

Creating your own Portfolio Dashboard

June 22nd, 2016 @ 12:00pm – 1:00pm EST
Jacques Goupil

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

Today's Speakers: PPM Works

- Over 25 years **experience** with Project Server/Online Implementations
- Provide **Industry Vertical Project Server Solutions** including BioPharma, Engineering, New Product Development, IT, EPMO, Hospital IT Management
- Project Server / Project Online **Integrations** and SAP, Oracle, and CRM
- **100% Client Satisfaction**
- Developed the Microsoft Project Server 2013 and 2010 **Certification Exams**
- Get Started today for \$50/month per user & 1 hr/week PPM Works support



Jacques Goupil



Scott Clausen

For more information: www.ppmworks.com

M P you G

PROJECT VIRTUAL CONFERENCE 15 **Microsoft® Project Virtual Conference 2016** **PROJECT SUMMIT BUSINESS ANALYST WORLD**

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

Microsoft Project Conference SPEAKERS

Microsoft Ignite Sept 26 – 30, 2016, Atlanta, GA

PMI Project Management Institute

Microsoft Customer Immersion Experience

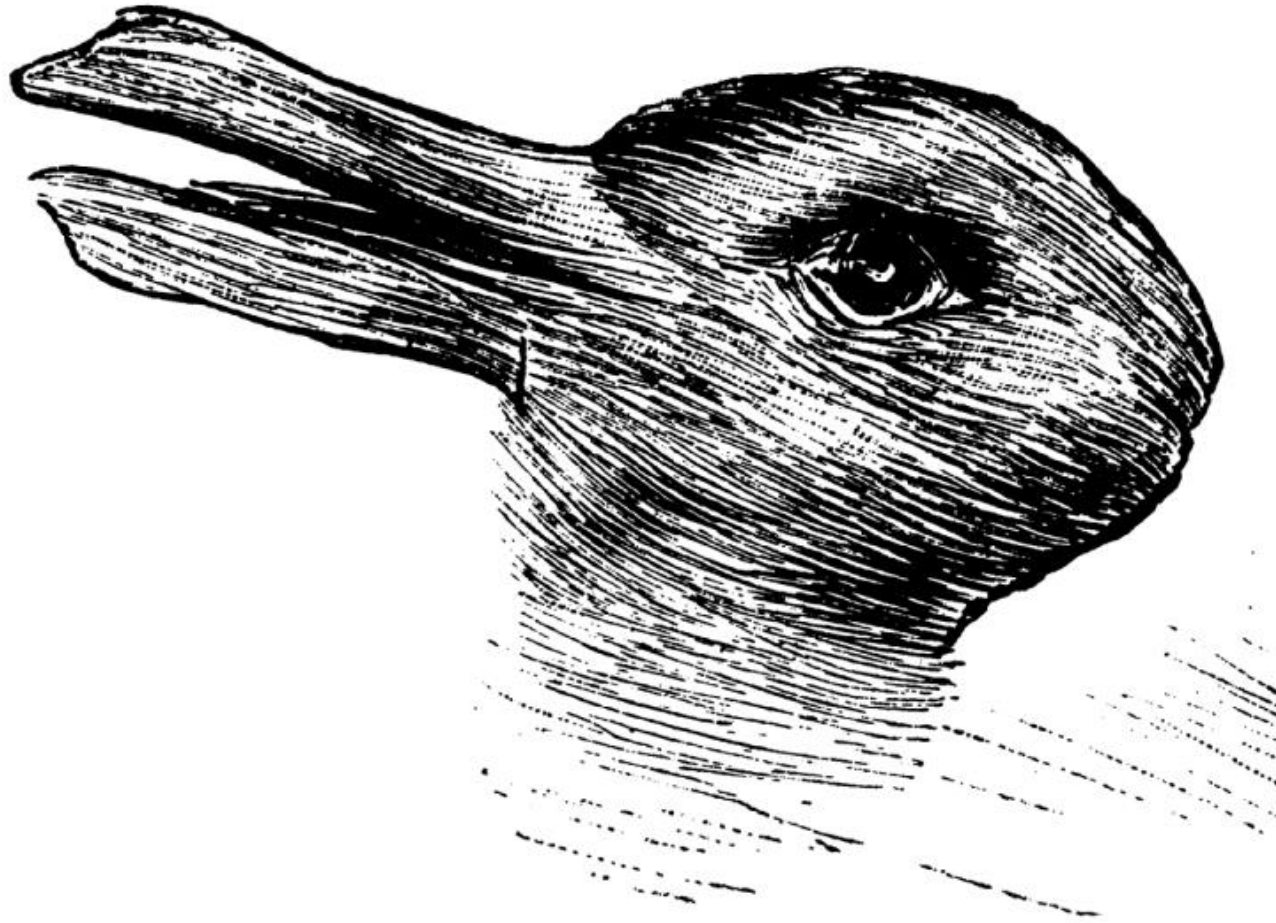
Goals of Today's Session

1. Set up a free Power BI trial
2. Easily attach and connect directly to your data
3. Leverage the Project Online dashboards to create dashboards
4. Visualize your project data and analyze it quickly
5. 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)
- Project Online Dashboards (Out of the Box)

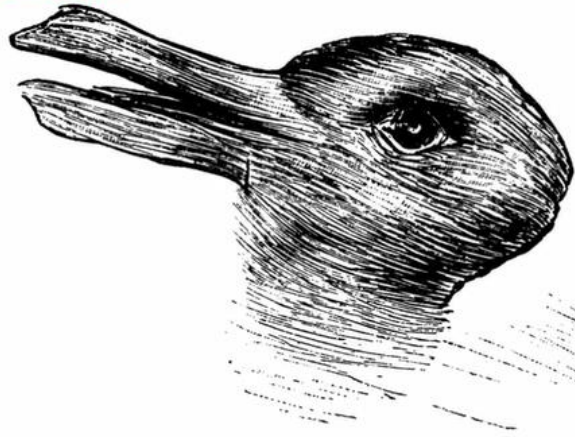
What do you see?



© 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

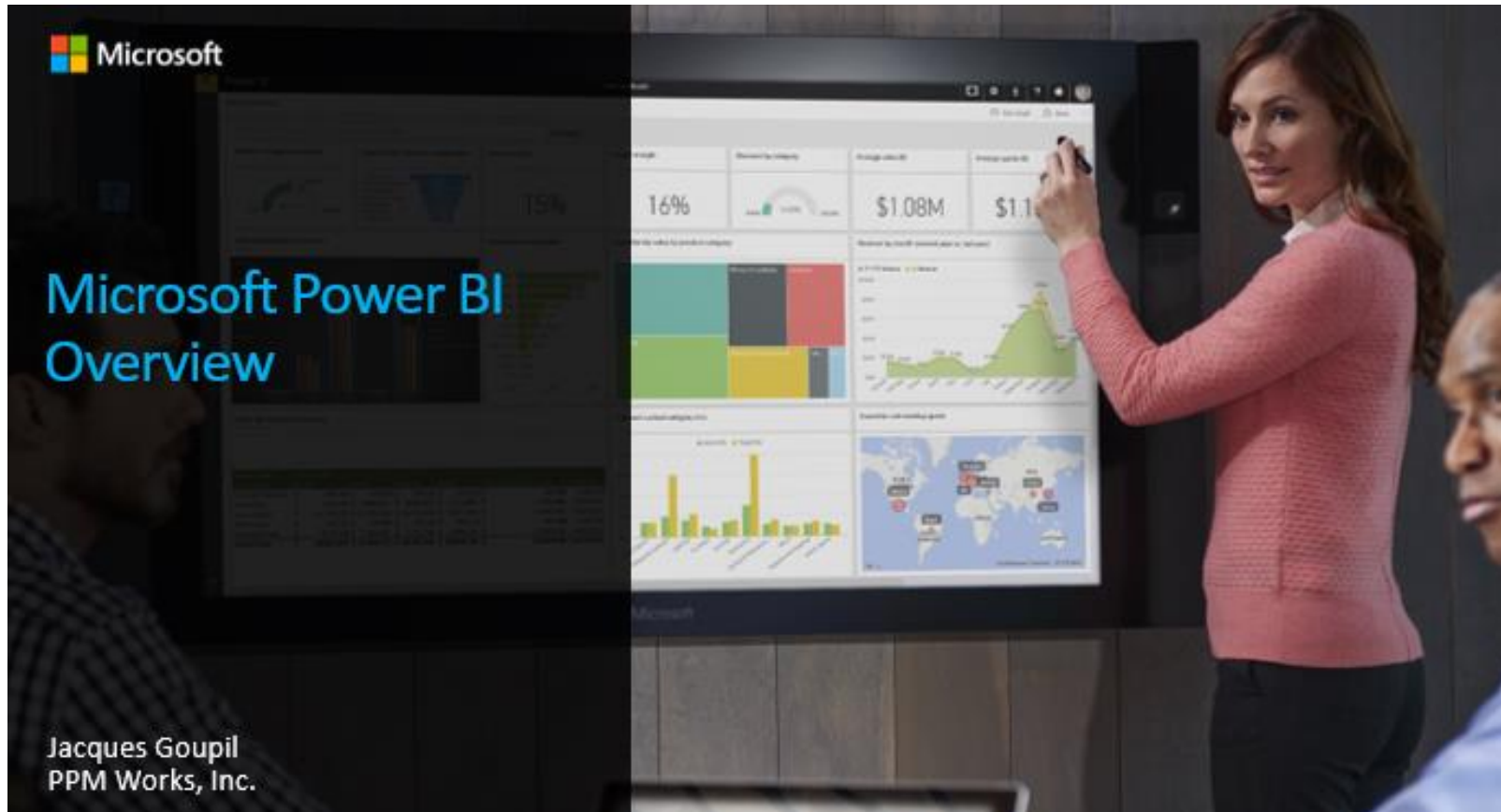
We want our Reports to be **clear, direct**, and to the point
and Now -- **Easy to Create**

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

Free Power BI Trial

<http://ppmworks.com/free-power-bi-office-365-trial>



Microsoft

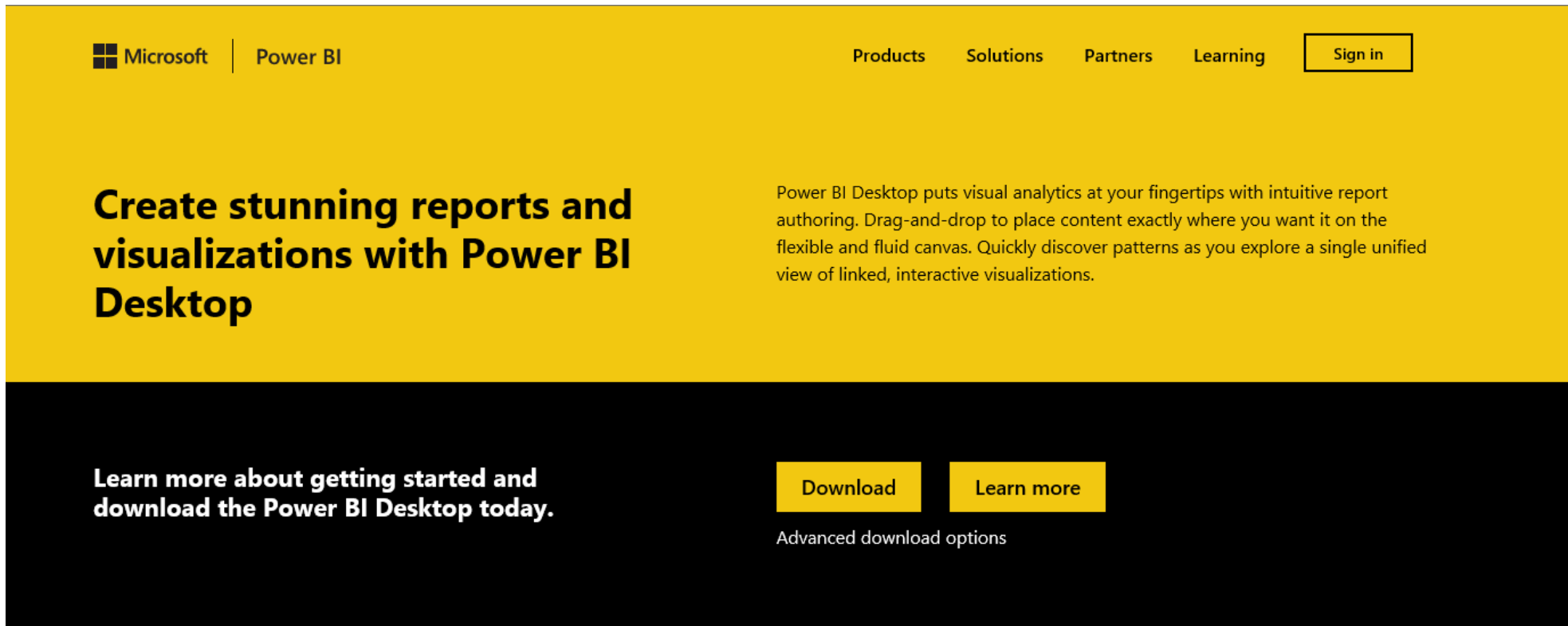
Microsoft Power BI Overview

Jacques Goupil
PPM Works, Inc.

The image shows a woman in a pink sweater pointing at a large screen displaying a Microsoft Power BI dashboard. The dashboard includes a Microsoft logo in the top left, a '16%' metric, '\$1.08M' and '\$1.1' values, a bar chart, a line chart, a world map, and a table. The text 'Microsoft Power BI Overview' is overlaid on the left side of the screen, and 'Jacques Goupil PPM Works, Inc.' is at the bottom left.

Download Power BI Desktop

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



The screenshot shows the top portion of the Power BI Desktop download page. The header is yellow with the Microsoft logo and 'Power BI' on the left, and navigation links for 'Products', 'Solutions', 'Partners', 'Learning', and a 'Sign in' button on the right. The main content area is also yellow and features a large heading, a descriptive paragraph, and two call-to-action buttons. The bottom section is black with white text and two more call-to-action buttons.

Microsoft | Power BI

Products Solutions Partners Learning [Sign in](#)

Create stunning reports and visualizations with Power BI Desktop

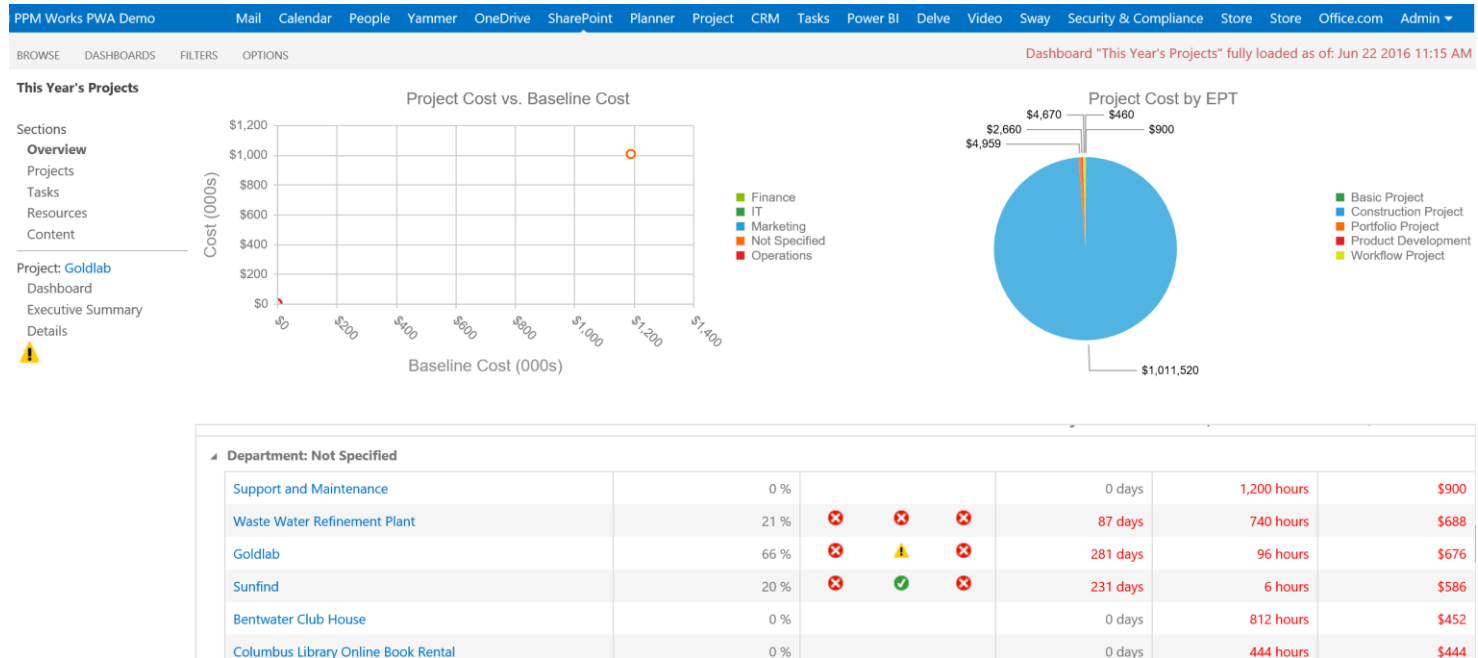
Power BI Desktop puts visual analytics at your fingertips with intuitive report authoring. Drag-and-drop to place content exactly where you want it on the flexible and fluid canvas. Quickly discover patterns as you explore a single unified view of linked, interactive visualizations.

[Download](#) [Learn more](#)

Advanced download options

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

Project Online Dashboards



- Out of the Box
- Connected to your data – a Quick overview report
- Good base to see what you really want

Project Online Dashboards DEMO



Microsoft Power BI Overview



Jacques Goupil
PPM Works, Inc.

Microsoft business intelligence & analytics

Trusted platform

Powerful self-service

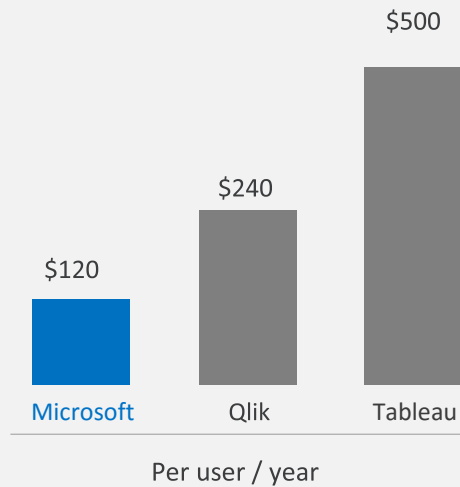
Faster insights

Industry leader



Gartner Magic Quadrant for Business Intelligence & Analytics Platforms, February 2016

At a fraction of the cost



5 seconds to get started,
5 minutes to WOW!

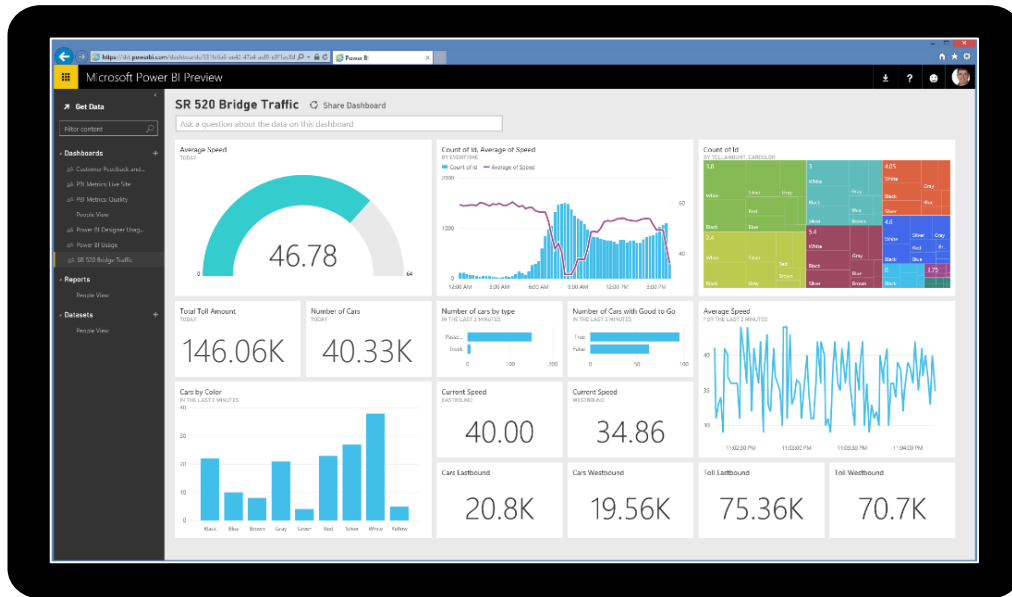


The most complete BI solution



The above graphics were published by Gartner, Inc. as part of a larger research document and should be evaluated in the context of the entire document. The Gartner document is available upon request from Microsoft. Gartner does not endorse any vendor, product or service depicted in its research publications, and does not advise technology users to select only those vendors with the highest ratings or other designation. Gartner research publications consist of the opinions of Gartner's research organization and should not be construed as statements of fact. Gartner disclaims all warranties, expressed or implied, with respect to this research, including any warranties of merchantability or fitness for a particular purpose.

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



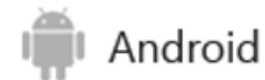
Native apps for iPad, iPhone, Android and Windows devices



Receive alerts to important changes in your data

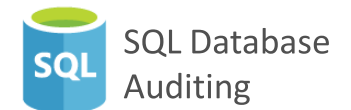
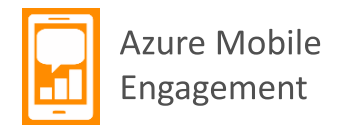
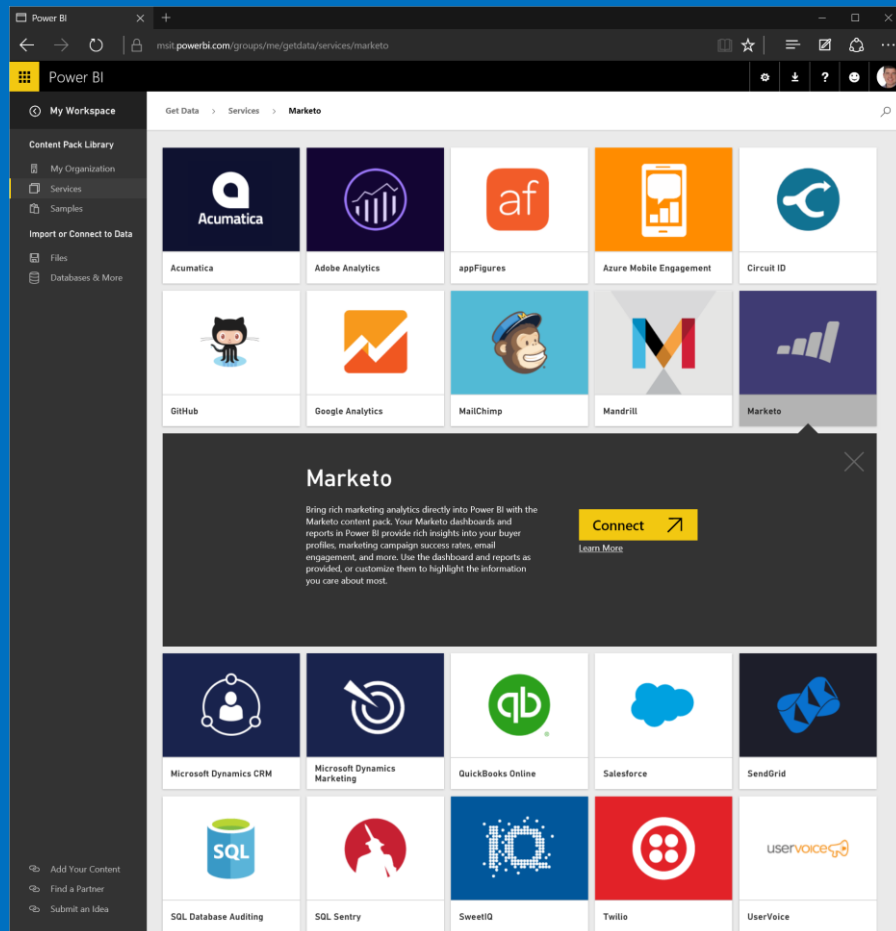


Share and collaborate with colleagues and take action

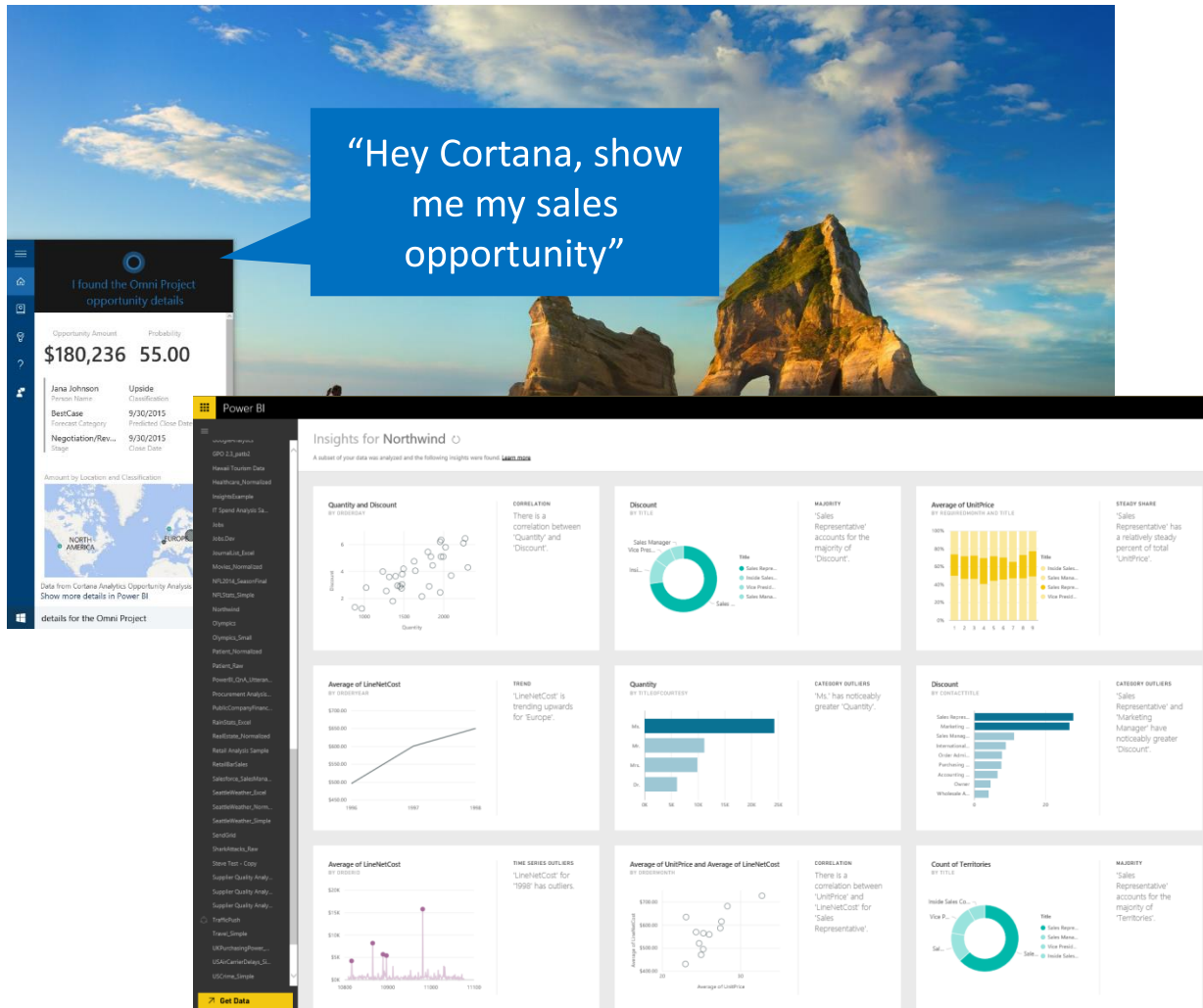


Get started quickly

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

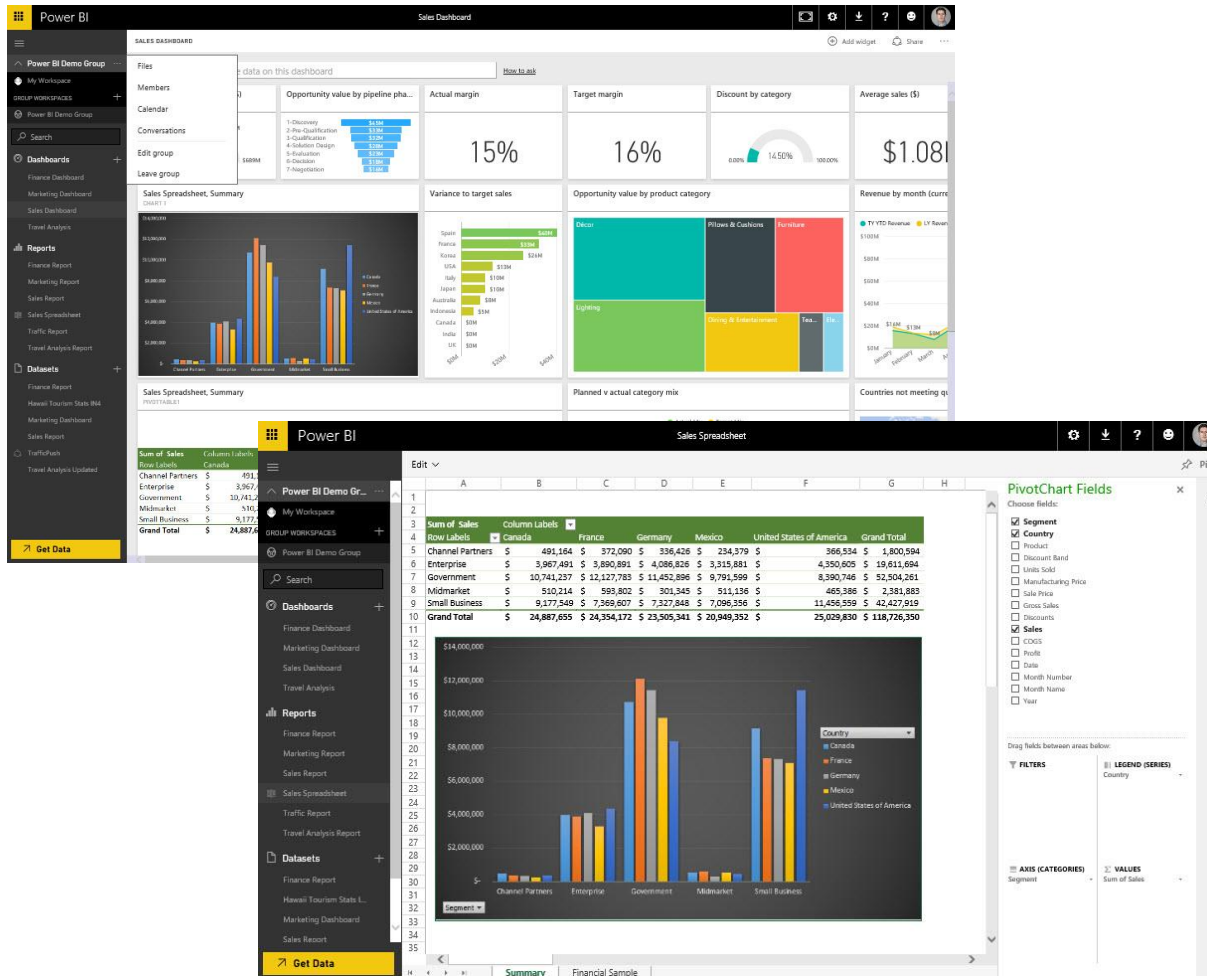


Experience your data in new ways



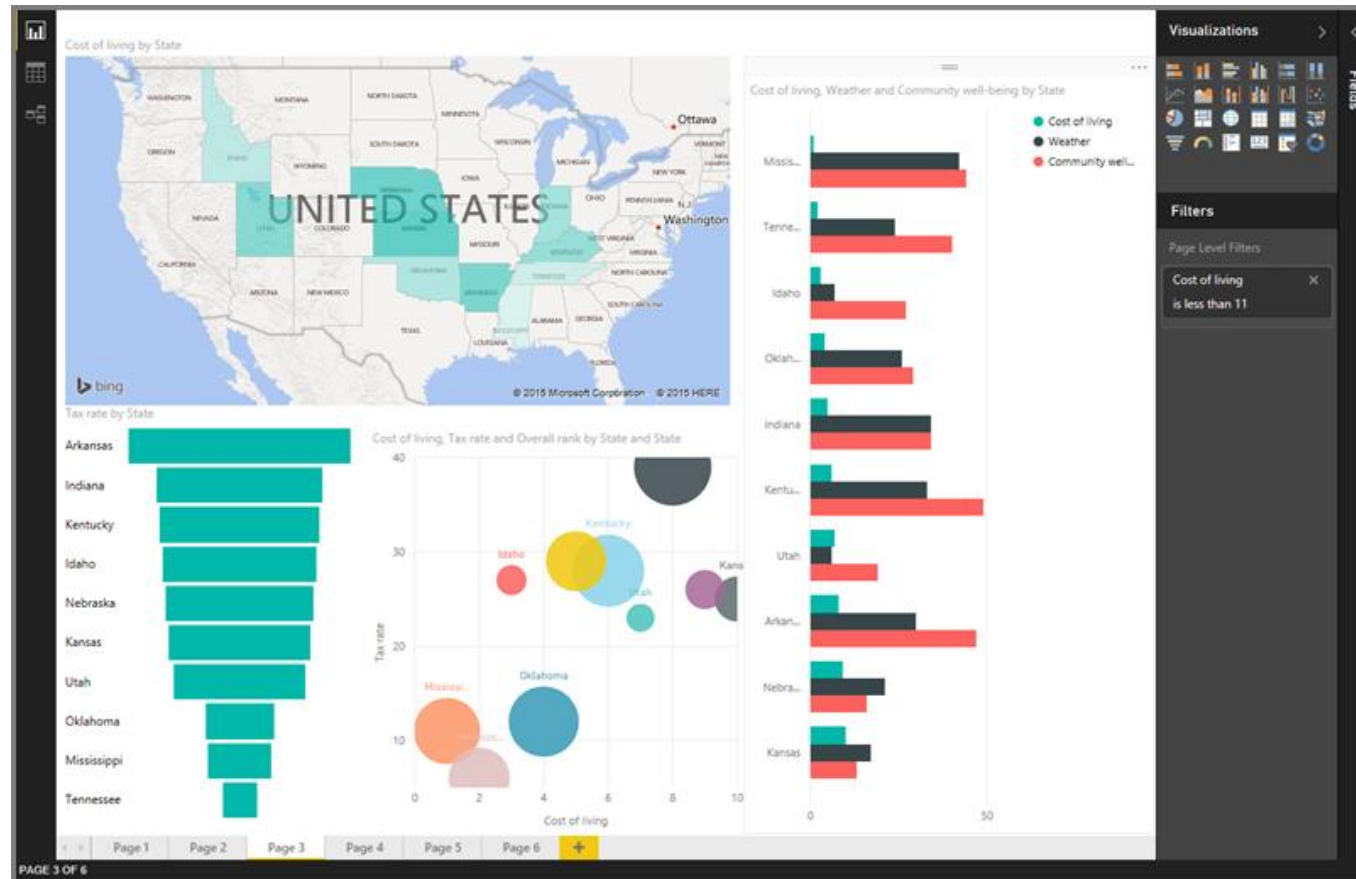
- ➔ Natural language query—ask questions of your data more naturally
- ➔ Cortana integration—allows you to access your data from Windows 10
- ➔ Quick insights—auto discover patterns and insights in your data

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

Power BI service and Power BI Desktop



Power BI Desktop = Analysts

- create data connections, models, and reports

Power BI Service = Users

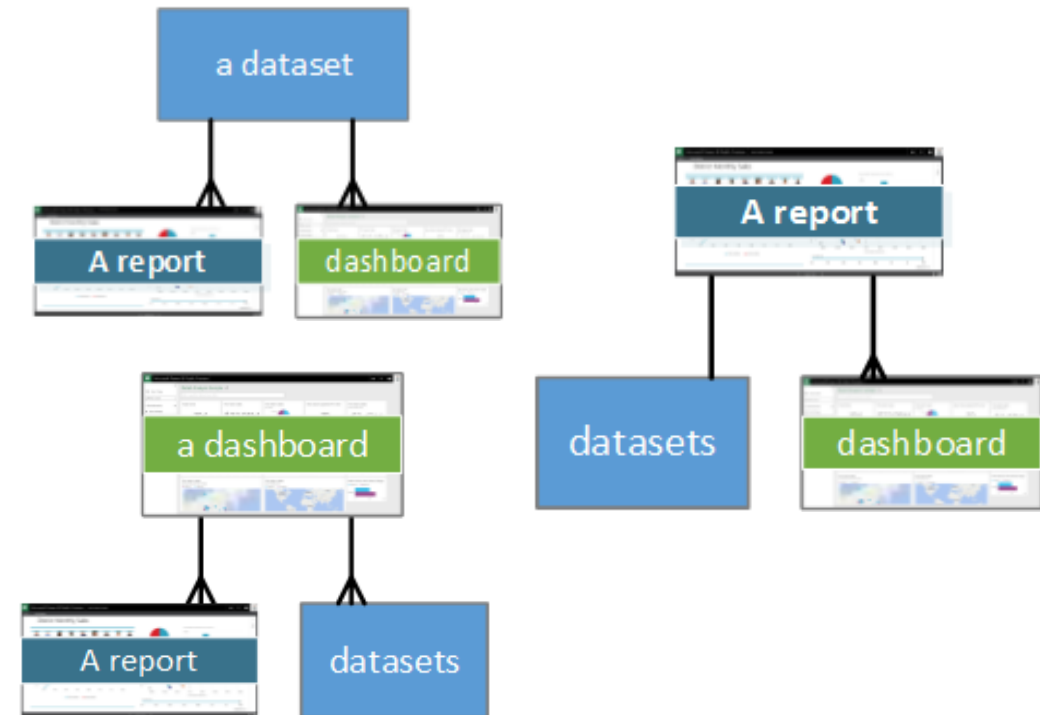
- interact and view Power BI Desktop Reports

<https://powerbi.microsoft.com>

Power BI DEMO

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
- Four major building blocks of Power BI service are:
 1. **Dataset:** something to import or connect to
 2. **Reports** are generated from datasets created in Power BI, Excel, or Power BI Desktop and published to Power BI
 3. **Tiles:** snapshot of your data *pinned* to a dashboard
 4. **Dashboards:** collections of tiles that represent important business info



Power BI Desktop

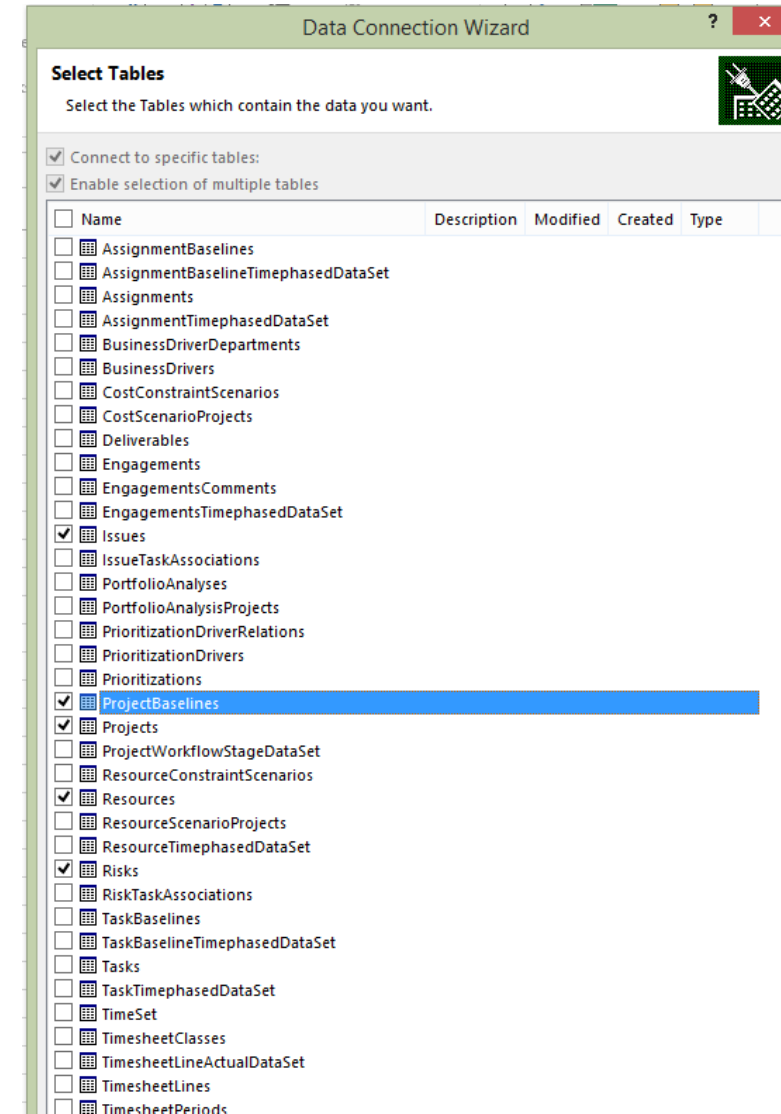
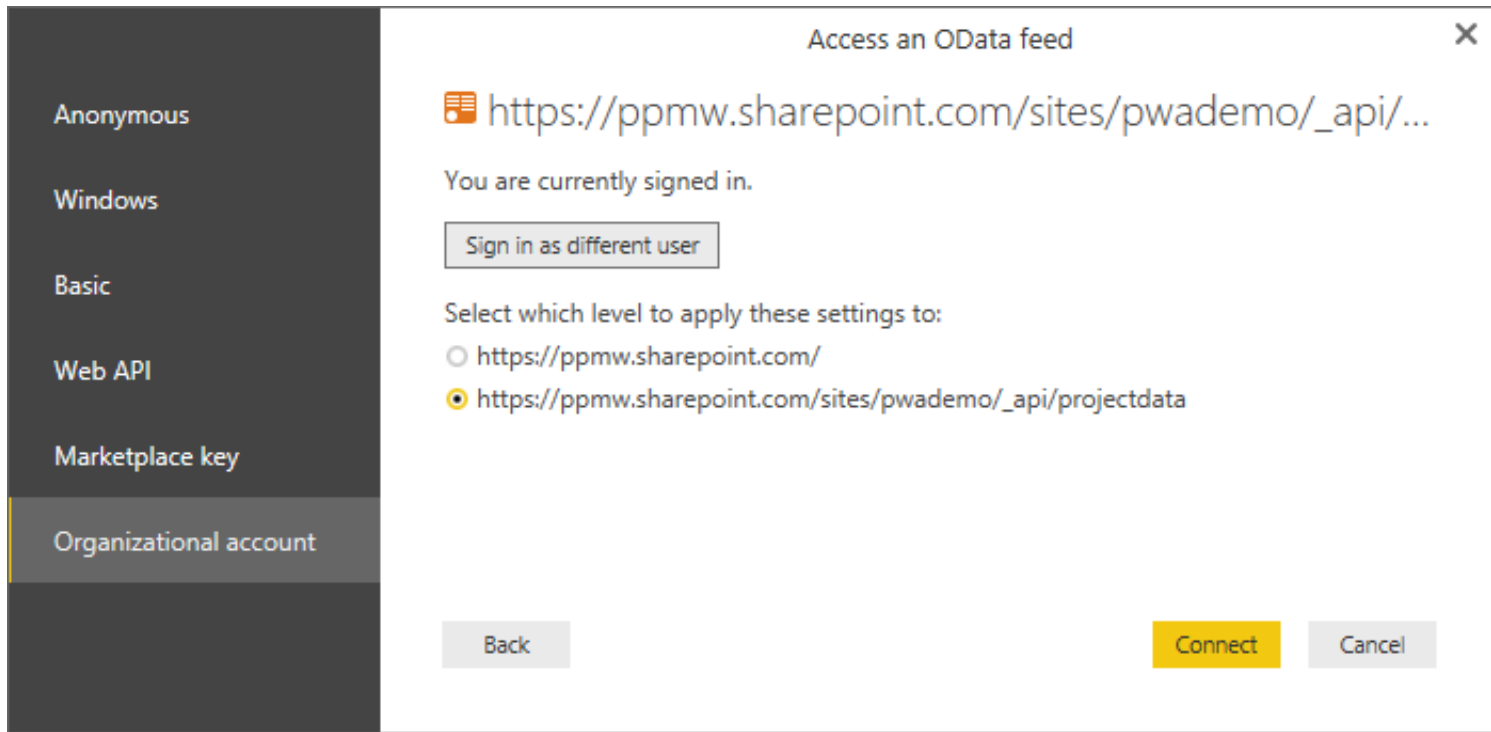
Power BI Desktop lets you create a collection of queries, data connections, and reports that can easily be shared with others

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**

Connecting Power BI Desktop

https://<myO365domain>.onmicrosoft.com/sites/pwa/_api/projectdata



Creating a Power BI Report and Dashboard

- **Demo**
 - **Creating a new Power BI Report / Dashboard**
 - **Power BI Desktop**
 - **Leverage the Content Pack**
 - **Adding Tiles through Q&A**

Power BI Desktop Benefits

- **Simplify getting your data ready to consume**
- **Combine more than 1 Dataset into a Report**
- **Import Report into Power BI**
- **Get Quick Insights**

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



Publishing to Power BI

Publishing to Power BI

✓ Success!

Open 'Projects by Work-RemainingWork.pbix' in Power BI

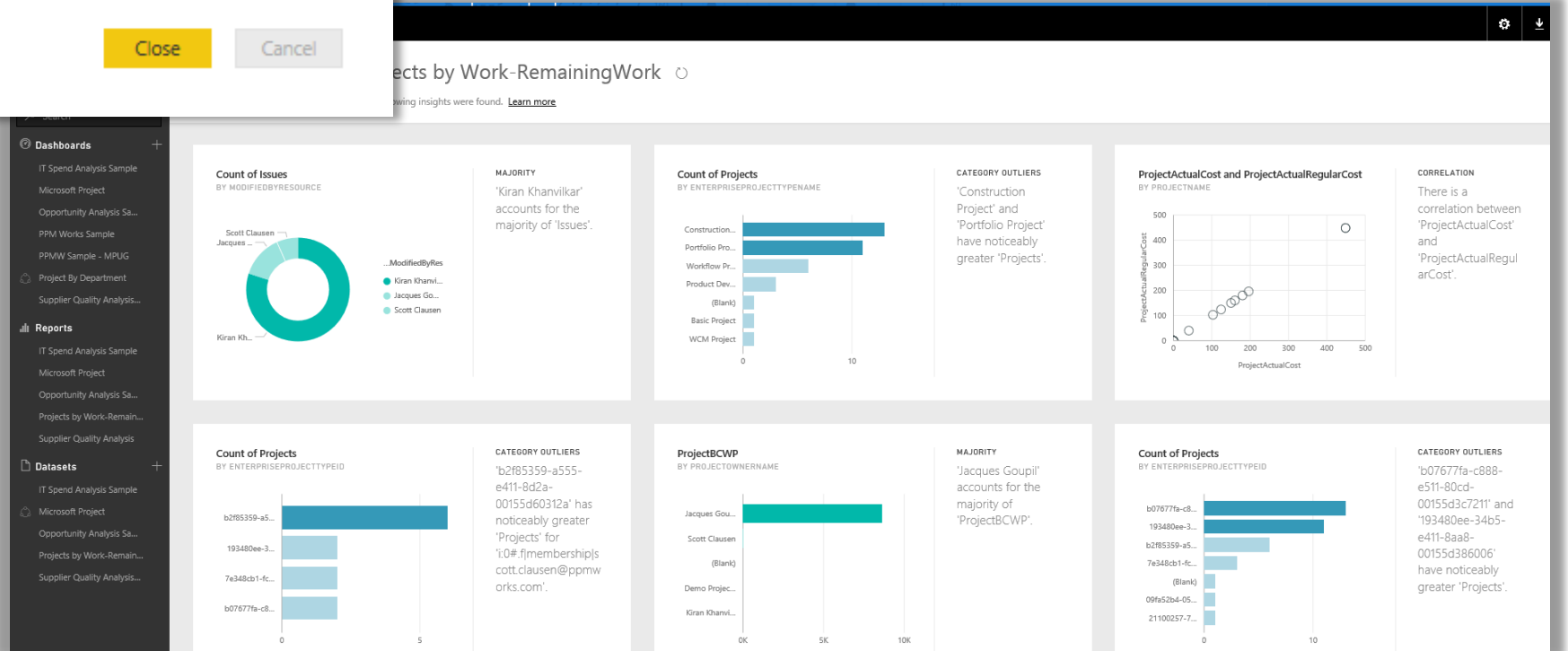
[Get quick insights](#)



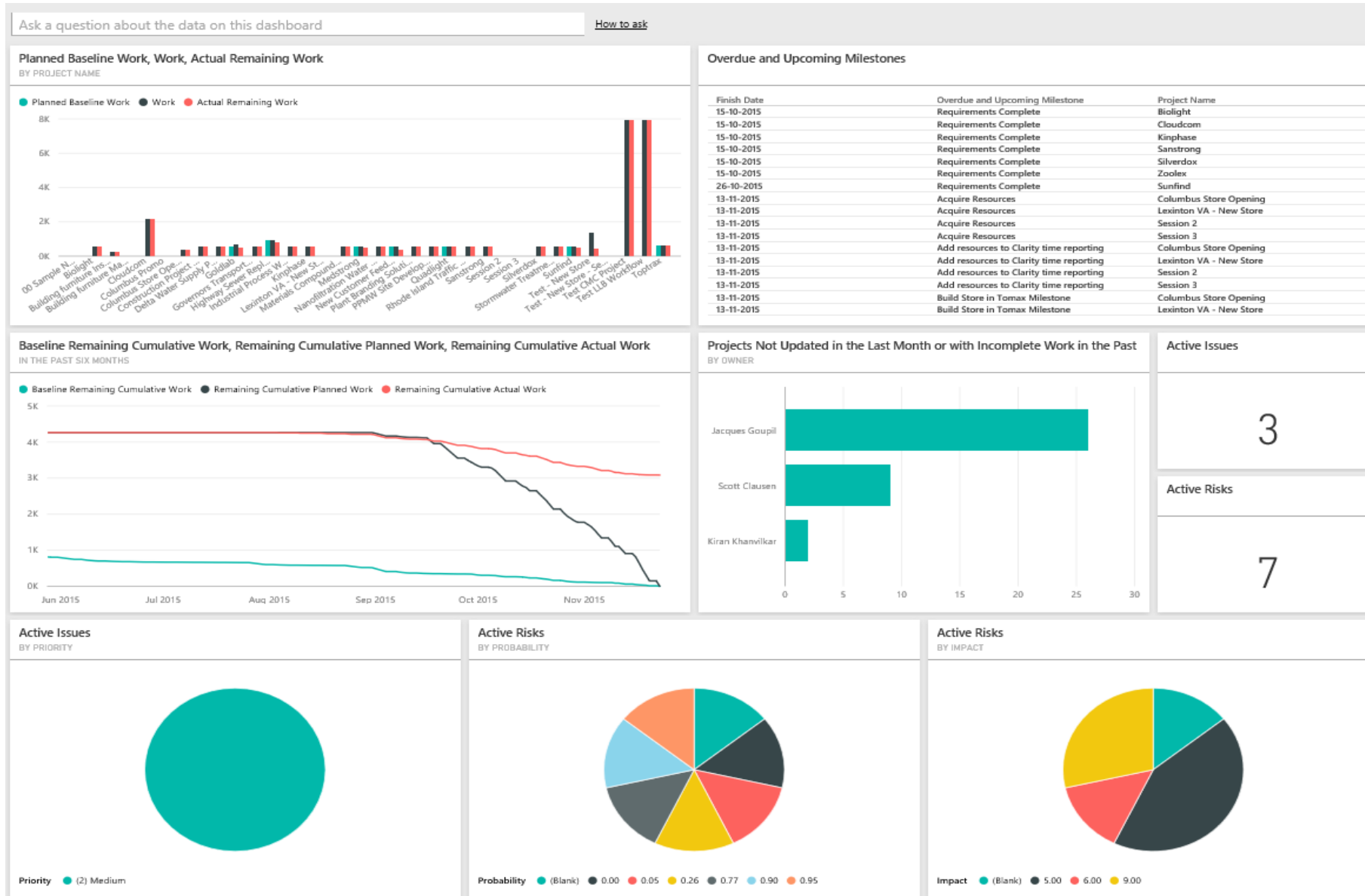
Close

Cancel

Get quick insights is a great 1st start for tiles/reports

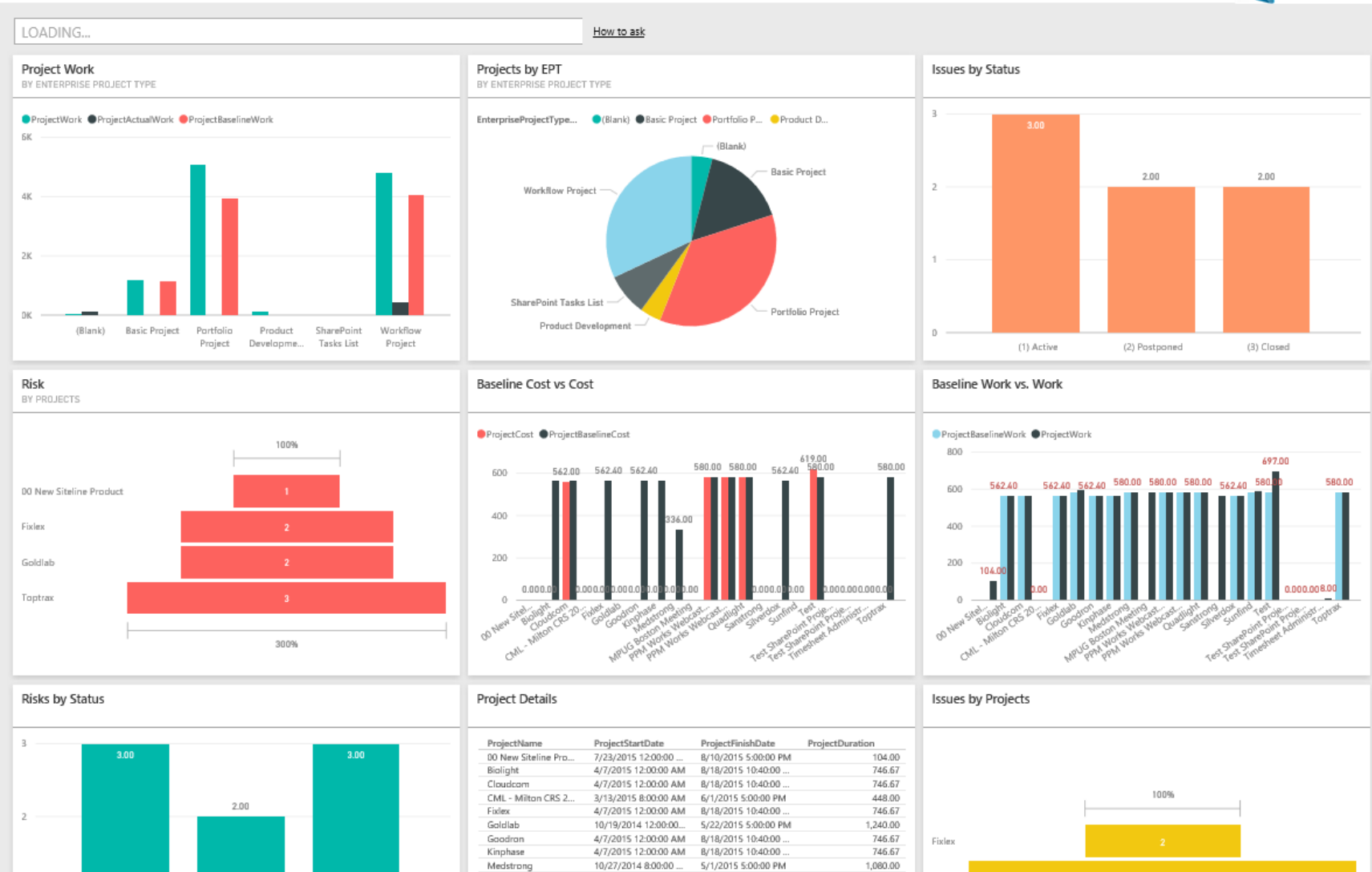


Power BI Content Pack



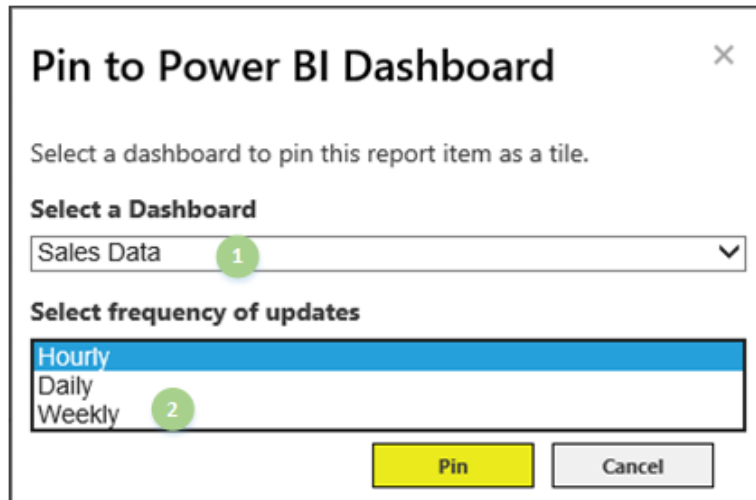
Sample Dashboards

PROJECT BY DEPARTMENT

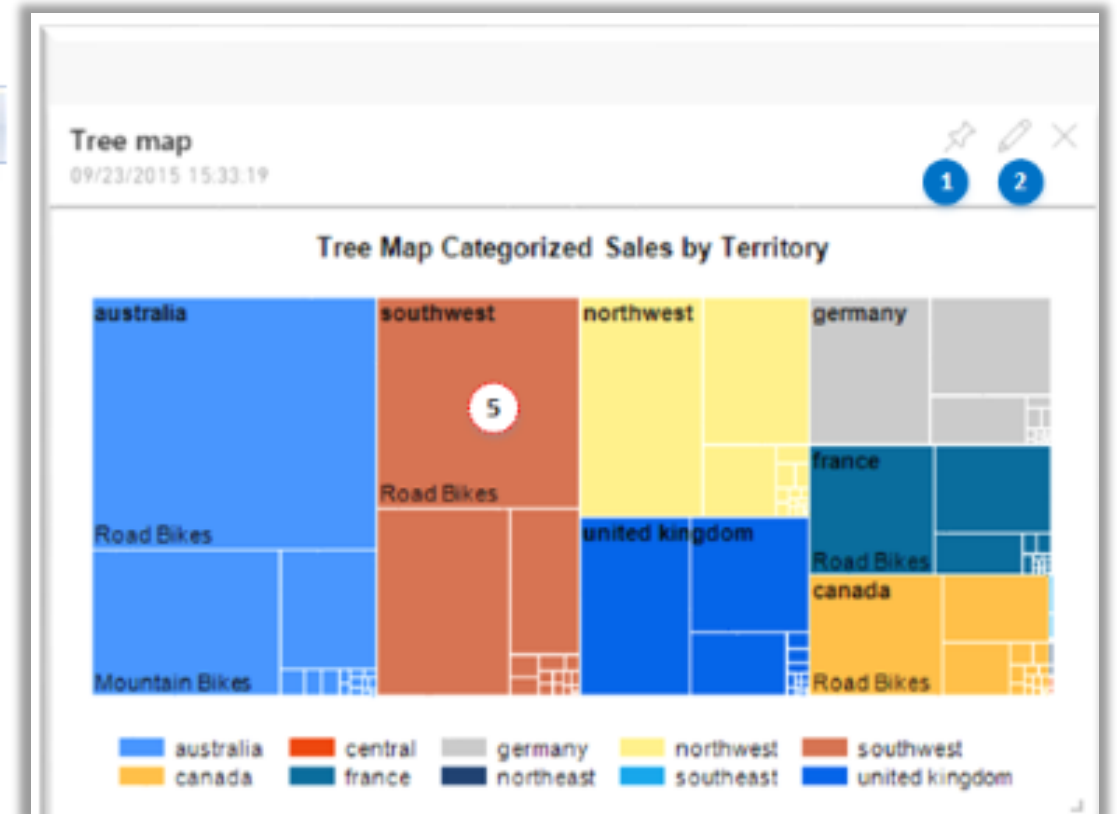


Did you know you can add SSRS to a Power BI Dashboard?

- **SQL Server 2016 Reporting Services** after Admin integrates Report Server with Azure AD and Power BI



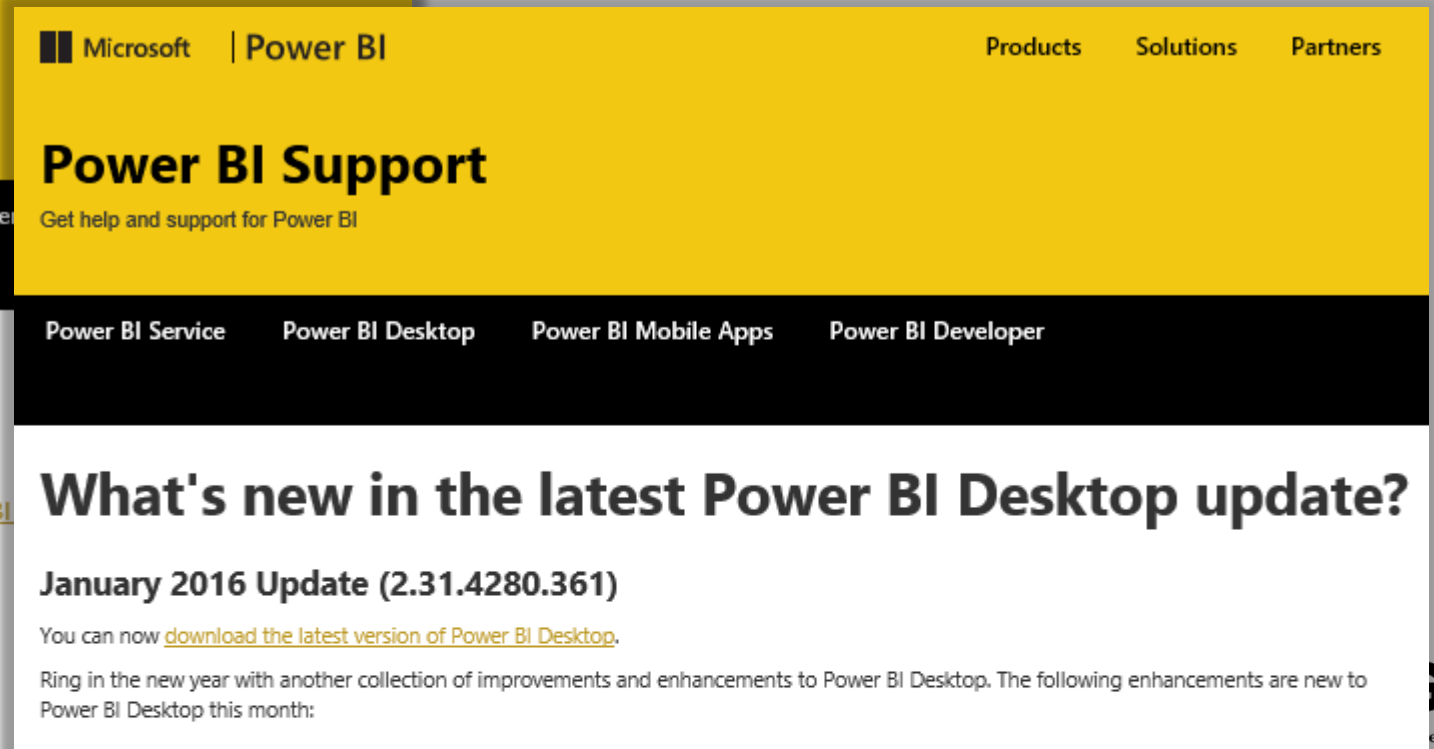
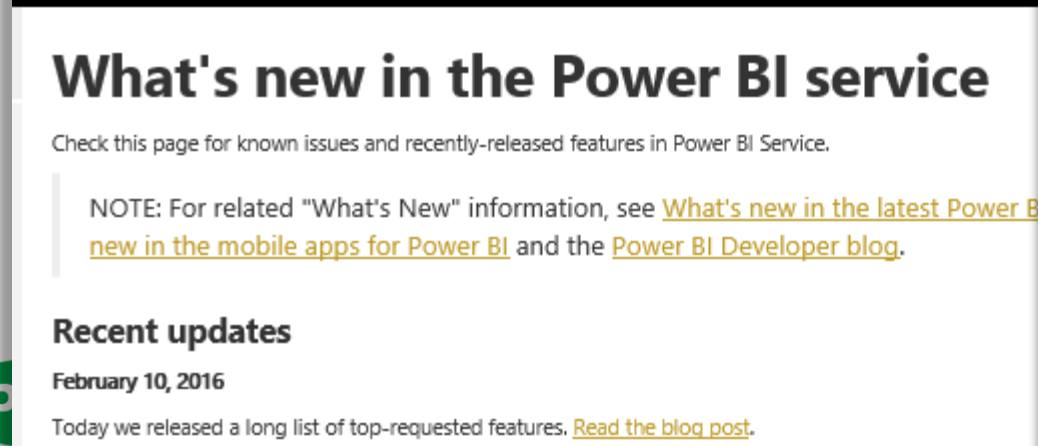
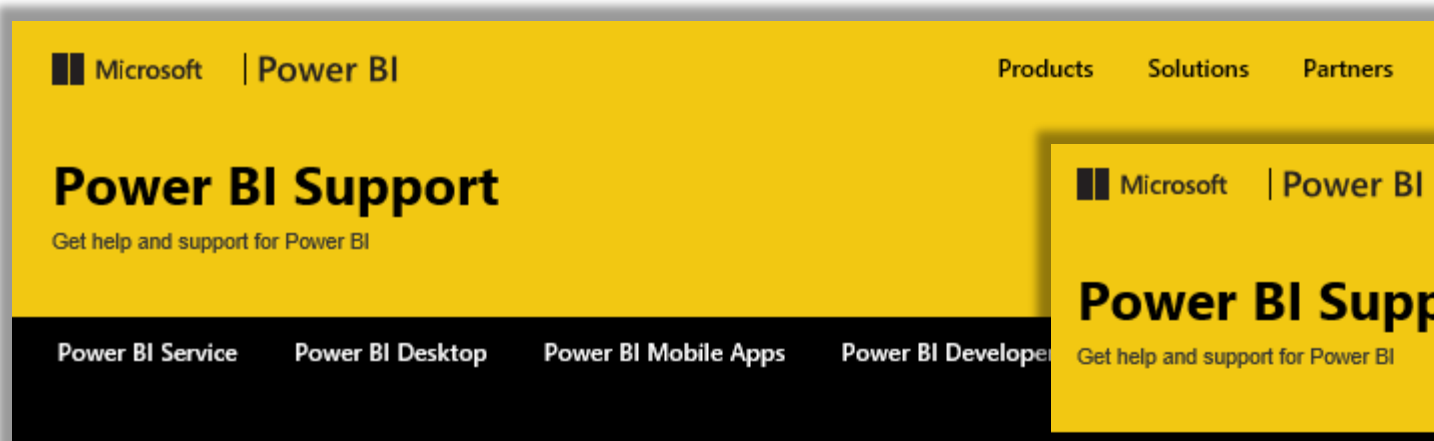
<https://msdn.microsoft.com/en-us/library/mt604784.aspx>



What's new in the Power BI service

- Releases every couple weeks and monthly for **Power BI Desktop**

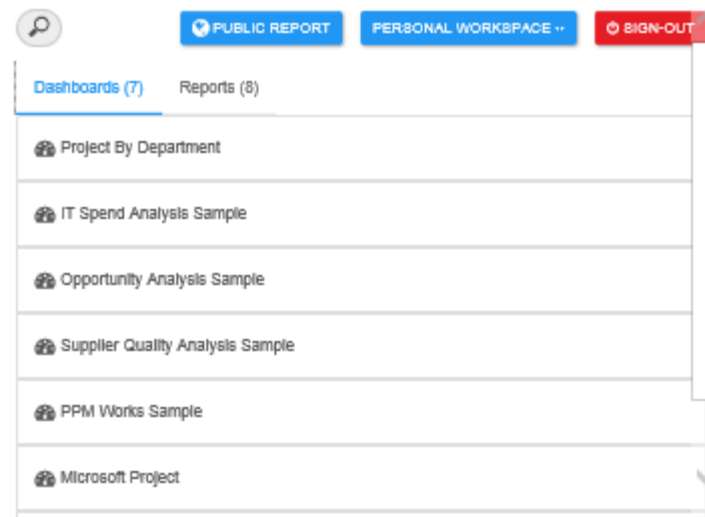
<https://powerbi.microsoft.com/en-us/documentation/powerbi-service-whats-new/>



Creating a Power BI Tile in Power Point

- **Steps**

- 1. Open Power Point and Insert the 'PowerBI Tiles' App**
- 2. Login to Authenticate Power BI**
- 3. Select the Dashboard or Power BI tile**



(Demo if time permits)

Sample Power BI Tile in Power Point

Planned Baseline Work, Work, Actual Remaining Work

BY PROJECT NAME



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>

Cost: 1 day of sessions and prep: \$3,600



PPM Works On Going Support

On Going Dashboard Support Services (30 hours) - if desired

Task Name	Duration	Cost
Dashboard in a Day	60 days	\$5,250
OnGoing Mentoring	60 days	\$5,250
OnGoing Mentoring	60 days	\$5,250

PPM Works End User Support Tiers:

- **Tier 1: Client will designate an internal team or Point of Contact as the first mechanism for end user support.**
- **Tier 2: PPM Works will provide expert support services to the support Tier 1 team. PPM Works experts are there when the client team needs support which they cannot provide internally.**

The Support Activities include:

- a. End User and Technical Support
- b. Configuration Recommendations
- c. Process/Functionality Discussions
- d. Q/A and Break-fix

Support Tracking Reports cover a two week reporting period and will effectively log all support requests, hours spent, and total support hours remaining.

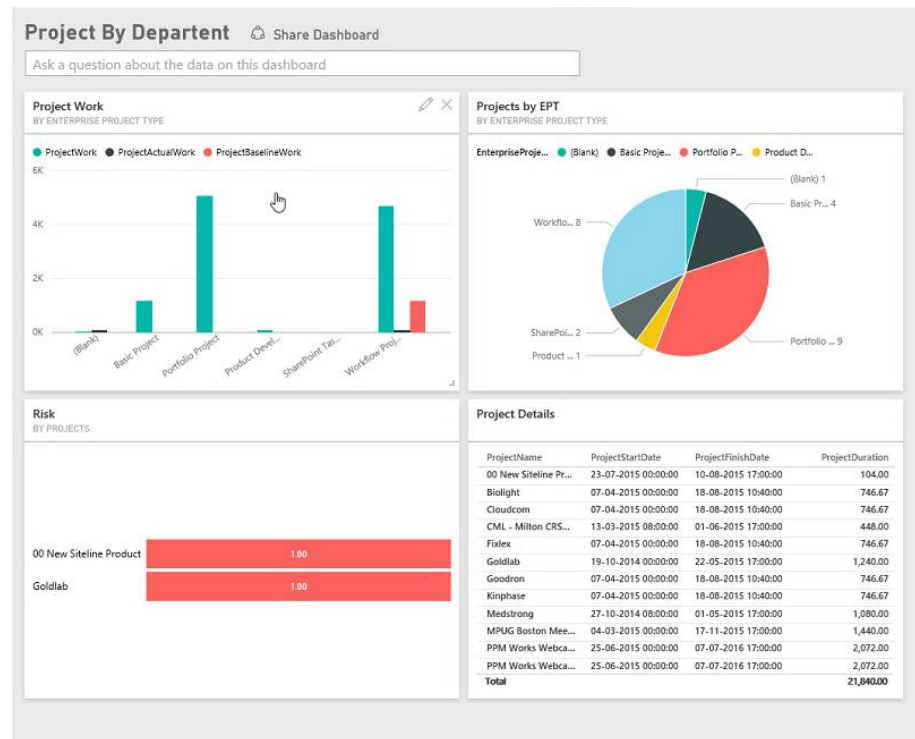
Report Pack Offering

Need Reports? Try our Report Pack.

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

Reporting Tools:

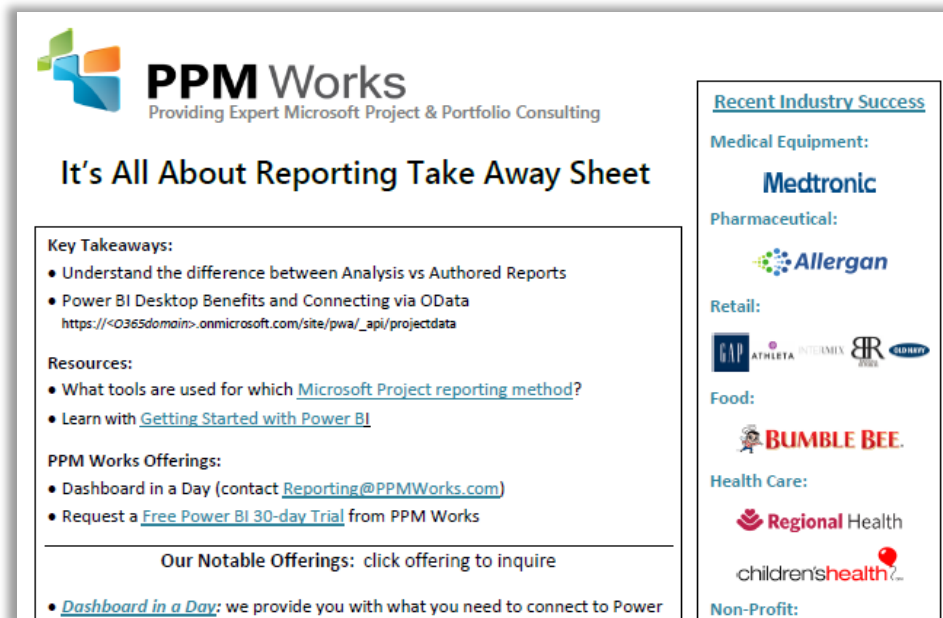
- SSRS
- Power BI
- Custom Development
- Excel Services



Take Away Guide: Creating Your Dashboard

Dashboard in a Day and Free Power BI Trial

- **Dashboard in a Day** Contact Reporting@ppmworks.com
- **Free Power BI Trial** <http://ppmworks.com/free-power-bi-office-365-trial>



PPM Works
Providing Expert Microsoft Project & Portfolio Consulting

It's All About Reporting Take Away Sheet

Key Takeaways:

- Understand the difference between Analysis vs Authored Reports
- Power BI Desktop Benefits and Connecting via OData
https://<O365domain>.onmicrosoft.com/site/pwa/_api/projectdata

Resources:

- What tools are used for which [Microsoft Project reporting method?](#)
- Learn with [Getting Started with Power BI](#)

PPM Works Offerings:

- Dashboard in a Day (contact Reporting@PPMWorks.com)
- Request a [Free Power BI 30-day Trial](#) from PPM Works

Our Notable Offerings: click offering to inquire

- [Dashboard in a Day](#): we provide you with what you need to connect to Power

Recent Industry Success

Medical Equipment:

Medtronic

Pharmaceutical:

Allergan

Retail:

Food:

BUMBLE BEE.

Health Care:

Regional Health

children'shealth

Non-Profit:

Question and Answer Session

?

?

?

?

?

If your question does not get answered in the allotted time, please send to reporting@ppmworks.com or post to the MPUG blog

?

?

?

?

?

?

Why clients choose PPM Works

Our Strength is our Experience: Upgrades, Integrations, and Reporting

Our Passion for Success: we are honest and dedicated and your project comes 1st

Our Core Values: treat you as family and we are not satisfied until you are

- 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

Call to Action



LinkedIn: www.linkedin.com/in/jacquesgoupil/ 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. Complete survey
3. Get your Reporting Take Away
4. Check out our Blogs / webcasts
5. Get LinkedIn with us (PPM Works)
6. Ask questions and **use the tool!**