launch after installing

- 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. Below the title, there are two radio buttons: "Basic" (selected) and "Advanced". Underneath, the label "URL" is followed by a text input field containing the URL "https://ppmw.sharepoint.com/sites/pwademo/_api/ProjectData". At the bottom right of the dialog, there are two buttons: "OK" (highlighted in yellow) and "Cancel".

Select the Tables

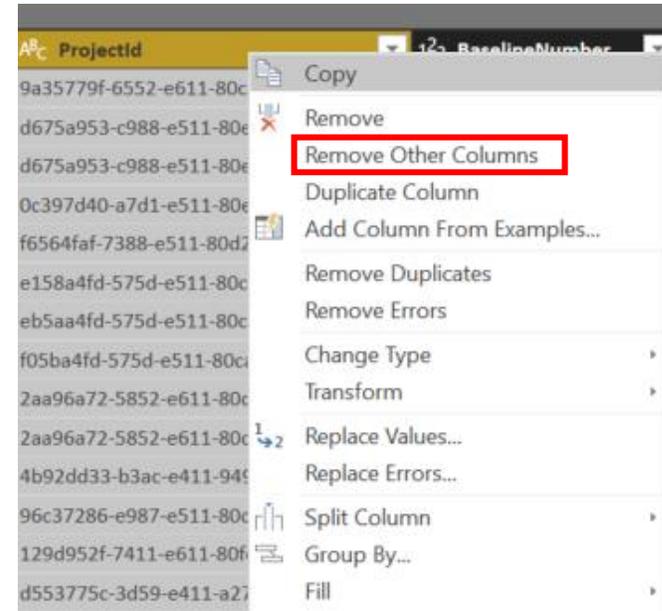
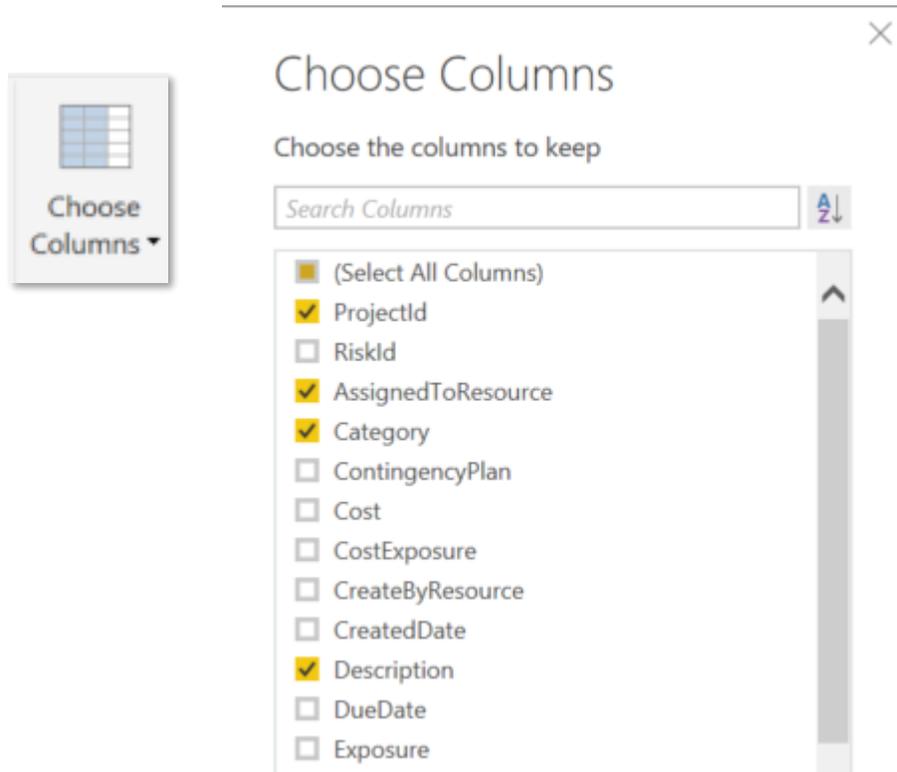
- Click on each Table
- Click load to pull in each available field from the selected tables or
- Click Edit to select only those fields you want to upload

The screenshot shows a software interface titled 'Navigator'. On the left, there is a list of tables under the heading 'Display Options'. The 'Projects' table is selected, indicated by a checkmark in a box. At the bottom of this list is a button labeled 'Select Related Tables'. On the right side of the window, a preview of the 'Projects' table is shown. The table has three columns: 'ProjectId', 'EnterpriseProjectTypeDescription', and 'EnterprisePrc'. It contains three rows of data. Below the table, there is an information icon and a message: 'The data in the preview has been truncated due to size limits.' At the bottom of the window, there are three buttons: 'Load' (yellow), 'Edit' (red), and 'Cancel' (grey).

ProjectId	EnterpriseProjectTypeDescription	EnterprisePrc
41763956-f0a1-e611-80ce-00155d084509	null	193480ee-34l
82e4a70f-f414-e711-80cf-00155d085807	null	7e348cb1-fc7
3a9ad3cb-8ebc-e611-80cd-00155d089b08	null	7e348cb1-fc7

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.

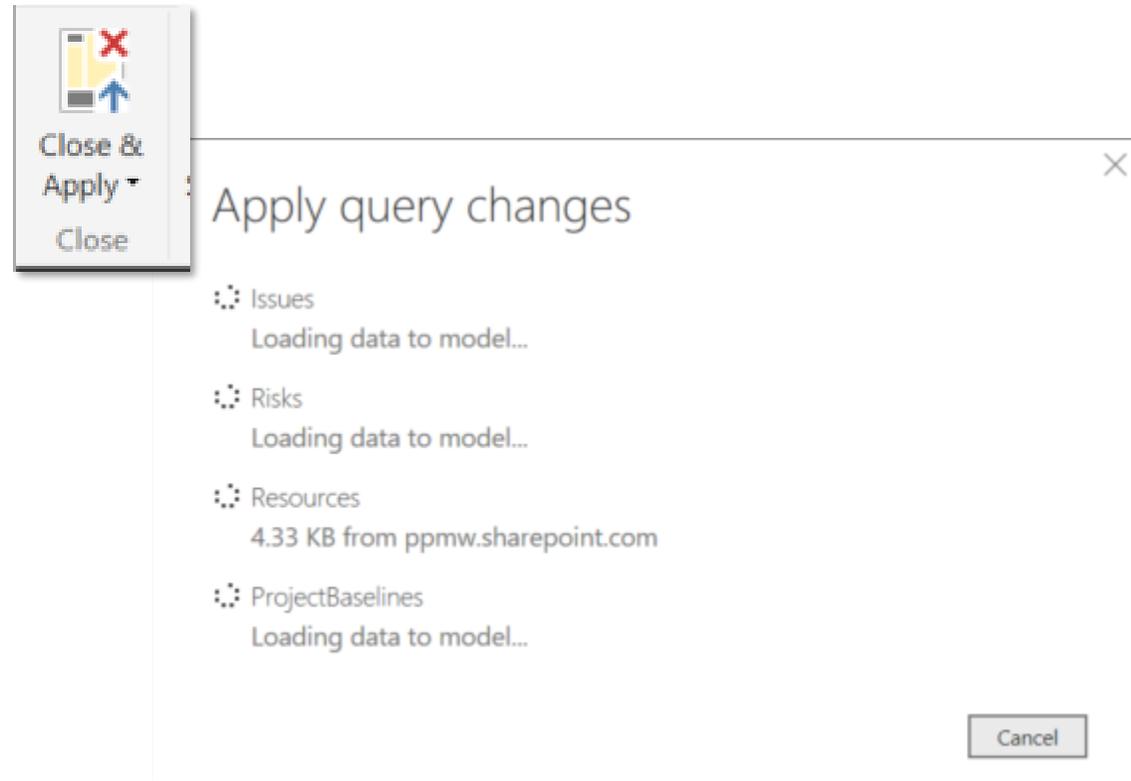
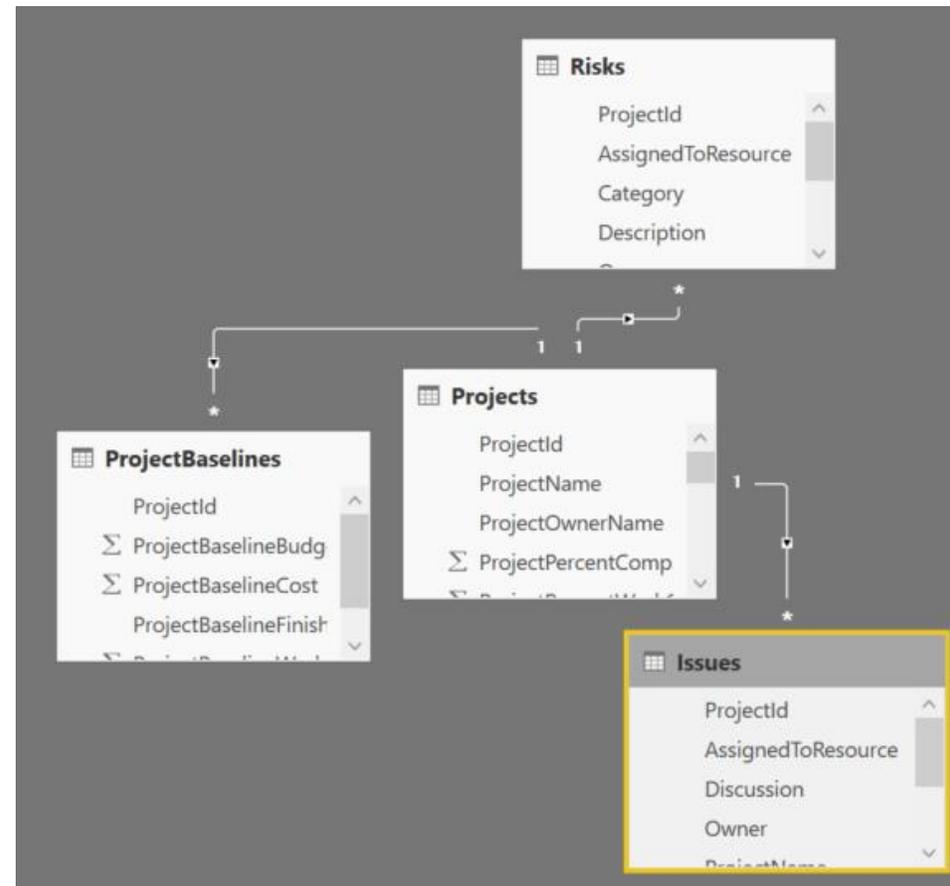


Table Relationship

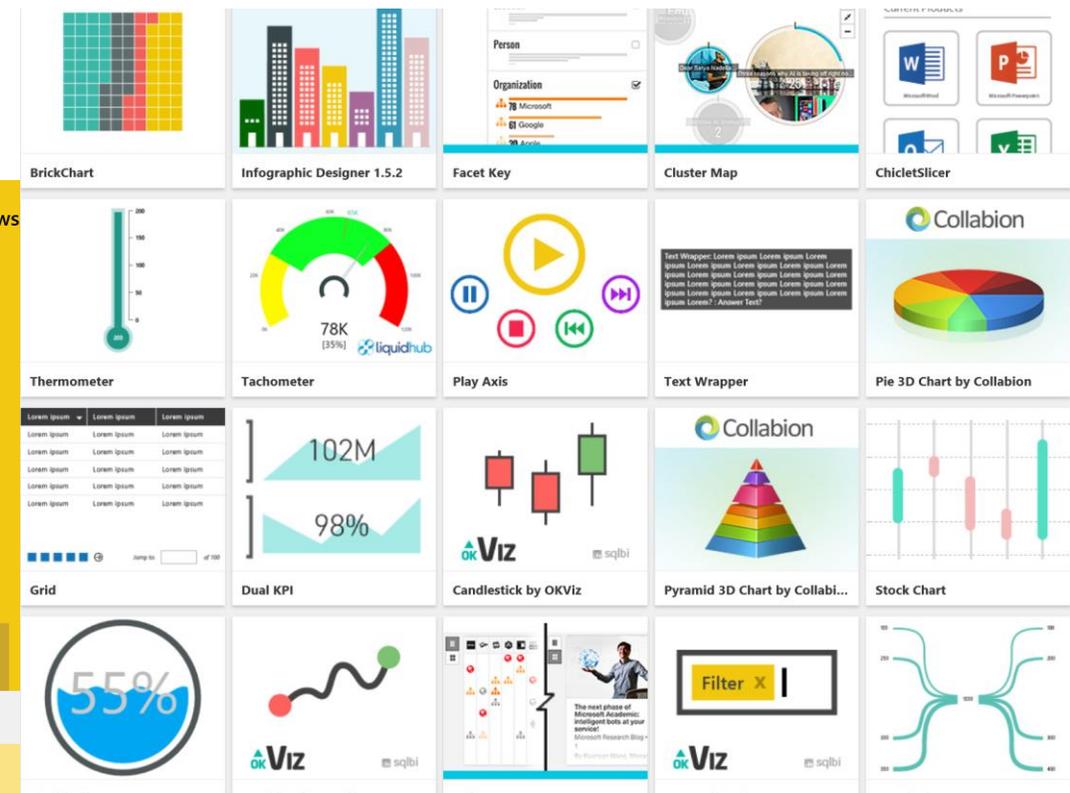
No need to create relationships between tables, Power BI does that for you.



Power BI Custom Visuals

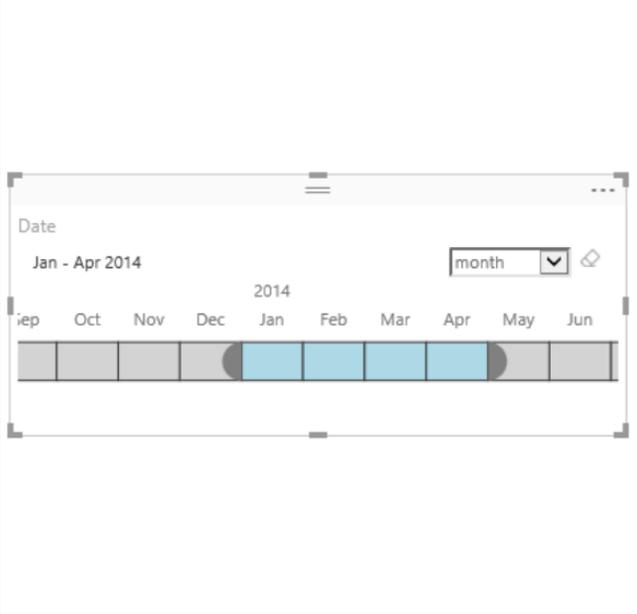
- Download custom visuals for Power BI at <https://app.powerbi.com/visuals/>

The screenshot shows the Power BI Custom Visuals gallery. At the top left, it says "Power BI" and "Browse". The main heading is "Welcome to Power BI custom visuals". Below this, it states: "A gallery of visuals created by the Power BI community. Browse through the visuals or submit one of your own for others to use." There is a button that says "Learn how to use custom visuals". A yellow banner at the bottom of the gallery area contains a warning icon and the text: "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." Below the banner is the "Visuals library" section, which includes a "Custom visuals" link (underlined) and an "R-powered visuals" link. On the right side of the library, there are controls for "Sort by" (set to "Most Recent") and a "Search Visuals" input field.



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](#)

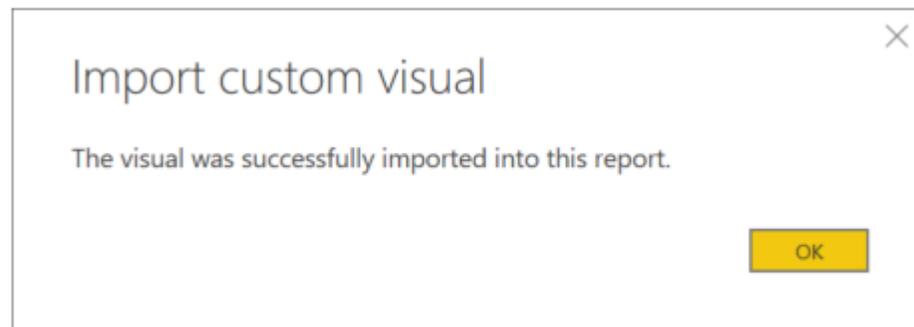
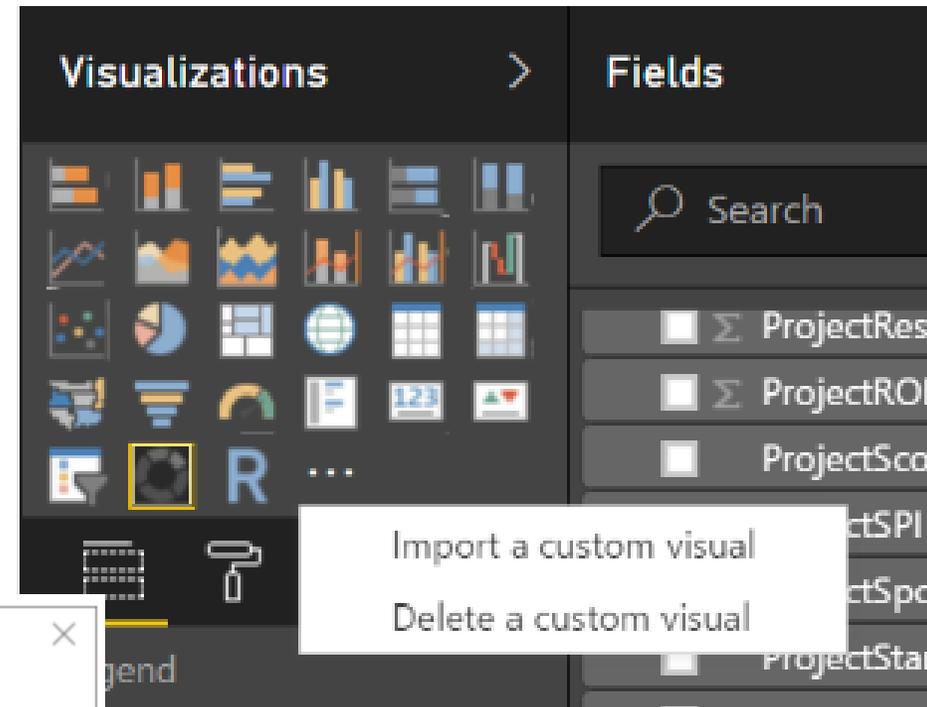
Version 1.3.19 — Last updated 4/21/2017

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

Import Custom Visuals

To import custom visuals:

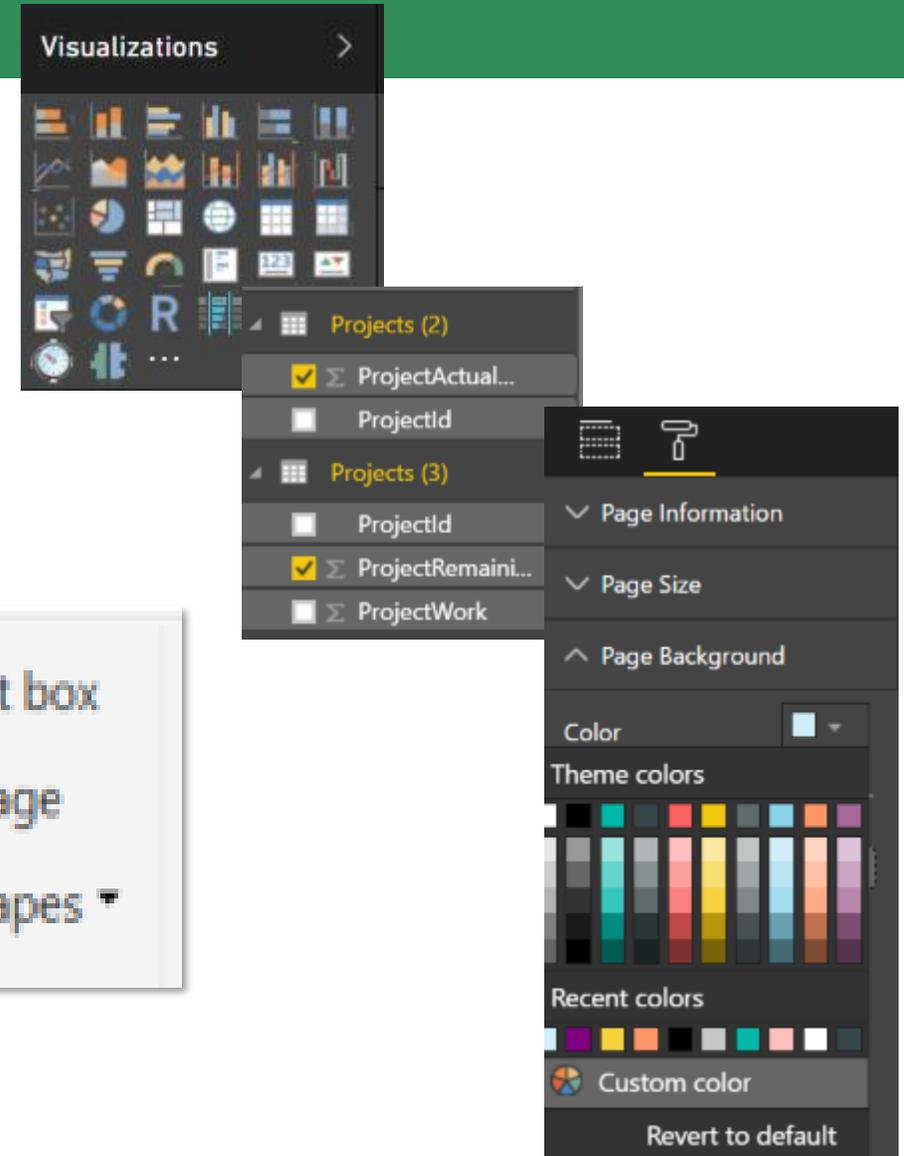
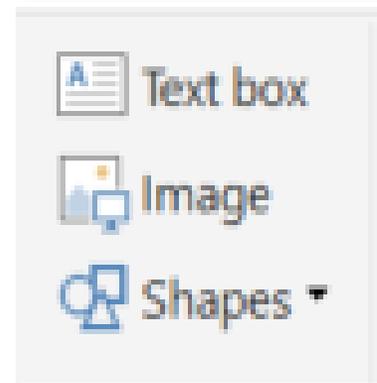
- Click on the ellipse
- Select Import a custom visual



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

The image shows two overlapping windows from the Power BI Desktop interface. The top window is titled "Publish to Power BI" and contains a "Select a destination" dropdown menu with "My workspace" selected. The bottom window is titled "Power BI Desktop" and displays a sign-in prompt for a "Work or school account". The email address "laura.crawford@ppmworks.com" is entered in the text field, and a yellow "Sign in" button is visible. A link for "Need a Power BI account?" is also present.

Publishing the Report

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

Publishing to Power BI

✓ Success!

[Open 'Resource Engagements.pbix' in Power BI](#)

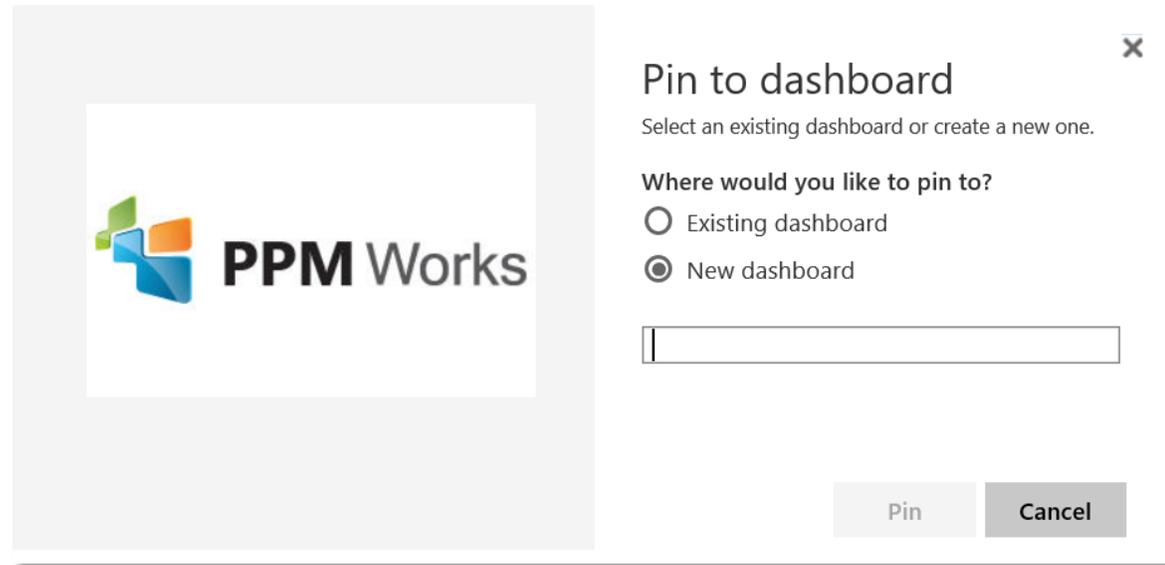
[Get Quick Insights](#)

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

Got it

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 sitting on a light-colored sofa, smiling broadly. He is wearing a blue denim jacket over a light-colored sweater. He is holding a silver pen in his right hand, pointing it towards the screen of a laptop. The laptop screen displays a Power BI dashboard with various charts, including a bar chart and a line chart, and a list of items. The background is a blurred indoor setting.

Power BI Dashboard Demo

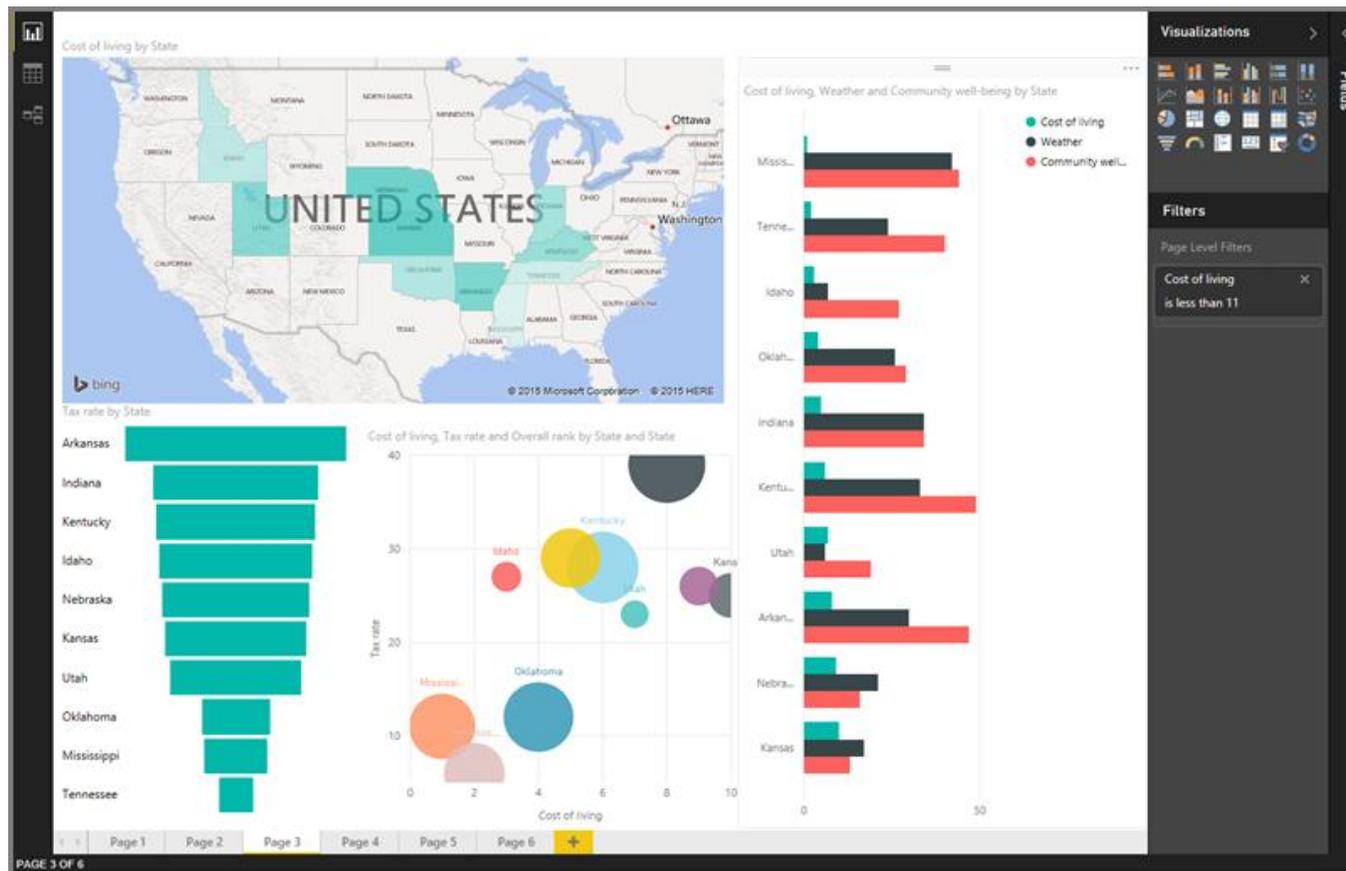
A man and a woman are sitting at a desk, looking at a laptop screen. The man is wearing a dark vest over a plaid shirt and is smiling. The woman is wearing a light-colored shirt and has her hair in a ponytail. They appear to be in a collaborative work environment.

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

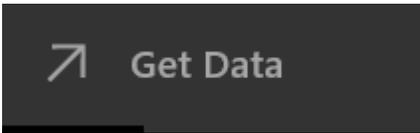
- create data connections, models, and reports

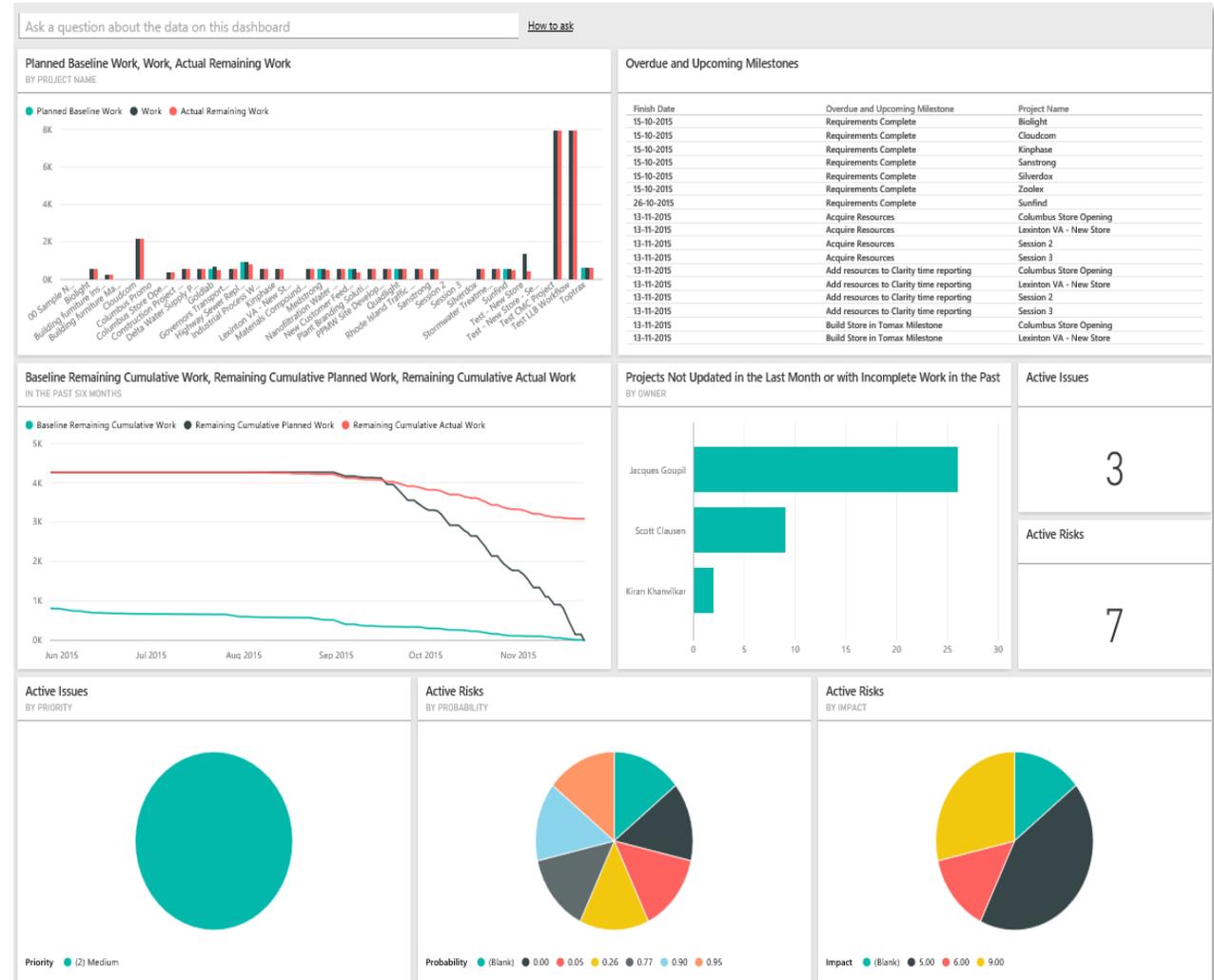
Power BI Service = Users

- 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

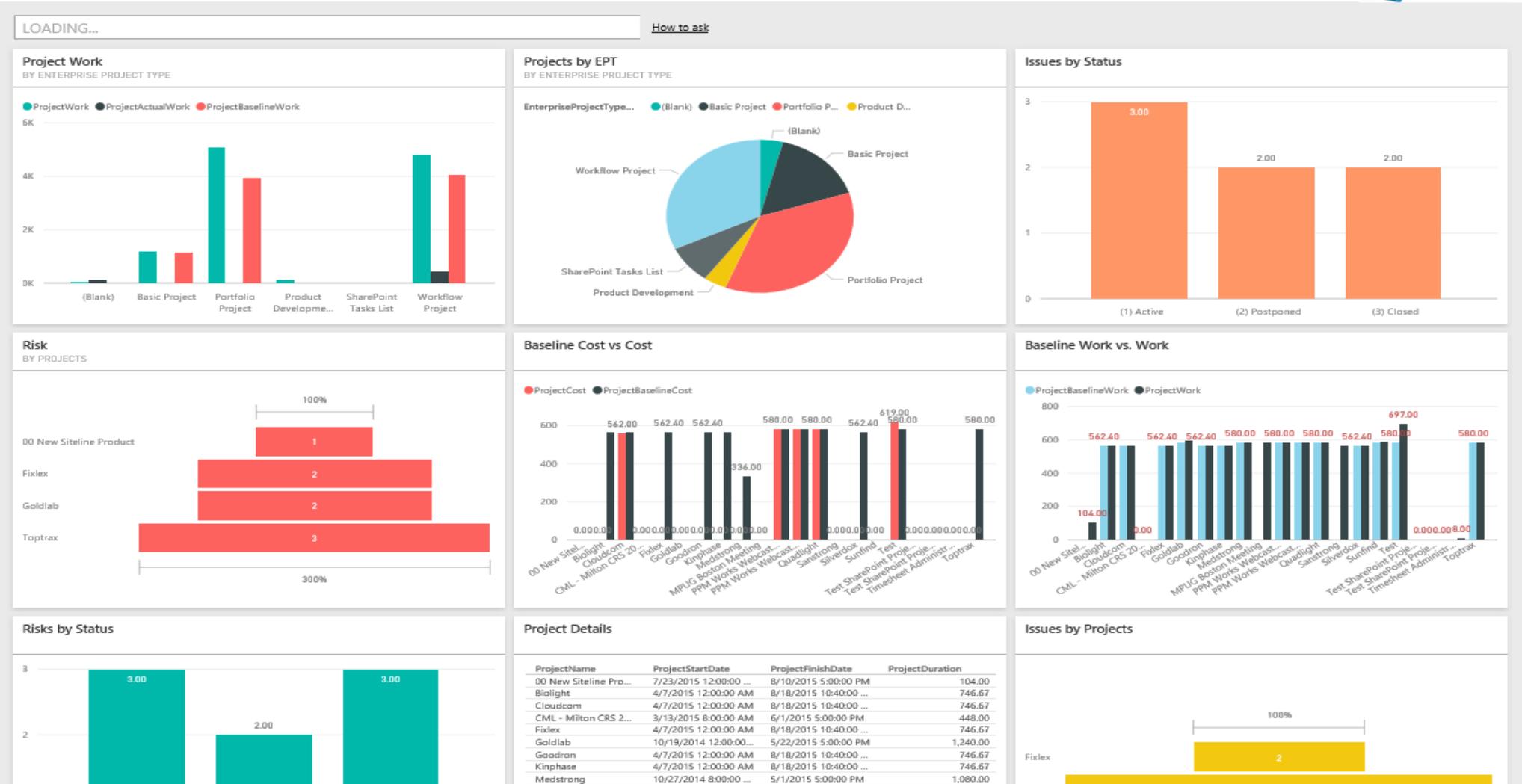
- Select Services to view all the SaaS providers
- Select Project Online to view all your project data in pre-configured dashboards and reports

The screenshot shows the 'Content Pack Library' interface. It features two main sections: 'My organization' and 'Services'. The 'My organization' section includes the text 'Browse content packs that other people in your organization have published.' and a yellow 'Get' button with an external link icon. The 'Services' section includes the text 'Choose content packs from online services that you use.' and a similar yellow 'Get' button. At the bottom, there are three navigation options: 'Samples' (with a folder icon), 'Solution Templates' (with a puzzle piece icon), and 'Partner Showcase' (with a person icon).

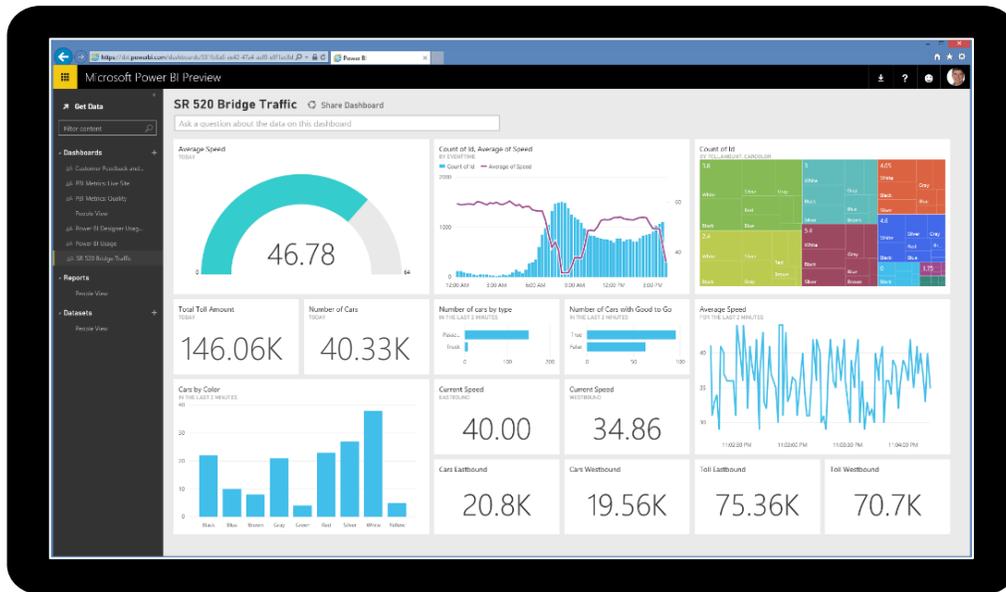
The screenshot shows a content pack card for 'Microsoft Project Online'. It features a green icon with a white 'P' and a checkmark. The title is 'Microsoft Project Online', followed by 'By Microsoft Power BI'. The description reads: 'Explore and monitor key aspects of your PPM deployment such as Projects, Issues, Risks and more'. At the bottom, there is a blue 'Get it now' button.

Power BI Content Pack

PROJECT BY DEPARTMENT

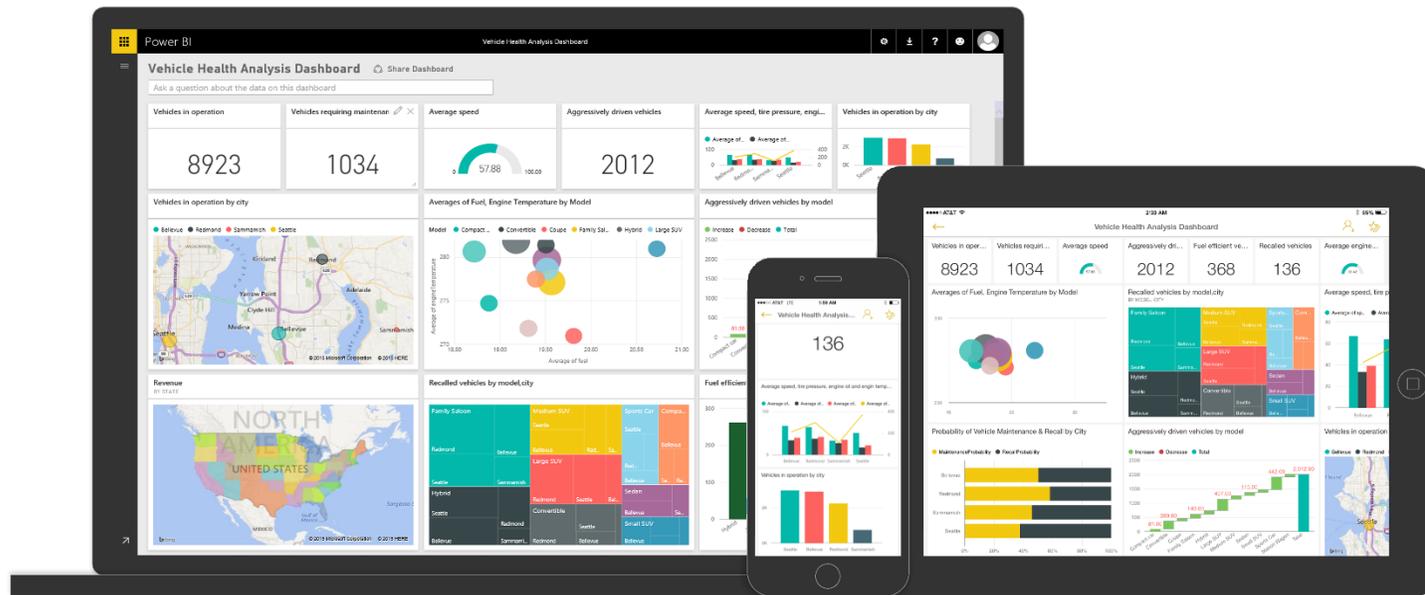


Live dashboards & reports



- ➔ Live dashboards provide a 360° 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

Mobile apps



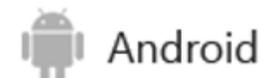
Native apps for iPad, iPhone, Android and Windows devices



Receive alerts to important changes in your data

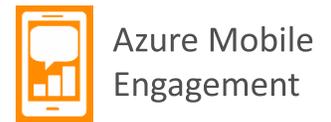
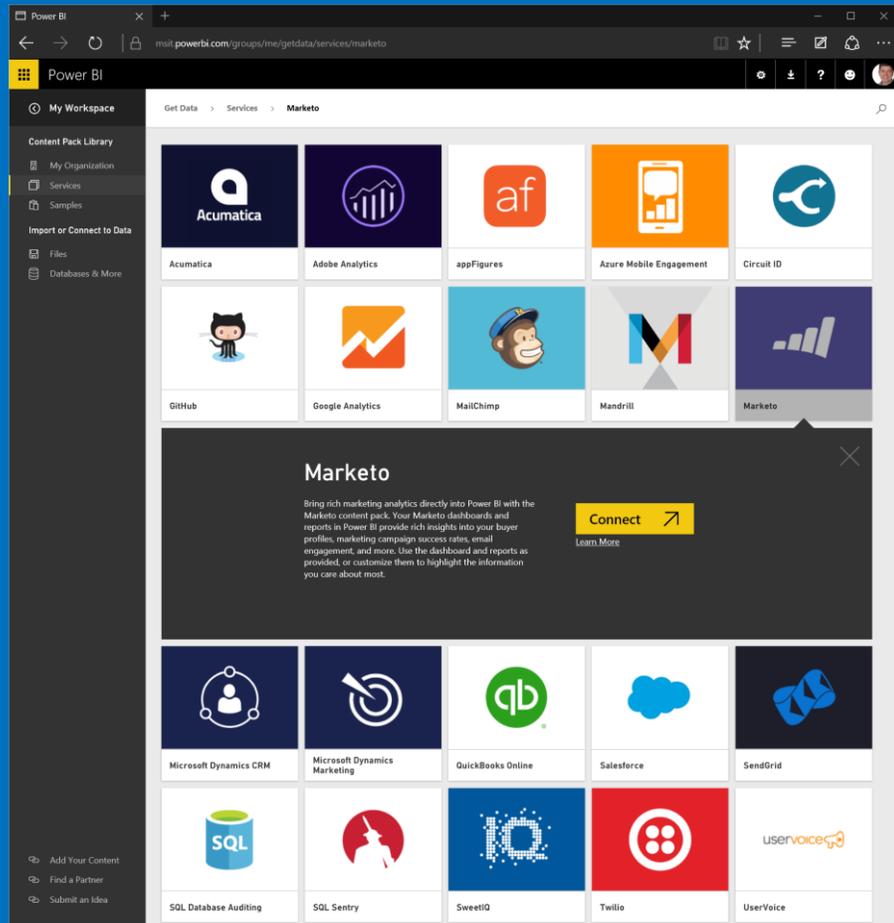


Share and collaborate with colleagues and take action

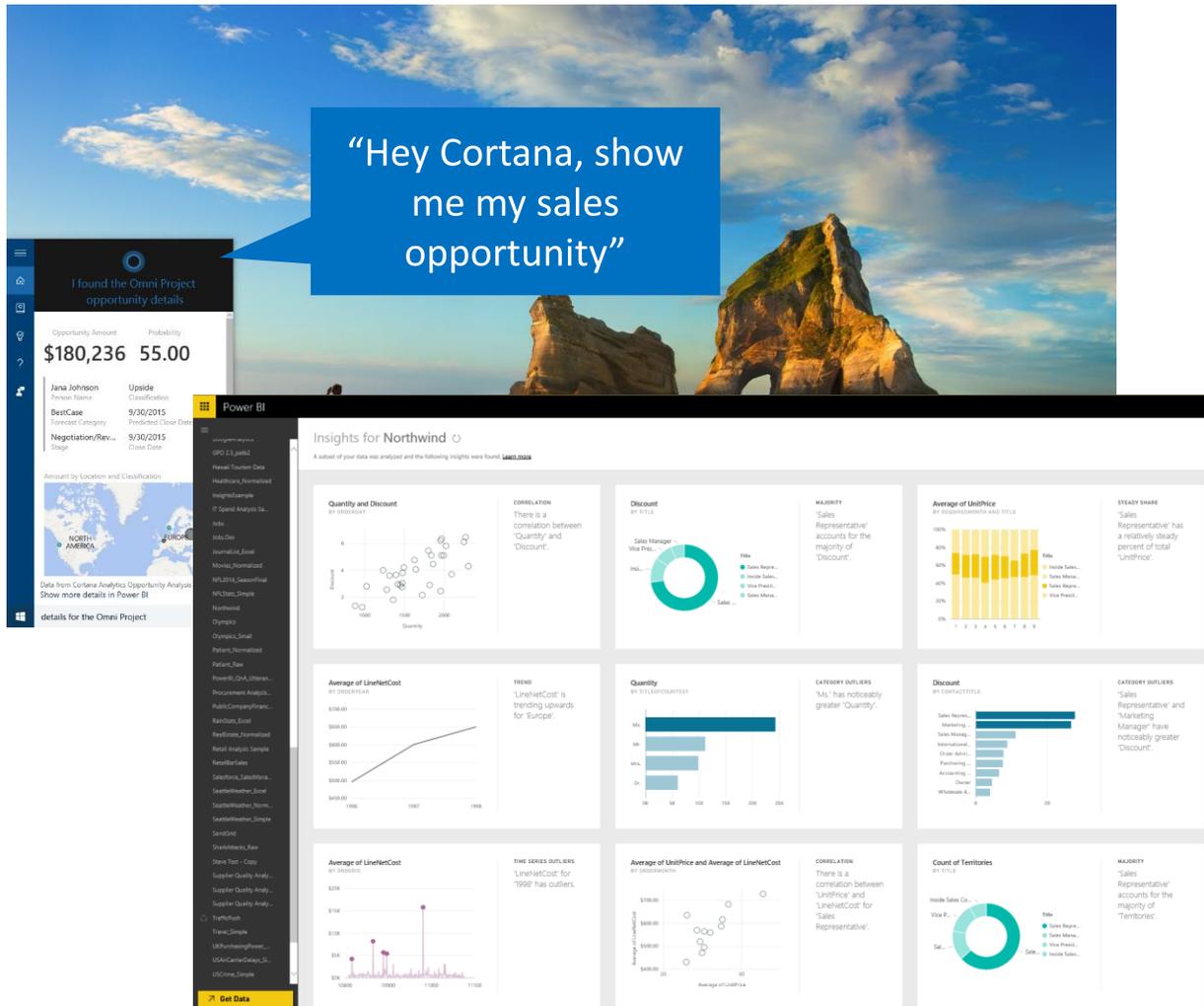


Get started quickly

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

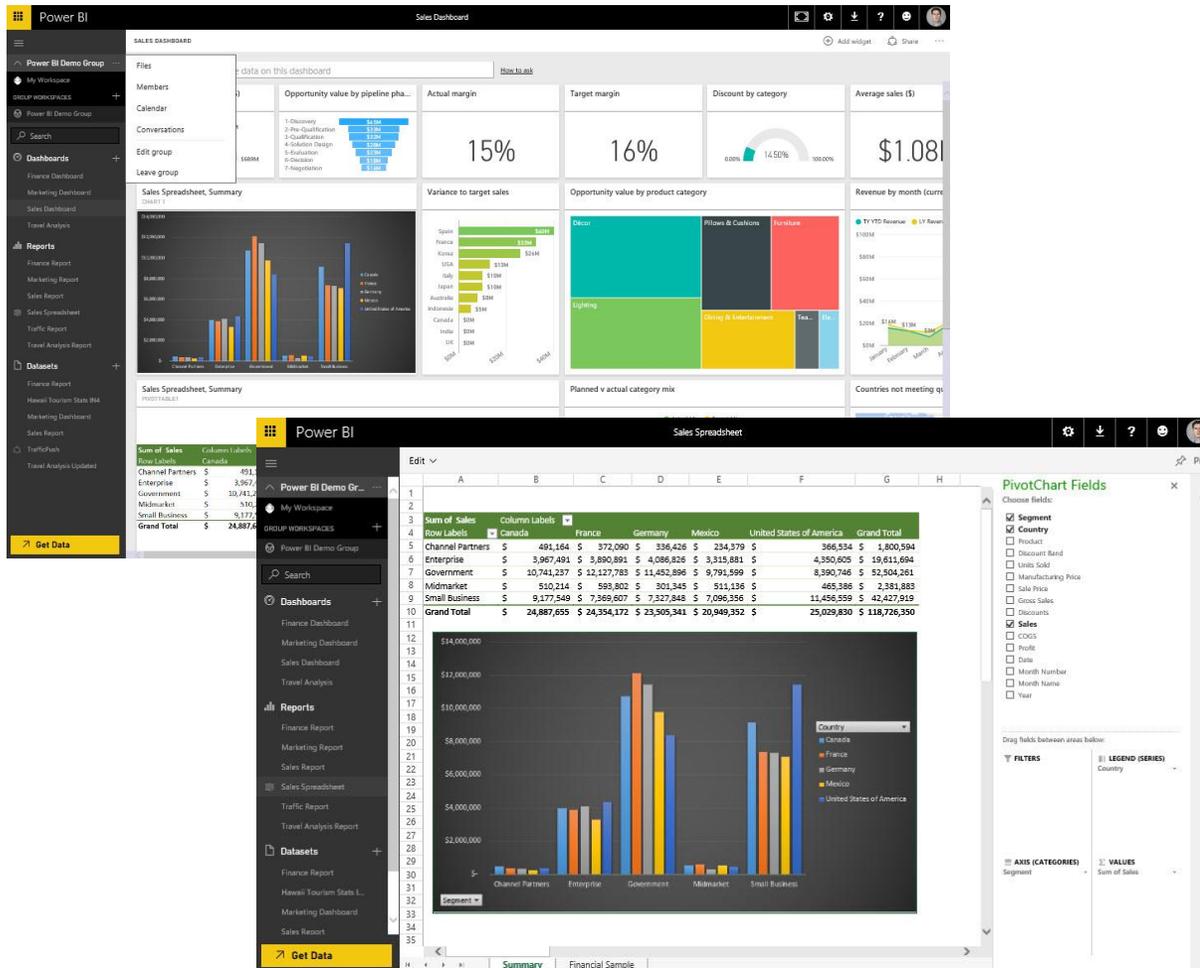


Experience your data in new ways



- ➔ 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

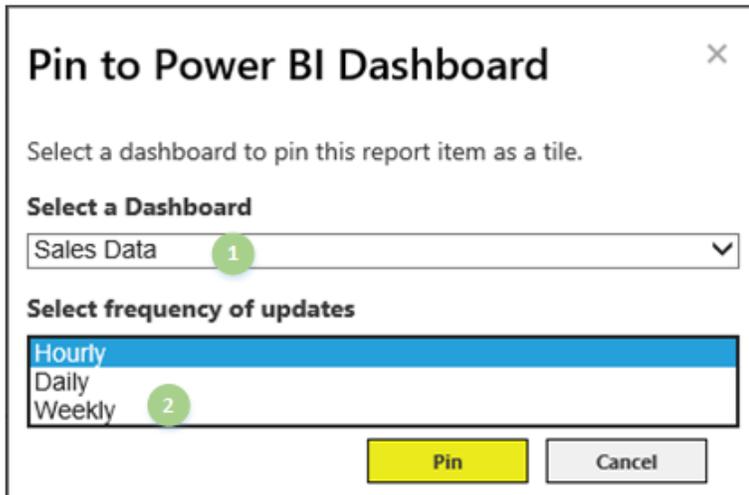
Seamless integration with Office 365



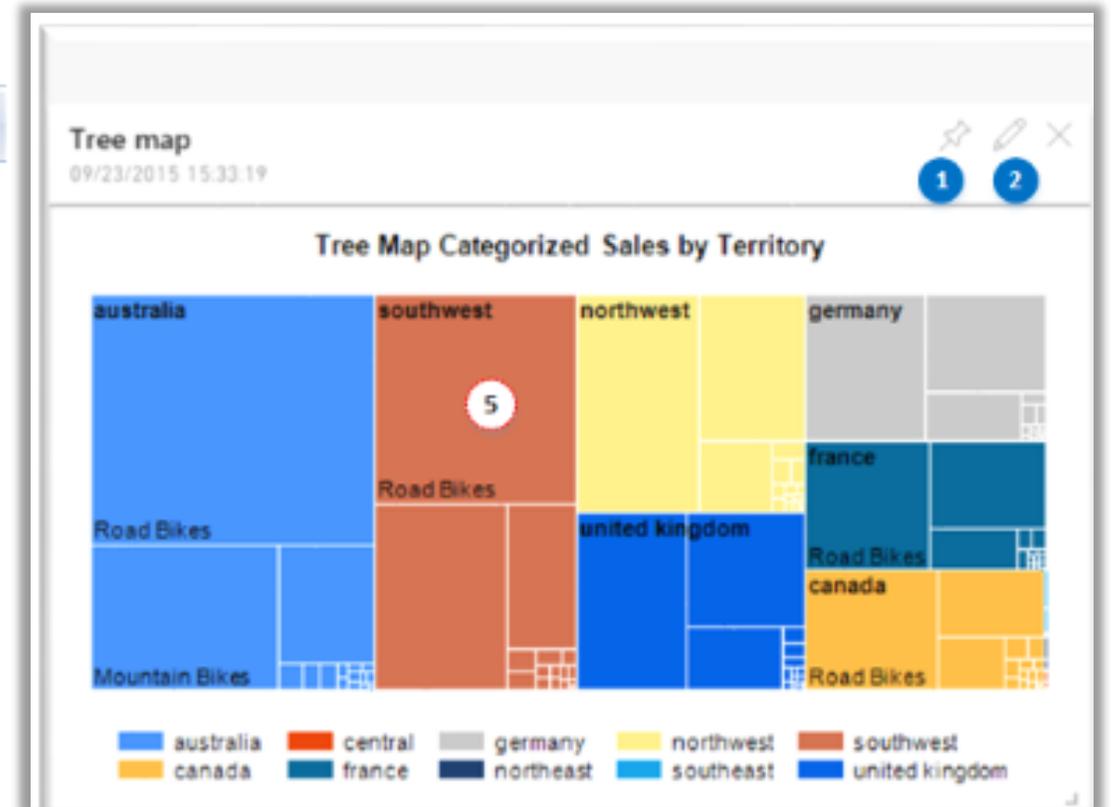
- ➔ Team collaboration through support for Office 365 Groups
- ➔ Seamless navigation to other workloads in Office 365
- ➔ Use Excel data and pin live charts to your Power BI dashboards
- ➔ View Excel spreadsheets through support for Excel Online

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 Setup• Mentoring• Dashboard Session• Support	<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 overview• ½ day session prep with you and PPM Works• ½ 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>



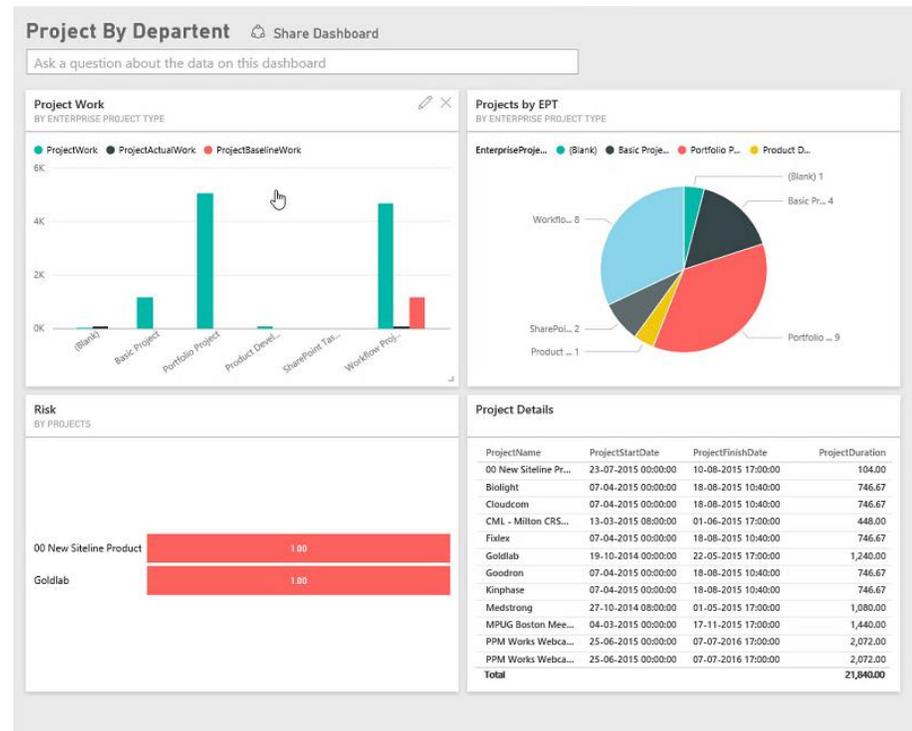
Report Pack Offering

Need Reports? Try our Report Pack.

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

Reporting Tools:

- SSRS
- Power BI
- Custom Development
- Excel Services



Question and Answer



Calls to Action



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

Our Site: www.ppmworks.com

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

Resource Engagements Toolkit: info@ppmworks.com

Questions: info@ppmworks.com

Calls to Action

- ✓ Complete the survey
- ✓ Request a copy of the slide deck today (Email info@ppmworks.com)
- ✓ Create your Power BI report
- ✓ Check out our Blogs / webcasts
- ✓ LinkedIn with us and send us any questions

Contact Details

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Director, Business Development

Toll Free: (888) 858-3060

Contact Us

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

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