



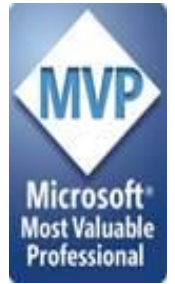
Integrating Multiple Planner Boards into a Power BI Dashboard

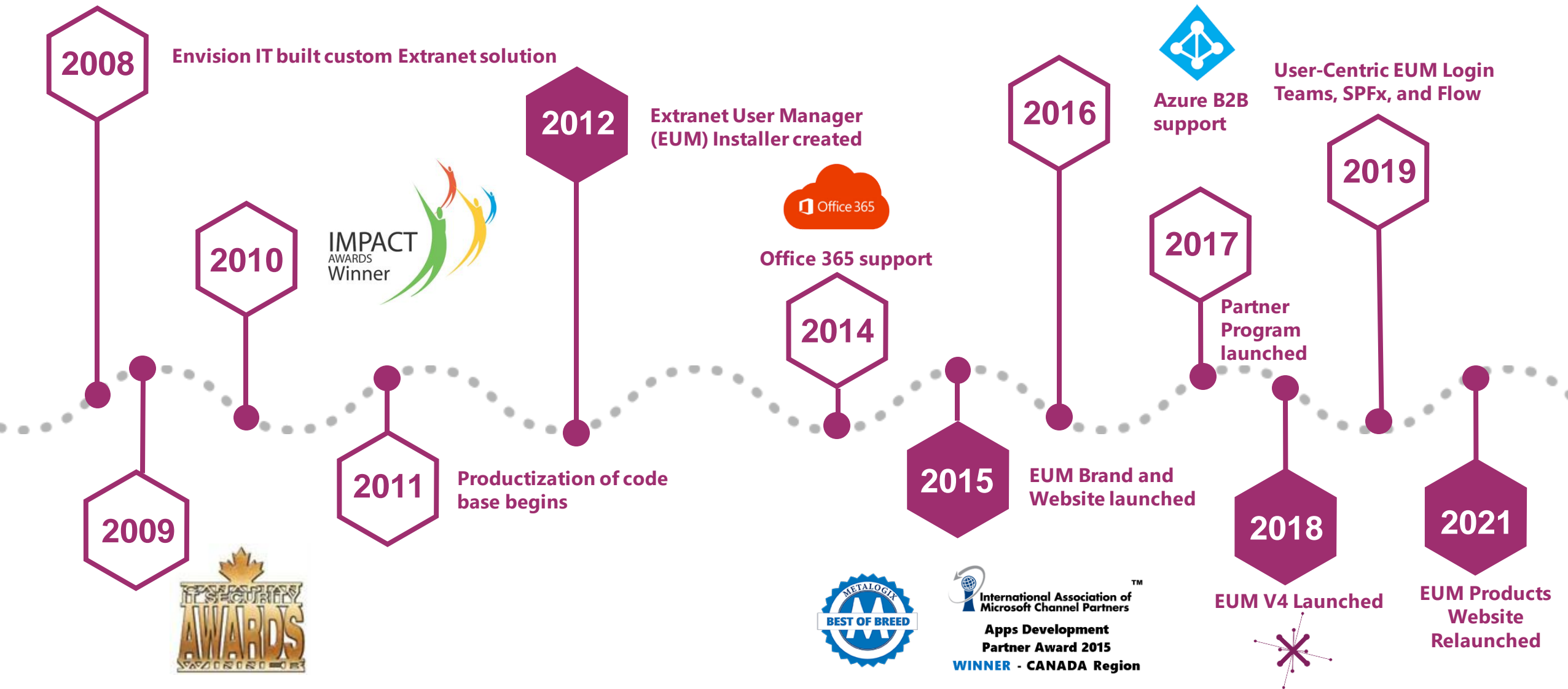
Thursday, May 20, 2021
12 - 1 PM Eastern Time

Peter Carson



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- Office Apps and Services Microsoft MVP
- peter.carson@extranetusermanager.com
- blog.petercarson.ca
- www.extranetusermanager.com
- Twitter @carsonpeter
- President Toronto SharePoint User Group

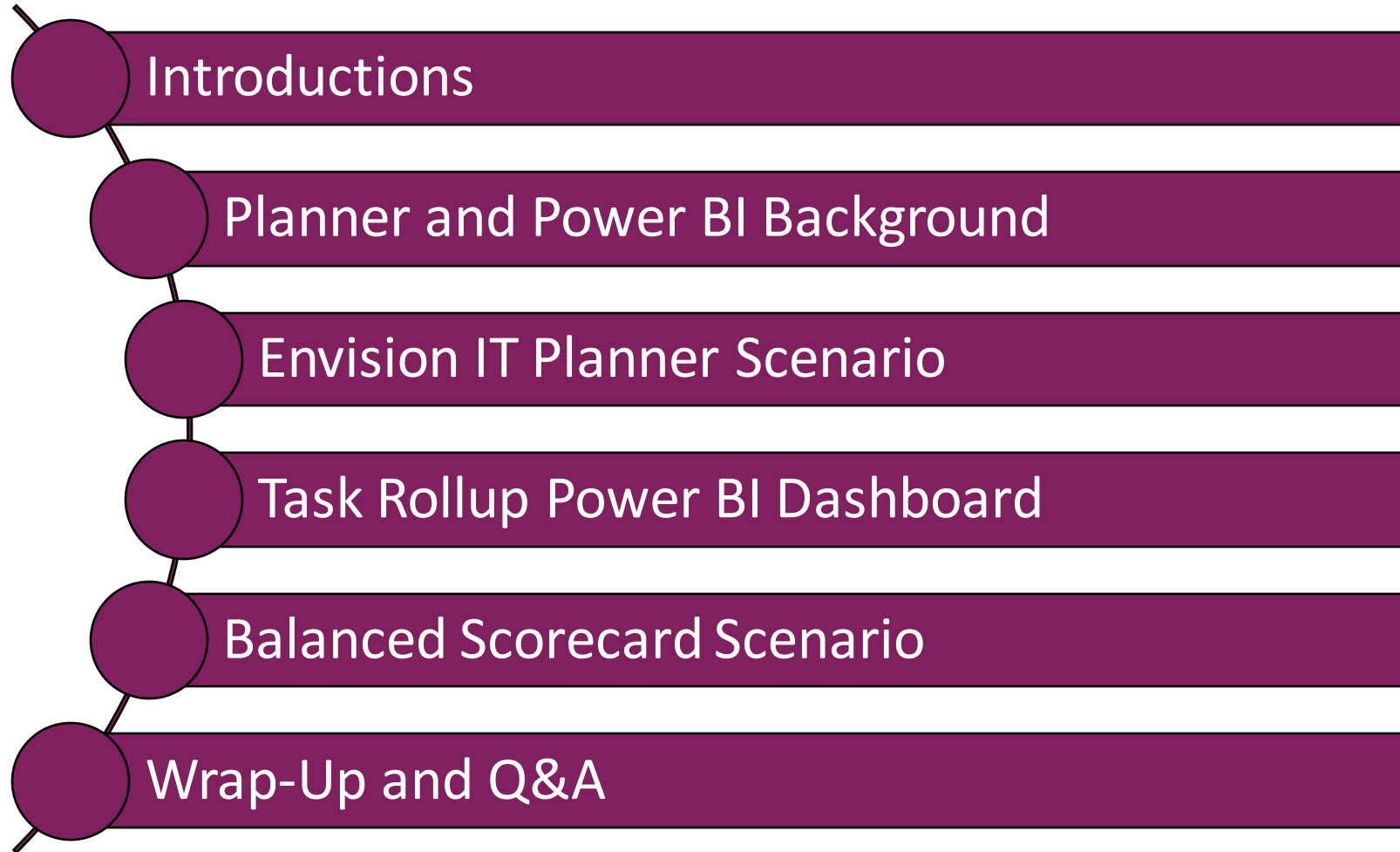




Customers around the Globe



Agenda

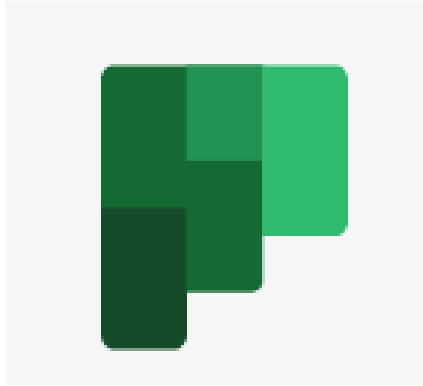


Microsoft Forms Poll

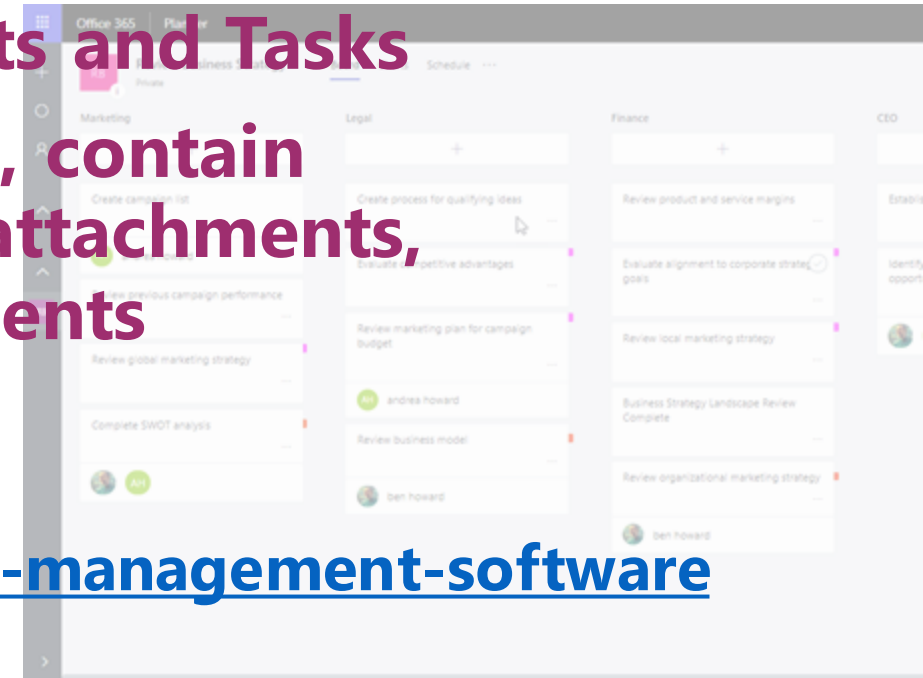


<https://bit.ly/3wrDSSZ>

Planner



- Simple task management tool
- Plan is created with each Microsoft 365 Group
- Plans consist of Buckets and Tasks
- Tasks may be assigned, contain checklists, due dates, attachments, description and comments
- Integrates with To-Do

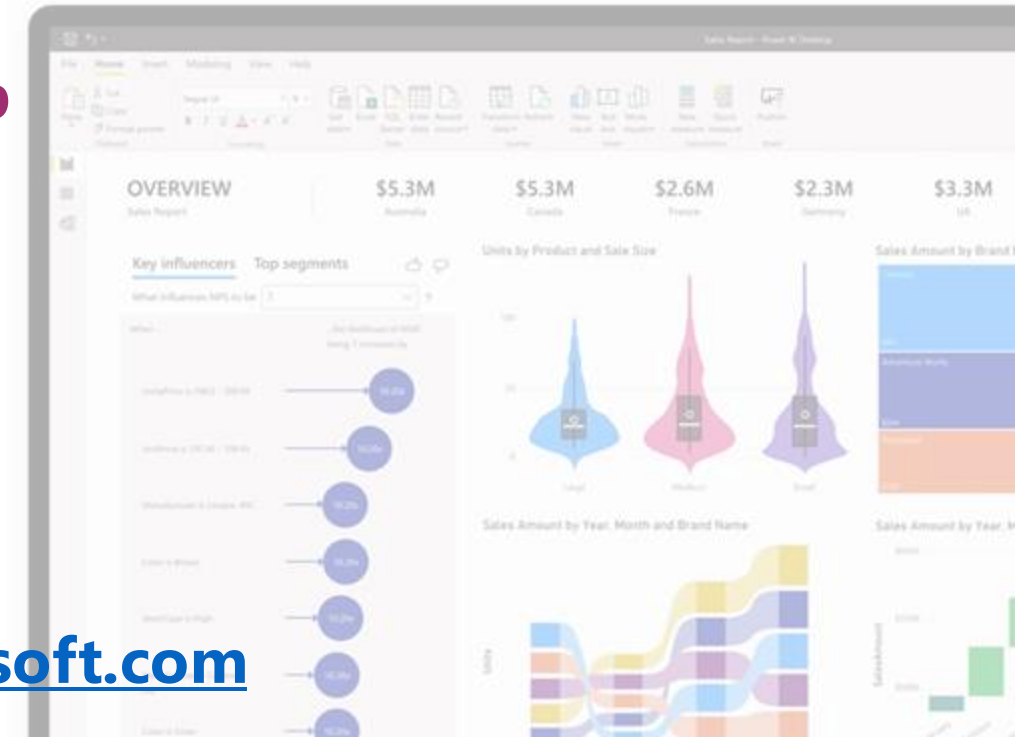


<https://products.office.com/en-us/business/task-management-software>

Power BI

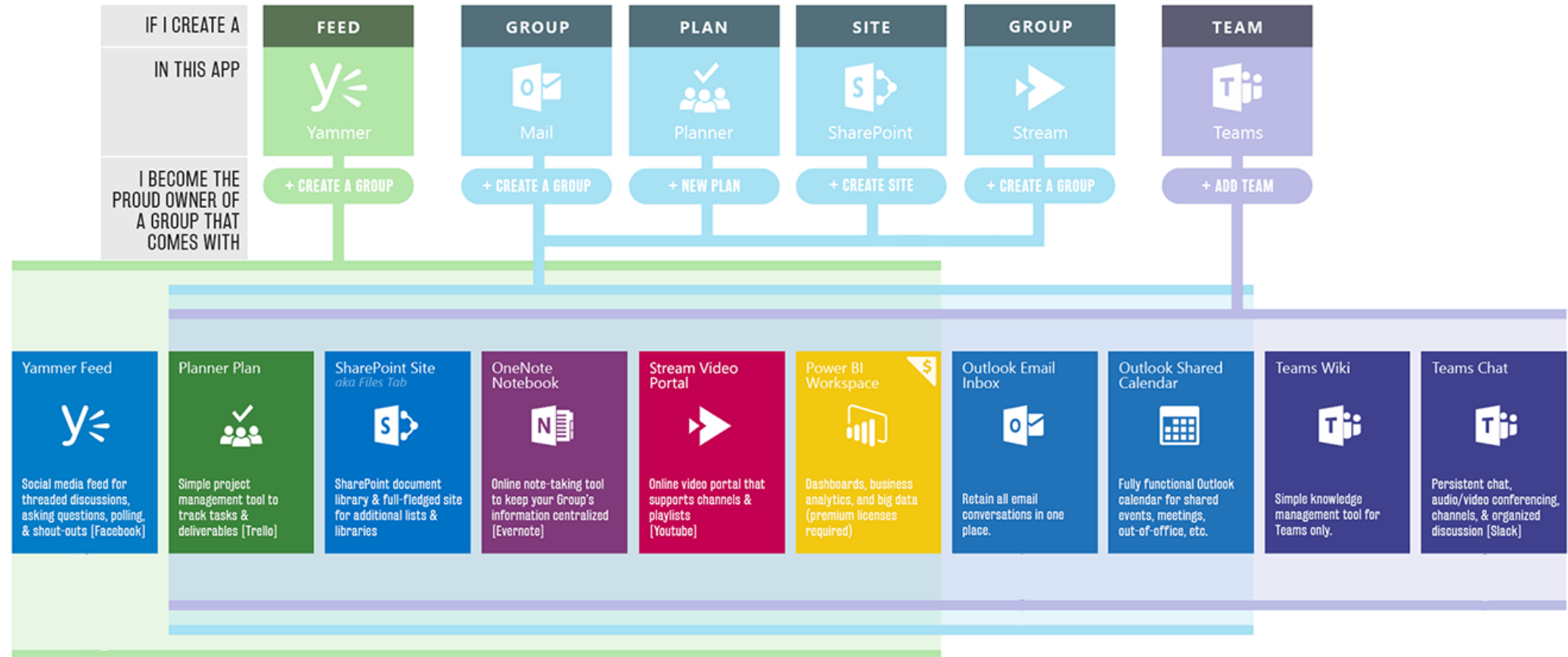


- **Connect data in Excel, corporate data sources, and external services**
- **Design your reports in Excel or Power BI Designer**
- **Publish them to the web**



<https://powerbi.microsoft.com>

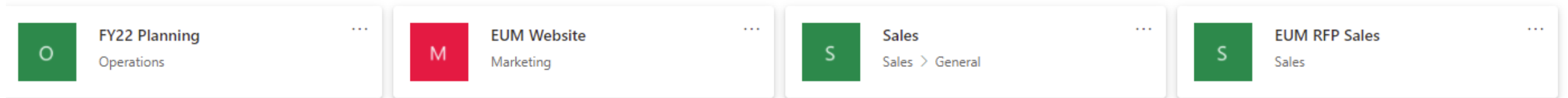
Microsoft 365 Groups



Matt Wade - <https://www.jumpto365.com/infographics/everyday-guide-to-office-365-groups>

Envision IT Planner Scenario

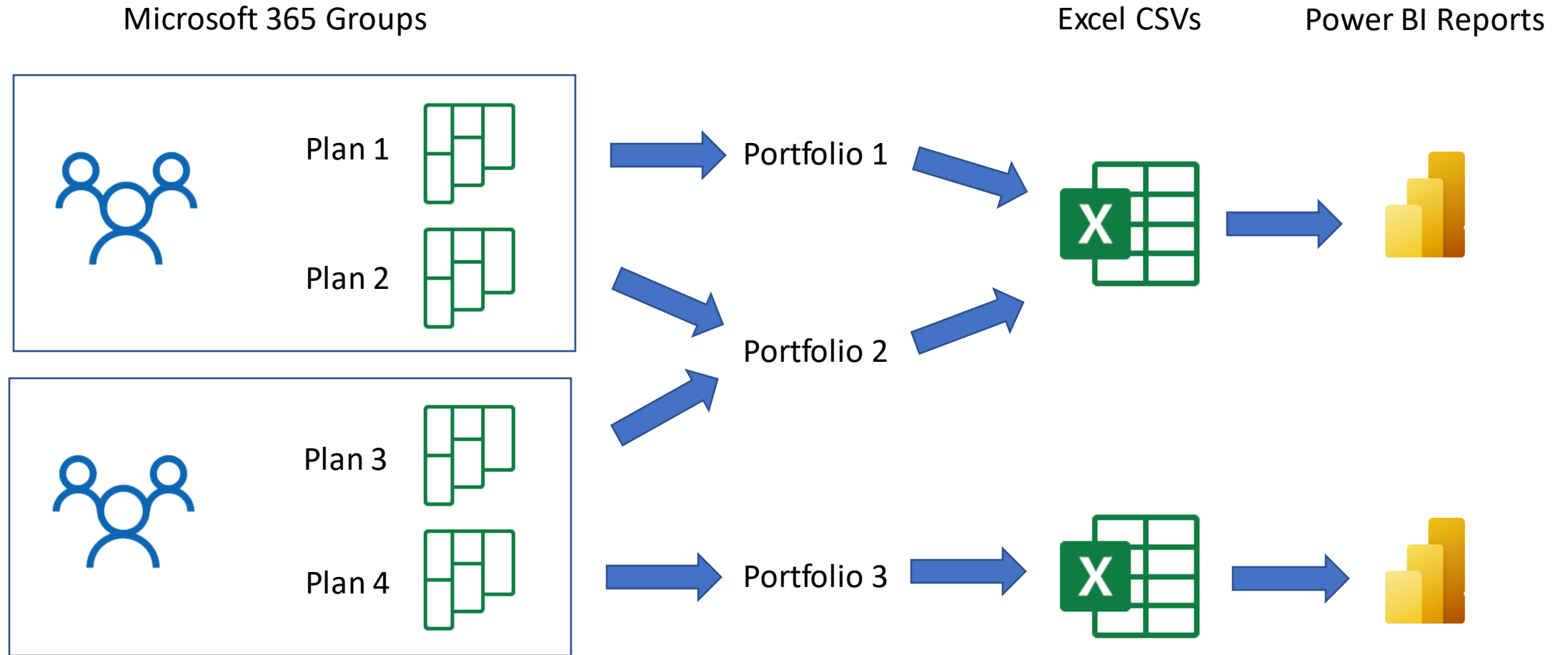
- **Use planner extensively throughout the organization**
 - Marketing
 - Website tasks
 - Content creation
 - Event preparation
 - Fiscal planning
 - Development and Consulting
 - RFP submissions
 - Client projects



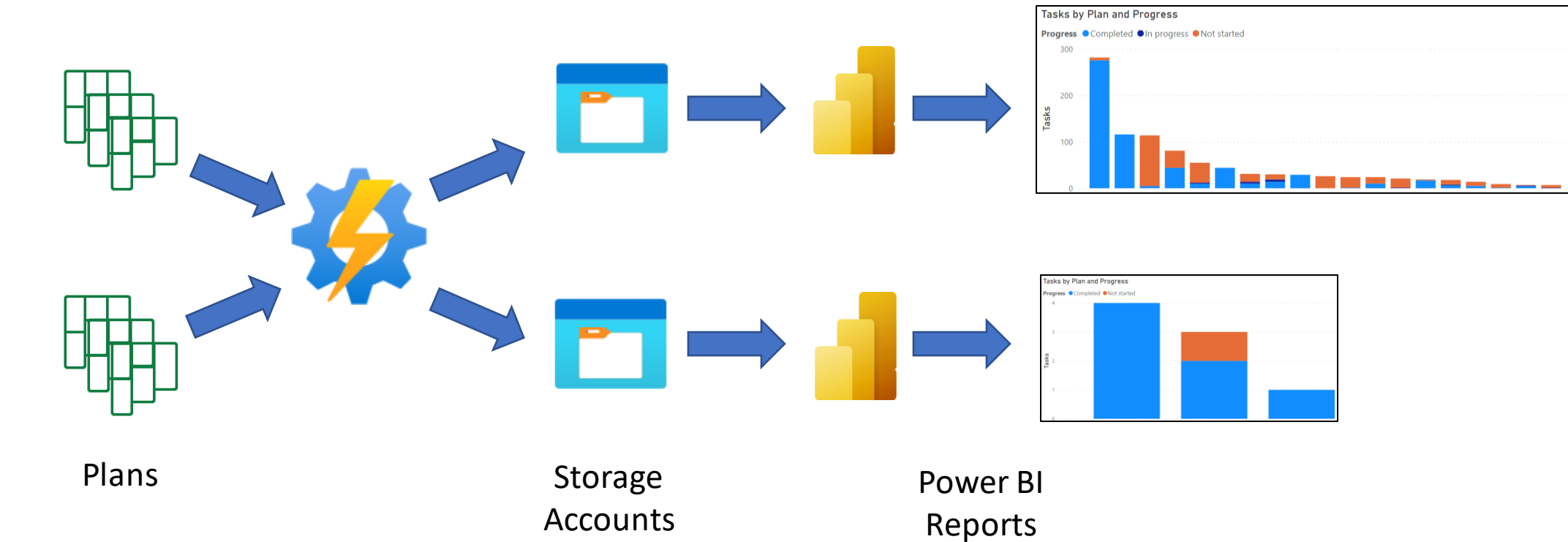
Envision IT Planner Scenario

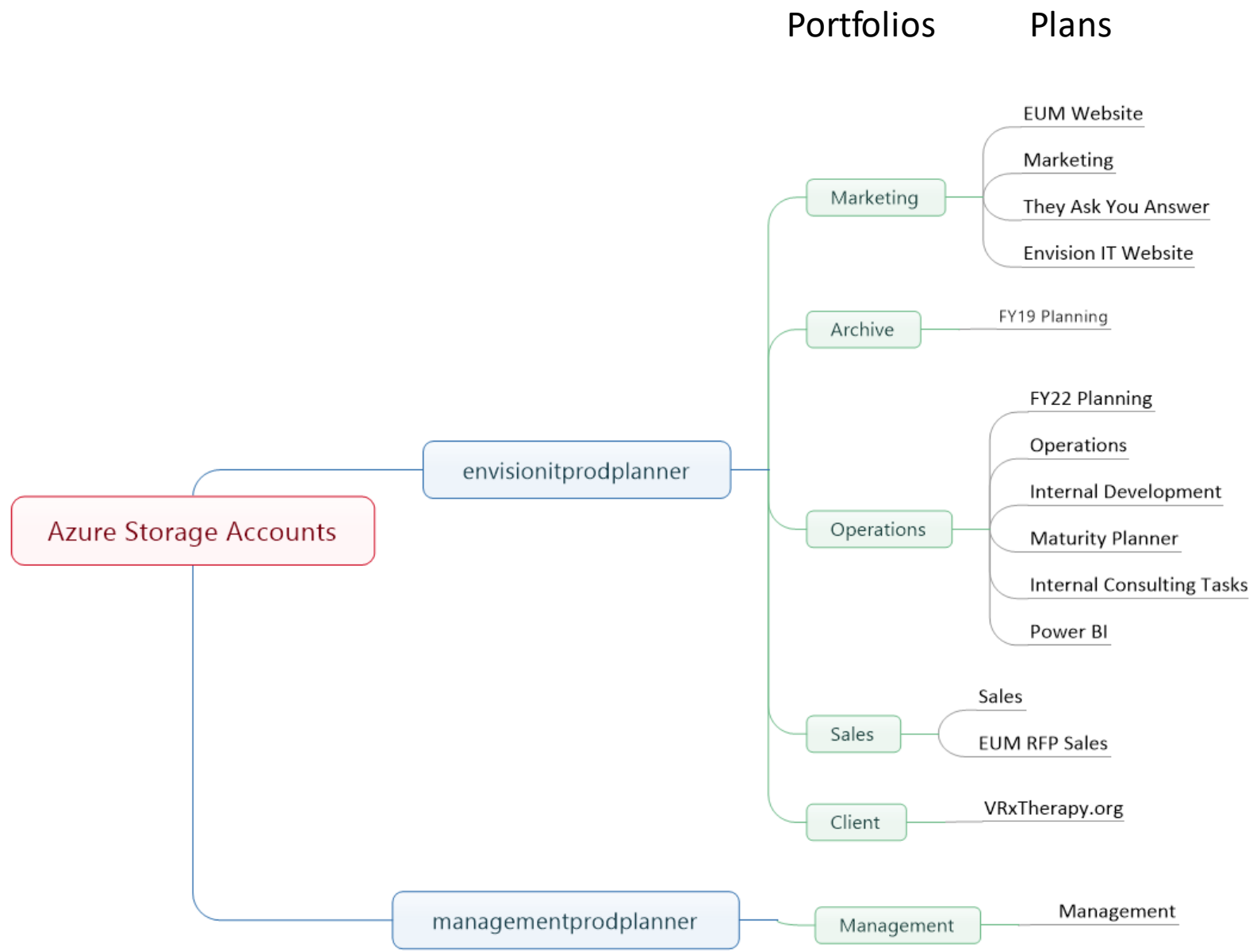
- **Drawbacks we have found:**
 - Challenging to get a single view of all tasks between plans
 - Limited visuals within Planner itself
 - Labeling has limited uses
 - Users shouldn't have access to all plans within the organization ie. Management Portfolio

Planner Rollup Architecture

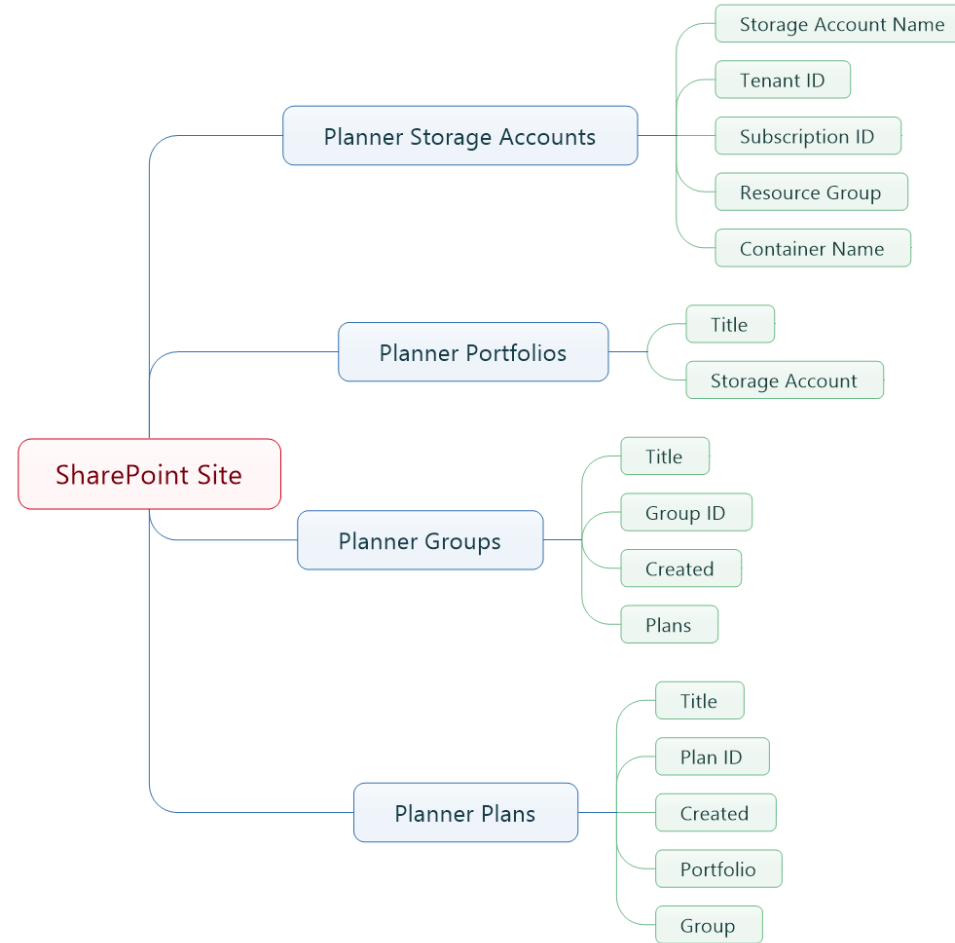


Planner Rollup





Planner Roll Up SharePoint Lists



Planner Plans SharePoint List

- PowerShell script runs and populates all plans that exist within the tenant in the designated SharePoint List
- Script can identify which Group the Plan is connected to
- Does not identify the Portfolio a Plan is connected to
 - Future enhancement to Teams Provisioning solution to support connecting a Plan and Portfolio at time of creation

Planner Plans					
Title ▾	Plan ID ▾	Created Date Ti... ▾	Portfolio ▾	Group ▾	ID ▾
FY19 Planning	-	2/21/2018 6:29 AM	Archive	FY19 Planning	9
FY22 Planning	-	11/11/2020 9:15 AM	Operations	Operations	10
Operations	-	9/3/2020 5:35 AM	Operations	Operations	11

Planner Groups SharePoint List

- Populated by script
- Identifies the number of plans associated with a group

Planner Groups ☆ > 1, 2, 4			
Title ▾	Group ID ▾	Created Date Ti... ▾	Plans ▾ ▾
FY19 Planning	a3b00236-5056-4ae0-8b22-0f24d8a4d278	2/15/2018 1:36 PM	1
Operations	3744d57f-ea59-4aaf-8118-5615b4e14156	4/9/2018 9:39 AM	2
Development	314058b1-0156-4809-bab8-e356b7888af6	4/30/2018 9:43 AM	1
Sales	502cd6e9-6f76-4e03-b1fb-69fb54353341	5/3/2018 10:29 AM	2
Consulting	546ea045-bf13-4b6a-81d0-da699a68c90c	5/4/2018 10:49 AM	2
Management	5ff36e79-c0b2-4879-9ea7-446752ba32a7	5/4/2018 10:58 AM	1

Planner Portfolios SharePoint List

- Managed manually
- Define the portfolios you would like to have and the storage account they should be stored in
- Everything except management goes into envisionitprodplanner Storage Account

Planner Portfolios	
Title ▾	Storage Account ▾
Marketing	envisionitprodplanner
Archive	envisionitprodplanner
Operations	envisionitprodplanner
Sales	envisionitprodplanner
Management	managementprodplanner
Client	envisionitprodplanner

Planner Storage Accounts SharePoint List

- Lists defines the tenant and subscription of where the Storage Account resides
- CSVs that are generated end up in the Storage Account
- Power BI reads this to populate the dashboard

Planner Storage Accounts				
Storage Account Name ▾	Tenant ID ▾	Subscription ID ▾	Resource Grou... ▾	Container Name ▾
envisionititprodplanner	2136 3-3031 4-53- 6100 107000000070	8-177131 3-17713- 5100 000010700707	Planner	data
managementprodplanner	2136 3-3031 4-53- 6100 107000000070	8-177131 3-17713- 5100 000010700707	Planner	data

Roll Up Power BI Dashboard Demo

Filters

Search

Filters on this page

...

completedDateTime

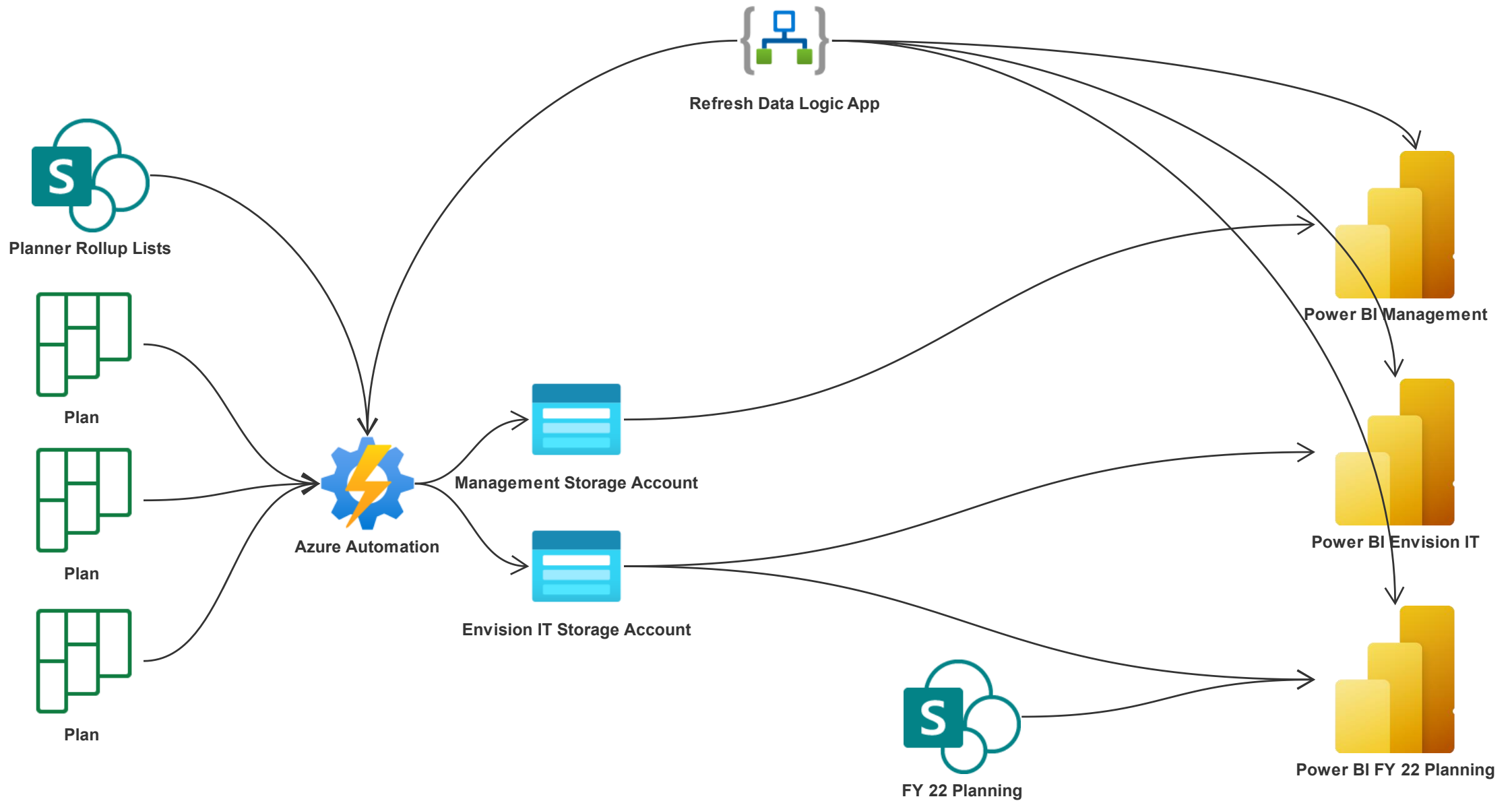
is after 1/1/2021 12:00:00 AM or is blank

Filters on all pages

...

Portfolio

is not Archive



Home >

Planner

Resource group

Search (Ctrl+)

- Overview
- Activity log
- Access control (IAM)
- Tags
- Events
- Settings
 - Deployments
 - Security
 - Policies
 - Properties
 - Locks
- Cost Management
 - Cost analysis
 - Cost alerts (preview)
 - Budgets
 - Advisor recommendations
- Monitoring
 - Insights (preview)
 - Alerts

+ Add Edit columns Delete resource group Refresh Export to CSV Open query Feedback Open in mobile Assign tags Move Delete Export template

Essentials

JSON View

Subscription (change) : Envision IT Prod
Subscription ID : aadc7ab7-bc3e-4710-9f68-62094970c1d4
Deployments : 4 Succeeded
Location : Canada Central
Tags (change) : Click here to add tags

Filter for any field... Type == all Location == all Add filter

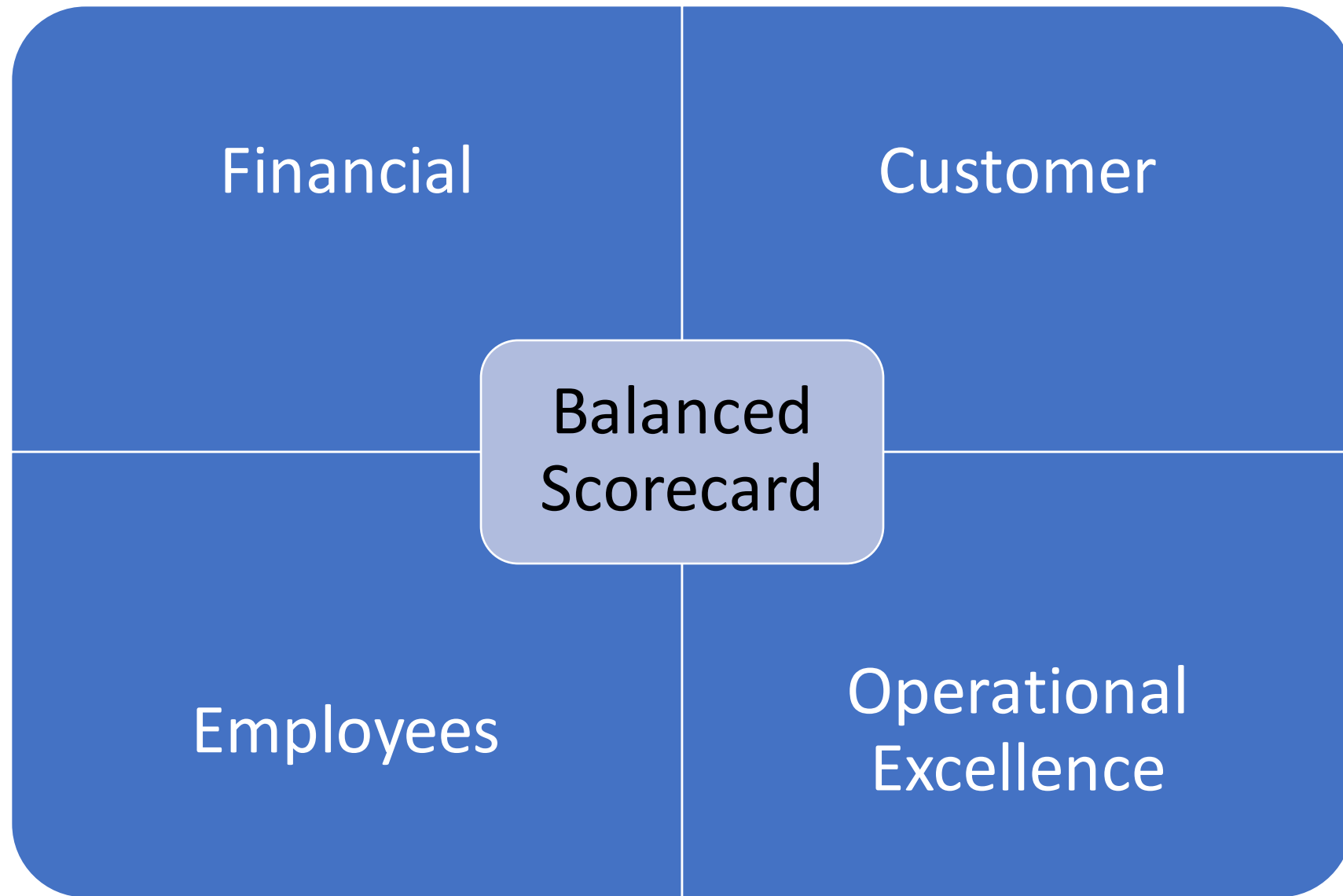
Showing 1 to 7 of 7 records. Show hidden types No grouping List view

<input type="checkbox"/> Name ↑↓	Type ↑↓	Location ↑↓	
<input type="checkbox"/> azureautomation	API Connection	Canada Central	...
<input type="checkbox"/> powerbi	API Connection	Canada Central	...
<input type="checkbox"/> PlannerReader	Automation Account	Canada Central	...
<input type="checkbox"/> Refresh-Planner-Power-BI	Logic app	Canada Central	...
<input type="checkbox"/> ReadPlannerData (PlannerReader/ReadPlannerData)	Runbook	Canada Central	...
<input type="checkbox"/> envisionitprodplanner	Storage account	Canada Central	...
<input type="checkbox"/> managementprodplanner	Storage account	Canada Central	...

FY 22 Balanced Scorecard

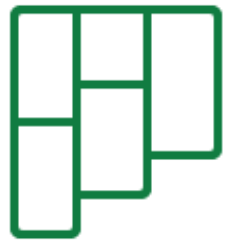
SWOT







Planner



FY 22 Balanced Scorecard Demo

Summary Points

- **Planner is a great tool for managing group tasks**
- **Power BI builds rich data visualizations**
- **With some additional IP, they play well together**
- **Being able to visualize tasks across Plans is extremely valuable**
- **Even within a single Plan, Power BI can mash the data up in interesting ways**
- **Security is important, who can see what tasks**

Additional Webinars



Open Source Approach to Teams Provisioning

June 1, 2021
12 pm – 1 pm EST



Managing Complex Projects with Microsoft 365

June 8, 2021
12 pm – 1 pm EST

Register for all upcoming events at <http://eum.co/resources/events>

Thank you!

Questions?

