KPI Reporting in Project Online
Presented by Laura Crawford
October 26, 2017

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Upcoming PPM Works Events

Date and Time	Webinar Topic
11/9/17 12 PM EST	The Ins and Outs of Resource Management: From Top Down Planner to Individual Management
12/7/17 12 PM EST	Creating Custom Dashboards in Project Professional 2016
1/11/18 12 PM EST	Create Custom Tables and Views in Project Professional
1/25/18 12 PM EST	Best Practices for SharePoint Project Site Template Development

Please visit www.ppmworks.com/events to view our full event list!

Hope to see you there

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Laura Crawford

Senior PPM Specialist

Laura has over 7 years of experience with Microsoft PPM and offers a unique combination of business, project management, and technical expertise. Laura is an expert at envisioning and delivering solutions that utilize technologies across the Project Online, SharePoint and Business Intelligence platforms. Laura holds an BS from State University of New York College at Oswego and is a Microsoft Certified Trainer and a Microsoft Specialist.

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

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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

Learning Objectives

In this informative session we will show you how to unleash the power of Excel Services to create real-time reports enabling you to visualize your data.

At the end of today's session you will be able to:

- Create a connection to your OData feed

- Import the data in to Excel as a PivotTable report and a Pivot Chart

- Format your Data

- Get started right away in creating new reports that will help your whole organization

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Introduction

Connecting to Your Data

Selecting the Tables

Creating a Relationship Between Tables

Creating a Pivot Table

Creating a Pivot Chart

Question and Answer

Agenda

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Session Goals

Improve KPI Reporting

Tips and Tricks for both New or Mature Organizations

Equip You to Get Started Today

Quick Reference on Steps to Get Started

Make the Most of Your Time

Fast-pace, Condensed Content with Time for Question and Answer

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Excel Reports

Excel Reports
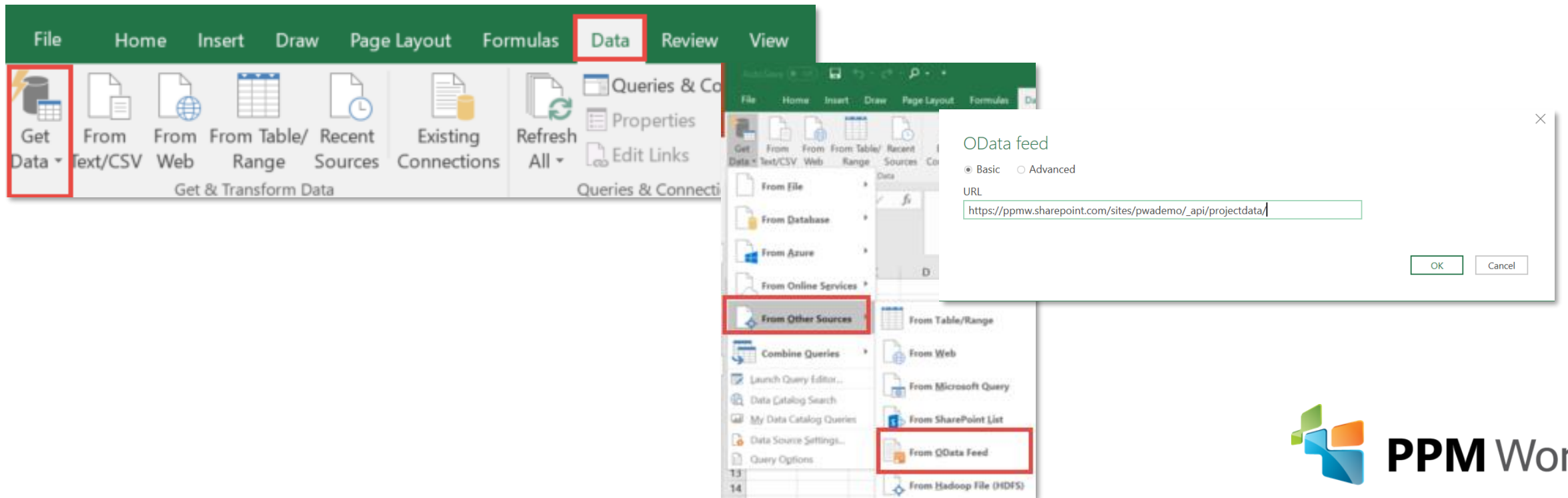
Project Online does not allow users to query the database directly. OData (Open Data Protocol) is used to access the data using HTTP messages.

Excel will allow us to:

- Define OData data sources
- Use Power Pivot to create relations between entities
- Use Pivot Table, graphs, tables or Power View to create reports

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Connecting Excel to Project Online Data
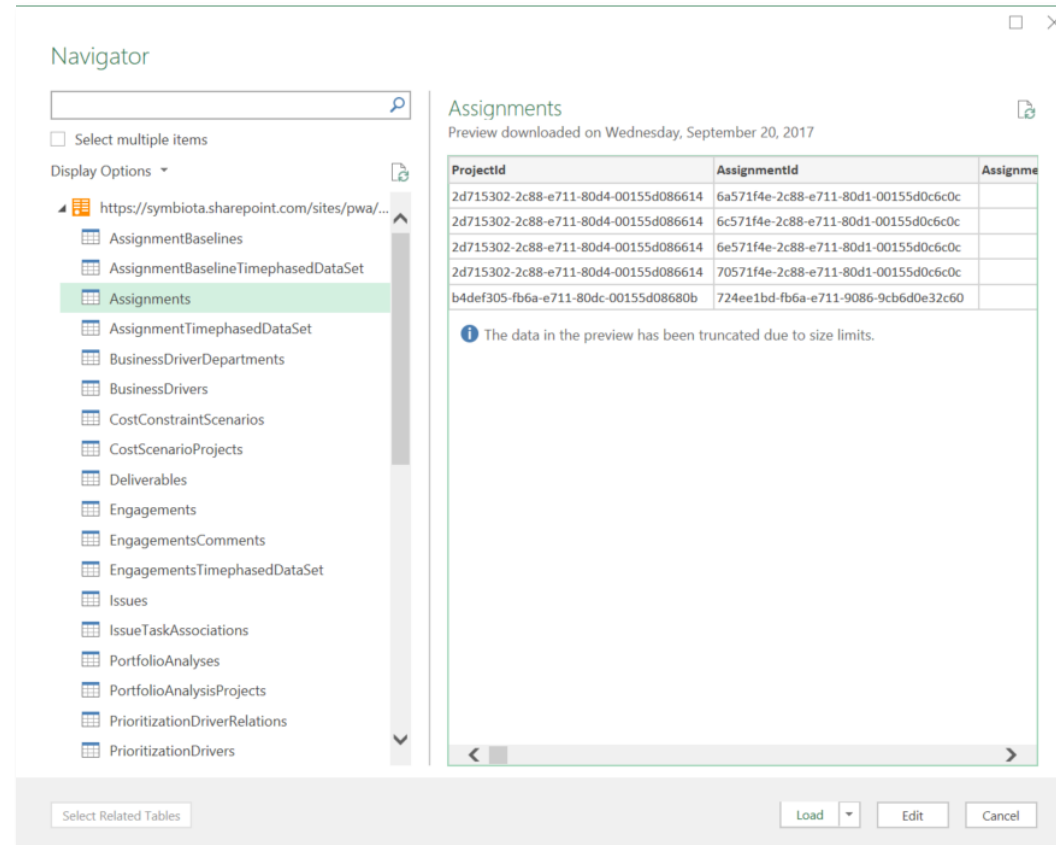
- Open a blank workbook

- From the Data ribbon, select Get Data | From Other Sources | From OData Feed

- Enter the URL: **https://yourURL.com/sites/pwa/_api/projectdata/**

Select the Tables

- Select the table and click Load – best practice is to only load the fields needed
- Select edit to remove fields

Select the Fields

To remove fields:

- Highlight the columns
- Right click and select Remove Columns
- Select Close & Load

Select Additional Tables

- Select Recent Source
- Click Connect
- Select additional tables
- Click Load to select all fields or edit to remove fields
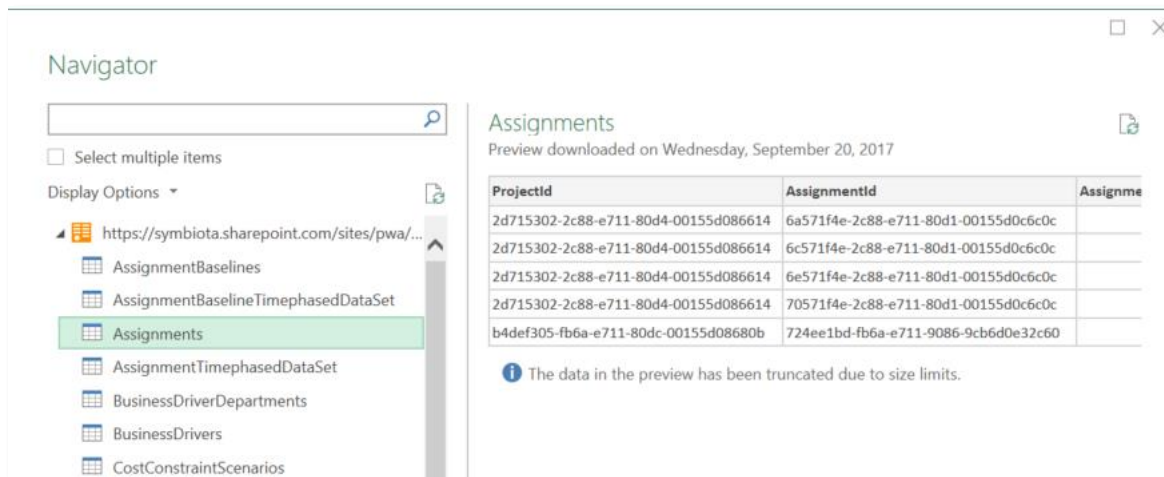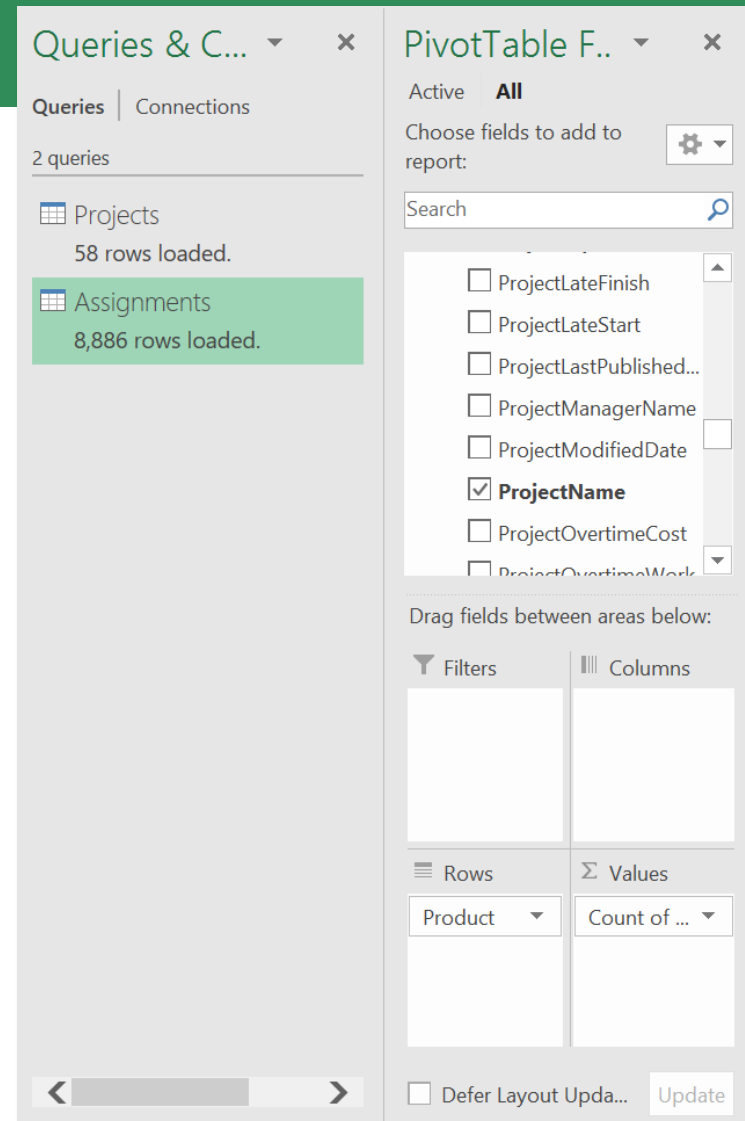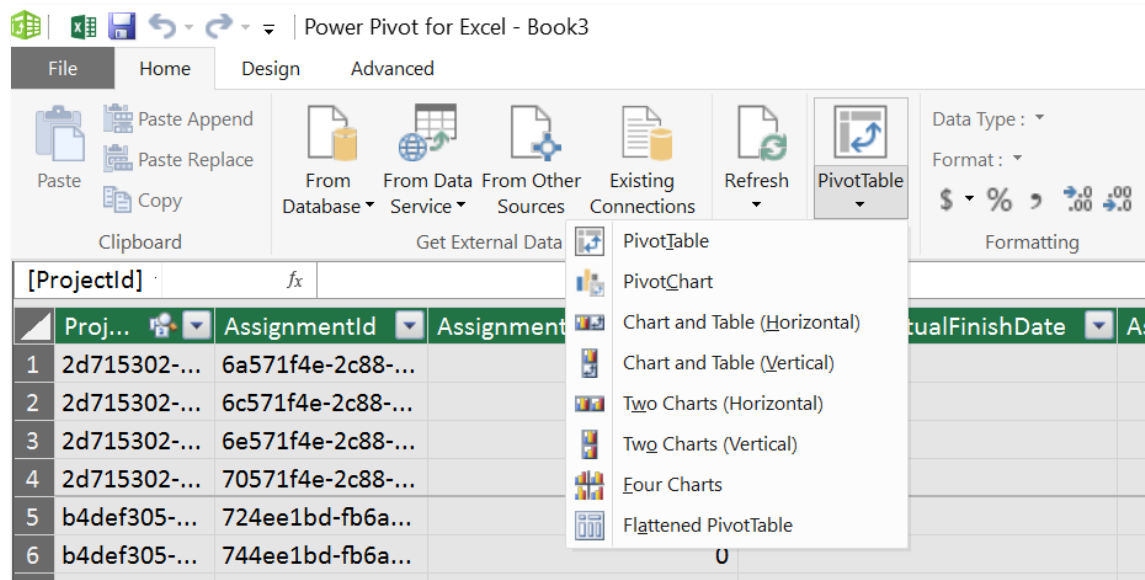
Table Relationship

- Select the Power Pivot tab
- Select Manage
- Select the Design tab
- Create Relationship
- Select the Project ID field in both the Assignments table and the Projects table

Creating a Pivot Table

- From the Home ribbon, select Pivot Table
- Select the Rows to display
- Drag and drop the values

Creating a Pivot Chart

Once the Pivot table has been created, the Pivot chart can be created using the same techniques as we used to created the table.
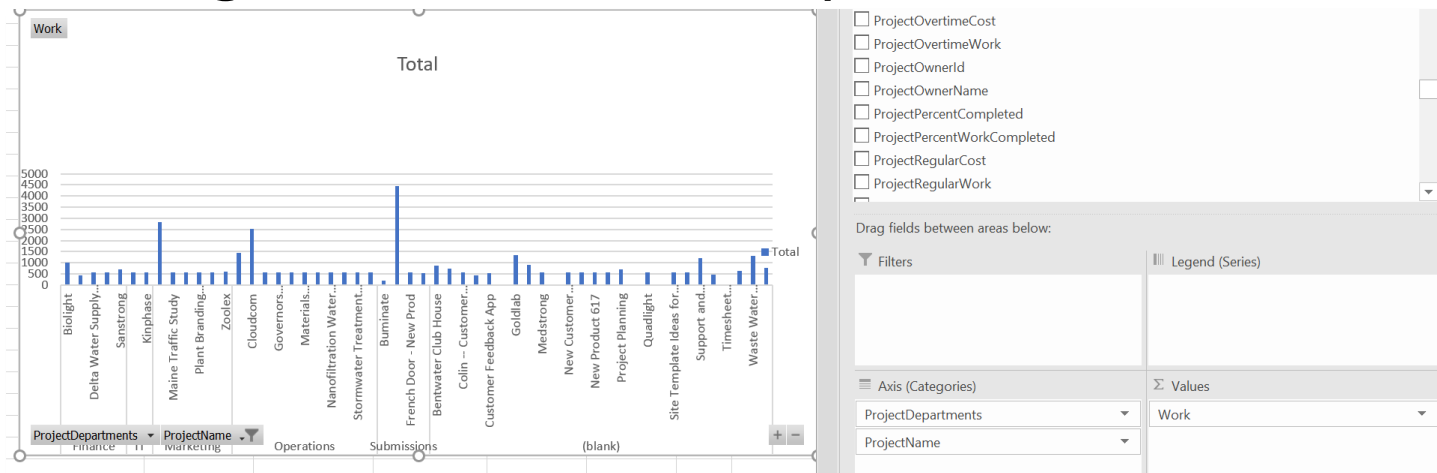
Drag and drop the fields to rearrange the data. Change the Chart type to improve how the data is displayed

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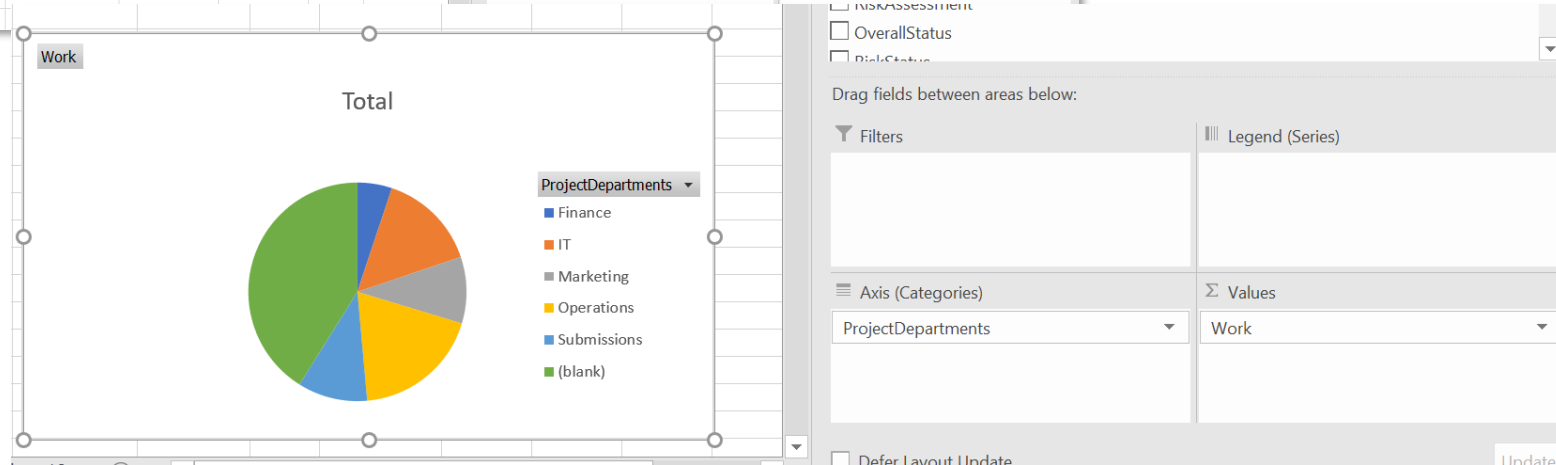
Refreshing the Data

The report can be saved to your desktop and refreshed upon opening.

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Demo

- Connecting Excel to your Project Online data
- Creating Relationships between tables
- Creating a Pivot Table
- Creating a Pivot Chart

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Question and Answer

PDU's for this Webinar

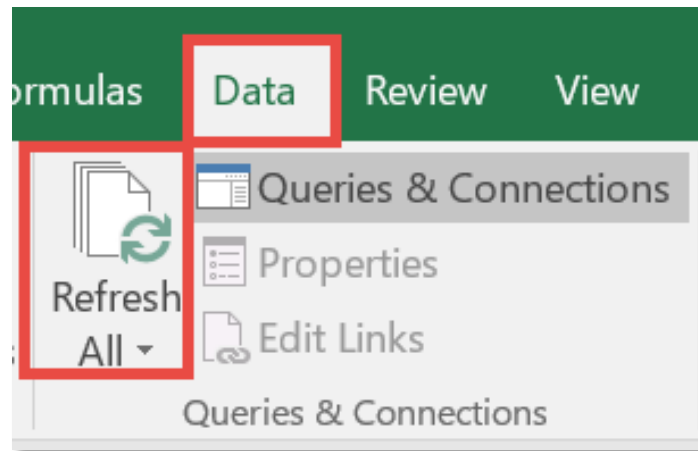PPM Works is a PMI® Registered Education Provider (R.E.P.). We offer PDU's for this presentation. To claim your PDU please email **info@ppmworks.com** with your PMI number and reference this presentation.

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