



# KPI Reporting in Project Online

Presented by Laura Crawford  
October 26, 2017

# 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

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Hope to see you there

# 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



# 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 1<sup>st</sup>
- 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

# Agenda

**Introduction**

**Connecting to Your Data**

**Selecting the Tables**

**Creating a Relationship  
Between Tables**

**Creating a Pivot Table**

**Creating a Pivot Chart**

**Question and Answer**

# 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





# Excel Reports

# Excel Reports

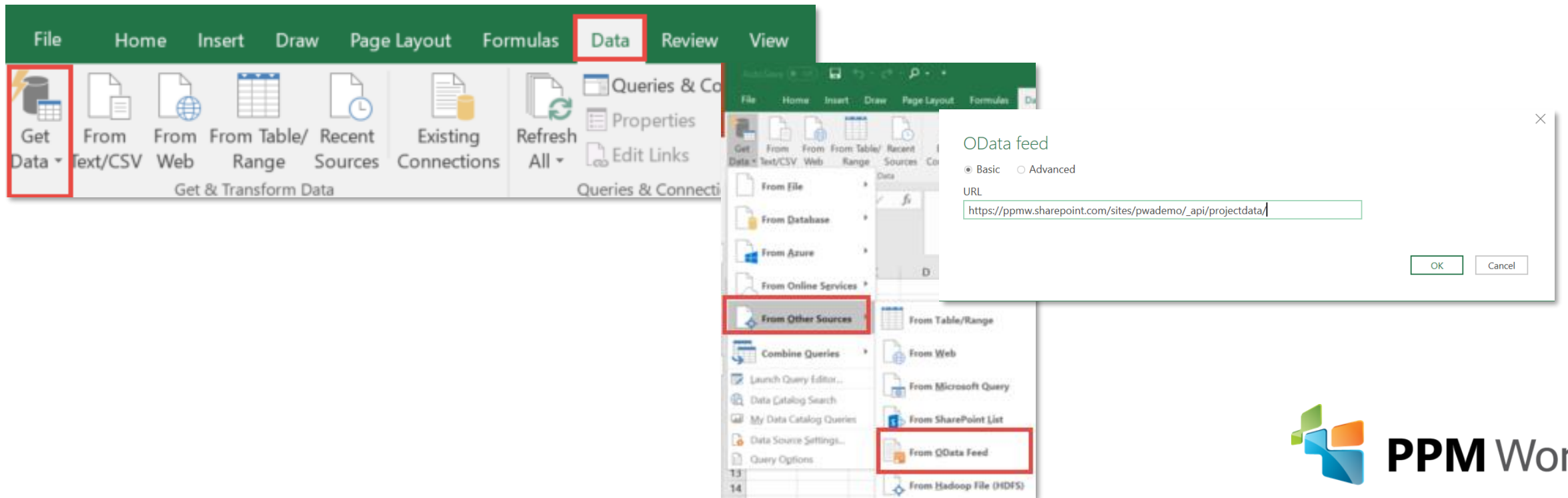
Project Online does not allow users to query the database directly. OData (Open Data Protocol) is used to access the data using HTTP messages.

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

# Connecting Excel to Project Online Data

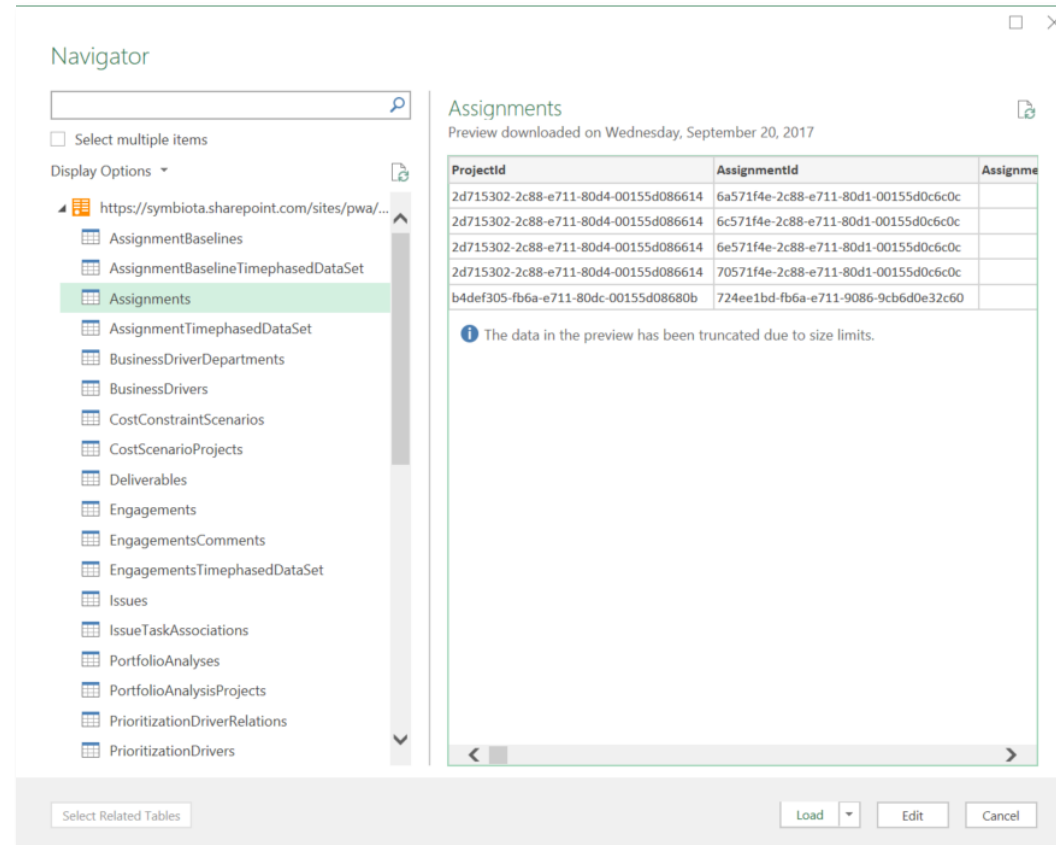
- Open a blank workbook
- From the Data ribbon, select Get Data | From Other Sources | From OData Feed
- Enter the URL: **[https://yourURL.com/sites/pwa/\\_api/projectdata/](https://yourURL.com/sites/pwa/_api/projectdata/)**



The screenshot illustrates the steps to connect Excel to Project Online Data. It shows the Microsoft Excel interface with the Data ribbon selected. The 'Get Data' button is highlighted with a red box. A dropdown menu is open, showing 'From Other Sources' selected, with 'From OData Feed' also highlighted. An 'OData feed' dialog box is open, showing the 'Basic' tab selected and the URL 'https://ppmw.sharepoint.com/sites/pwademo/\_api/projectdata/' entered in the URL field. The dialog box has 'OK' and 'Cancel' buttons.

# Select the Tables

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



The screenshot shows the PPM Works interface. On the left is the 'Navigator' pane with a search bar and a list of tables. The 'Assignments' table is selected. On the right is a preview of the 'Assignments' table with columns 'Projectid', 'Assignmentid', and 'Assignme'. Below the table is a message: 'The data in the preview has been truncated due to size limits.' At the bottom of the interface are buttons for 'Select Related Tables', 'Load', 'Edit', and 'Cancel'.

Projectid	Assignmentid	Assignme
2d715302-2c88-e711-80d4-00155d086614	6a571f4e-2c88-e711-80d1-00155d0c6c0c	
2d715302-2c88-e711-80d4-00155d086614	6c571f4e-2c88-e711-80d1-00155d0c6c0c	
2d715302-2c88-e711-80d4-00155d086614	6e571f4e-2c88-e711-80d1-00155d0c6c0c	
2d715302-2c88-e711-80d4-00155d086614	70571f4e-2c88-e711-80d1-00155d0c6c0c	
b4def305-fb6a-e711-80dc-00155d08680b	724ee1bd-fb6a-e711-9086-9cb6d0e32c60	

# Select the Fields

To remove fields:

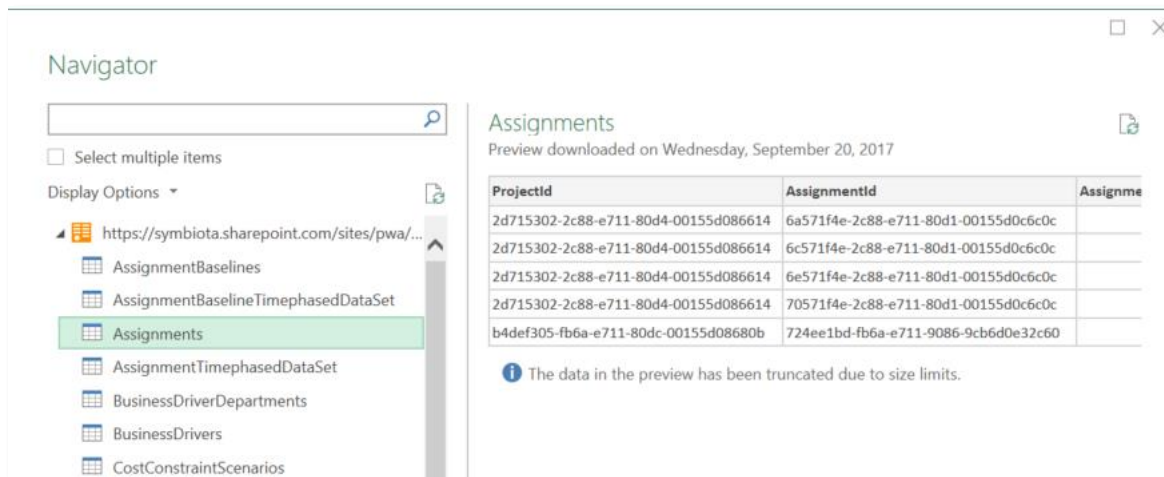
- Highlight the columns
- Right click and select Remove Columns
- Select Close & Load

The screenshot shows the Microsoft Power BI Query Editor interface. The top ribbon includes tabs for Home, Transform, Add Column, and View. The Home tab is active, showing various data manipulation options like Refresh, Properties, Advanced Editor, Manage, Choose Columns, Remove Columns, Keep Rows, Remove Rows, Sort, Split Column, Group By, Replace Values, Merge Queries, Append Queries, Combine Files, Manage Parameters, Data source settings, New Source, and Recent Sources. Below the ribbon, a table is displayed with columns: ParentProjectId, PlannerCommitDate, PlannerDecisionAliasLookupTableId, PlannerDecisionAliasLookupTableValueId, and PlannerDecisionID. The first five columns are highlighted in green. A context menu is open over the highlighted columns, with 'Remove Columns' selected and highlighted in red. Other options in the menu include 'Remove Other Columns', 'Add Column From Examples...', 'Remove Duplicates', 'Remove Errors', 'Replace Values...', 'Fill', 'Change Type', 'Merge Columns', 'Group By...', 'Unpivot Columns', 'Unpivot Other Columns', and 'Unpivot Only Selected Columns'. A 'Close & Load' button is visible in the top right corner of the interface.

	ParentProjectId	PlannerCommitDate	PlannerDecisionAliasLookupTableId	PlannerDecisionAliasLookupTableValueId	PlannerDecisionID
1		null	null	null	null
2		null	null	null	null
3		null	null	null	null
4		null	null	null	null
5		null	null	null	null
6		null	null	null	null
7		null	null	null	null
8		null	null	null	null
9		null	null	null	null
10	c43f7052-347c-e711-bc91-3402868164ff	null	null	null	null
11		null	null	null	null
12		null	null	null	null
13		null	null	null	null
14		null	null	null	null

# Select Additional Tables

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



# Table Relationship

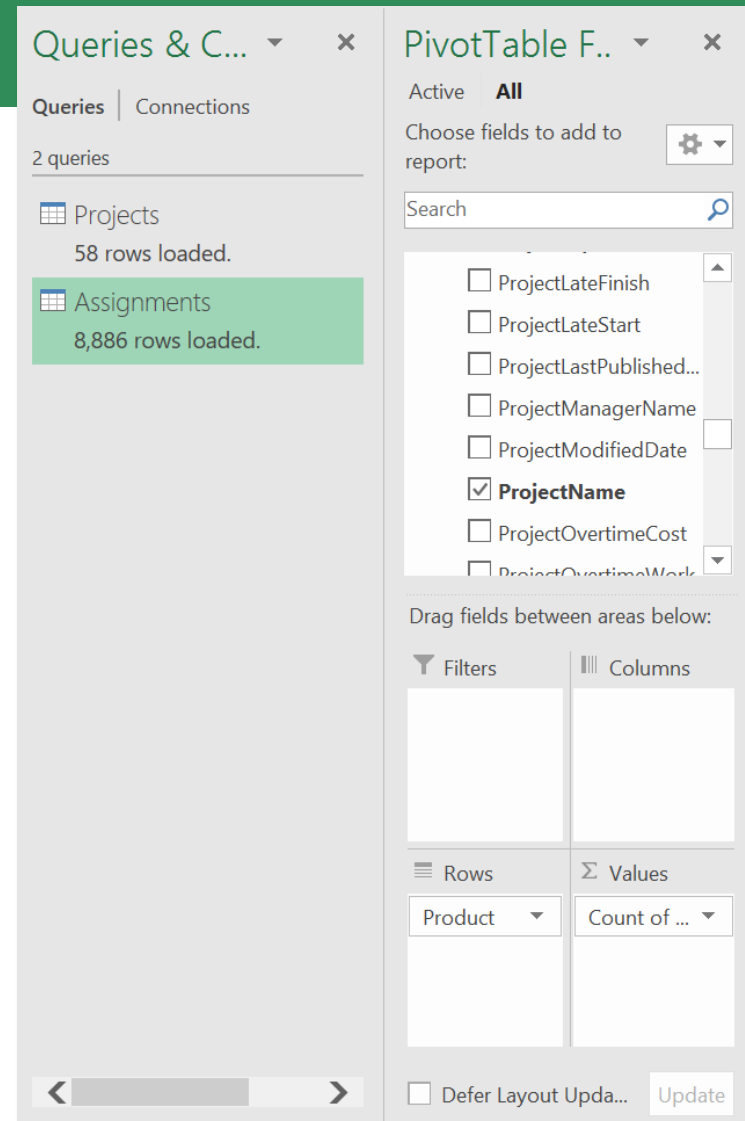
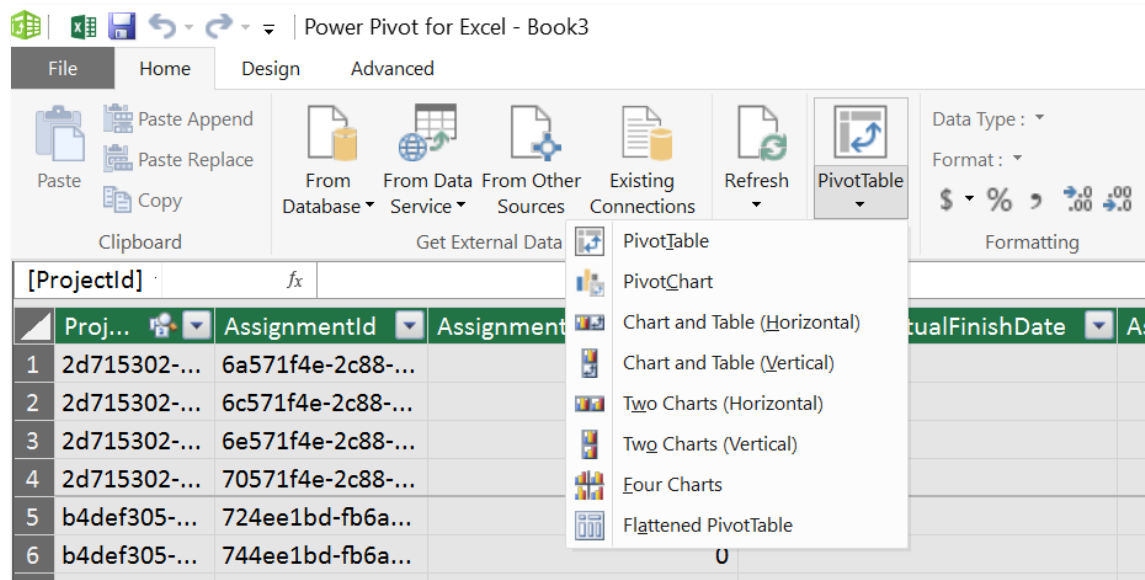
The screenshot shows the Microsoft Excel interface with the Power Pivot ribbon selected. The 'Design' sub-tab is active, and the 'Create Relationship' dialog box is open. The dialog is showing the 'Assignments' table selected, with the 'ProjectId' field highlighted in red. The 'Projects' table is also visible, with its 'ProjectId' field highlighted in red. The 'Projects' table data is as follows:

ProjectEarnedValuesStale	ProjectEnterpriseFeatures	ProjectFinishDate	ProjectFinishVariance	ProjectFixedCost	ProjectId	Project
False	True	8/31/2017 5:00:00 PM	0	0	2d715302-2c88-e711-80d4-00155d086614	8
False	True	2/14/2018 5:00:00 PM	0	0	b4def305-fb6a-e711-80dc-00155d08680b	7
False	True	4/13/2017 5:00:00 PM	0	0	ebb91620-210f-e711-80d0-00155d0c5b05	16
False	True	10/3/2017 5:00:00 PM	0	0	fc3bd3b6-0530-e711-846b-0050b6cc713a	100174
False	True	3/1/2018 5:00:00 PM	0	0	291101a7-cd6b-e711-87df-0050b6cc713a	100210

- 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

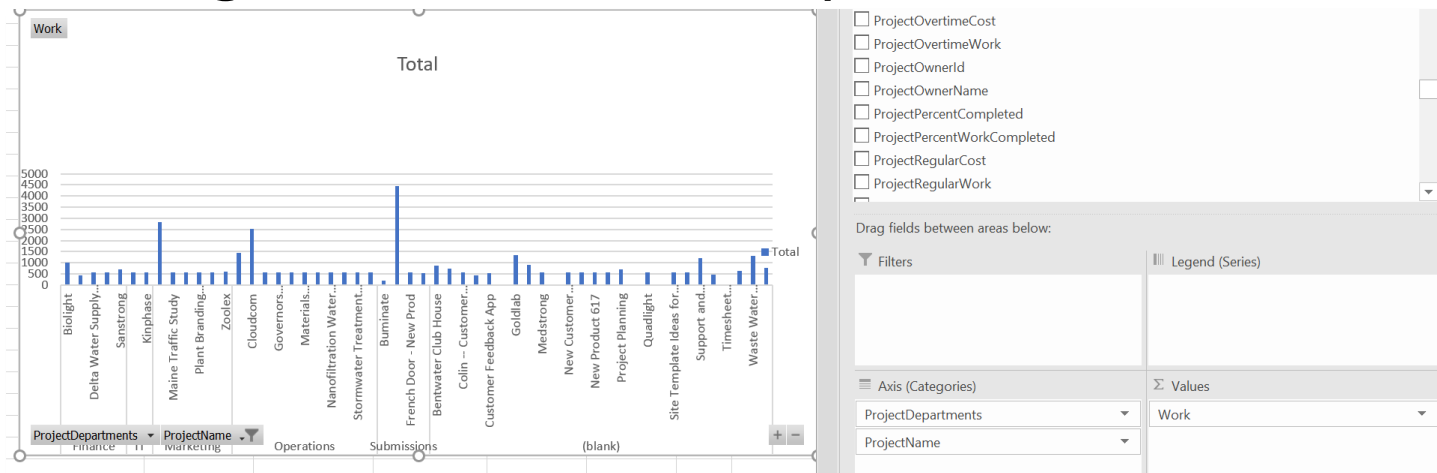
- From the Home ribbon, select Pivot Table
- Select the Rows to display
- Drag and drop the values



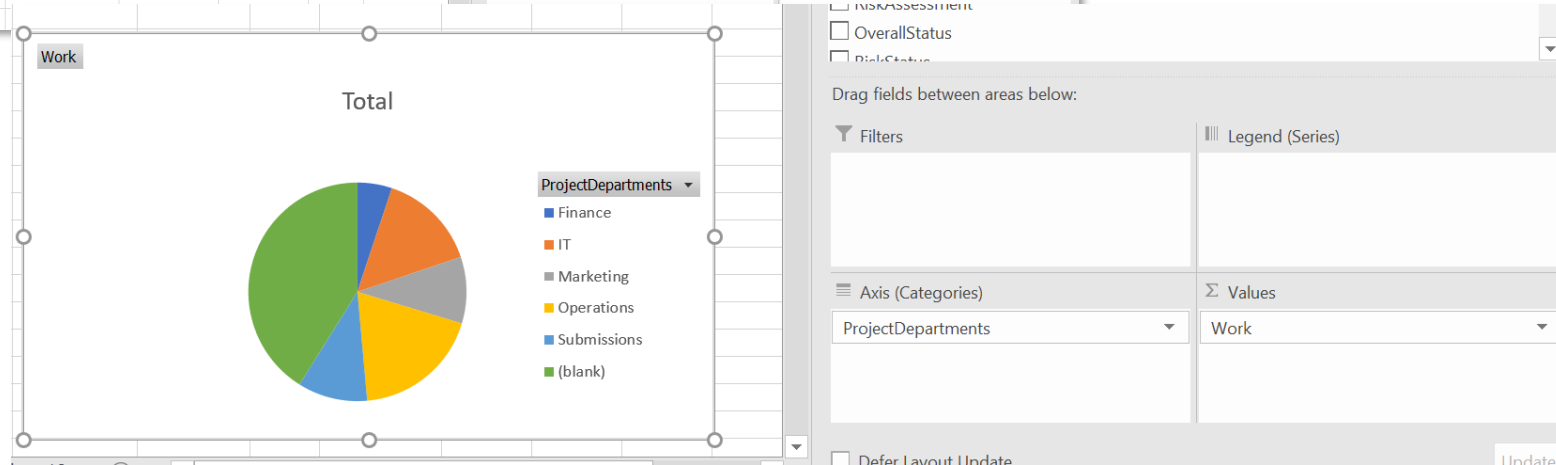


# Creating a Pivot Chart

Once the Pivot table has been created, the Pivot chart can be created using the same techniques as we used to created the table.

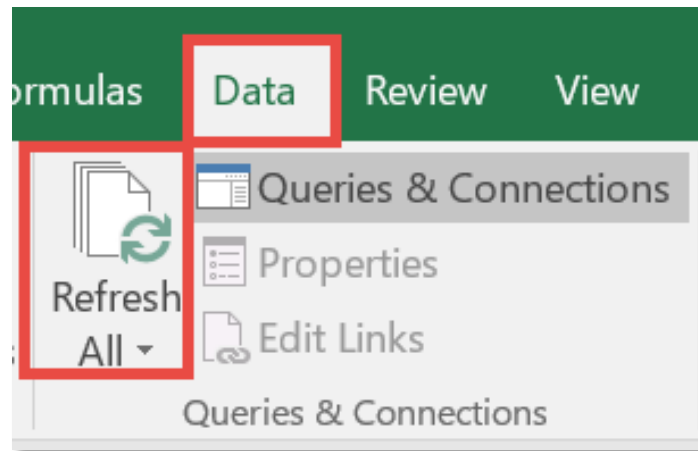


Drag and drop the fields to rearrange the data. Change the Chart type to improve how the data is displayed



# Refreshing the Data

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



# Demo

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

# 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.

# Contact Us

**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](mailto:info@ppmworks.com)

**Web:** [www.ppmworks.com](http://www.ppmworks.com)

# Pictures

- For more pictures please go to:

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