

Lessons Learned How-To Power BI App



This is a tutorial to use this app to view a quantitative analysis of your portfolio of project objectives

Prerequisites

- A [Power BI license](#).
 - An account in the service – PowerBI.com
- A valid installation link for the app, which you get either from AppSource or from the app creator.
- A good familiarity with the [basic concepts of Power BI](#).
- An Office 365 and SharePoint Online license
- A SharePoint Online Site where you can upload files

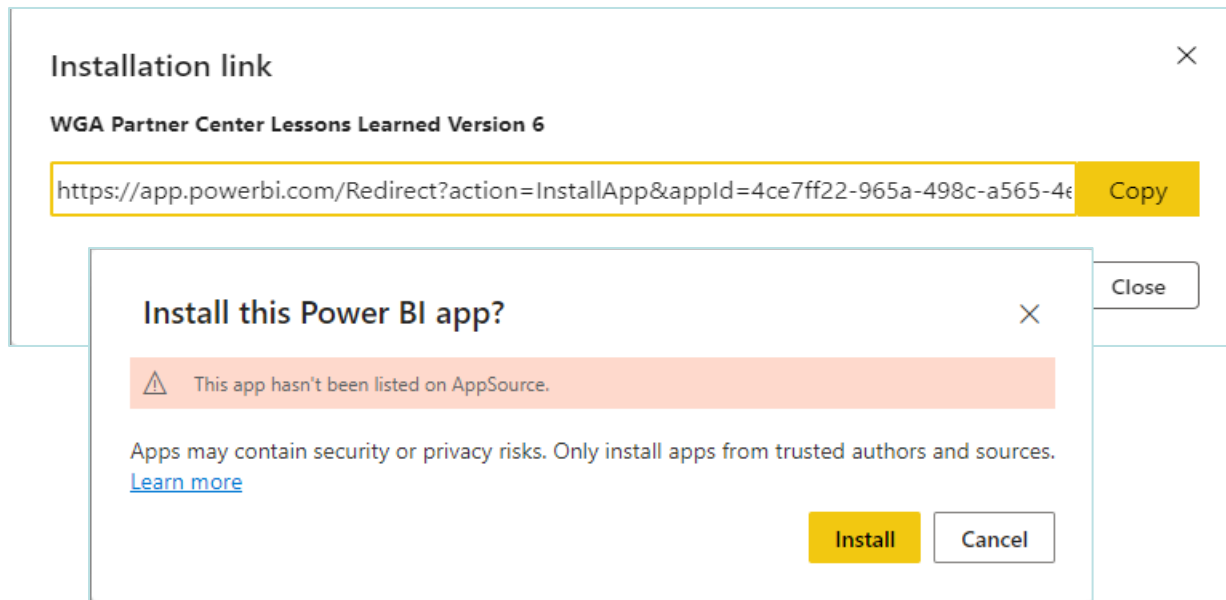
Customization Instructions

Do the following to install the app and view your own project data in it.

1. Install the Power BI App
2. View the Dashboard with the sample data
3. Create your project data Excel file
4. Edit your project data source (Excel)
5. View the Dashboard with your data

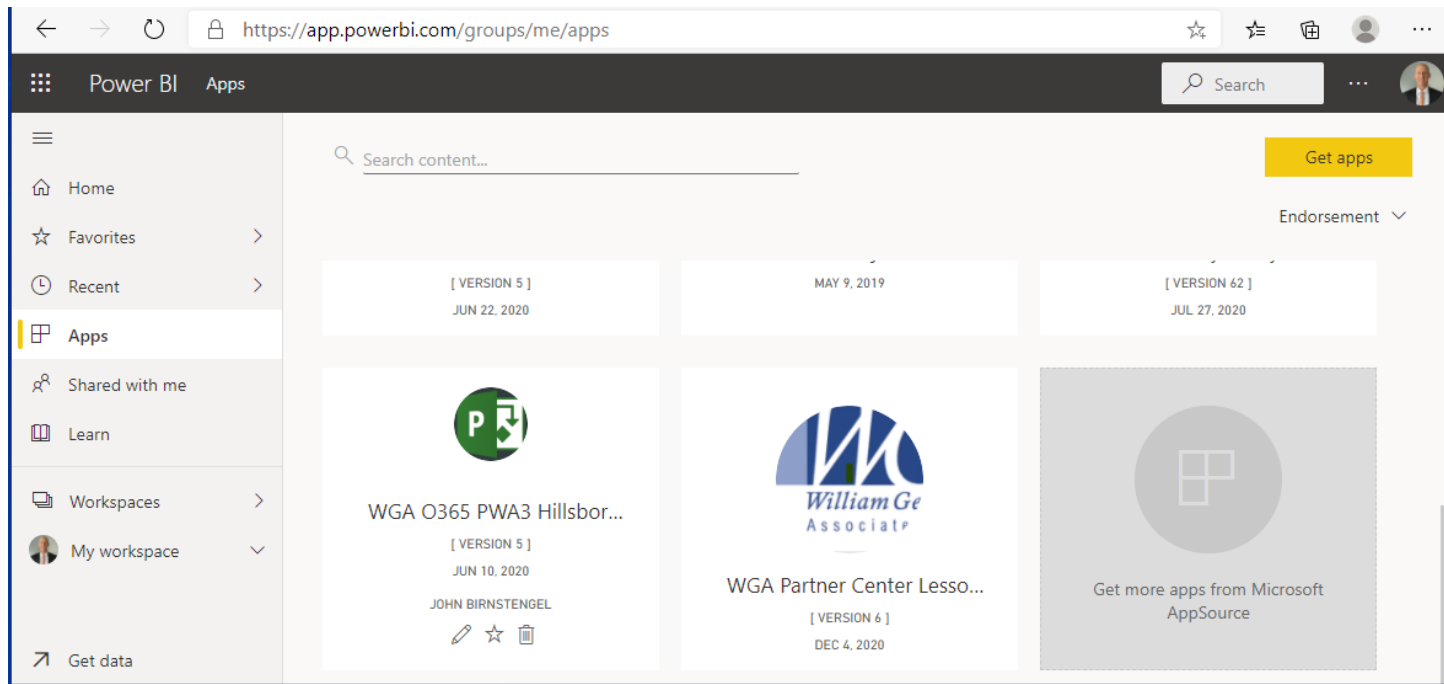
1. Install the Power BI App

- A. Copy and paste the install link from the WGA Lessons Learned offer in a browser window
- B. Install the app when prompted
 - A. You will be asked to login to the Power BI service



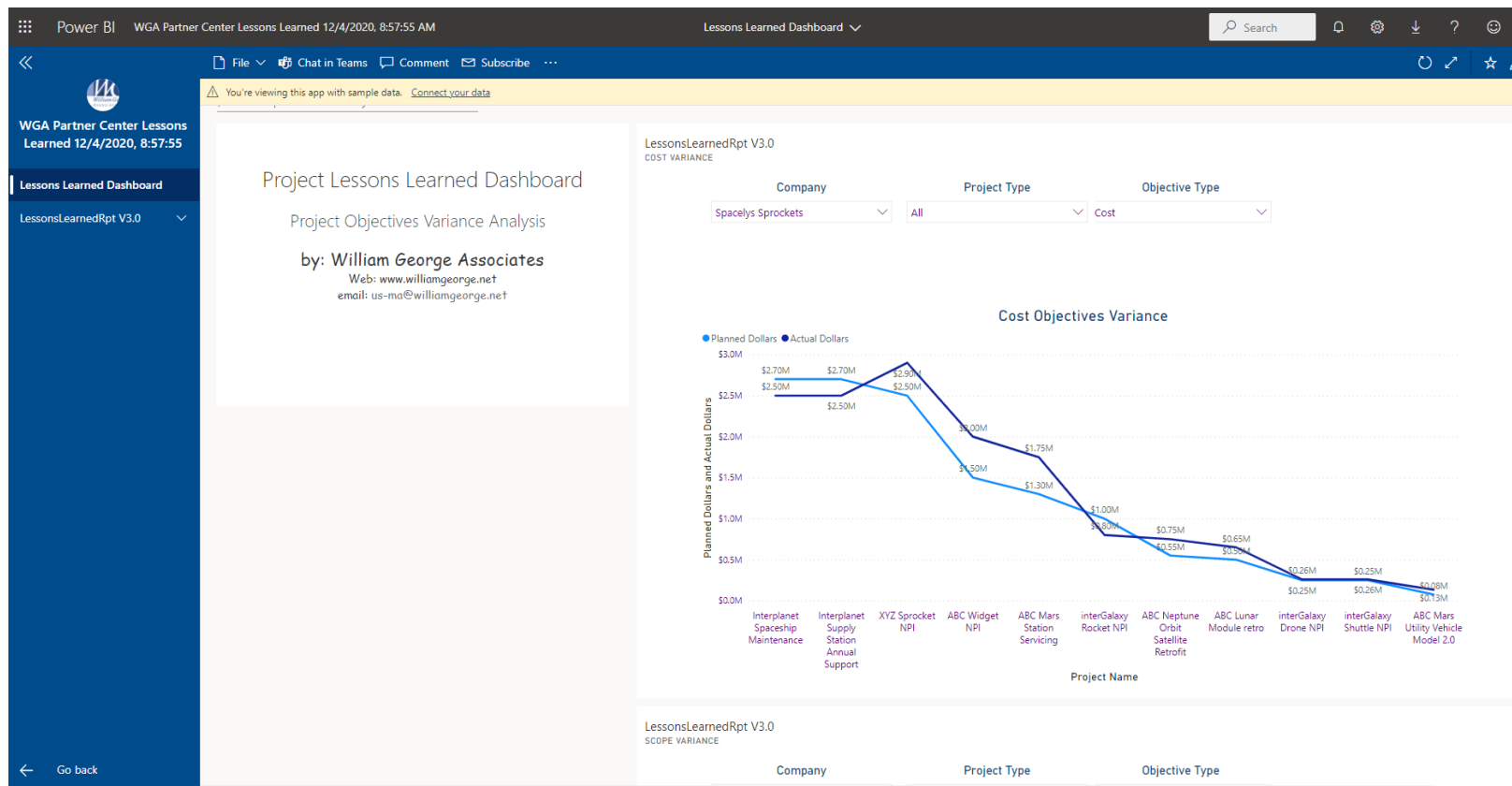
2.A View the Dashboard with the sample data

A. Click on the App to launch it



2.B View the Dashboard with the sample data

B. The Lessons Learned Dashboard is displayed



3.A Create your project data Excel file

Now you will create your own data file, so your projects are rendered in the report.

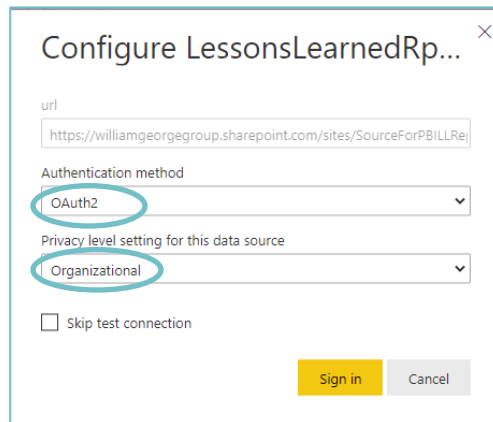
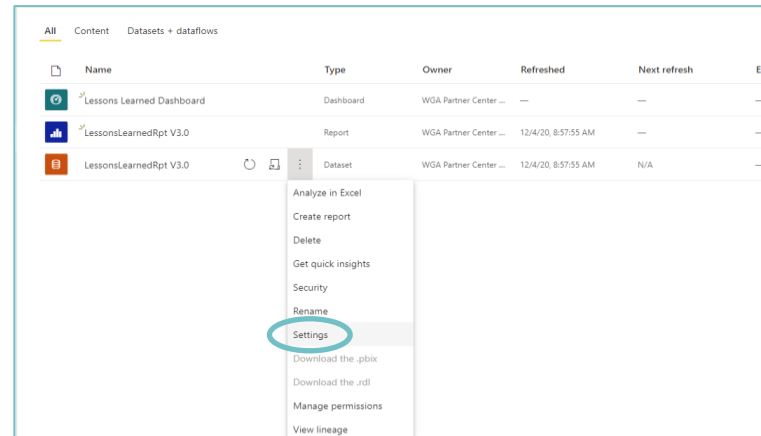
- A. Locate the template source file (Excel) from the WGA support page and upload it to a well-known SharePoint Online location in your O365 Tenant.

The screenshot displays a SharePoint Online interface. On the left, there is a navigation pane with options: Home, Conversations, Documents (highlighted), Shared with us, and Notebook. The main content area shows the 'SourceForPBILLReport' public group. At the top of the main area, there are buttons for '+ New', 'Upload', and 'Edit in grid view'. Below this, under the 'Documents' section, a file named 'LessonsSourceTemplate.xlsx' is visible. In the top right corner of the main area, there is a search bar labeled 'Search this site'. The top navigation bar includes links for Home, About Us, Our Services, Course Catalog, and Public Courses. The WGA logo and 'William George Associates Ltd.' are visible in the top left and bottom left corners.

3.B Create your project data Excel file

B. Edit the app and enter your credentials

- 1) Edit the Power BI App
- 2) Go to the dataset settings and set the data source credentials so you can access your data file. For example, for O365 set the authentication method to OAuth2 and Privacy to Organizational and sign in with your O365 account.



3.C Create your project data Excel file

C. Point to Your Source File

1. Also in the dataset settings, under parameters change the path to the location of your file in SharePoint Online. E.g.
<https://yourdomain.sharepoint.com/sites/Source/Shared%20Documents/LessonsSourceTemplate.xlsx>

The screenshot shows a configuration window for a dataset. It has three main sections: 'Gateway connection', 'Data source credentials', and 'Parameters'. The 'Parameters' section is expanded, showing a 'FileURL' field with the description 'URL for the source Excel file'. The text 'BILLReport/Shared%20Documents/LessonsSourcetemplate' is entered into this field and is highlighted with a black border. Below the field are two buttons: 'Apply' (yellow) and 'Discard' (grey).

4.A Edit your project data source

A. Open your source Excel file to make these changes:

- Change the company names and project names to your unique values.
- Enter the planned and actual values for the objectives
- Make sure each row on each sheet has a unique ID. The ID field on each sheet is highlighted in yellow.

The screenshot shows the Microsoft Excel interface with the following data in the 'Projects' worksheet:

	A	B	C	D	E	F	G
1	Company ID	Project ID	Project Name	Project Type ID			
2	1	1	Project 1		1		
3	1	2	Project 2		4		
4	1	3	Project 3		2		
5	2	4	Project 4		1		
6							
7							

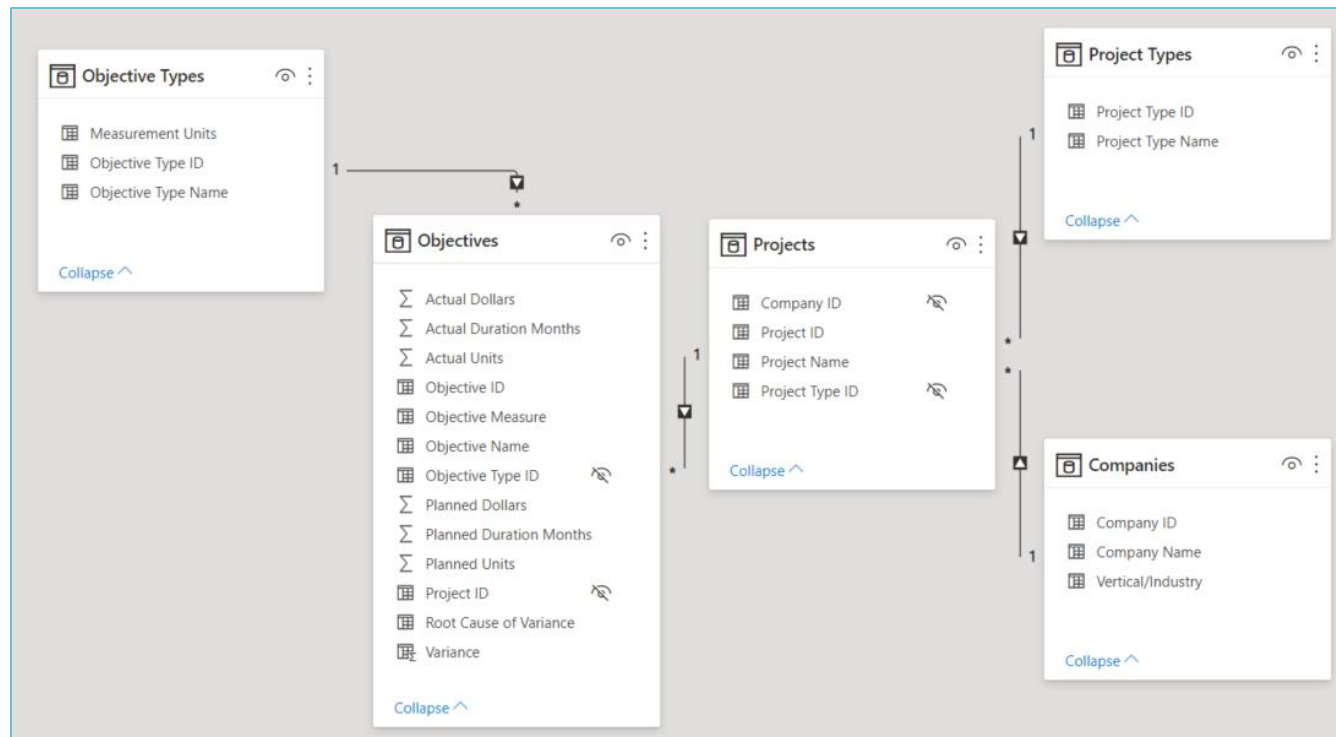
4.B Edit your project data source - Objectives

- Edit the objective names to be your unique values.
- Enter the planned and actual values for the objectives.
- Objectives values can be in units, dollars, or months
- Ensure each objective matches a type (Type ID) and the values match the Objective Measure field of the objective. E.g. A “Schedule” objective has values in the Planned and Actual Months columns.

	A	B	C	D	E	F	G	H	I	J	K	L
	Project ID	Objective ID	Objective Type ID	Objective Name	Planned Units	Actual Units	Planned Dollars	Actual Dollars	Planned Duration Months	Actual Duration Months	Root Cause of Variance	Objective Measure
1												
2	1	1	1	Produce Deliverables	4	7					2 additional deliverables- customer request/scope change, 1 internal error costing 3 months/\$150,000 (design review not performed on key	Units
3	1	2	2	Manage Budget			\$ 2,500,000	\$ 2,900,000			Internal error (see above) Customer scope changes (\$250,000 cost, \$400,000 revenue)	Dollars
4	1	3	3	Manage Duration					18	24	3 month delay for internal error	Months
5	2	4	1	Produce Deliverables	7	4					2 month delay for scope changes Reduced scope	Units
6	2	5	2	Manage Budget			\$ 20,000,000	\$19,000,000			Research reductions	Dollars
7	2	6	3	Manage Duration					24	20	Research reductions	Months
8	3	7	1	Produce Deliverables	12	15					Customer requested more features	Units
9	3	8	4	Quality - Reduce defects	20	19					QA QC efforts impacted number of defects	Units
10	3	9	5	Increase feature set - Price of Product			\$ 35,000	\$ 40,000			Price of Final product increased	Dollars
11	4	10	1	Produce Deliverables	5	8					2 additional deliverables- customer request/scope change, 1 internal error costing 3 months/\$150,000 (design review not performed on key	Units
12	4	11	2	Manage Budget			\$ 3,500,000	\$ 3,900,000			Internal error (see above) Customer scope changes (\$250,000 cost, \$400,000 revenue)	Dollars
13	4	12	3	Manage Duration					24	30	3 month delay for internal error 2 month delay for scope changes	Months

4.C The Data Model

- To assist in understanding how to enter your source data, the report Data Model is shown below.



4.D Data Source File Tips

- Do not change the column heading names or Power BI will throw an error
- Ensure each objective is linked to a project using the Project ID and similarly to an Objective Type using the Objective Type ID
- Ensure each Project is linked to a Company using the Company ID field.

5. View the Dashboard with your data

- A. Open the App Dashboard - Click on the Dashboard in the App's workspace
- B. Change the parameters to reflect your data changes
- C. View the Variance reports with your data and...

Analyze the results of your portfolio's objectives!

