Power BI Dashboards Overview

Video has been removed from this PDF. Visit the BrightWork 365 knowledge base to view.
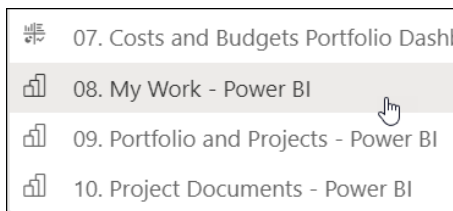
Power BI Dashboards Introduction

Project teams are generating more data than ever. In order to achieve success, project managers need to compile all of this information into high-level, easy-to-consume Dashboards. Using Power BI dashboards and reports in the Power Platform, BrightWork 365 helps senior executives and PMO leads to easily access, analyze, and action this data.

With BrightWork 365 out-of-the-box dashboards for project management you can:

- Use Power App Dashboards to compile and consume your project data
- Leverage Power BI Dashboards for project portfolio management
- Connect your data to Power BI and Power Apps

To view Power BI dashboards, click into the Home section of **Main Nav > Dashboards**, and use the Dashboard drop-down to choose the desired Power BI Dashboard. Power BI Dashboards are differentiated from Power Apps Charts in the drop-down by having the words **Power BI** in their titles.

Additional Power BI reports can be added as desired through customization (contact your Customer Success Partner for more information).
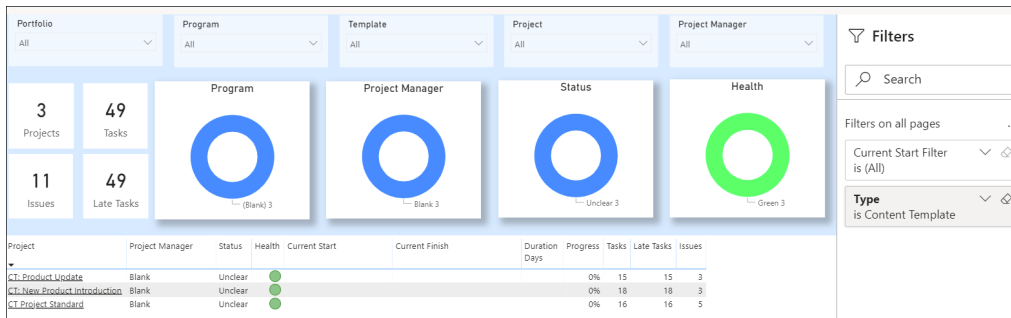
> **Note**
> - In order to view or use BrightWork 365 Power BI Dashboards, users must have a Microsoft Power BI Pro license or E5/G5 plan, and at least **Viewer** permission for the relevant Power BI Workspace.
> - Specific examples of BrightWork 365 Power BI Dashboards can be found throughout this Knowledge Base in relevant articles including Portfolio & Program Status Reporting, Resource Utilization, Project Documents Dashboard and Work Allocation Reports.
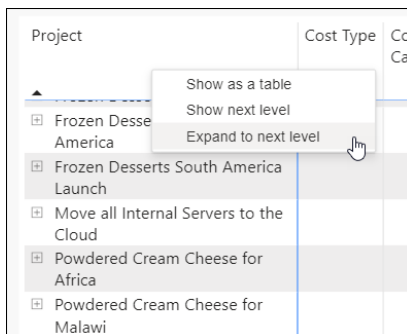
Navigating Power BI Dashboards

> **Tip** You can improve Power BI readability by collapsing the Filters pane on the right side of the screen and the left nav.
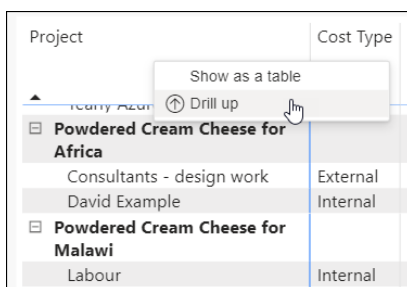
The Power BI dashboards include detailed interactive reports related to various elements of the system including Portfolios, Programs, Templates, Projects, and Project Managers. The reports can be filtered to further narrow down the returned results either by using **Ctrl-Click** to choose several chart objects or the checkboxes within an object, or with the **Filters** configuration options on the side of the screen.
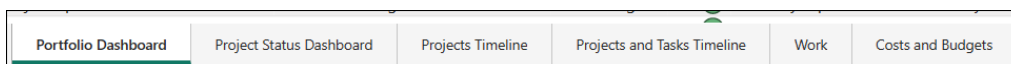

To expand all report list groupings, right-click on the grouped column (e.g.,**Project**) and click **Expand to next level**.

To collapse all report list groupings, right-click on the grouped column (e.g., **Project**) and click **Drill up**.
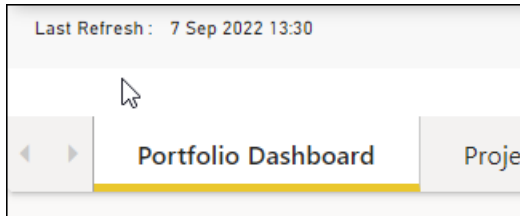

Along the bottom of Power BI Dashboard screens are tabs for additional report focus options - below is an example from the **Portfolio and Projecta - Power BI** Dashboard:
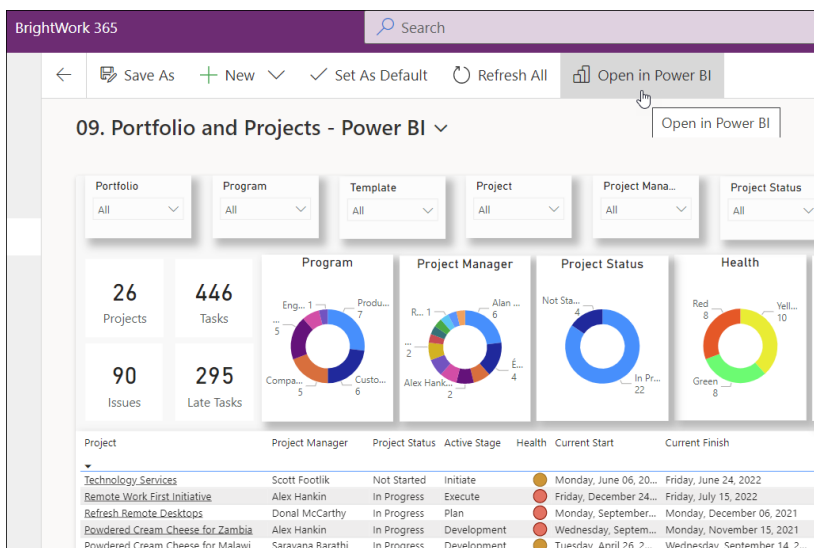

You can view the **Last Refresh** time of reports at the bottom of report pages. BrightWork

does not force refreshes after data changes, the refreshes will occur on the schedule your administrator configures in your organization's Power BI admin settings.
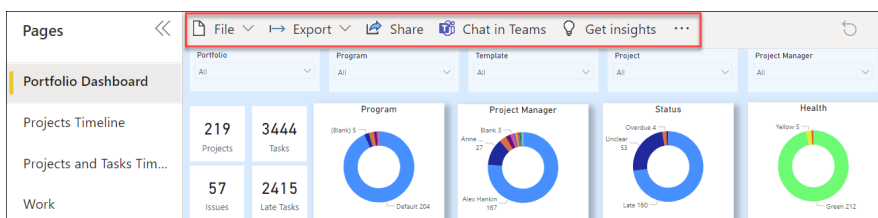

Open in Power BI Service

Microsoft **Open in Power BI Service** offers additional options to interact with BrightWork 365 reports. Users can conveniently access the service by clicking **Open in Power BI** on a BrightWork 365 Power BI dashboard page.

After navigating to the Power BI page, users are presented with menu options along the top of the web page including File (Print, Embed), Export (PDF, PowerPoint), Share (Copy link, Mail, Teams), and Chat in Teams.

For more information see Customize Power BI Dashboards and these Microsoft resources:

- https://docs.microsoft.com/en-us/power-bi/
- https://docs.microsoft.com/en-us/learn/powerplatform/power-bi?WT.mc_id=powerbi_landingpage-docs-link