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

William George Associates Ltd.

Putting Clients in Control of Critical Projects

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.

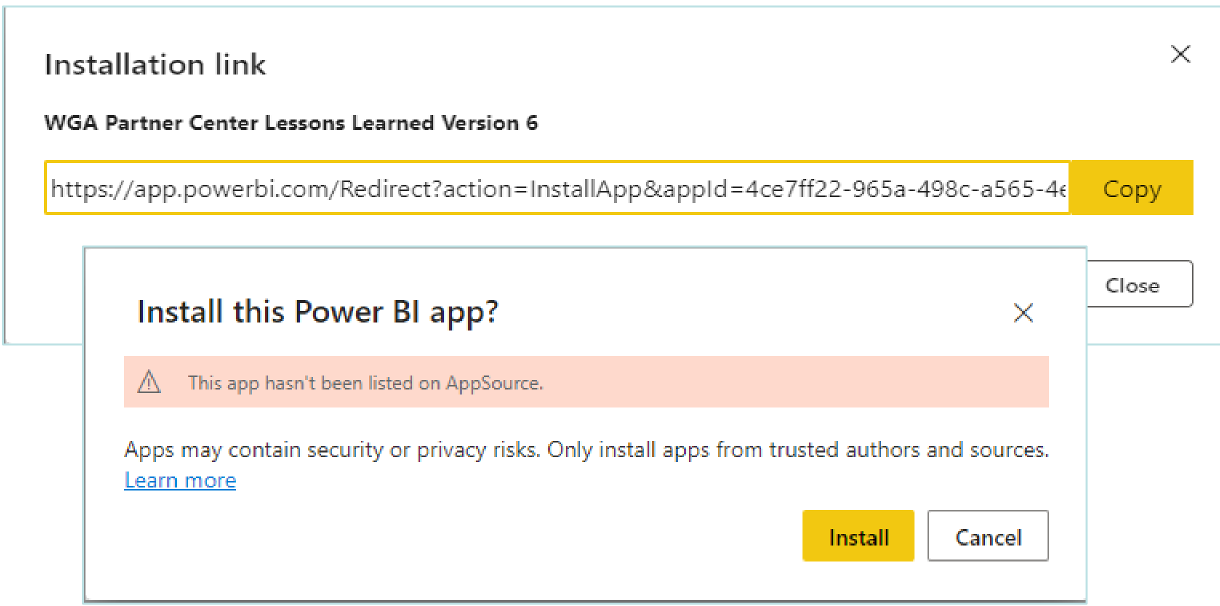
1. Install the Power BI App
2. View the Dashboard with the sample data
3. Create your project data Excel file
4. Edit your project data source (Excel)
5. View the Dashboard with your data

1. Install the Power BI App

A. Copy and paste the install link from the WGA Lessons Learned offer in a browser window

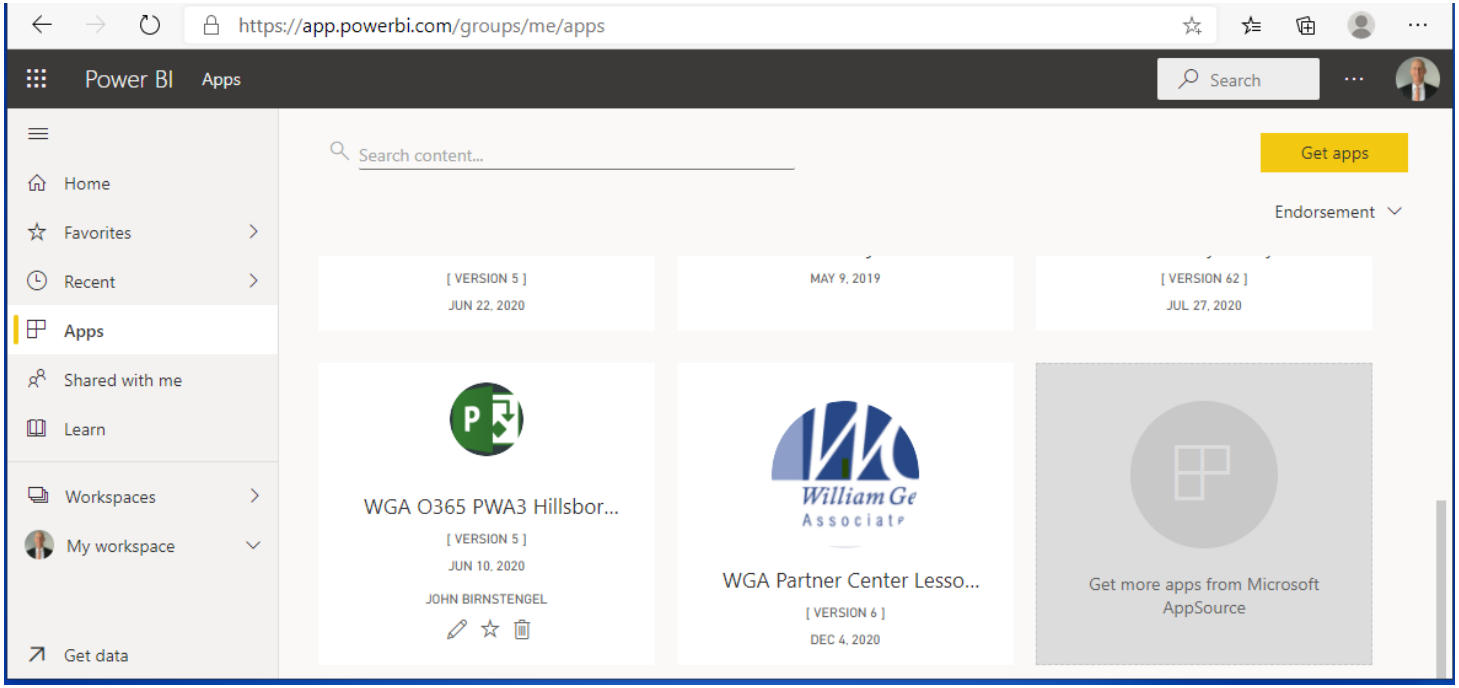
B. Install the app when prompted

   A. You will be asked to login to the Power BI service



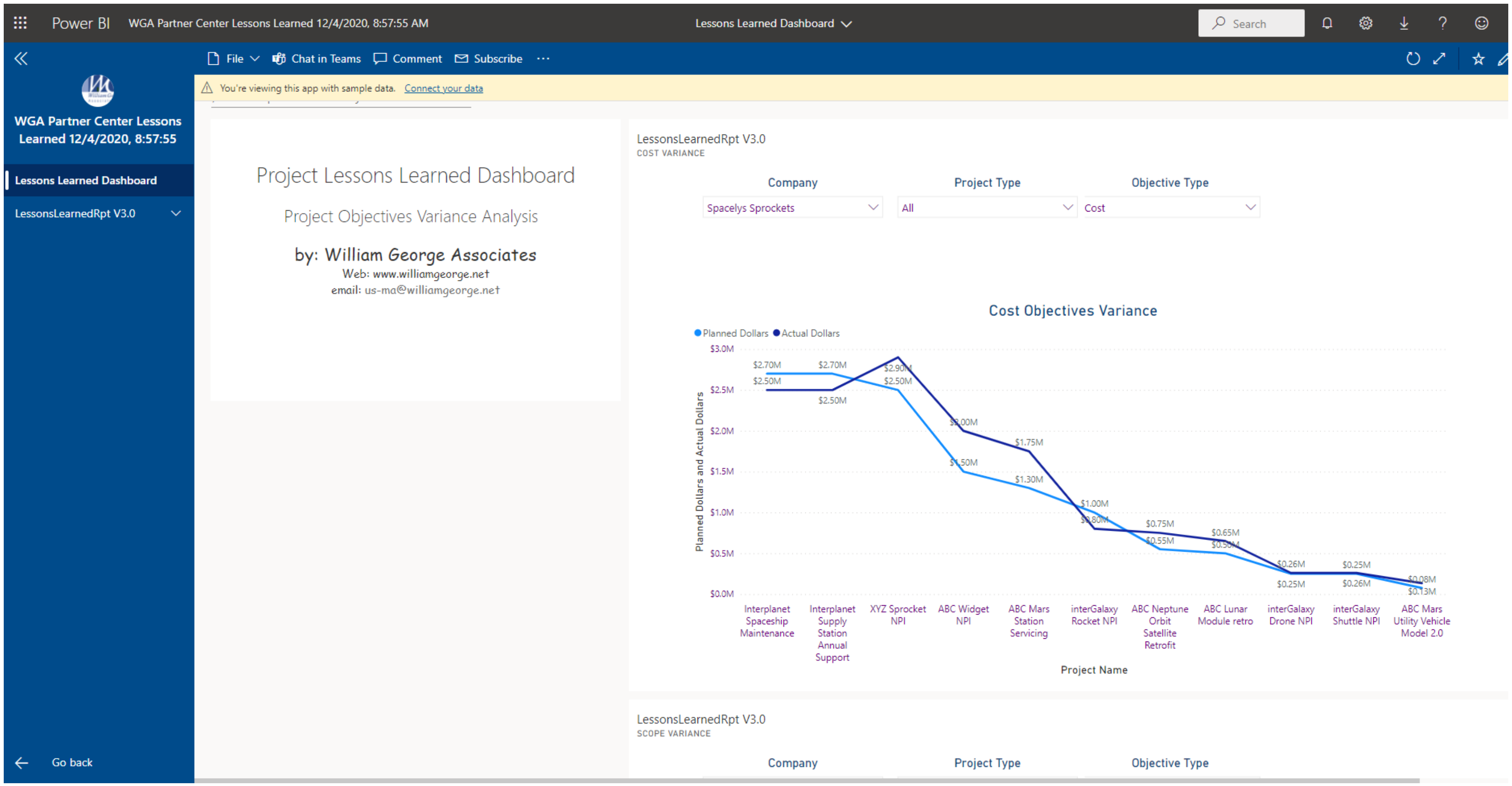
2.A View the Dashboard with the sample data

A. Click on the App to launch it



2.B View the Dashboard with the sample data

B. The Lessons Learned Dashboard is displayed

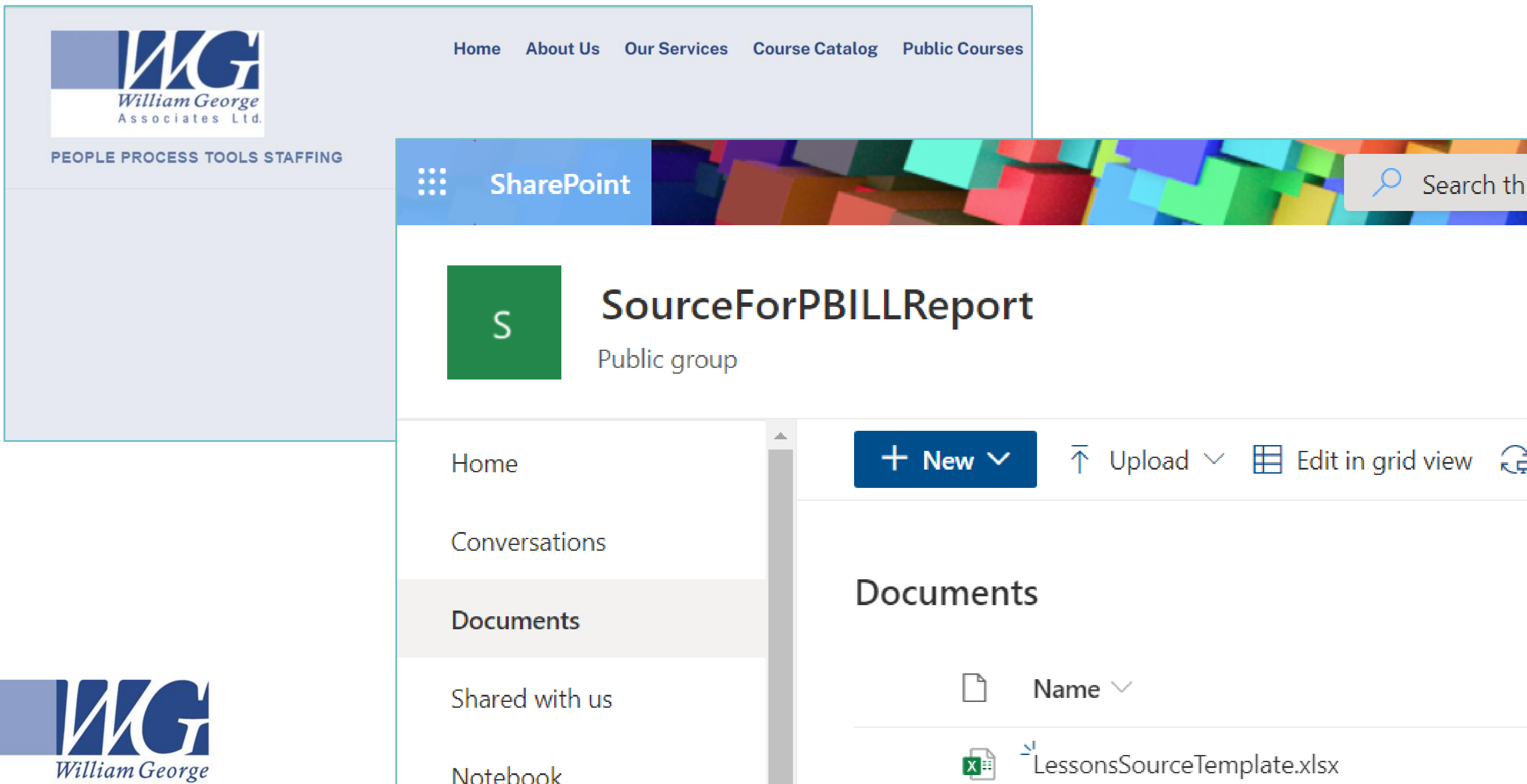


Putting Clients in Control of Critical Projects

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.

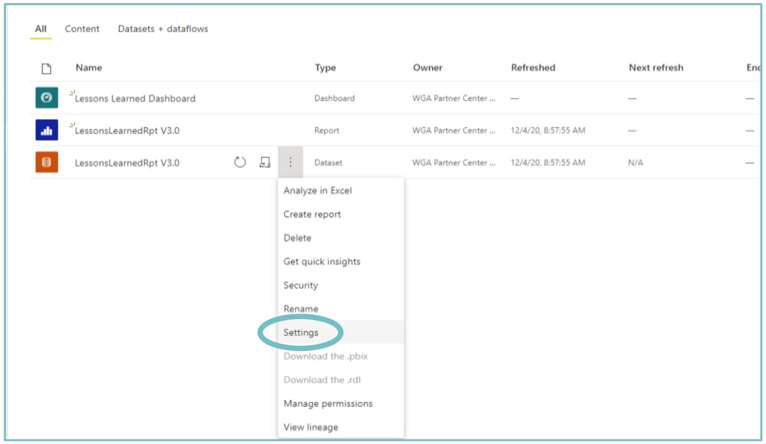


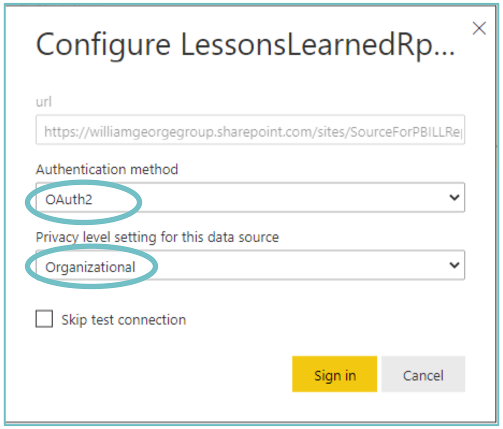
3.B Create your project data Excel file

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.

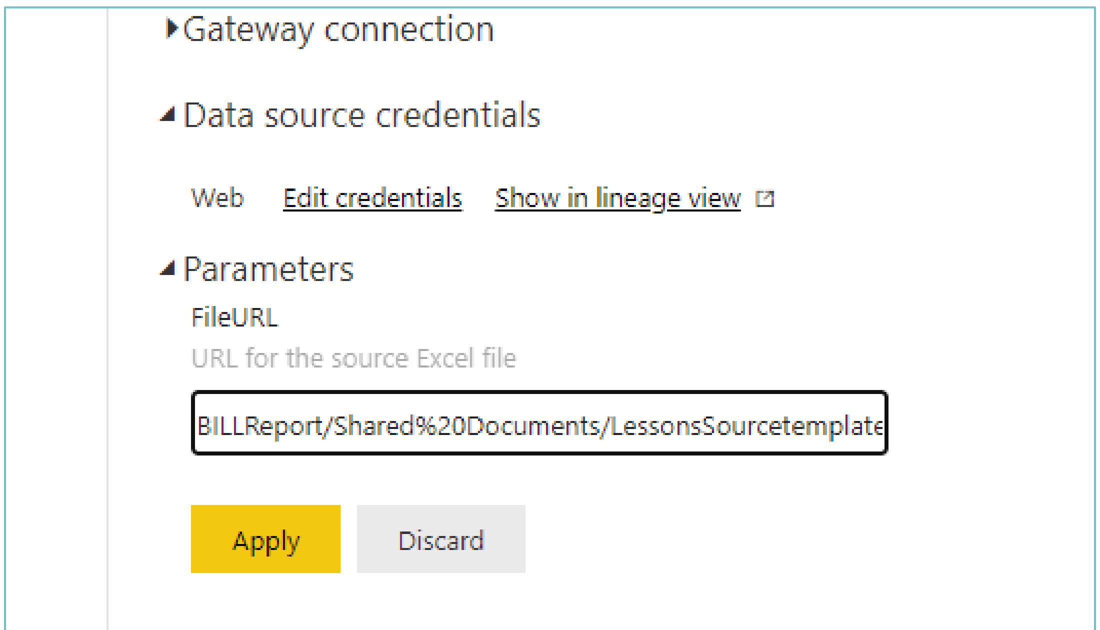




3.C Create your project data Excel file

C. Point to Your Source File

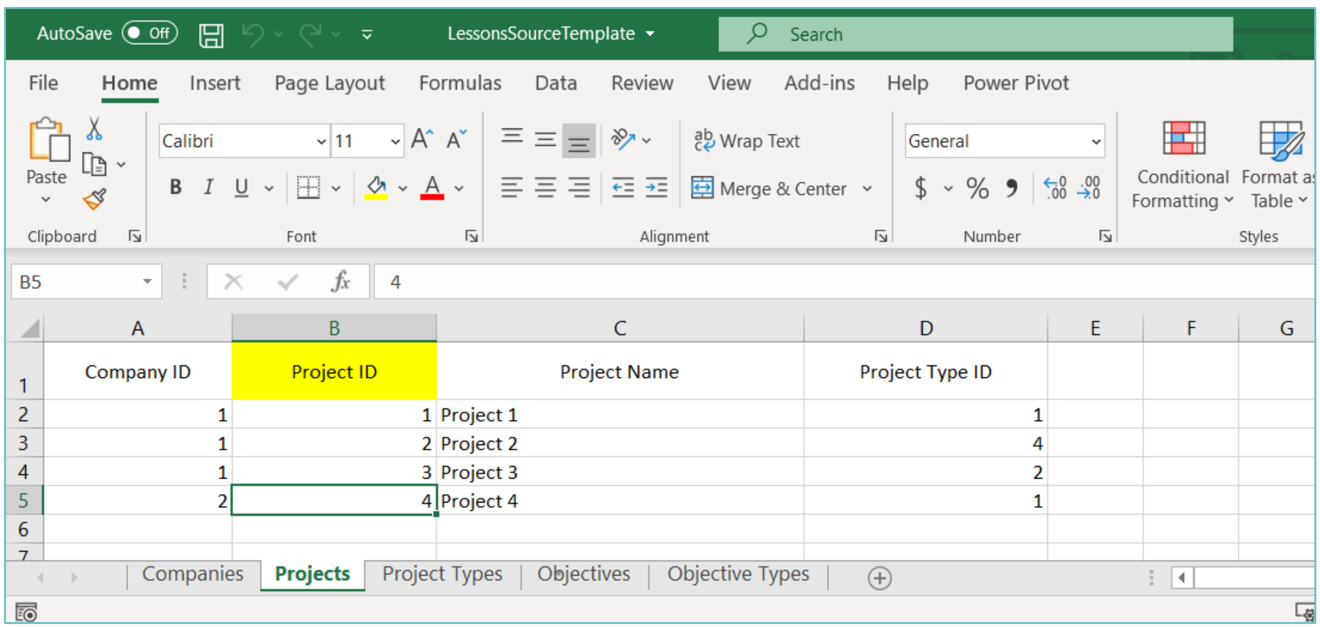
1. Also in the dataset settings, under parameters change the path to the location of your file in SharePoint Online. E.g. https://yourdomain.sharepoint.com/sites/Source/Shared%20Documents/LessonsSourceTemplate.xlsx



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.



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
1	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
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 2 month delay for scope changes	Months
5	2	4	1	Produce Deliverables	7	4					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

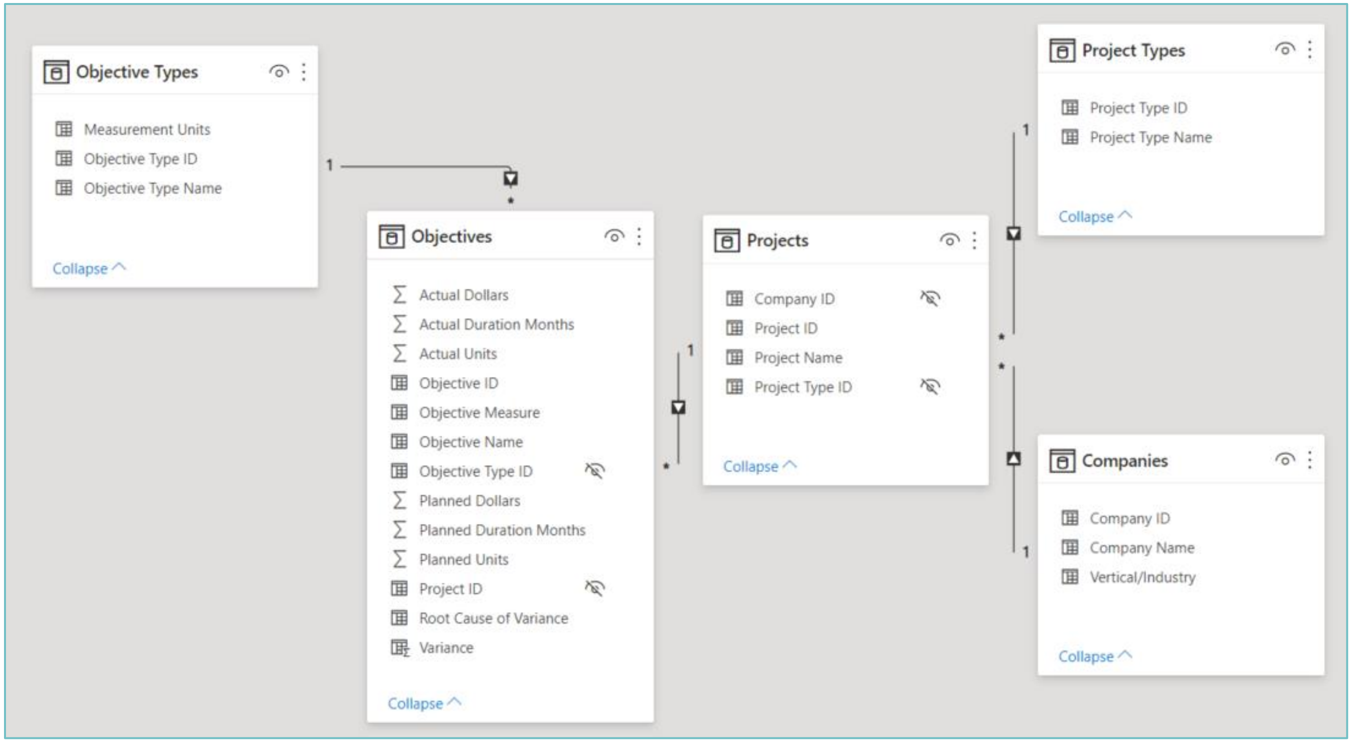
Companies | Projects | Project Types | **Objectives** | Objective Types

Ready | Display Settings | 90%

William George Associates Ltd.

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!