## Enterprise Reporting with Planner Premium

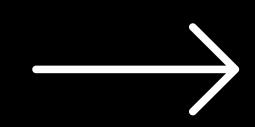
Date October 9

Time @ 12:00 pm - 1:00 pm

**ERIK VAN HURCK** 



### 2024 WEBINAR SERIES







## $\rightarrow$

# About the Webinar

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

How will this effect our reporting?



## About Speaker

I help the PMO succeed with Microsoft Technology

I work at Projectum, building Power Platform xPM solutions.



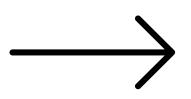
https://www.youtube.com/@theprojectcorner



https://www.theprojectcornerblog.com



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



## ERIK VAN HURCK

### Senior Consultant @ Projectum



## Agenda

We will look at

- The Data structure of Planner Premium
- How to build an enterprise project report
- Power BI report sharing best practices



## 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.

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### **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.

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

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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

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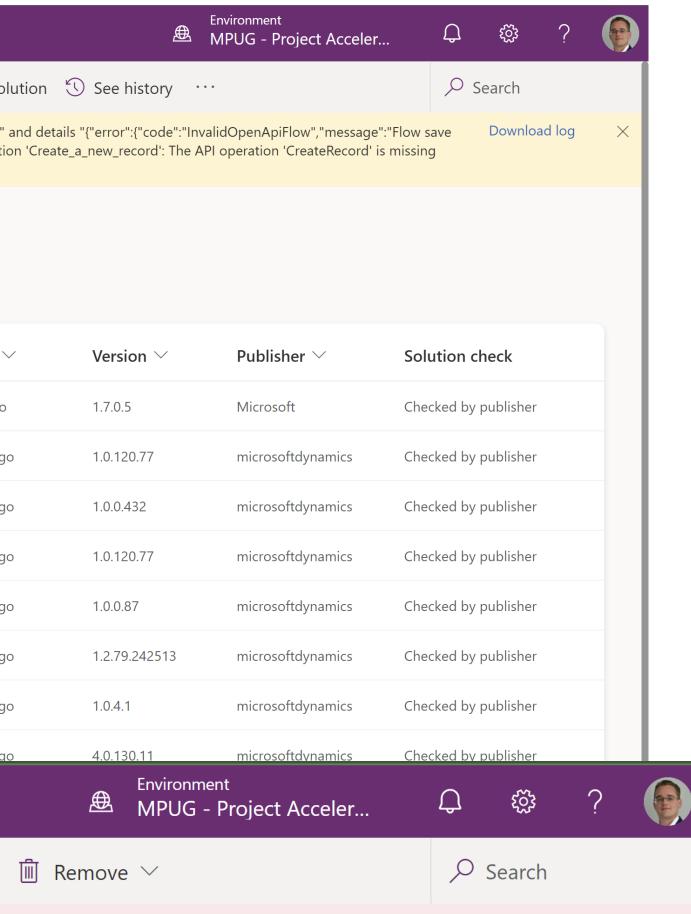
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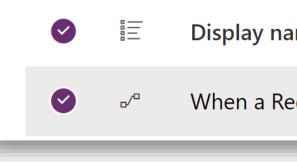
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## Build the report

The default report that comes with the accelerator contains links to the <u>standard</u> tables.

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





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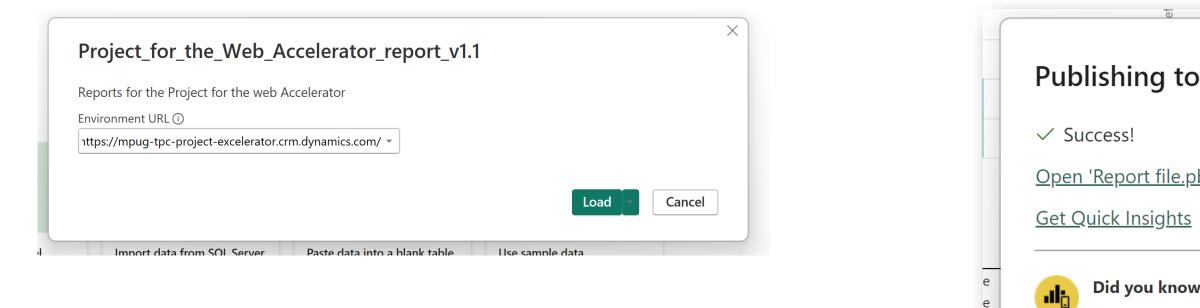
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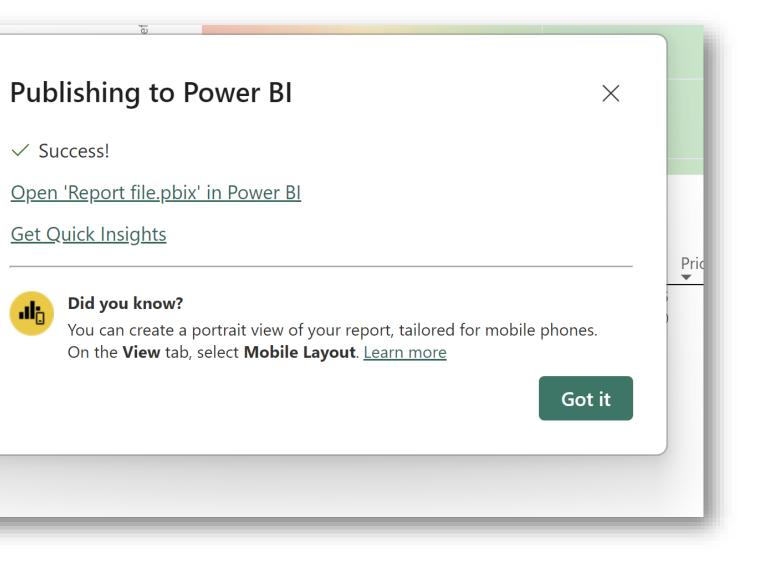
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Here's the latest version of the Power BI Template for the Accelerator

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

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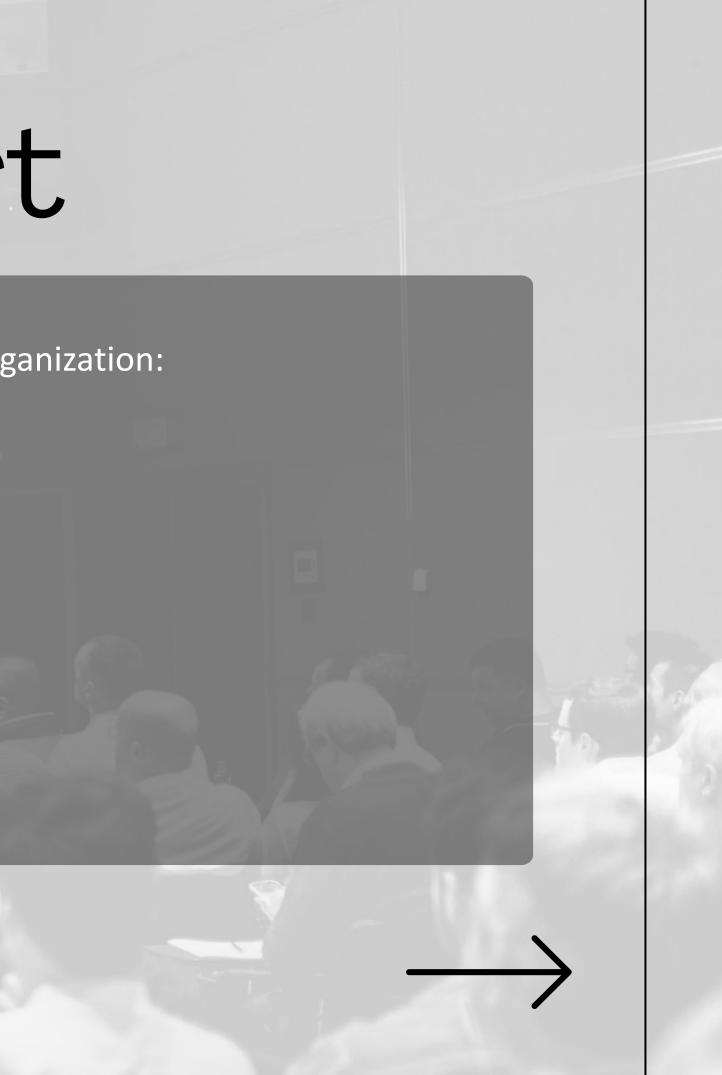


## Share the report

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

Adding the report to the Power App.

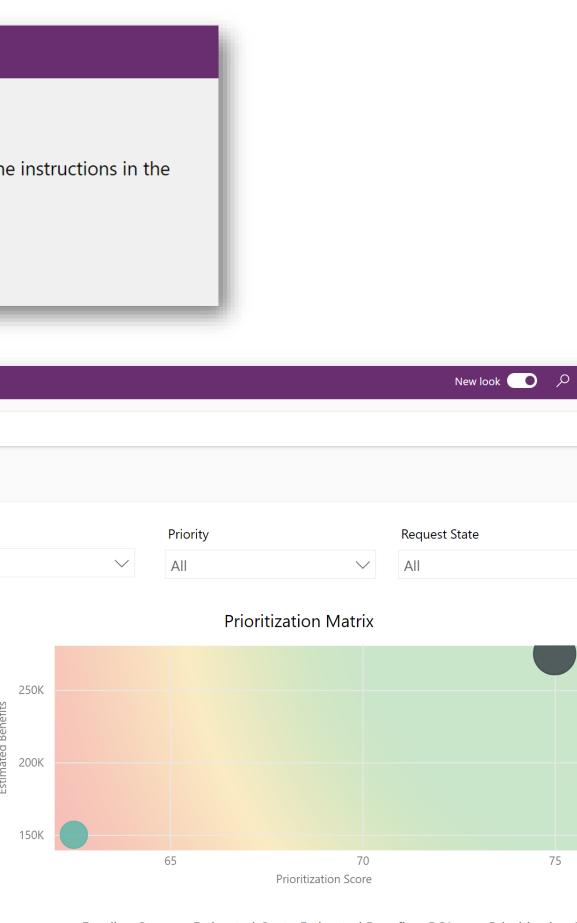
Adding the report to a Power BI App.



### 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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Internal	100,000.00	150,000.00	0.50	63

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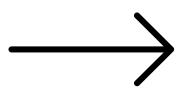
75



## 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

## ERIK VAN HURCK

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