

NOV 23
2019

SharePoint Saturday Toronto #SPSToronto

Power BI and SharePoint in Higher Education

LEVEL 100

What's the experience with an organization-wide deployment of Power BI and SharePoint Online and how does this adapt to the requirements and needs of Higher Education?

#PowerBI #SharePoint



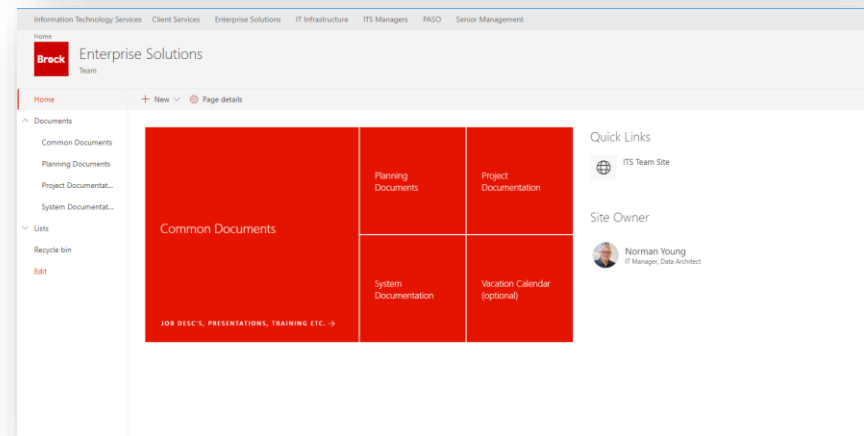
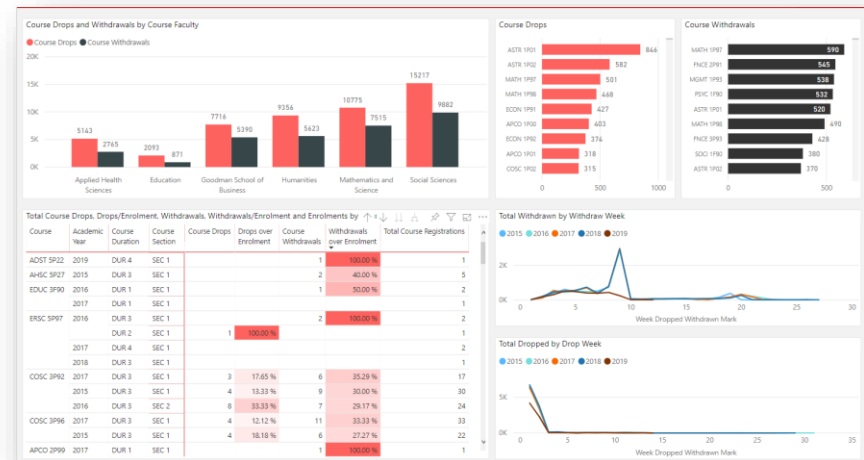
Agenda

Power BI

- Admissions dashboards
- Enrolment planning management

SharePoint

- Employee portal
- Collaboration sites
- Site request and provisioning solution
- Case Management solution
- SharePoint Usage Docs





Admissions dashboards

Problem:

- Too much data and not enough information
- No timely access to performance indicators

Solution:

- Near real-time information using SQL data warehouse and Power BI

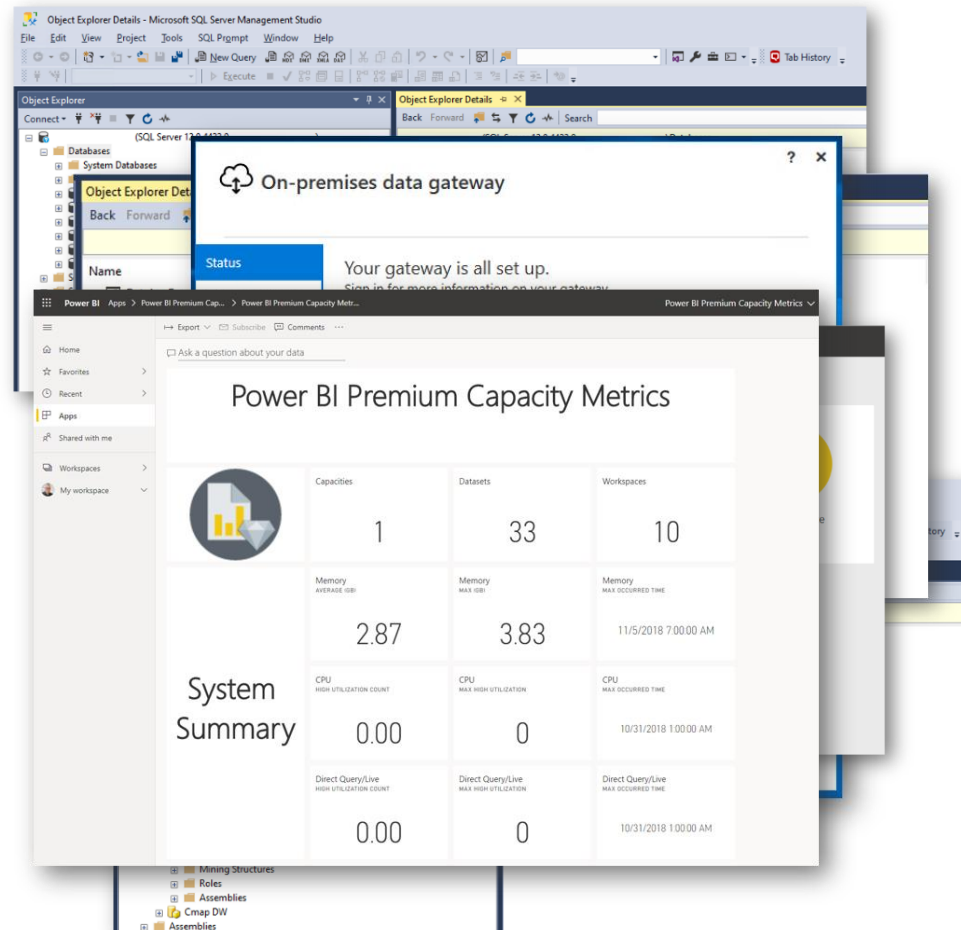
Value:

- Transform data into meaningful, timely and actionable information
- Create opportunities for intervention
- Informed decision making

Admissions dashboards

Tech overview:

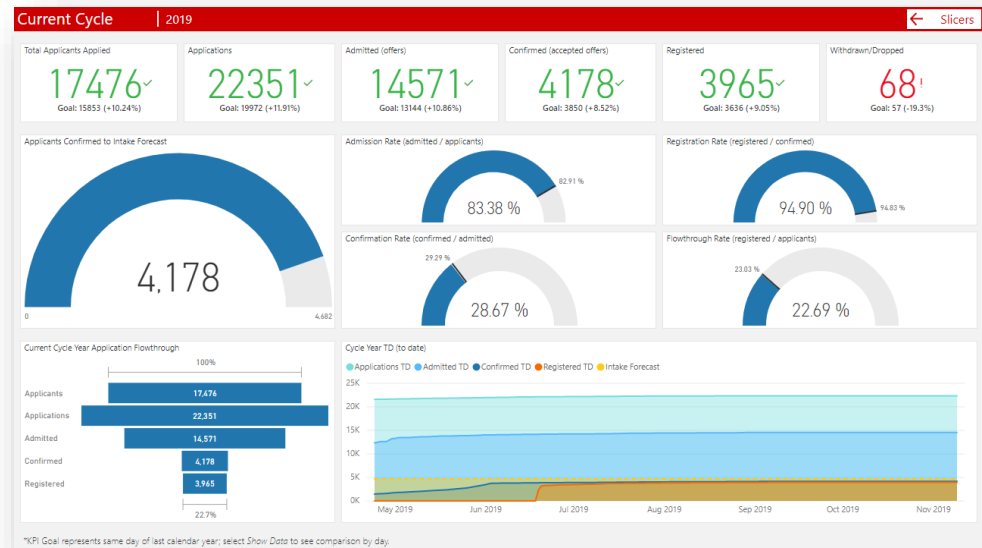
- On premise SQL Server
- SSAS for OLAP and SSIS for ETL
- DQS for address validation
- 2 stage ETL – source to staging (1) and staging to target (2); Runs 1AM and noon daily
- On Premise Data Gateway for connectivity
- Deployed using Power BI Apps
- Hosted on Power BI Premium



Admissions dashboards

Demo:

- Applicant pipeline KPI's.
- Forecasted to Actual's.
- Flowthrough rate.
- Historical comparisons.
- Global, provincial and local recruitment.
- Applicant choice comparisons.





Enrolment planning management

Problem:

- Not enough information to make fully informed decisions.

Solution:

- Custom web app that leverages Power BI Embedded.

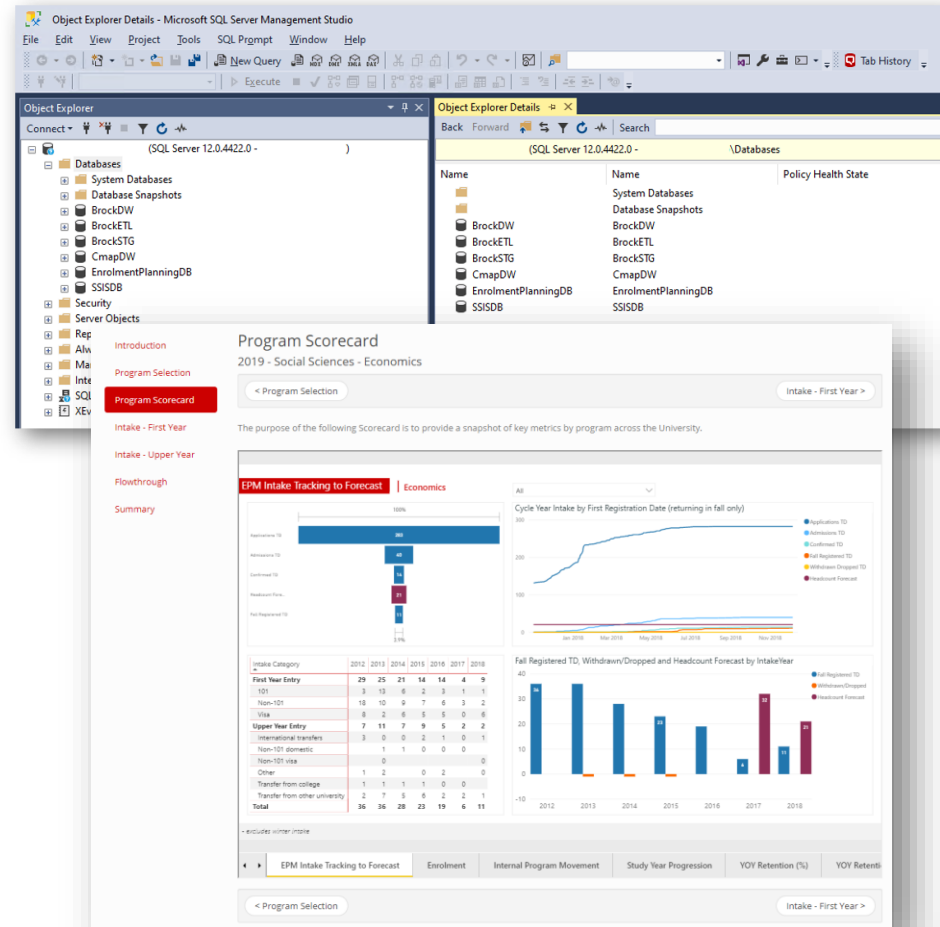
Value:

- Provides information tailored to the decision making at hand.
- Increases informed decision making.
- Used for University wide strategic (i.e. budget), tactical (i.e. staffing) to operational (i.e. residence) planning.
- Sets realistic, informed and “agreed” upon targets!!!

Enrolment planning management

Tech overview:

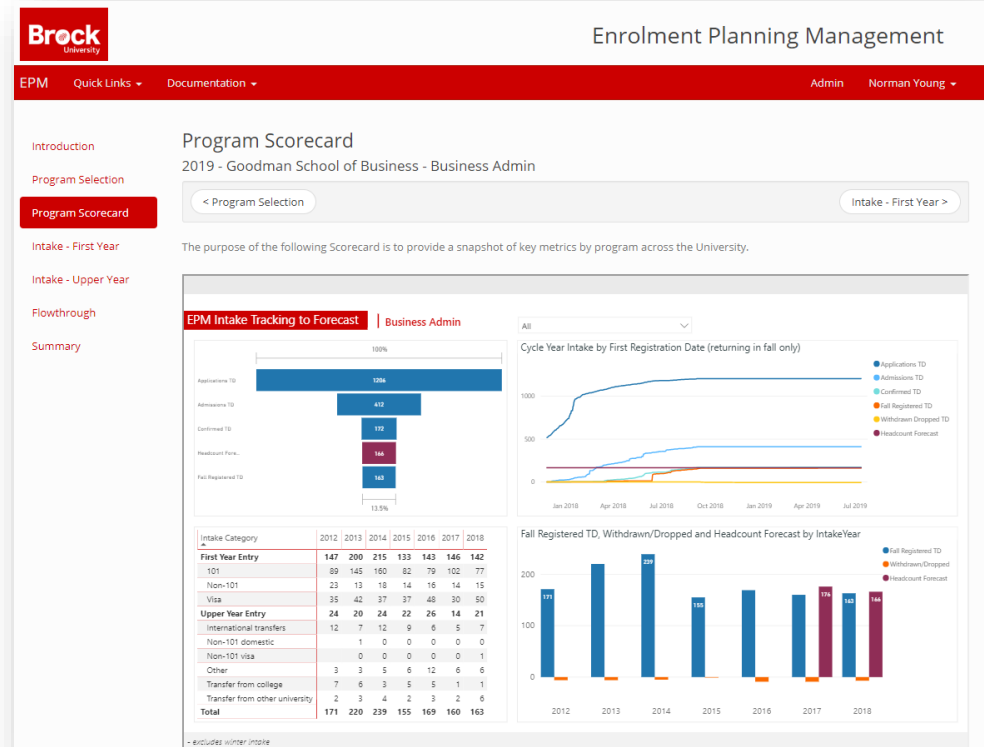
- SQL Server Database.
- C# MVC web app.
- Power BI Embedded.



Enrolment planning management

Demo:

- Web app.
- Scorecards
- Step by step though the process.
- In context analytics.
- Output.
- Power BI App.





Employee portal

Problem:

- Public web site became a dumping ground for employee content making it difficult for applicants and students to find key information.

Solution:

- Move all employee content to SharePoint communication sites and revamp public site to a recruitment and retention tool.

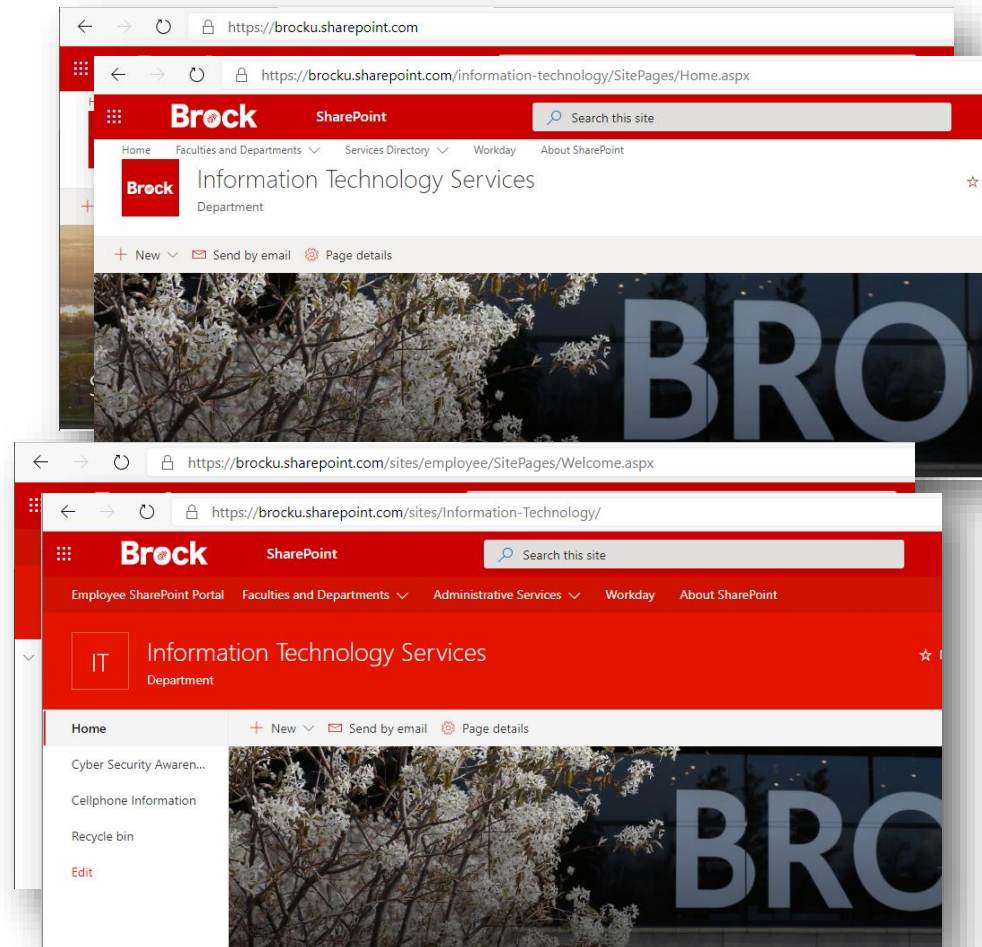
Value:

- Focused content for targeted audiences.

Employee portal

Tech overview:

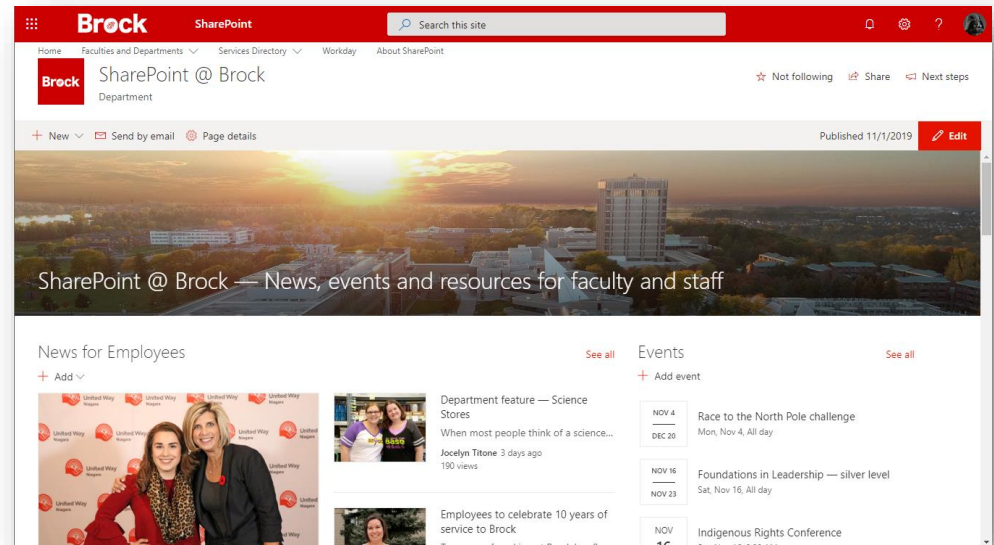
- SharePoint root URL for parent site and subsites for departments using “classic” Publishing sites.
- Moving to a flat architecture using “modern” Communication sites tied together by a single HUB.



Employee portal

Demo:

- Quick walk through of existing.
- Global navigation.
- Site usage.
- HUB site preview.





Collaboration sites

Problem:

- Email and “shadow IT” only forms of collaboration.

Solution:

- SharePoint Team sites for departmental, committee, projects collaboration.

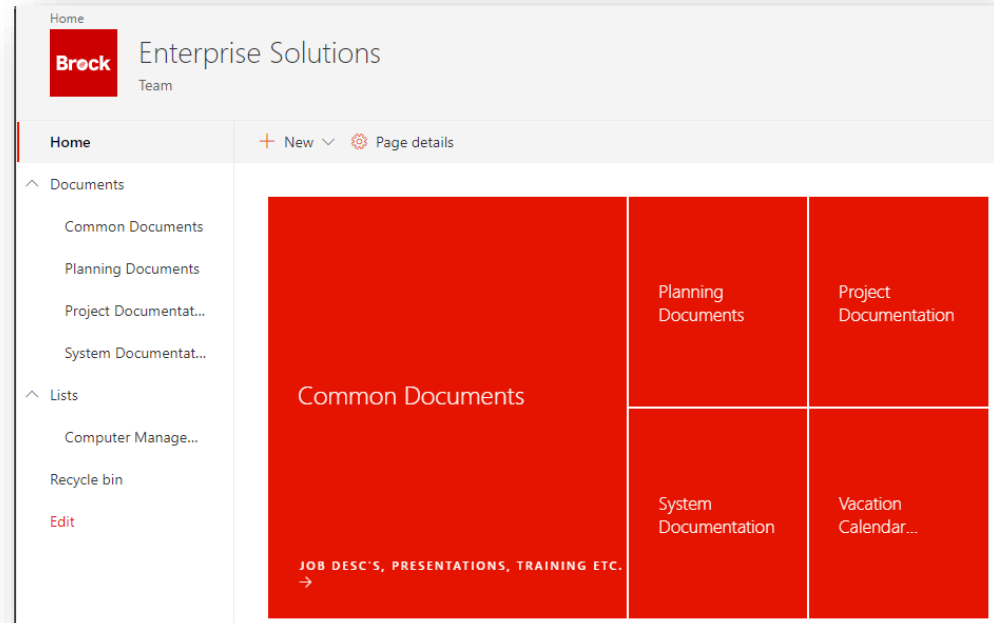
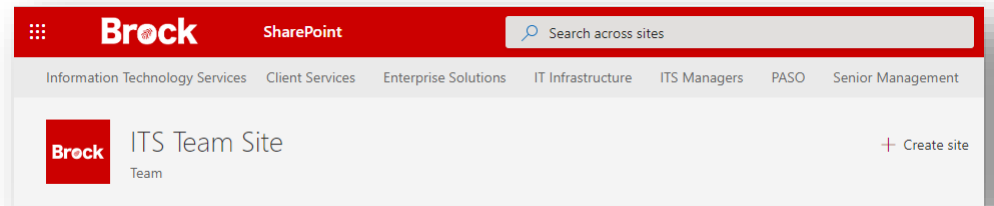
Value:

- Centralized location.
- Modern document management with less reliance on IT.
- Less email!!!
- Consistency in use and design.

Collaboration sites

Tech overview:

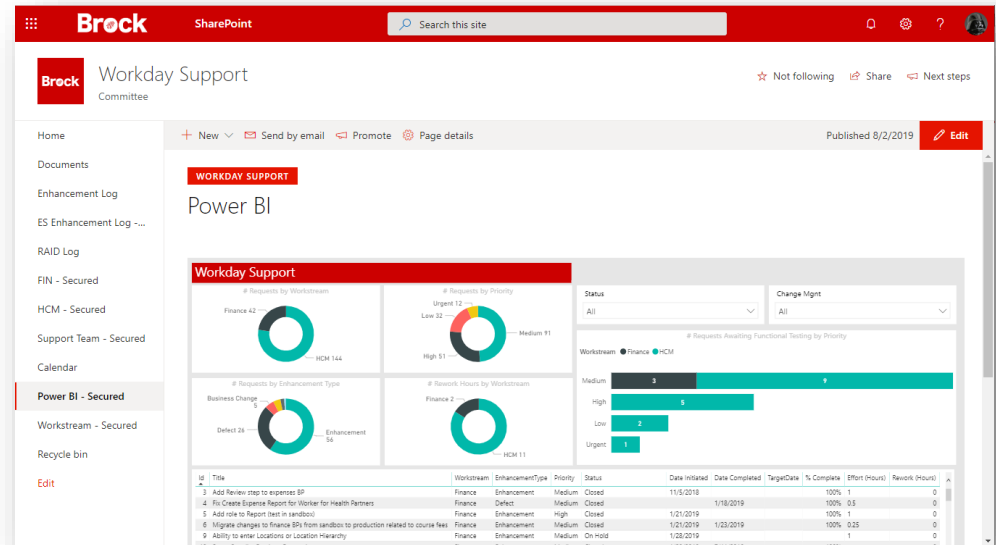
- Information architecture decision making.
- Document library scenarios.



Collaboration sites

Demo:

- Simple site.
- Targeted solution site.
- Complex site.





Site request and provisioning solution

Problem:

- Custom site builds taking too long for IT to complete.
- No consistency in the builds.

Solution:

- Custom provisioning app with standard site templates using Azure and PnP cmdlets.

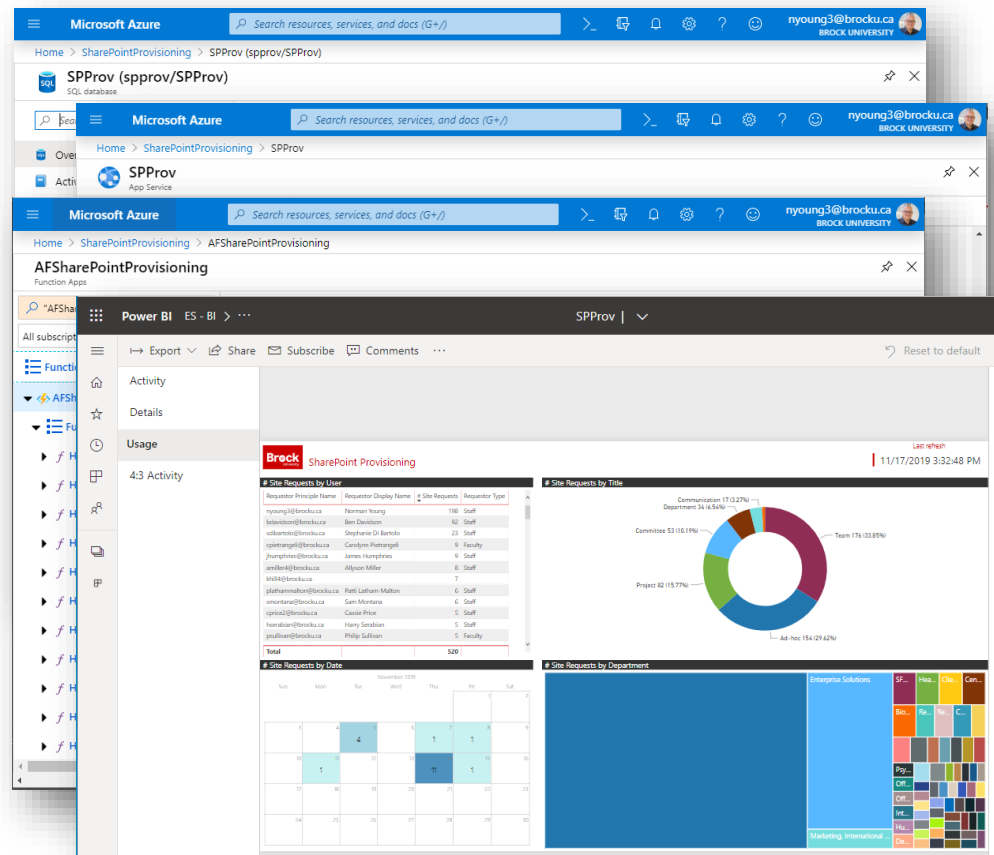
Value:

- Less reliance on IT.
- Standardized builds with fast turn around time.
- More time for user support, engagement and adoption.

Site request and provisioning solution

Tech overview:

- Azure SQL Database.
- Azure App Service.
- Azure Functions using PnP cmdlets.
- Power BI for reporting.



Site request and provisioning solution

Demo:

- Provision project site.
- Provision team site.
- Power BI reporting.

The screenshot shows the SharePoint @ Brock website. The top navigation bar includes links for Home, Faculties and Departments, Services Directory, Workday, and About SharePoint. The main header displays the Brock logo and the text 'SharePoint @ Brock Department'. On the right, there are links for 'Not following', 'Share', and 'Next steps'. Below the header, a grey bar indicates the page was 'Published 9/11/2018'. The main content area is titled 'Create a Site' with the subtitle 'Choose the type of site you'd like to create'. There are three tabs: 'COLLABORATION' (selected), 'COMMUNICATION', and 'CUSTOM'. Under the 'COLLABORATION' tab, there are two options: 'AD-HOC' and 'COMMITTEE'. The 'AD-HOC' option is highlighted with a red background and a white person icon. It describes 'Ad-hoc' sites as allowing informal working groups to connect, collaborate, and create documents. Examples of when to use an Ad-hoc site include: being a Faculty member collaborating and sharing course documents with students, being a Staff member performing event planning with users outside of the department, and being a Student working with other Students on course presentations and projects. A lock icon indicates that site access is managed by the site owner. The 'COMMITTEE' option is also visible, featuring a red background and a white group icon. It describes 'Committee' sites as allowing formal working groups to connect, collaborate, and create documents. Examples of when to use a Committee site include: being a member of a University committee creating, collaborating and sharing agendas and materials with fellow committee members, and being a Brock employee performing long term collaborative work with users outside the department. A lock icon indicates that site access is managed using the IT Security Request Form (SARF).

Home Faculties and Departments Services Directory Workday About SharePoint




Brock SharePoint @ Brock
Department

☆ Not following ↗ Share ↗ Next steps

Published 9/11/2018

Create a Site

Choose the type of site you'd like to create

 COLLABORATION  COMMUNICATION  CUSTOM

AD-HOC

Ad-hoc sites allow informal working groups to connect, collaborate and create documents. Examples of when to use an Ad-hoc site:

- I'm a Faculty member collaborating and sharing course documents with students.
- I'm a Staff member performing event planning with users outside of my department.
- I'm a Student working with other Students on course presentations and projects.

🔒 Site access is managed by the site owner.

COMMITTEE

Committee sites allow formal working groups to connect, collaborate and create documents. Examples of when to use an Committee site:

- I'm a member of a University committee creating, collaborating and sharing agendas and materials with fellow committee members.
- I'm a Brock employee performing long term collaborative work with users outside my department.

🔒 Site access is managed using the IT Security Request Form (SARF).



Case Management solution

Problem:

- Manual tracking of processes not covered off by IT/ERP systems.

Solution:

- Convert manual forms/processes to SharePoint Lists with Flow.

Value:

- Central and modern solution with all the benefits of a SharePoint and O365.
- Automation to add value to users.

Case Management solution

Tech overview:

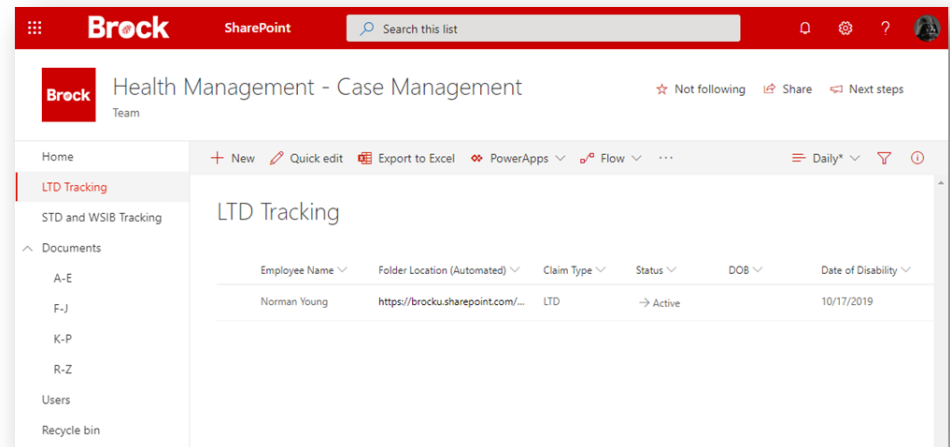
- SharePoint team site for collaboration
- Lists for process tracking.
- Flow for automation.
- PowerApps for form customization.

The screenshot displays the 'Brock Health Management - Case Management' SharePoint team site. The left sidebar shows navigation options: Home, LTD Tracking (selected), STD and WSIB Tracking, Documents, and Users. The 'Power Automate' app is also visible. The main content area shows a list of items with a status of 'Active'. A form is open for 'Norman Young', with fields for Employee Name, Folder Location (Automated), Claim Type (STD), Hard Copy (toggle), Employee Group (AP & E), 1st Day Off (12/31/2001), 20 Day Point (Calculated) (2019-11-06T05:00:00Z), 9 Week Point (Calculated) (2020-01-06T05:00:00Z), and Date HR Contacted (10/16/2019). A 'Date of Disability' field shows 10/17/2019. The form is titled 'Norman Young Brock University (default)' and includes 'Resubmit', 'Cancel', and 'Edit' buttons.

Case Management solution

Demo:

- Site tour.
- List purpose and functions.
- Flow automation.

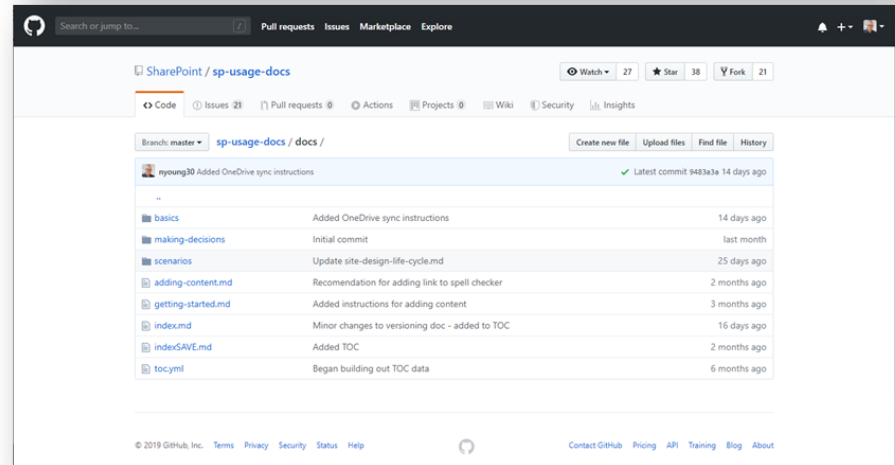


The screenshot displays a SharePoint interface for a team named 'Brock'. The page title is 'Health Management - Case Management'. The left sidebar shows a navigation menu with 'Home' selected, and 'LTD Tracking' highlighted under the 'Documents' section. The main content area shows the 'LTD Tracking' list with one item: Norman Young, with a folder location of https://brocku.sharepoint.com/..., claim type of LTD, status of Active, and date of disability of 10/17/2019.

Employee Name	Folder Location (Automated)	Claim Type	Status	DOB	Date of Disability
Norman Young	https://brocku.sharepoint.com/...	LTD	→ Active		10/17/2019

SharePoint Usage Docs

- <https://github.com/SharePoint/sp-usage-docs>
 - SharePoint Documentation on usage and feature patterns for site owners and citizen developers.
 - This repository is here for YOU.
 - From SharePoint basics, decision making through too scenarios - learn from others...
- ... or help others by contributing issues and content.



Thank you for attending!

Want to know more?

[Visit the Power BI blog](#)

[Visit the SharePoint blog](#)

Want to get inspired?

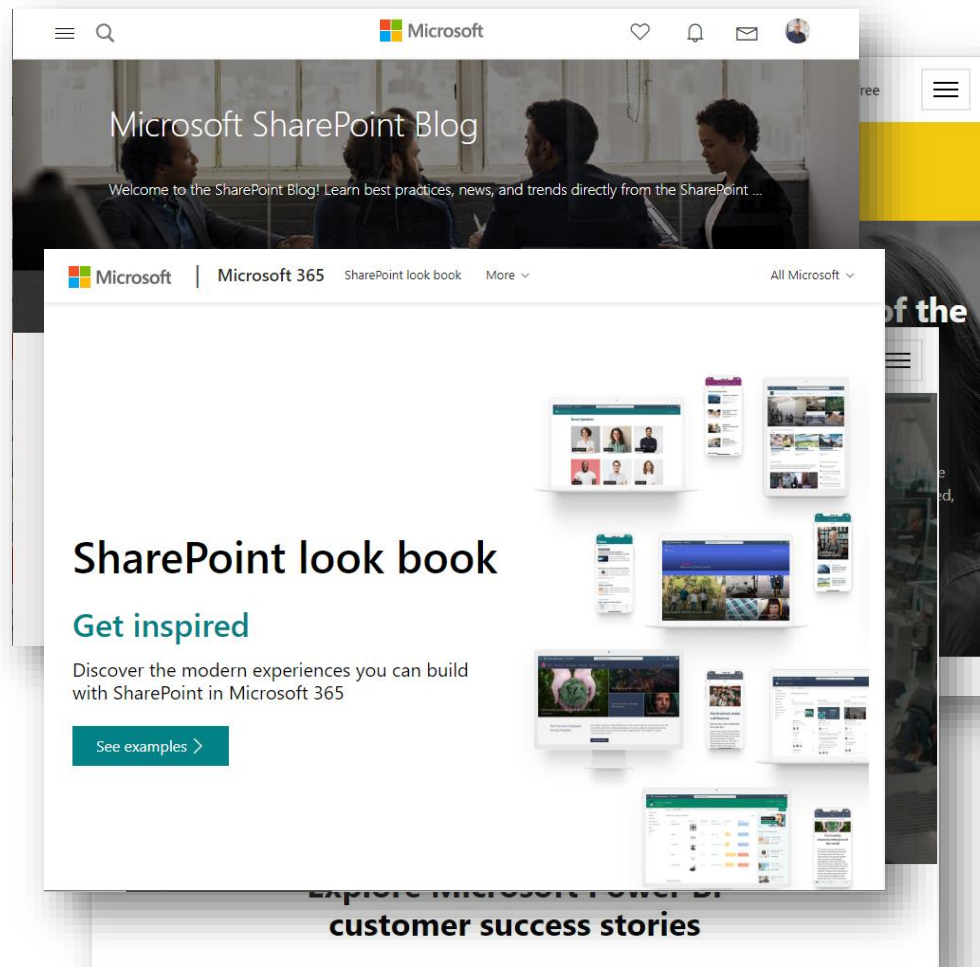
[Visit the Power BI Customer Showcase](#)

[Get the SharePoint Look Book](#)

Want to connect?

[Linkedin.com/in/norm-young](https://www.linkedin.com/in/norm-young)

[Twitter.com/stormin](https://twitter.com/stormin) 30





Thank You Sponsors!



PLATINUM

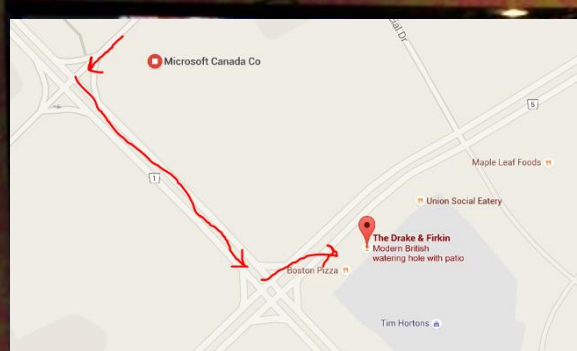


GOLD



SILVER





SharePint

The Drake & Firkin

6982 Financial Dr, Mississauga, ON L5N 8J4



SharePoint Saturday
Toronto #SPSToronto

NOV 23
2019

SharePoint Saturday Toronto #SPSToronto

Toronto SharePoint
(meetup.com/torontospug/)

Toronto SharePoint Business
(meetup.com/tspbug/)

Metro Toronto .NET
(meetup.com/metrotorontoug/)

North Toronto Cloud & DevOps
(meetup.com/NorthTorontoUG/)

Toronto Nintex User Group
(meetup.com/TorontoNintexUG/)

IT Pro Toronto
(meetup.com/ITProToronto/)

Toronto Enterprise DevOps
(meetup.com/Toronto-Enterprise-DevOps-User-Group/)

Toronto Power Platform
(meetup.com/Toronto_Power_Platform_UG/)



Thank you
Toronto community!