MPUG

Enterprise Reporting with Planner Premium

Date
October 9

Time
@ 12:00 pm - 1:00 pm

ERIK VAN HURCK

2024
WEBINAR
SERIES

MPUG

About the Webinar

Microsoft renamed Project for the web to **Planner Premium**.

How will this effect our reporting?

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About Speaker

I help the PMO succeed with Microsoft Technology

I work at Projectum, building Power Platform xPM solutions.

https://www.youtube.com/@theprojectcorner

https://www.theprojectcornerblog.com

https://www.linkedin.com/in/erikvanhurck

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Agenda

We will look at

- The Data structure of Planner Premium

- How to build an enterprise project report

- Power BI report sharing best practices

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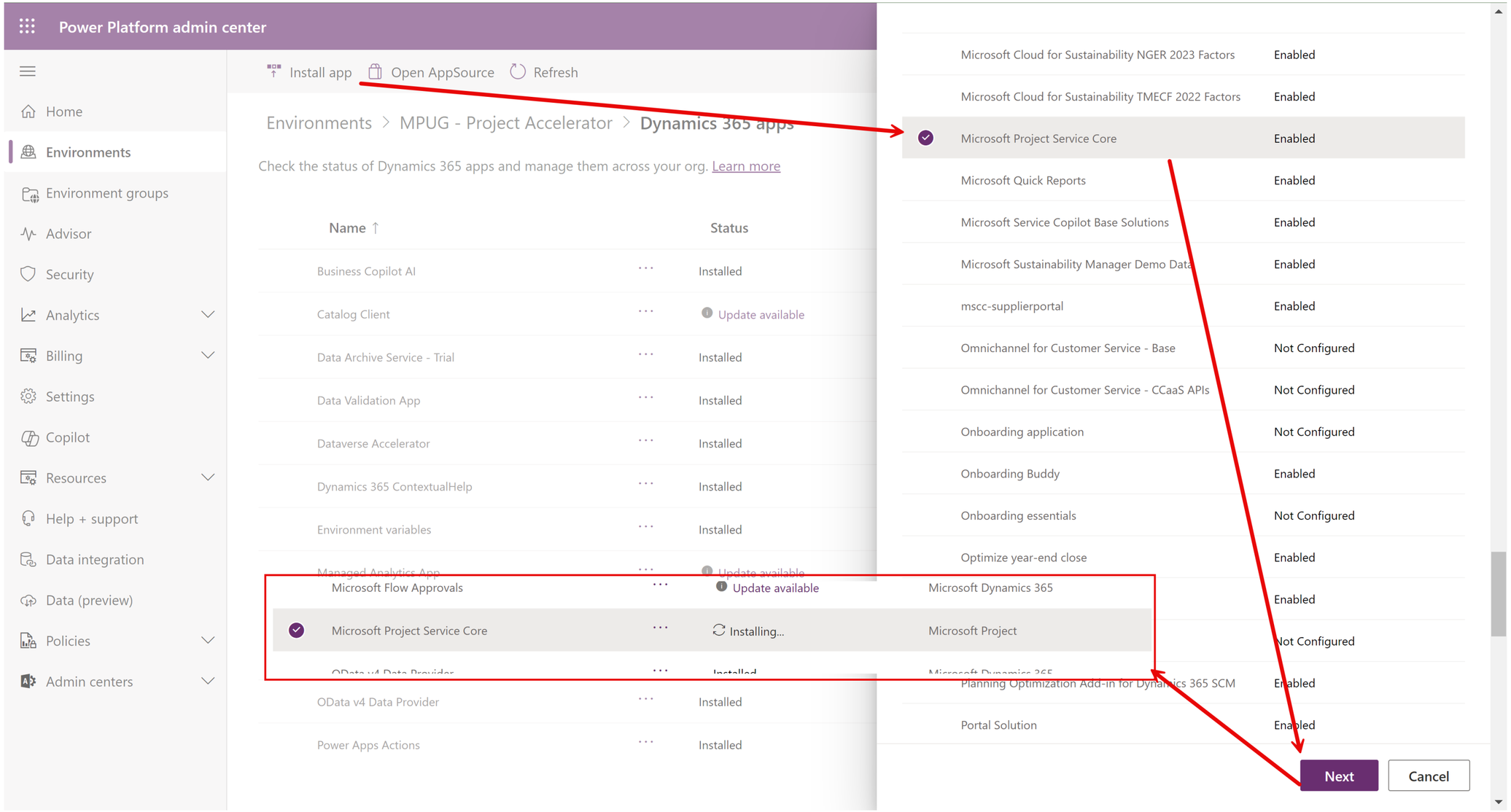
Data structure

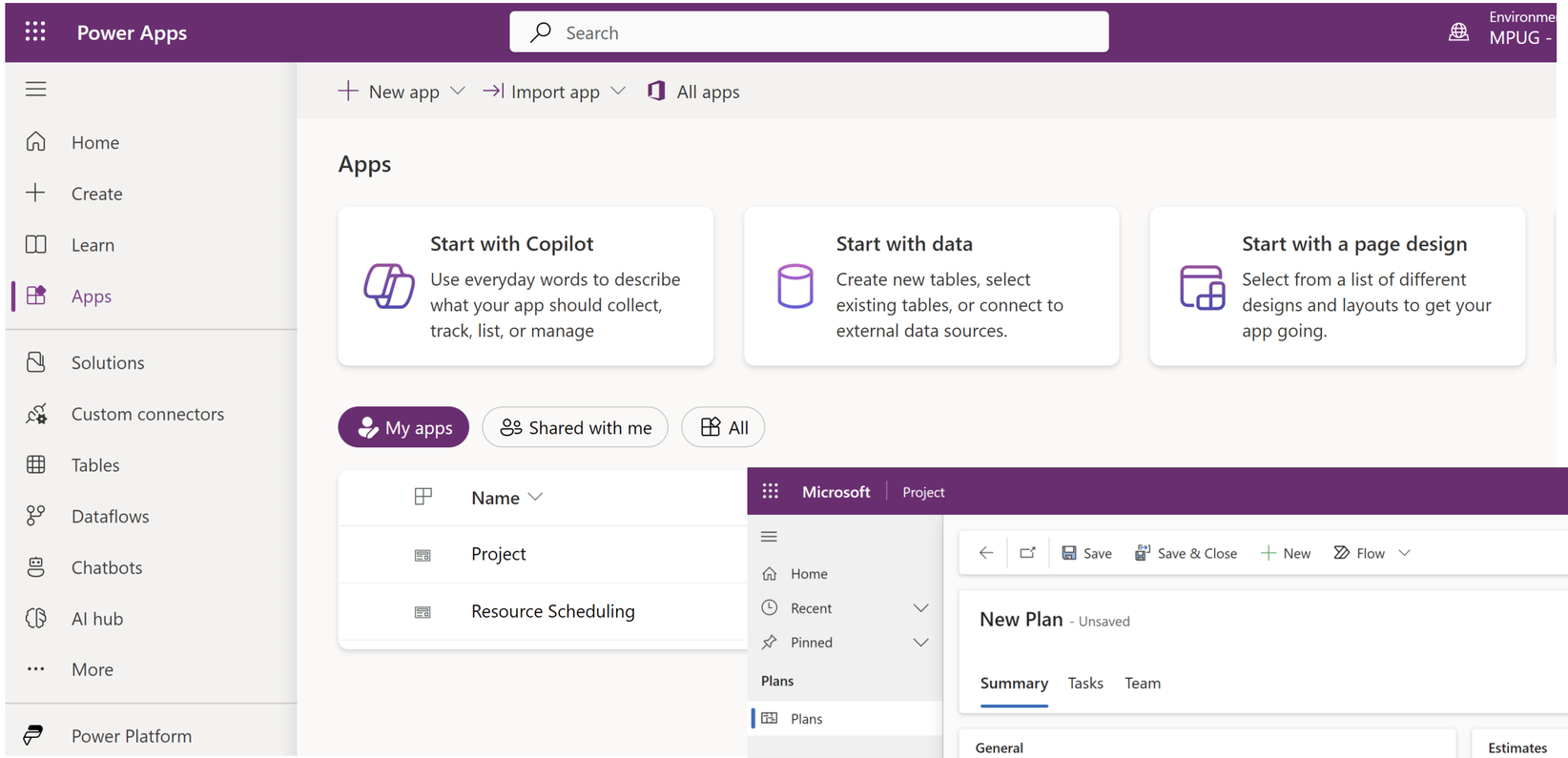
Planner Premium is a Power Apps application. Which means it has a Dataverse backend.

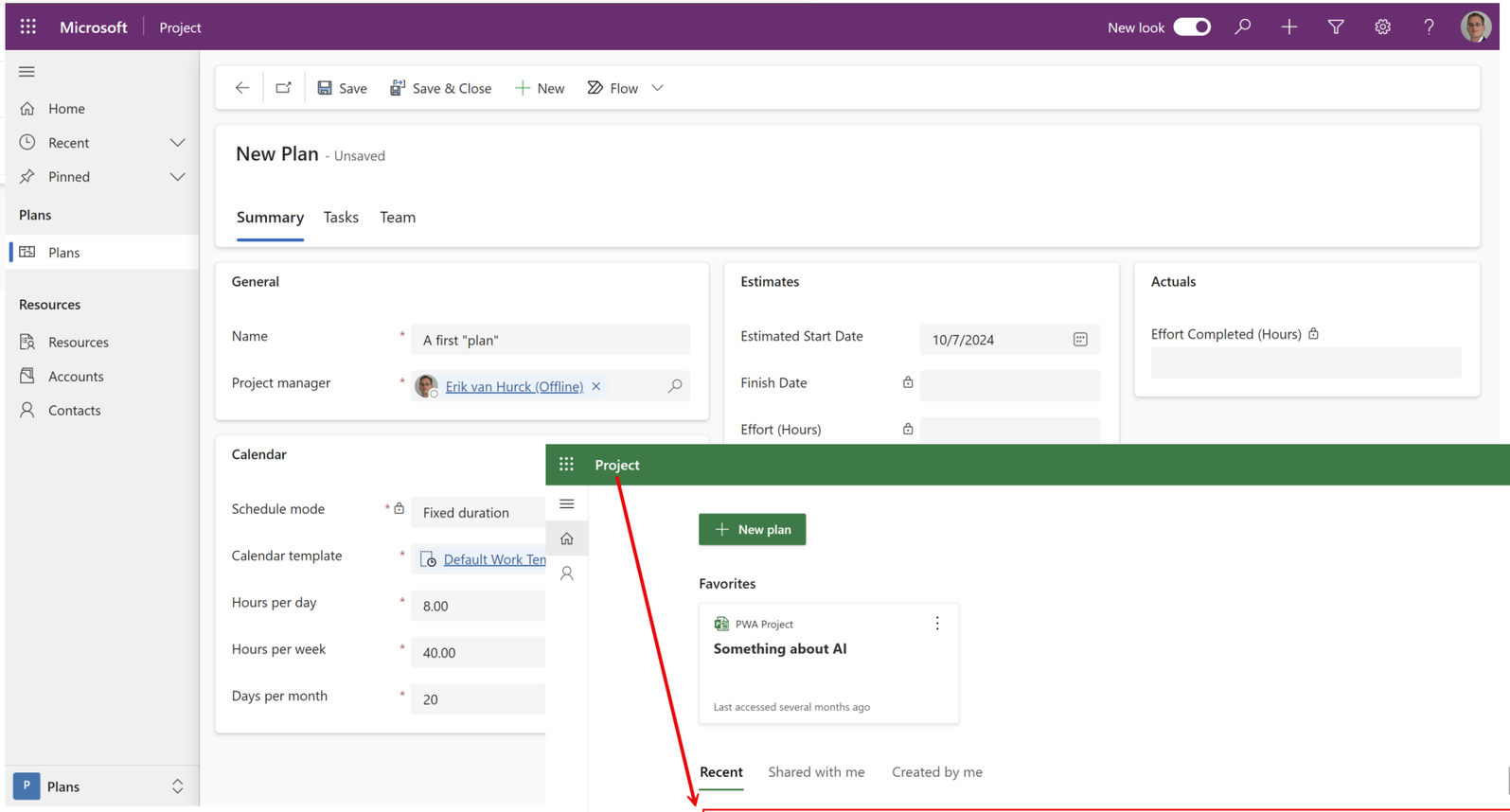
The Dataverse can be visualized inside the “maker portal” at make.powerapps.com.

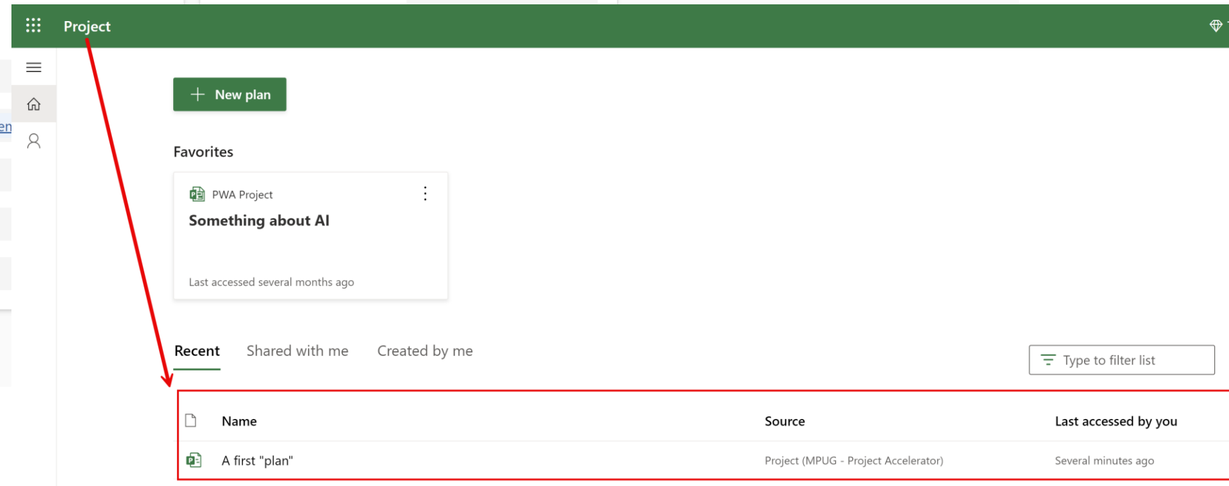
You will need sufficient permissions (system admin or Environment maker) to access the environment this way.



*) This installation might take up between 30 to 90 minutes.


Power Apps
Search
Environme
MPUG -
New app
Import app
All apps
Home
Create
Learn
Apps
Solutions
Custom connectors
Tables
Dataflows
Chatbots
AI hub
More
Power Platform
Apps
Start with Copilot
Use everyday words to describe what your app should collect, track, list, or manage
Start with data
Create new tables, select existing tables, or connect to external data sources.
Start with a page design
Select from a list of different designs and layouts to get your app going.
My apps
Shared with me
All
Name
Project
Resource Scheduling


Microsoft
Project
New look
Save
Save & Close
New
Flow
Home
Recent
Pinned
Plans
Plans
Resources
Resources
Accounts
Contacts
Plans
New Plan - Unsaved
Summary
Tasks
Team
General
Name * A first "plan"
Project manager * Erik van Hurck (Offline)
Estimates
Estimated Start Date 10/7/2024
Finish Date
Effort (Hours)
Actuals
Effort Completed (Hours)
Calendar
Schedule mode * Fixed duration
Calendar template * Default Work Ten
Hours per day * 8.00
Hours per week * 40.00
Days per month * 20


Project
New plan
Favorites
PWA Project
Something about AI
Last accessed several months ago
Recent
Shared with me
Created by me
Type to filter list
Name
Source
Last accessed by you
A first "plan"
Project (MPUG - Project Accelerator)
Several minutes ago

README | Code of conduct | MIT license | Security

Project for the web Accelerator

The Project for the web Accelerator applies useful customizations to the Project for the web Power App. The Accelerator can *easily* be deployed to any environment that has Project for the web already in it. Scenarios included in the Accelerator are...

💡 **Project Requests**. Create a list of ideas for Projects that include a business case and expected impact. The included Power Automate flow will create projects whenever the state of requests is set to *Approved*.

💼 **Programs**. Create a heirarchy of programs and projects see how work fits into the bigger picture.

🔥 **Risks and Issues**. Manage the surprises that accompany every project. Create and assign risks and issues to minimize impacts to a project's schedule.

🚧 **Changes**. Use change tracking processes to help understand the history of a project.

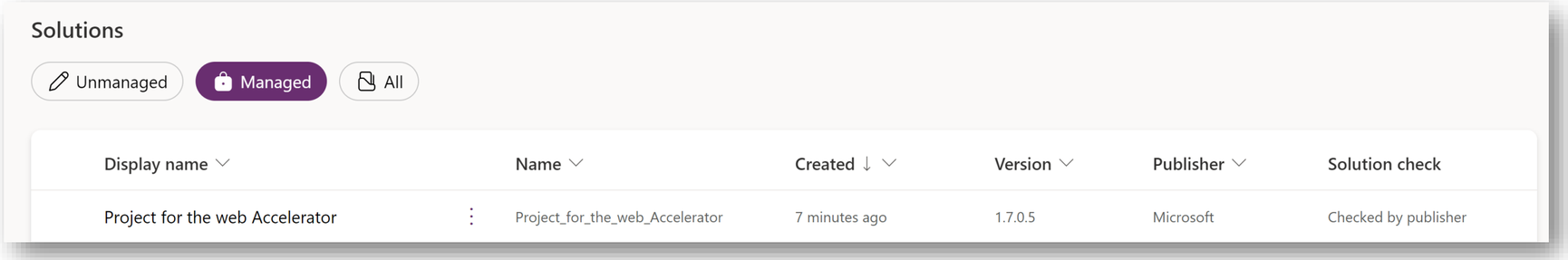
📝 **Status**. Centralize recording of project status to keep stakeholders up-to-date.

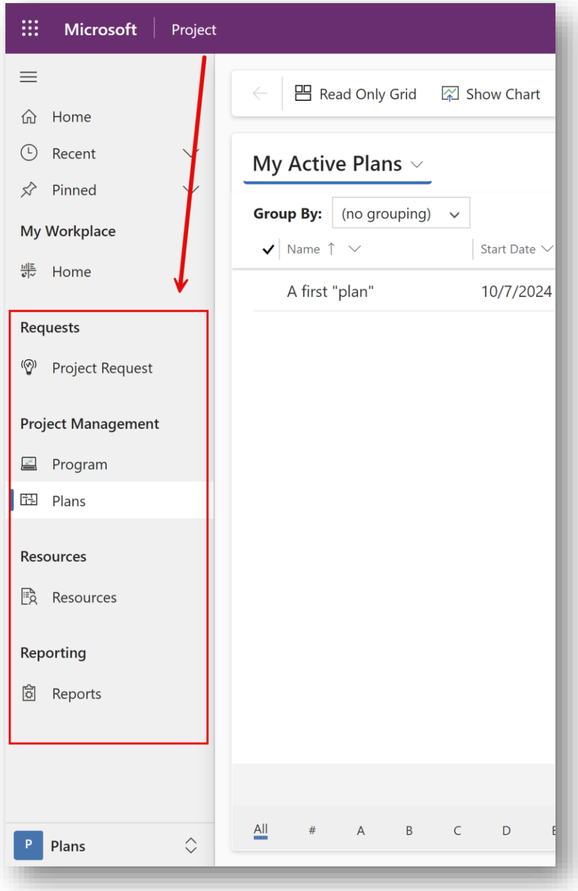
This repository also contains a Power BI template that can be deployed alongside the Accelerator. For the best experience, deploy the Accelerator, then deploy the Power BI content pack, and finally, customize the Accelerator to use the deployed Power BI report. **Follow the instructions below to get started!**

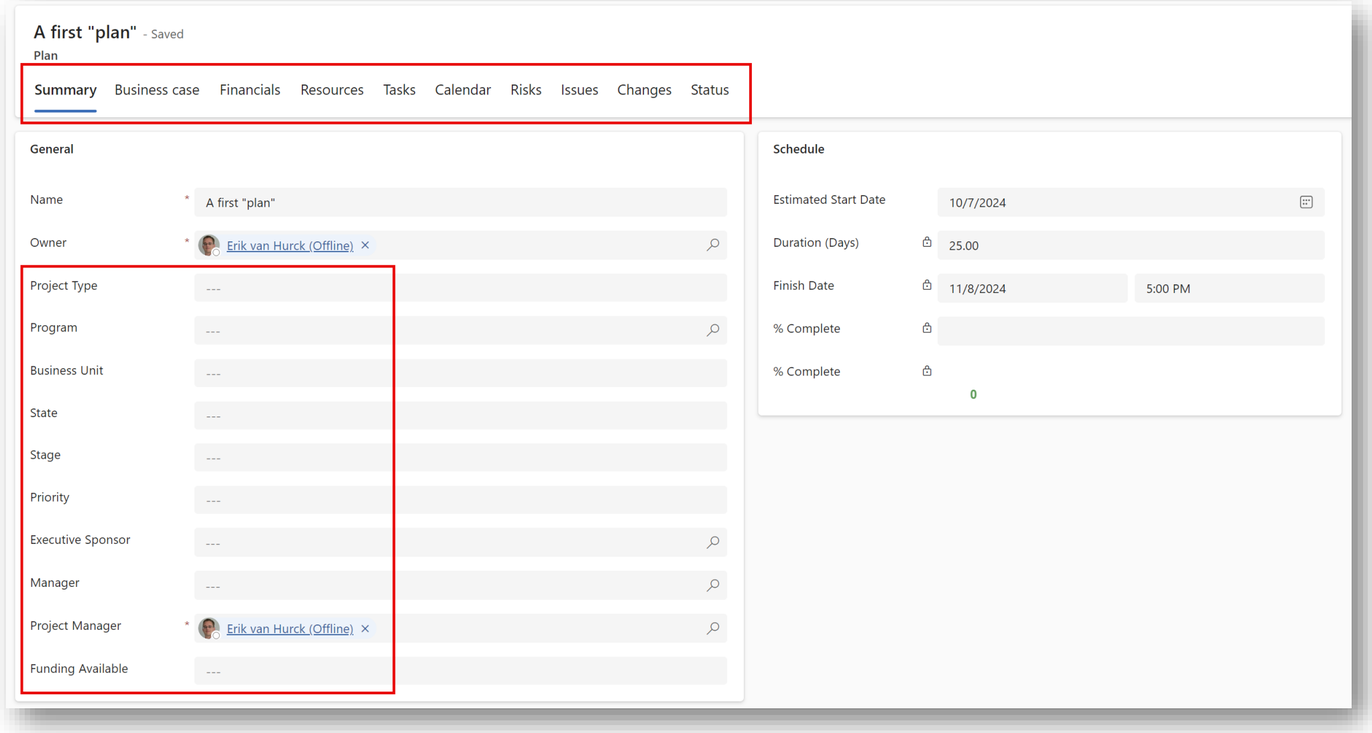
Here's the latest version of the Accelerator

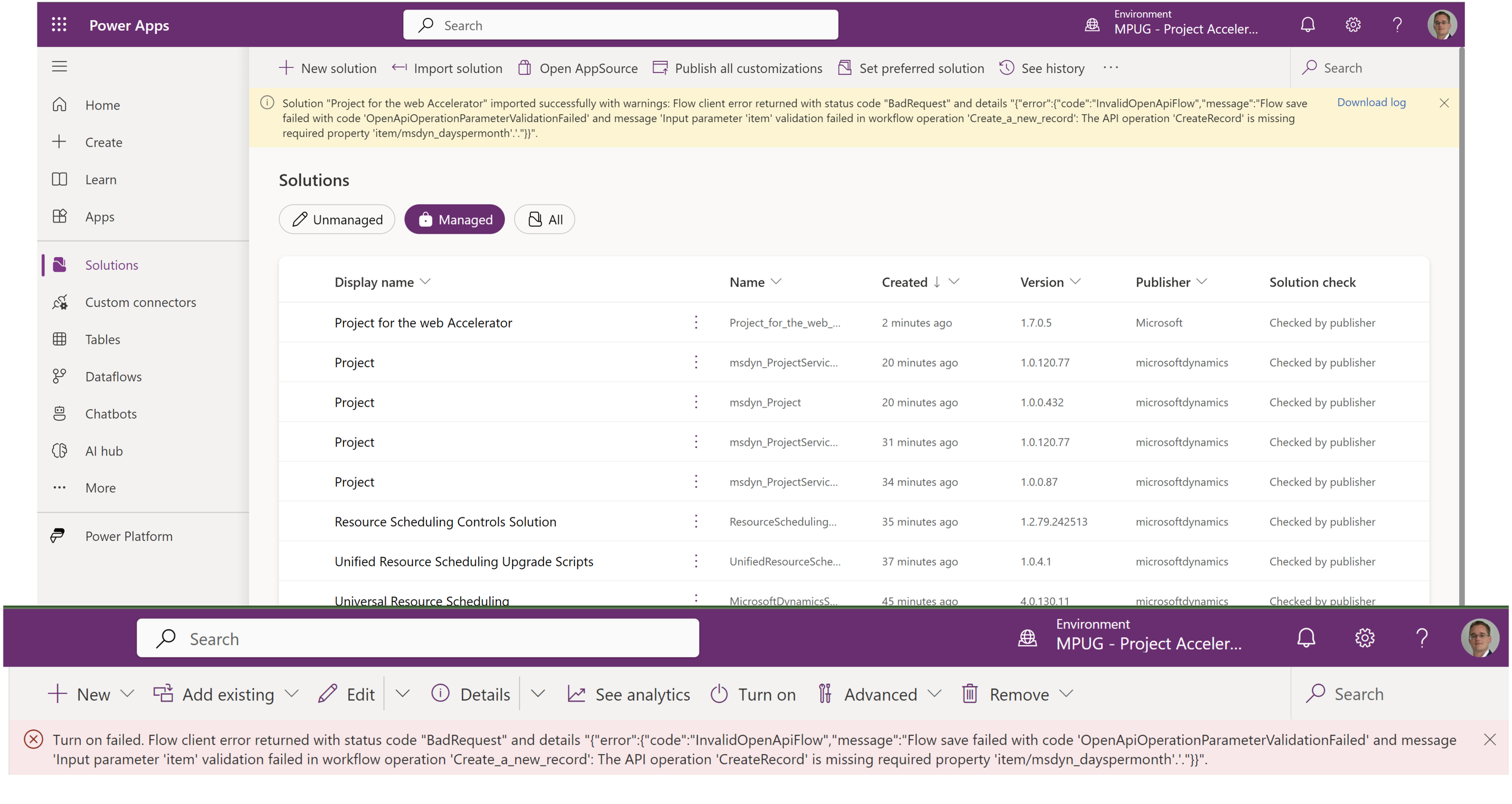
Here's the latest version of the Power BI Template for the Accelerator

*) Grab the Project Accelerator Power App to improve on Planner Premium: [GitHub - OfficeDev/Project-Accelerator: An Accelerator solution for Project for the web]


Solutions
Unmanaged
Managed
All
Display name
Name
Created
Version
Publisher
Solution check
Project for the web Accelerator
Project_for_the_web_Accelerator
7 minutes ago
1.7.0.5
Microsoft
Checked by publisher


Microsoft
Project
Home
Recent
Pinned
My Workplace
Home
Requests
Project Request
Project Management
Program
Plans
Resources
Resources
Reporting
Reports
Plans
Read Only Grid
Show Chart
My Active Plans
Group By:
(no grouping)
Name
Start Date
A first "plan"
10/7/2024
All
#
A
B
C
D


A first "plan"
- Saved
Plan
Summary
Business case
Financials
Resources
Tasks
Calendar
Risks
Issues
Changes
Status
General
Name
A first "plan"
Owner
Erik van Hurck (Offline)
Project Type
Program
Business Unit
State
Stage
Priority
Executive Sponsor
Manager
Project Manager
Erik van Hurck (Offline)
Funding Available
Schedule
Estimated Start Date
10/7/2024
Duration (Days)
25.00
Finish Date
11/8/2024
5:00 PM
% Complete
% Complete
0


Power Apps
Search
Environment
MPUG - Project Acceler...
New solution
Import solution
Open AppSource
Publish all customizations
Set preferred solution
See history
Search
Home
Create
Learn
Apps
Solutions
Custom connectors
Tables
Dataflows
Chatbots
AI hub
More
Power Platform
Solution "Project for the web Accelerator" imported successfully with warnings: Flow client error returned with status code "BadRequest" and details "{"error":{"code":"InvalidOpenApiFlow","message":"Flow save failed with code 'OpenApiOperationParameterValidationFailed' and message 'Input parameter 'item' validation failed in workflow operation 'Create_a_new_record': The API operation 'CreateRecord' is missing required property 'item/msdyn_dayspermonth'.'."}}".
Download log
Solutions
Unmanaged
Managed
All
Display name
Name
Created
Version
Publisher
Solution check
Project for the web Accelerator
Project_for_the_web_...
2 minutes ago
1.7.0.5
Microsoft
Checked by publisher
Project
msdyn_ProjectServic...
20 minutes ago
1.0.120.77
microsoftdynamics
Checked by publisher
Project
msdyn_Project
20 minutes ago
1.0.0.432
microsoftdynamics
Checked by publisher
Project
msdyn_ProjectServic...
31 minutes ago
1.0.120.77
microsoftdynamics
Checked by publisher
Project
msdyn_ProjectServic...
34 minutes ago
1.0.0.87
microsoftdynamics
Checked by publisher
Resource Scheduling Controls Solution
ResourceScheduling...
35 minutes ago
1.2.79.242513
microsoftdynamics
Checked by publisher
Unified Resource Scheduling Upgrade Scripts
UnifiedResourceSche...
37 minutes ago
1.0.4.1
microsoftdynamics
Checked by publisher
Universal Resource Scheduling
MicrosoftDynamicsS...
45 minutes ago
4.0.130.11
microsoftdynamics
Checked by publisher
Search
Environment
MPUG - Project Acceler...
New
Add existing
Edit
Details
See analytics
Turn on
Advanced
Remove
Search
Turn on failed. Flow client error returned with status code "BadRequest" and details "{"error":{"code":"InvalidOpenApiFlow","message":"Flow save failed with code 'OpenApiOperationParameterValidationFailed' and message 'Input parameter 'item' validation failed in workflow operation 'Create_a_new_record': The API operation 'CreateRecord' is missing required property 'item/msdyn_dayspermonth'.'."}}".

When a Request State is Updated to Approved create a Project

Editing this managed flow will create customizations stored in a new unmanaged layer. Learn more

If yes

Create a new record

* Table name	Plans
* Calendar Id	1
* Contracting Unit (Organizational Units)	Contracting Un...
* Days Per Month	Use days when the unit of measure for a task is months.
* Hours Per Day	Use hours when the unit of measure for a task is days.
* Hours Per Week	Use hours when the unit of measure for a task is weeks.
* Name	Name
* Project manager (Users)	/systemusers/ Owner (Value)
* Schedule mode	Fixed duration
* Work hour template (Work template)	Work Hour Te...

Show advanced options

Calendar

Schedule mode *	Fixed duration
Hours per day *	8.00
Hours per week *	40.00
Days per month *	20

Turn on succeeded

Solution "Project for the web Accelerator" imported successfully.

Publish all customizations succeeded.

Unmanaged Project Accelerator layer > **All**

Display name	Name	Type
When a Request State is U...	When a Request ...	Cloud Flow

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Build the report

The default report that comes with the accelerator contains links to the standard tables.

Any alterations will need to be added to the report manually.

README | Code of conduct | MIT license | Security

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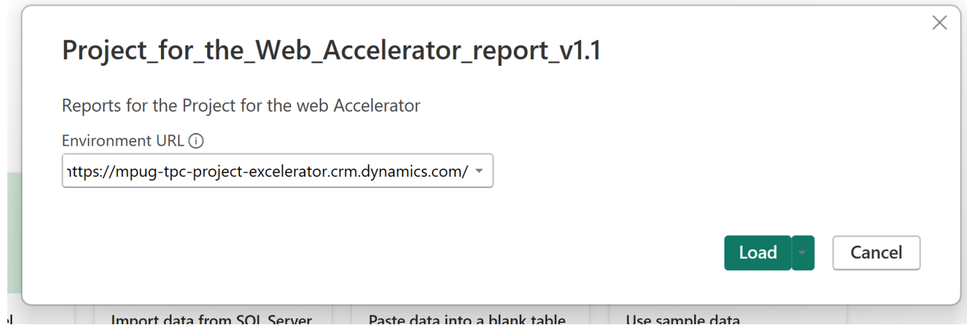
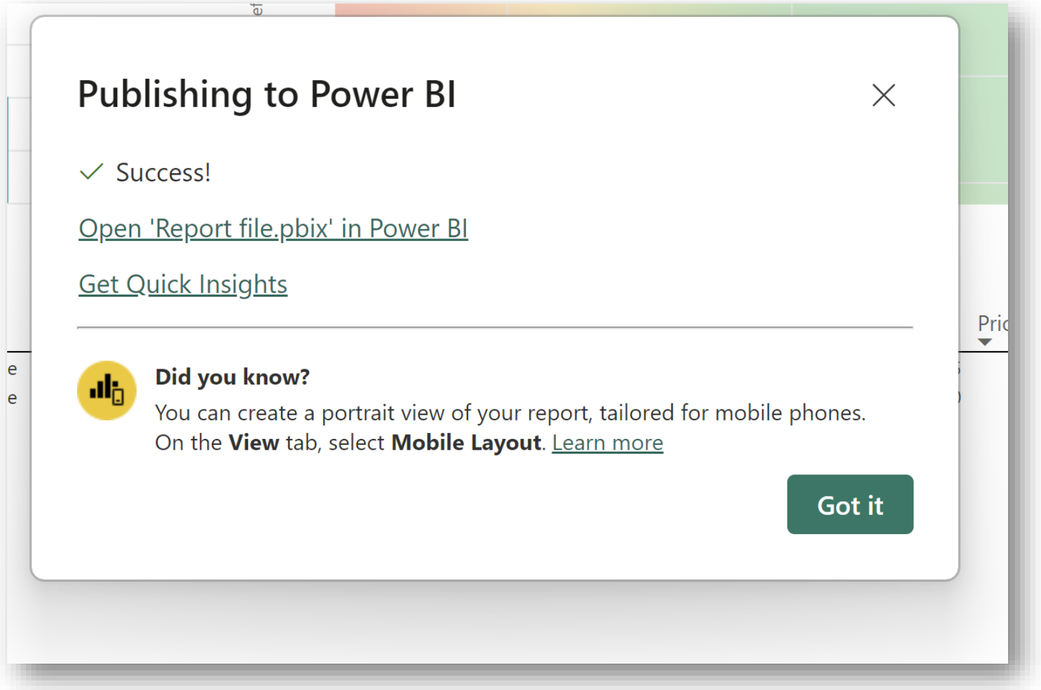
Here's the latest version of the Power BI Template for the Accelerator

*) Remember to grab the second link as well (the Power BI Template).


Project_for_the_Web_Accelerator_report_v1.1
Reports for the Project for the web Accelerator
Environment URL
https://mpug-tpc-project-excelerator.crm.dynamics.com/
Load
Cancel


Publishing to Power BI
Success!
Open 'Report file.pbix' in Power BI
Get Quick Insights
Did you know?
You can create a portrait view of your report, tailored for mobile phones.
On the View tab, select Mobile Layout. Learn more
Got it

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Share the report

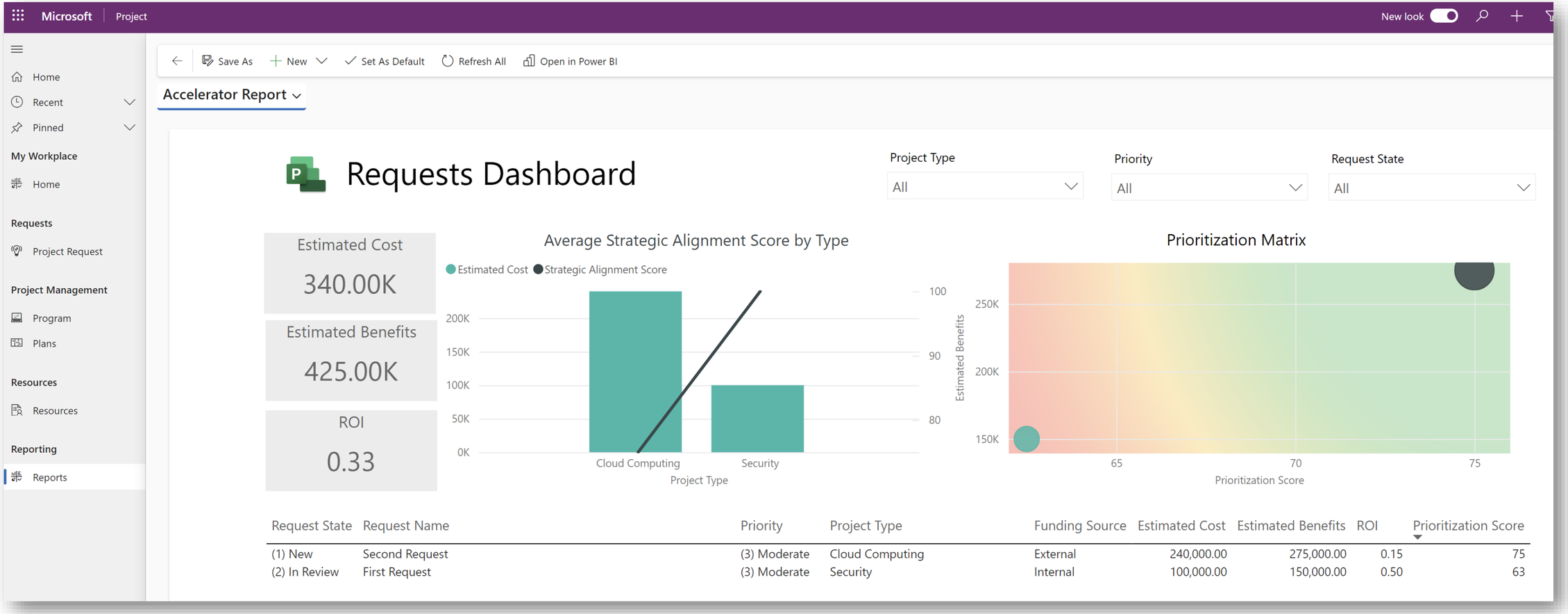
We will take a look at two ways to share the report to the organization:

Adding the report to the Power App.

Adding the report to a Power BI App.

Integrating the Accelerator with Power BI

You can can integrate the Project for the web Accelerator with the purpose-built Power BI template. To get started, follow the instructions in the [Project for the web Accelerator GitHub page.]



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Thank you for attending

What was that about building
Power Platform xPM solutions?

Read more

https://www.youtube.com/@theprojectcorner

https://www.theprojectcornerblog.com

https://www.linkedin.com/in/erikvanhurck