

Power BI PMO: DAX Metrics & Gantt Dashboards

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.

3 Days

24 HOURS

9

MODULES

33

TOPICS

3

HANDS-ON ACTIVITIES

COURSE OVERVIEW

This course covers preparing and modelling project data in Power BI, including connecting to sources such as Excel, SharePoint and SQL, shaping data with Power Query, and building relationships and date tables. It then covers DAX for project metrics such as Earned Value, SPI and CPI, along with time intelligence functions, before moving into visualisations including Gantt charts, KPI indicators, risk matrices and portfolio health summaries, plus interactivity features such as slicers, drillthrough and bookmarks. The final part covers publishing and sharing dashboards through the Power BI Service, row-level security, dashboard optimisation and mobile-friendly reports, along with a review of the PL-300 exam format and practice questions.

WHO THIS COURSE IS FOR

PMO Analysts

Project Managers

Power BI Developers

Data Analysts

Portfolio Managers

LEARNING OBJECTIVES

- Explain the Power BI ecosystem and its use for project management data
- Connect to data sources such as Excel, SharePoint and SQL
- Prepare risk register and cost data using Power Query
- Build relationships and date tables across project tables
- Apply DAX to calculate PMO metrics such as SPI and CPI
- Build Gantt charts, KPI indicators and portfolio dashboards
- Configure slicers, drillthrough, tooltips and bookmarks for interactivity
- Deploy dashboards to the Power BI Service with row-level security

9 Modules, 33 Topics

DAY 1

Data Preparation & Modeling for Project Dashboards

01

Introduction to Power BI & Project Management Use Cases

TOPICS

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

02

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

TOPICS

- 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

03

Hands-On

Data Modeling Concepts (PL-300: Model Data)

TOPICS

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

04

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

TOPICS

- 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)

05

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

TOPICS

Gantt charts for schedule tracking · KPI indicators for SPI/CPI · Risk matrix and bubble chart for issues ·

Portfolio view: Project health summary

06

Hands-On

Enhancing Interactivity (PL-300: Visualize & Analyze)

TOPICS

Slicers (project, timeline, risk category) · Drillthrough for detailed project view · Tooltips and bookmarks ·

Q&A visuals and smart narrative

07

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

TOPICS

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

08

Dashboard Optimization & Best Practices

TOPICS

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

PL-300 Exam Tips & Review

TOPICS

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

HANDS-ON ACTIVITIES

Practise What You Learn

#	MODULE	ACTIVITY
03	Data Modeling Concepts (PL-300: Model Data)	Hands-On
06	Enhancing Interactivity (PL-300: Visualize & Analyze)	Hands-On
09	PL-300 Exam Tips & Review	Hands-On

WHAT IS INCLUDED

Everything You Need to Succeed

- Koenig course material for every module
- Delivery by certified instructors and subject matter experts
- Hands-on exercises throughout the course
- Course completion certificate from Koenig

ABOUT KOENIG

Who We Are

Established in 1993, Koenig Solutions is a globally recognised training provider with 35+ technology partnerships, 5,000+ training programmes and a network of certified instructors and subject matter experts, supporting individuals and enterprise teams worldwide.

FLEXIBLE DELIVERY

Learn the Way That Suits You

Classroom Training

Live Online Classes (ILO)

Fly-Me-A-Trainer (FMAT)

Flexi (Self-Paced)

1-on-1 Training

Ready to Get Started?

Talk to a learning advisor about schedules, group training and customised delivery.

Visit koenig-solutions.com

✉ info@koenig-solutions.com