

iCoTech Services

GETTING STARTED WITH POWER BI:

A STEP-BY-STEP GUIDE

If you're new to Power BI, don't worry—implementing it into your PMO doesn't have to be overwhelming. This template will help you get started Power BI into your PMO processes with ease.

Understanding what matters

Identify Key Metrics: What are the most important project metrics for your PMO? (e.g., project progress, risks, resource allocation, budget tracking).

Align with Senior Management: Make sure the metrics you select align with your organisation's goals and senior management's priorities.

Tip: Create a list of objectives and metrics to guide your reporting strategy. Focus on answering key business questions with your dashboards.

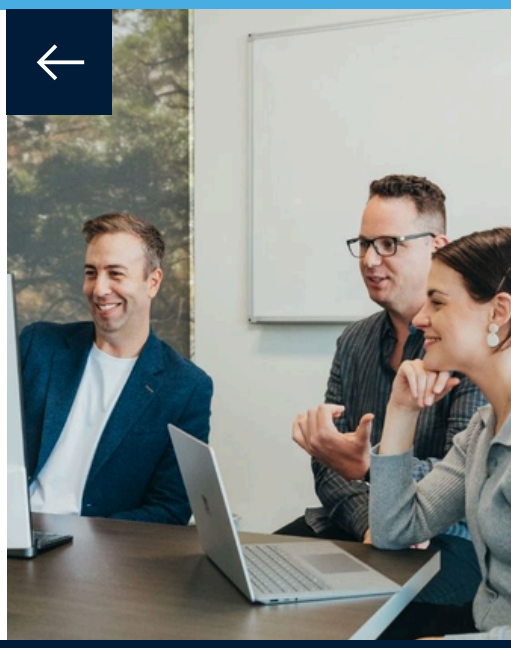
Connect Your Data Sources

Power BI connects to various data sources to give you a unified view of your project data.

List Your Data Sources: Identify all the sources where your project data resides (e.g., MS Project, Excel, SharePoint, cloud-based tools).

Establish Data Connections: Link these data sources to Power BI for seamless data integration and real-time insights.

Tip: Ensure that all key data points, such as project timelines, budgets, and resource allocation, are connected to maintain a single source of truth.



0333 577 3713 info@icotechservices.co.uk www.icotechservices.co.uk

Build Custom Dashboards

Tailor your Power BI dashboards to showcase the most relevant information.

Start with High-Level Views: Create dashboards that give an overview of your project portfolio for senior management.

Drill Down to Task-Level Insights: Build more detailed dashboards for team members or specific projects, showing status, milestones, risks, etc.

Tip: Use visual elements like Gantt charts, progress bars, and timelines for clarity. Ensure your dashboards are easy to read and shareable.



Ensure Data Quality and Accuracy

Accurate data is critical for effective decision-making.

Audit Your Data: Regularly check that your data is accurate, up-to-date, and consistent across all sources.

Set Data Quality Standards: Establish guidelines for entering and updating project data to avoid discrepancies.

Tip: Schedule monthly data audits to ensure accuracy and maintain confidence in your reports.

Refine and Optimise

As you grow comfortable with Power BI, continuously improve your dashboards.

Solicit Feedback: Regularly ask stakeholders if the dashboards meet their needs.

Make Adjustments: Refine your dashboards as new project data or reporting requirements emerge.

Tip: Start small with essential reports, then expand as you see how Power BI improves your project management processes.

How we can help:

At iCoTech, as Microsoft Partners, we can apply our knowledge and expertise to design innovative solutions that have structure and consistency to give you more control over delivery manage projects with accelerators that amplify Power Platform and Planner.



Get in touch:

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