

Power BI for Project Management Professionals

This training is designed for delivery, tailored to project management and PMO needs (schedule, cost, risk, and portfolio dashboards) while aligning with the PL-300: Microsoft Power BI Data Analyst certification exam.

Duration: 3 Days (24 Hours)

Day 1: Data Preparation & Modeling for Project Dashboards

Session 1: Introduction to Power BI & Project Management Use Cases

- Overview of Power BI ecosystem (Desktop, Service, Mobile)
- Typical project management data: schedule, cost, risks, milestones
- Mapping project data to PMO KPIs

Session 2: Data Connection & Preparation (PL-300: Prepare Data)

- Connecting to Excel, CSV, SharePoint, and SQL
- Using Power Query for transformation:
 - Removing duplicates, handling nulls
 - Merging & appending queries
- Shaping risk register and cost data for analysis

Session 3: Data Modeling Concepts (PL-300: Model Data)

- Data types and roles in Power BI
- Creating relationships between project tables
- Creating and managing Date tables
- Introduction to calculated columns

Hands-On

Day 2: DAX, KPIs & Visualizations for PM Dashboards

Session 1: Introduction to DAX for Project Metrics (PL-300: Model Data)

- DAX syntax basics: calculated columns vs. measures
- Key PMO metrics using DAX:
 - Planned Value, Earned Value, SPI, CPI
 - Schedule Variance and Cost Variance
- Time intelligence functions (YTD, cumulative project cost)

Session 2: Visualizations & PMO Dashboards (PL-300: Visualize & Analyze)

- Gantt charts for schedule tracking
- KPI indicators for SPI/CPI
- Risk matrix and bubble chart for issues
- Portfolio view: Project health summary

Session 3: Enhancing Interactivity (PL-300: Visualize & Analyze)

- Slicers (project, timeline, risk category)
- Drillthrough for detailed project view
- Tooltips and bookmarks
- Q&A visuals and smart narrative

Hands-On

Day 3: Deployment, Security & Certification Focus

Session 1: Sharing & Deployment (PL-300: Deploy & Maintain Assets)

- Publishing to Power BI Service
- Workspaces, apps, and usage scenarios
- Schedule refreshes and managing datasets
- Row-Level Security (RLS)

Session 2: Dashboard Optimization & Best Practices

- Performance analyzer
- Choosing visuals for different stakeholder needs
- Creating mobile-friendly reports

Session 3: PL-300 Exam Tips & Review

- Overview of PL-300 format and question types
- Topic-wise recap with PMO project lens
- Practice questions and exam strategy

Hands-On