Top 5 Project Portfolio Business Challenges
Presented by: Jenny Ward

Agenda

- Introductions
- Project ID Is Your Friend
- Reporting Data Settings
- Graphical Indicators
- Power BI Reports in Project Sites
- Microsoft Forms for Project Surveys

2

PPM Works

Jennifer (Jenny) Ward

Senior PPM Specialist

With a well-rounded, 20-year career in IT and a focus on service delivery, Jenny has grown adept at prioritizing the challenges her clients face and responding effectively. Most recently, she spent 7 years as SharePoint and Project Server Administrator for a global data and telephony company, a role in which she acted as both technical and operational director of a Project Management support team. Not only is Jenny comfortable with installation, maintenance, reporting, and end-user training, but also front-end site design and execution.

Why 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

4

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

PPM Works

Goals of Today's Session

1. Learn about how the following can help assist you with common business challenges:

    - The Project Number field
    - Reporting Data settings and how they can affect your data and visualizations
    - Incorporating graphical indicators/KPIs into Power BI Reports
    - Embedding a Power BI report into a SharePoint site
    - Creating a Microsoft Forms survey to analyze Project process feedback

2. Be ready to dig into each of these areas and make the most of your environment!

PPM Works

Let's Get Started!

PPM Works

Project ID Field

Each Enterprise Project Type allows you to customize the Project ID:

Project Id

Generate a project ID for all projects created from the EPT. This will help with quickly identifying a project and being able to search for it.

Prefix:

Starting Number: *

Postfix:

Minimum Digit Padding *

This would allow you to group projects, categorically, by these IDs. You also could add either a prefix or a suffix to indicate whether a project was in Idea phase or not.

PPM Works

Project ID Field

You can also make this field available on Project Detail pages by editing the page and adding it.
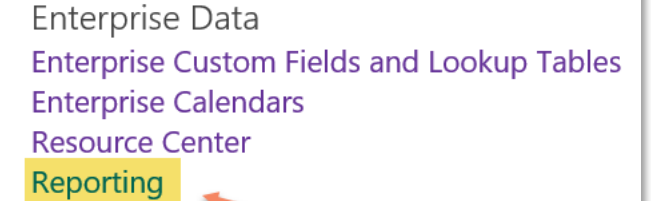

This would allow you to edit the project number if need be.

PPM Works

Project Reporting Settings

From PWA settings, Enterprise Data: Reporting

Our recommendation: Daily

Enterprise Data
Enterprise Custom Fields and Lookup Tables
Enterprise Calendars
Resource Center
Reporting

Timephased Data

Choose the level of granularity that the timephased data will be generated.

Important: Each project needs to be published to reflect any changes in options. The Timesheets reporting endpoints are not affected.

○ Never
◉ Daily
○ Weekly

Weekly timephased data will use the Regional Site Settings definitions of:
- First day of the week
- First week of the year

Important: If you change the first day of the week or year after projects have been published using the weekly option, you will need to republish all projects.

○ Monthly
○ By fiscal period

By fiscal period timephased data will use the fiscal periods defined in the Fiscal Periods section.
Important: Reporting data will only be generated for defined fiscal periods. Also, if you change an existing fiscal period, you will need to republish all projects.

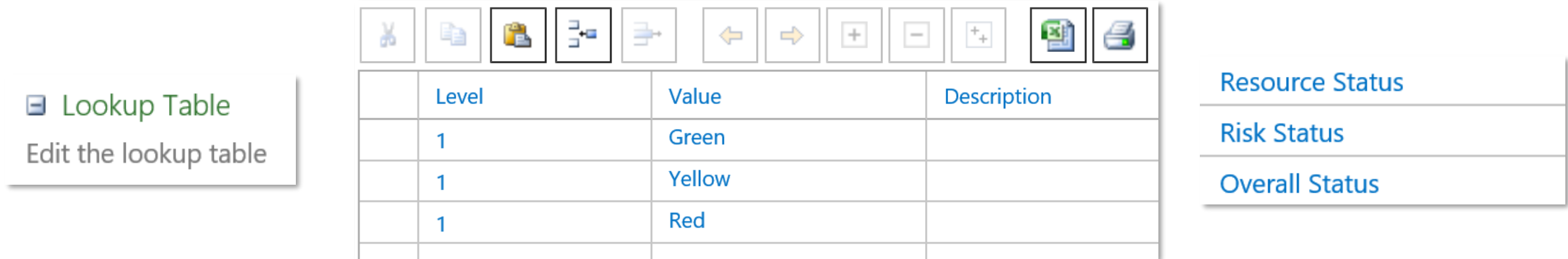PPM Works

Project Reporting Settings

Understand the Impact:

https://blogs.msdn.microsoft.com/brismith/2017/11/29/project-online-changes-to-granularity-of-time-phased-odata/

This was designed as a benefit for performance, but could have a negative impact if not realized.

It only occurs on new PWA environments. It won't automatically change on your already-configured environment!

PPM Works

Incorporating Graphical Indicators

Showing Graphical Indicators in Power BI starts by creating fields that will hold those values.

You'll create a status lookup table first, then pull that Project Level field into Power BI.

PPM Works

Incorporating Graphical Indicators

MPUG has a great "cheat sheet" for all the indicator icons you can access in your environment:

https://www.mpug.com/articles/enterprise-project-type-icons-you-didnt-know-you-had/

https://YourPWASiteAddress/_layouts/inc/pwa/images/*imagenamefromabove.png*
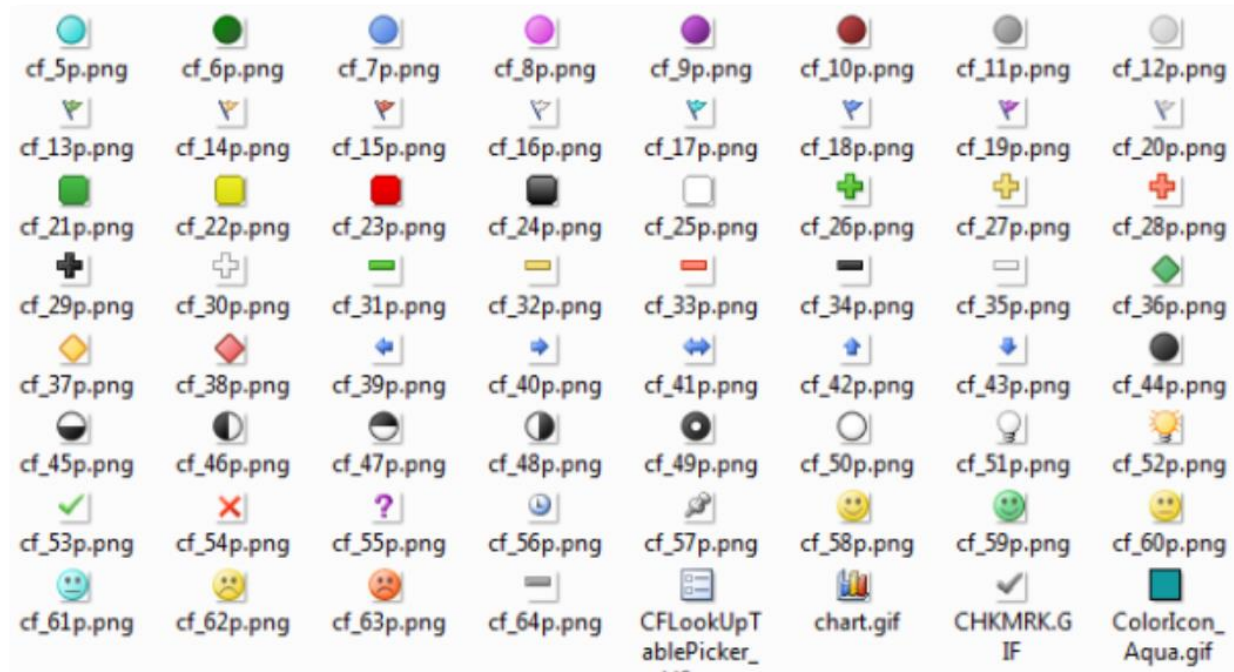
Incorporating Graphical Indicators

This allows you to represent the Status values you create (or the absence of values) both in Power BI and in Project Center.

Overall Status	Budget Status	Schedule Status	Scope Status
⚫	⚫	⚫	⚫
🔴	🟢	🔴	🔴
🟢	🟢	🟢	🟢
🔴	⚫	🔴	⚫
🔴	⚫	🔴	⚫
🔴	⚫	🔴	⚫

Project Name ↑		Overall	Schedule	Cost
0 - April Day	•••	🟢	⚪	🟢
0 CLM KP Training	•••		🟢	
0 CLM Planner Demo	•••		⚪	
00 - Tom - Office365 Depolyment	•••	🟢	⚪	🟢
00 Non Project Commitment Plan	•••	🟢	⚪	🟢
00 Ongoing Support	•••	🟢	⚪	🟢
Architect Series Door PX404	•••	🔴	🟢	🔴
Bentwater Club House	•••	🟢	🔴	🟢

Embed Power BI Reports into Project Sites

- One location for reports – on your main PWA site

- Easy access for Executives with a link they already know

- Automatically updated when report is updated

Requirements:

- Modern Pages enabled

- Permission and knowledge on creating and editing Site Pages

- A desire to make something really cool ;)

PPM Works

Embed Power BI Reports into Project Sites

New ⌄   Quick edit   Export to Excel   Flow ⌄   ...

Site Pages

New ⌄   Quick ed

- Wiki Page
- Web Part Page
- Site Page
- Link

PPM Works   PPM Works PWA Demo

Save as draft

Name your page

Add a new web part in column one

Power BI

All A to Z

Power BI

Power BI

PPM Works

Embed Power BI Reports into Project Sites

Save as draft

Draft not saved

Publish

Name your page

Power BI

Include a Power BI report on your page.

Add report

You can display reports from Power BI by pasting the link below.

Power BI report link

Paste the report link here.

Learn more

Page name

Display

Show Navigation Pane

On

Show Filter Pane

Off

PPM Works

Microsoft Forms

Microsoft describes Forms as:

A tool that allows you to create surveys, quizzes, and polls, and easily see results as they come in. When you create a quiz or **form**, you can invite others to respond to it using any web browser, even on mobile devices.

Surveys

Project Lessons Learned

Survey to determine PM experience with new project process

Hi Jenny, when you submit this form, the owner will be able to see your name and email address.

1. Overall, how do you feel the new Project Management process worked for you and your project?
   - ○ It went well!
   - ○ It was fair.
   - ○ It was poor.

2. What areas caused the biggest challenges?
   - ○ Service Delivery
   - ○ Resource Management
   - ○ Finance
   - ○ Client
   - ○ None

3. What areas provided you the greatest amount of assistance on this project?
   - ○ Service Delivery
   - ○ Resource Management
   - ○ Finance
   - ○ Client
   - ○ None

1. Overall, how do you feel the new Project Management process worked for you and your project?
   More Details
   - 🔵 It went well!   3
   - 🟠 It was fair.   2
   - 🟢 It was poor.   1

2. What areas caused the biggest challenges?
   More Details
   - 🔵 Service Delivery   1
   - 🟠 Resource Management   3
   - 🟢 Finance   1
   - 🔴 Client   1
   - 🟣 None   0

3. What areas provided you the greatest amount of assistance on this project?
   More Details
   - 🔵 Service Delivery   4
   - 🟠 Resource Management   1
   - 🟢 Finance   0
   - 🔴 Client   0
   - 🟣 None   1

PPM Works

Q & A

PPM Works

LinkedIn: Jennifer Ward and
https://www.linkedin.com/company/ppm-works-inc-
Our Site: www.ppmworks.com
Blog: http://blogs.ppmworks.com

Calls To Action

1. Start incorporating these techniques today
2. Check out our Blogs / webcasts
3. Get LinkedIn with me (Jenny Ward)
4. Send questions to Info@ppmworks.com

PPM Works

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

PPM Works