

THE POWER OF BI WITH MICROSOFT POWER BI
SUITE OF BUSINESS ANALYTICS TOOLS

Introductions



CLARITY CONSULTANT

KHUSHBOO KUMARI

2014 - TODAY

About Me

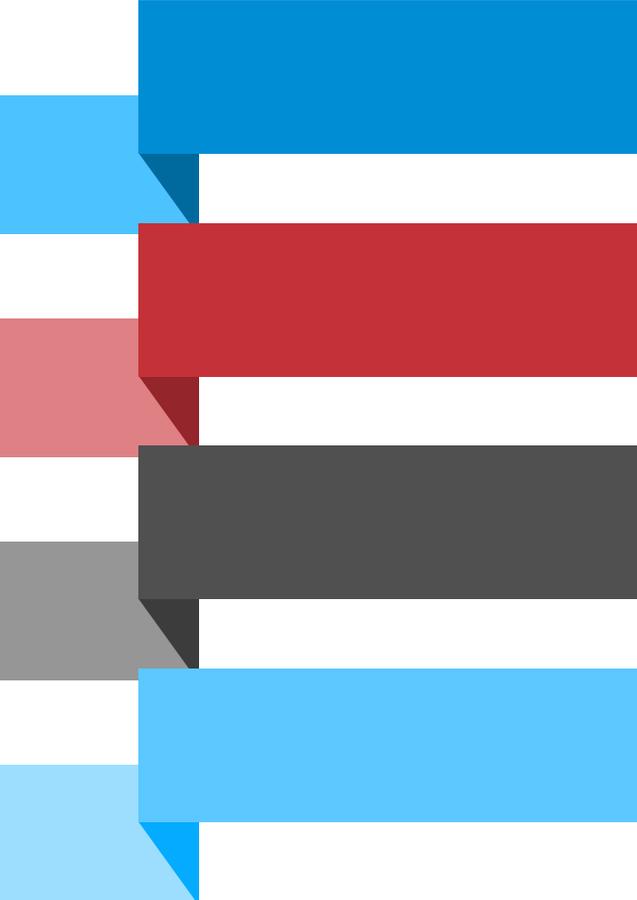
Experienced in developing and supporting technical and functional solutions on Clarity. I have extensive exposure of working on different modules of Clarity PPM, Jaspersoft and Power BI .

Agenda

The power of BI with Microsoft Power BI

Session Agenda

The power of BI with Microsoft Power BI



Power BI and Its Features

Power BI Service, Report Server

Power BI Desktop

Integrating BI with PPM application

Session Agenda

The power of BI with Microsoft Power BI

Power BI and Its Features

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What is Power BI ?

Suite of business analytics tools that deliver insights throughout your organization

Power BI is a collection of software services, apps, and connectors that work together to turn your unrelated sources of data into coherent, visually immersive, and interactive insights. Your data may be an spreadsheet, or a collection of cloud-based and on-premises hybrid data warehouses.



Features of Power BI Report



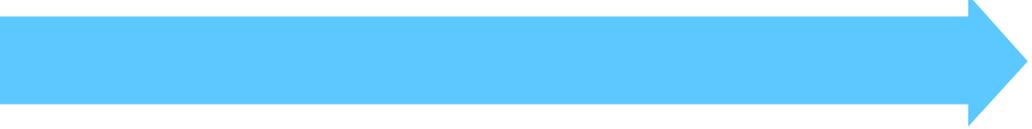
Simple and fast



Natural-language queries



Quick Insights



Decorate Report



Pinning a report

Session Agenda

The power of BI with Microsoft Power BI

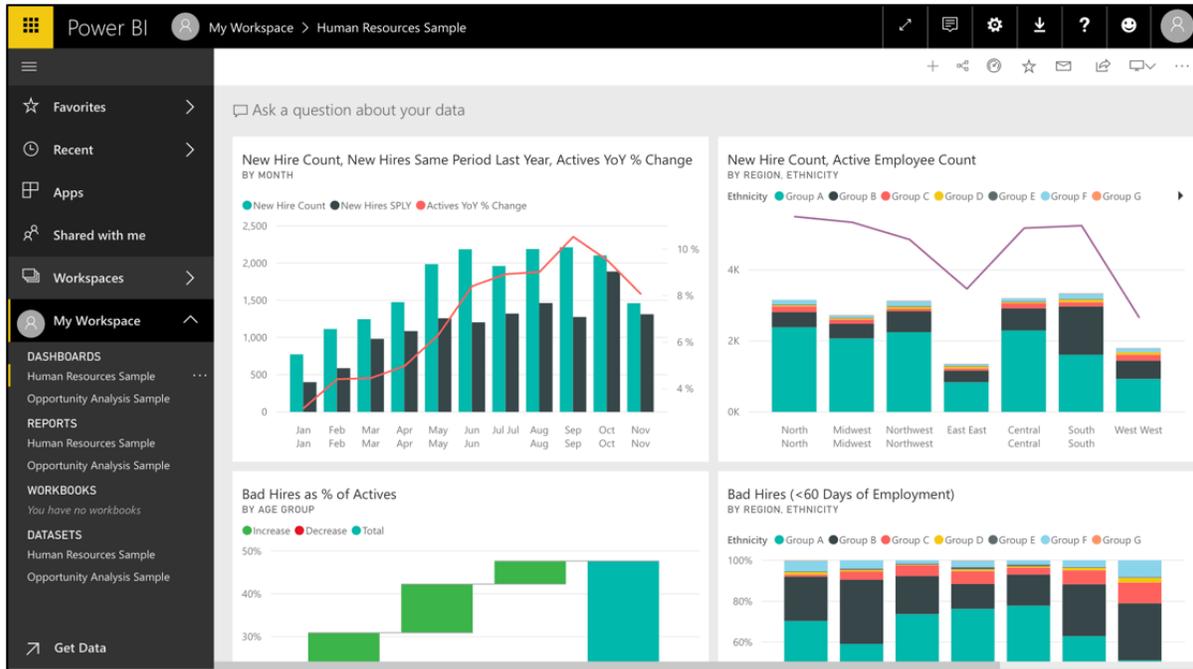
Power BI and Its Features

Power BI Service, Report Server

Power BI Desktop

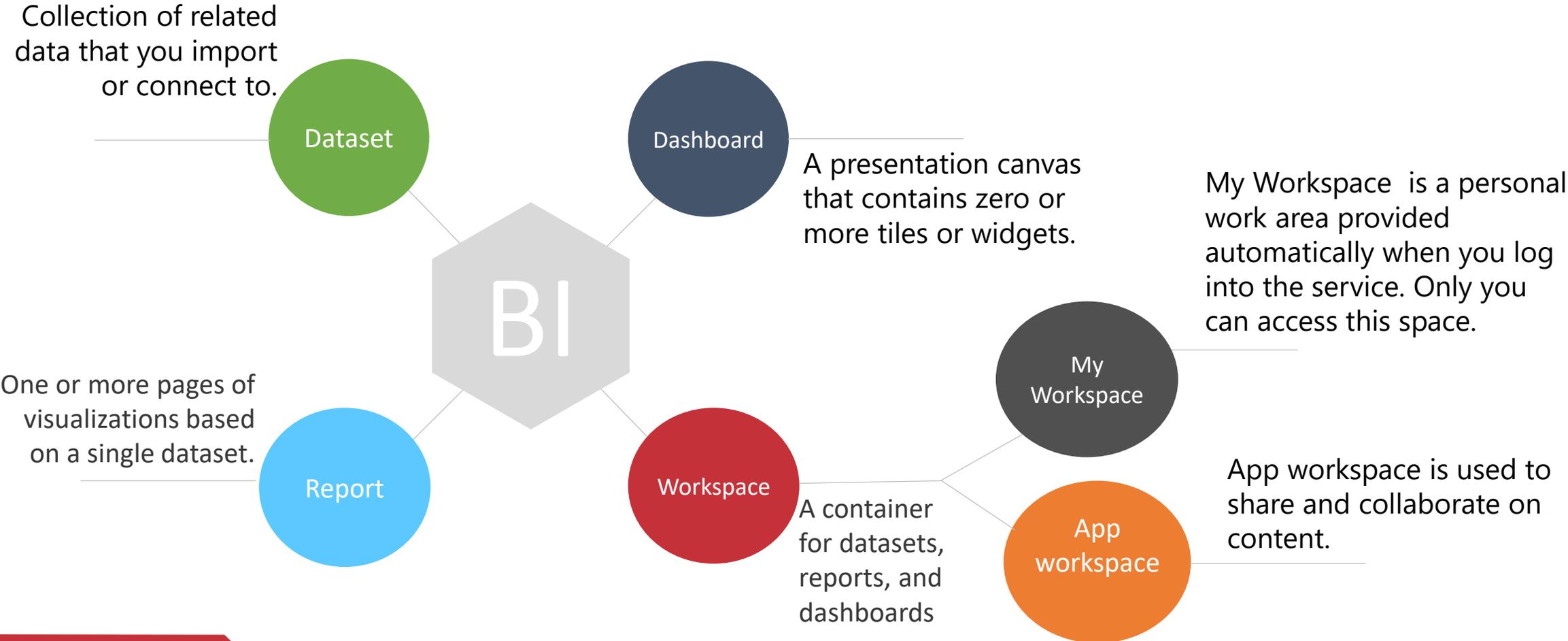
Integrating BI with PPM application

Power BI Service



- Cloud-based platform
- Users can access the service through a web-based portal
- Allows to connect to customer data, transform and build reports.

The Primary Components of Power BI Service



Power BI Report Server

On-premises solution

- Hosted within an own data centers.
- The Report Server web portal allows for report management.
- The portal also allows access to all your reports and KPIs.
- Like the Power BI service, Power BI Report Server works in conjunction with Power BI Desktop. You can create reports and then save them to Power BI Report Server.

Session Agenda

The power of BI with Microsoft Power BI

Power BI and Its Features

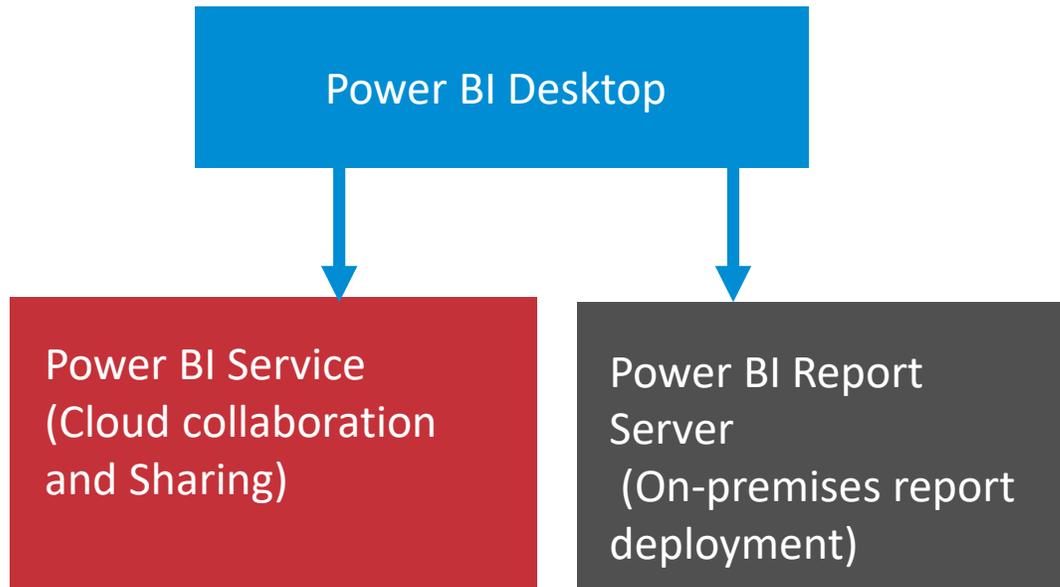
Power BI Service, Report Server

Power BI Desktop

Integrating BI with PPM application

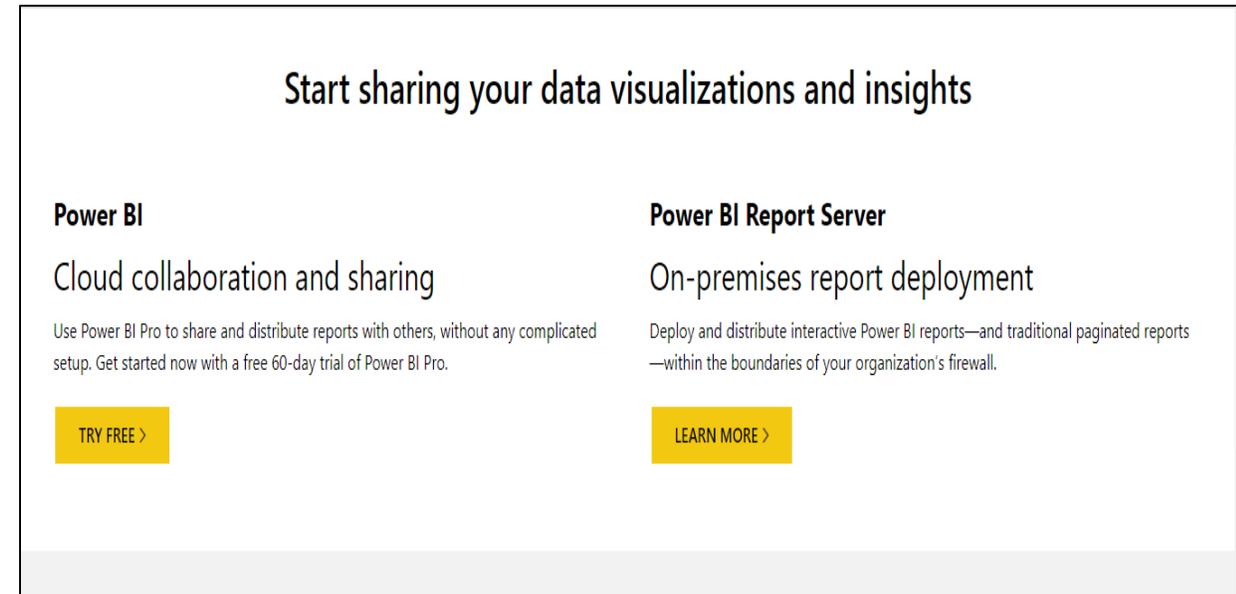
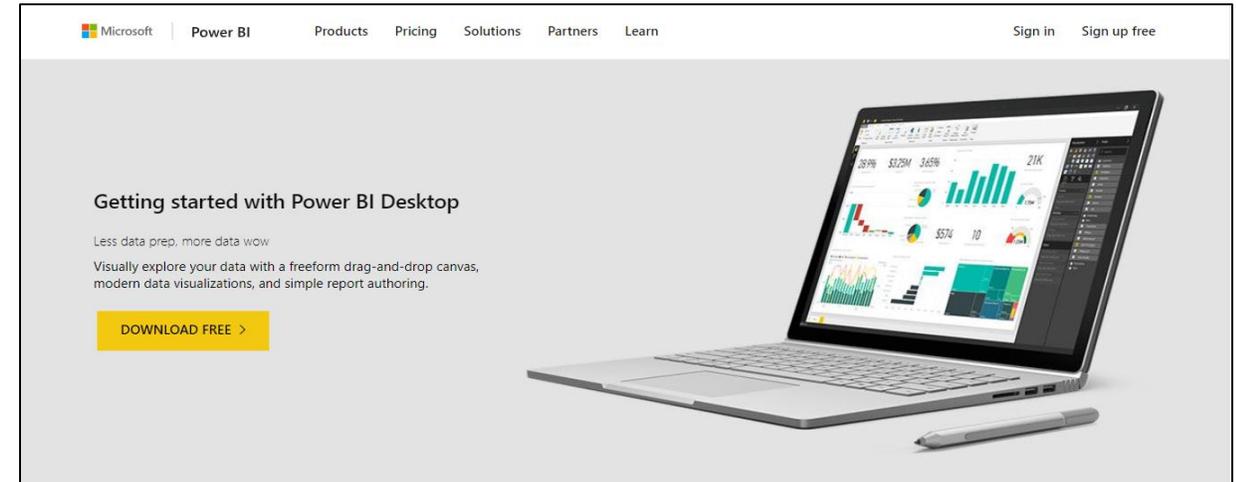
Choose how to get started with Power BI

Power BI is present in two different versions:



If want to work with the desktop version then start downloading it by clicking on the download button or just go through the below link:

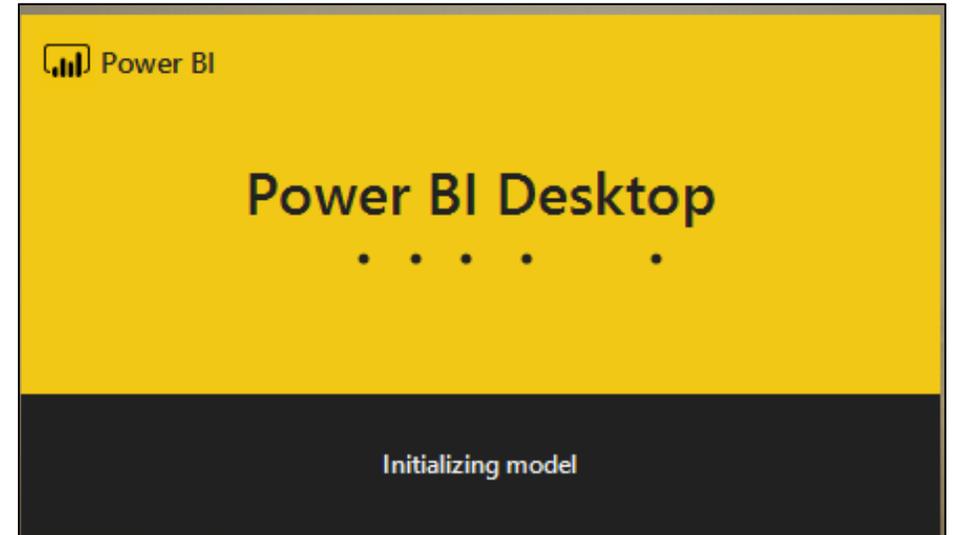
<https://powerbi.microsoft.com/en-us/downloads/>



Power BI Desktop

Power BI Desktop is a downloadable application that Microsoft provides for 30 days free trial. Also available free along with typical Office 365 subscription.

Build data queries ,create reports and visualizations, and publish the consolidated report packages to the Power BI service or Power BI Report Server.



Power BI Desktop

Power BI desktop www.powerbi.com

- Download the Desktop setup, start the installation. Open the Power BI Desktop and sign in into the application using the organization email address. E.g. a.x@abc.com.

The image shows a composite of three elements related to Power BI. On the left is a screenshot of the Power BI website homepage, featuring a yellow background and the headline "Business intelligence like never before". Below the headline is a "START FREE" button. In the center is a screenshot of the Power BI Desktop application interface, displaying various data visualizations such as a bar chart for "Campaign revenue vs target" (showing 683.2K), a gauge for "Confidence in prediction" (85%), and a bar chart for "Response status". On the right is a screenshot of the Power BI Desktop sign-in screen, which includes a "Power BI Desktop" header, navigation options like "Get data", "Recent sources", and "Open other reports", a "Sign in to collaborate and share content" section with "Try free" and "Sign in" buttons, and a sidebar with links for "WHAT'S NEW", "POWER BI BLOG", "FORUMS", and "TUTORIALS".

- Please note that you cannot provide your personal email address.

First look of Power BI Desktop

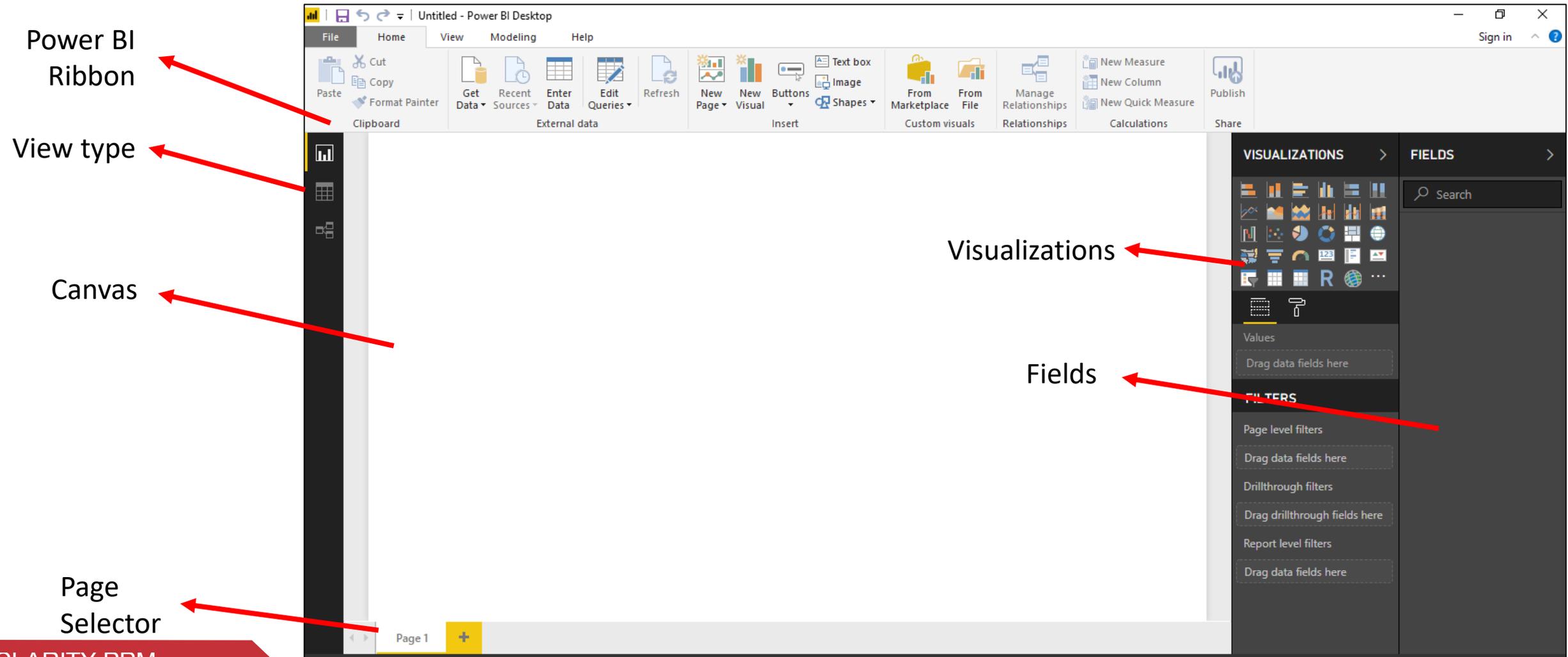
The screenshot displays the Power BI Desktop application window. The title bar reads "Untitled - Power BI Desktop" and the user name "Khushboo Kumari" is visible in the top right corner. The interface is divided into several sections:

- Left Panel (Navigation):** Contains a "Clipboard" section with "Cut", "Copy", "Paste", and "Format Paint" options. Below it are icons for "Home", "View", "Modeling", and "Help". A list of recent reports is shown, including "odata.pbix", "Web.pbix", "Resource actuals.pbix", and "SQL.pbix", each with a file path starting with "E:\> KK > Projects > Seminar > BI >...".
- Center Panel (Start Screen):** Features a large yellow background with the text "Power BI Desktop". Below this, there are options to "Get data" and "Recent sources". A central video player shows a preview of a report with a play button overlay. Below the video, there are four video thumbnails with titles: "Building reports", "Query view concepts", "Uploading your reports", and "Create a Phone report". A "VIEW ALL VIDEOS" link is located at the bottom right of this section.
- Right Panel (Announcements):** Contains a section titled "WHAT'S NEW" with the text "Take a look at what's new and improved in Power BI in this month's update." Below it is a "FORUMS" section with the text "Visit the Power BI Forum to ask questions or interact with other users in the Power BI community." At the bottom right, there is a dark grey box for the "Microsoft Business Applications Summit" on "June 10 - 11 | Atlanta, GA", with the text "Learn directly from the engineers behind Power BI and get a sneak peek at what's new and next." and a "Register today" button with a right-pointing arrow.

At the bottom of the window, there is a "Page 1" indicator and a "PAGE 1 OF 1" label in the bottom left corner.

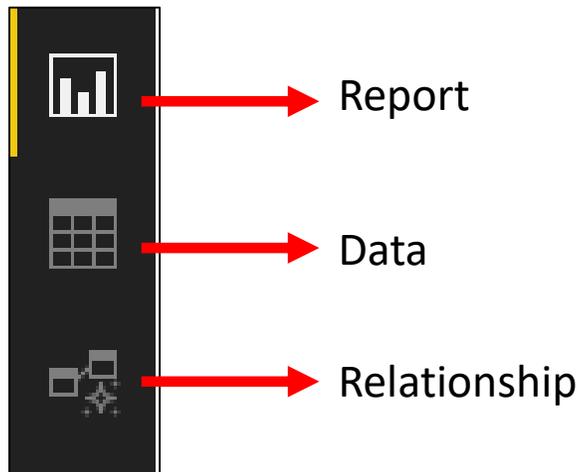
Power BI Pane

Once you start up with the application the below screen will appear.



Power BI Desktop Categories

Can be divided into three categories for how you interact with data and create reports



Report view: A canvas for building and viewing reports based on the datasets defined in Data view.

Data view: It helps you to inspect, explore, and understand data in your Power BI Desktop model. With Data View, you're looking at your data after it has been loaded into the model.

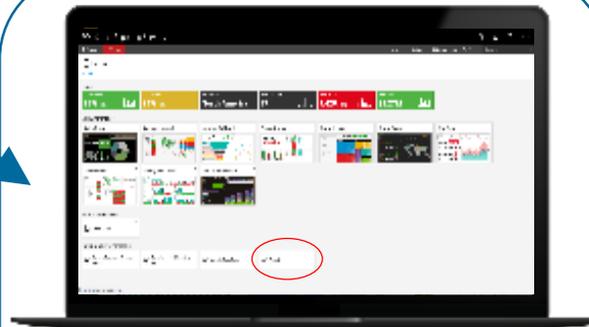
Relationships view: Identified relationships between the datasets defined in Data view. When possible, Power BI Desktop identifies the relationships automatically, but you can also define them manually.

BI Report Development

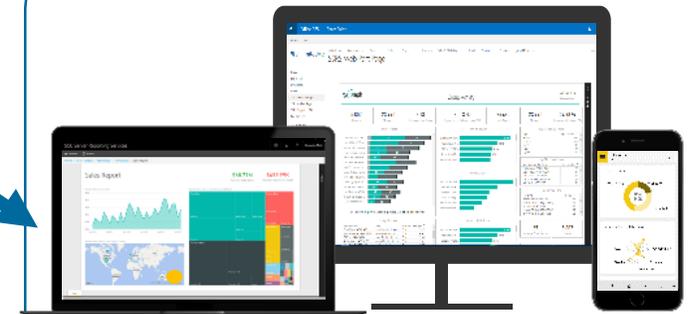
Development and Publishing a Power BI Report



Creation of Reports
in Power BI Desktop



Publish the Reports to
Power BI /Report Server



View and interact in Power BI
Mobile or Web browser.

Sub Topics

Power BI Desktop



Connecting to Data Source



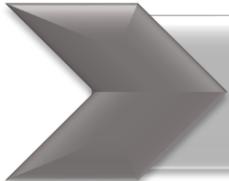
Publish from Power BI Desktop

Sub Topics

Power BI Desktop



Connecting to Data Source



Publish from Power BI Desktop

Connecting to Data Source

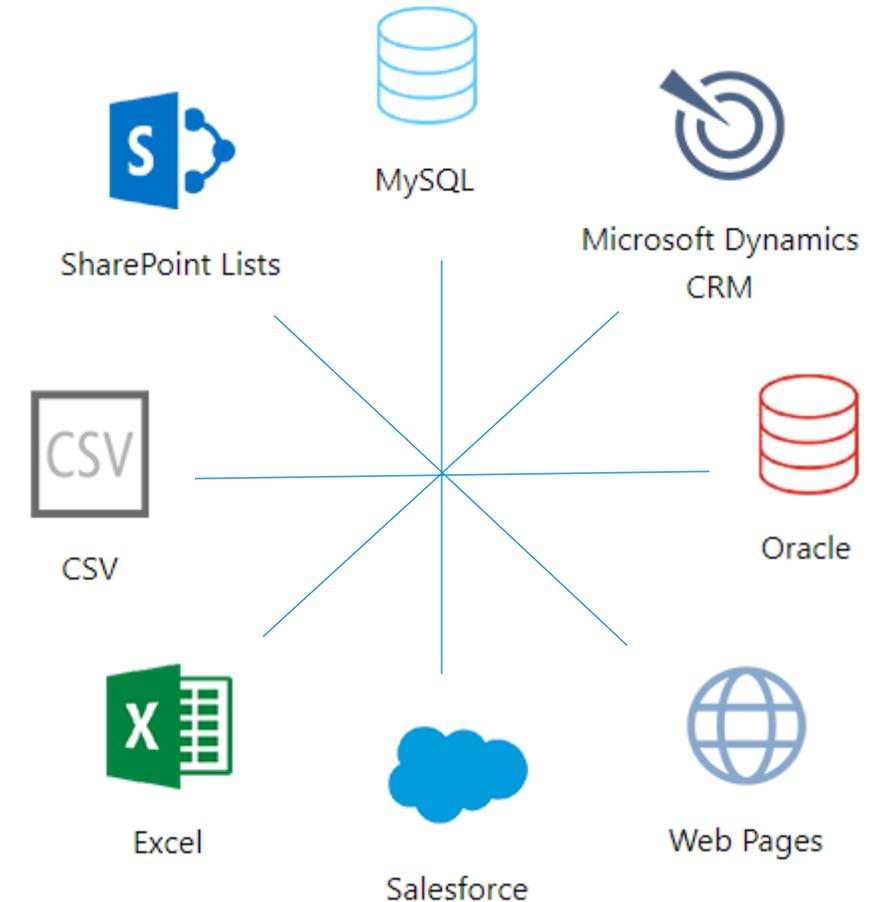
Power BI provide us the wide range of data sources to connect.

OData Feed

File Based (Excel, CSV, XML, JSON)

Databases (Oracle, SQL Server, MySQL etc.)

Online Services and many more..



Sub Topics

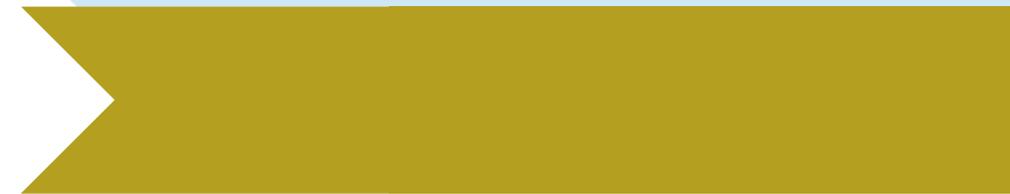
Connecting to Data Source



OData



SQL



Web

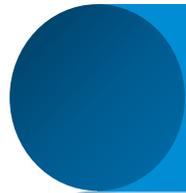


Excel

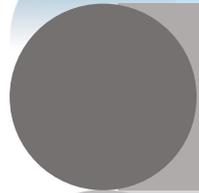


Sub Topics

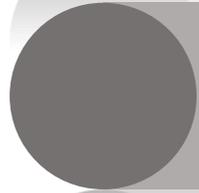
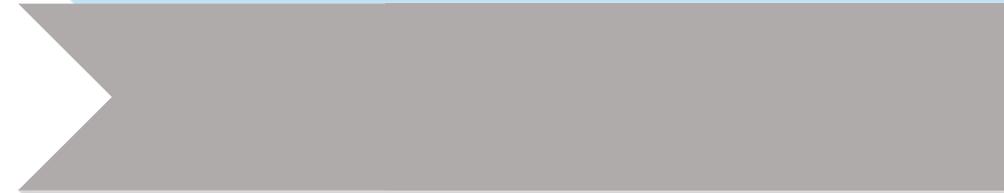
Connecting to Data Source



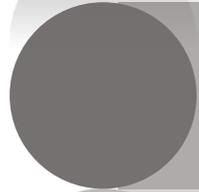
OData



SQL



Web



Excel



Connecting to OData

Broadcom has extended their SaaS offering of Clarity PPM with an OData connection.

Steps to connect with Clarity data warehouse through OData in Power BI :

01

Login to Clarity > Administration > General Settings > Data Warehouse OData Service.

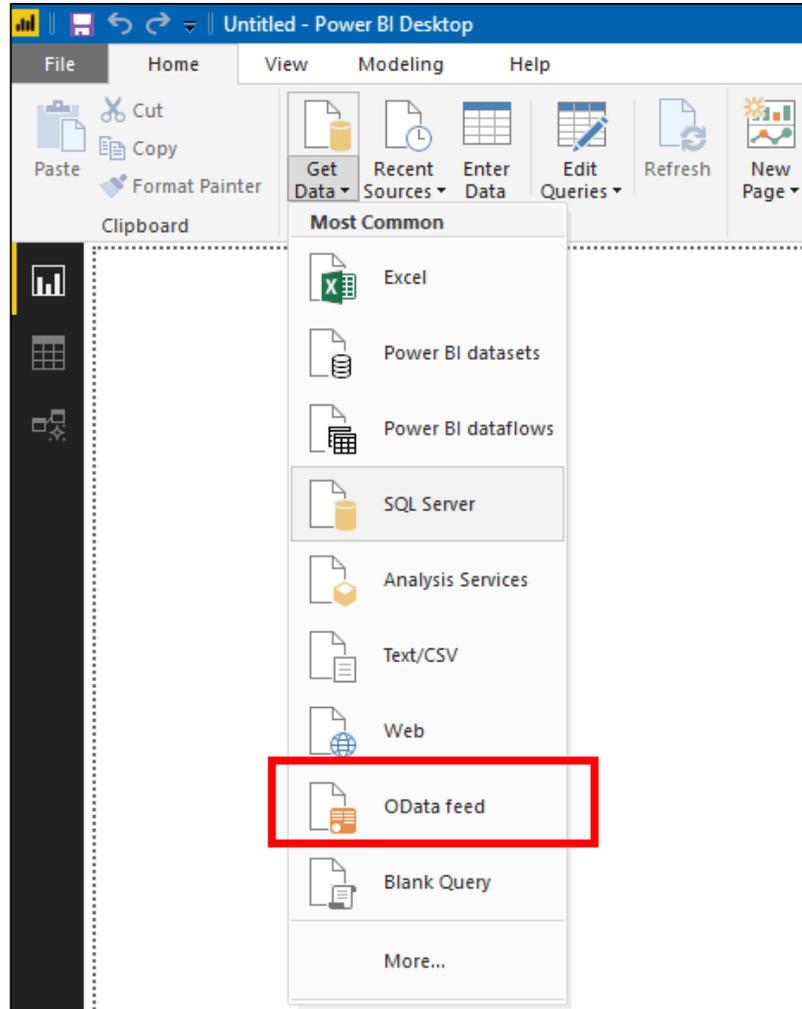
The screenshot shows the Clarity PPM Administration interface. On the left, a navigation menu lists several options: General Settings, System Options, Site Links, Client Downloads, Feature Enablement, Data Warehouse OData Service (highlighted with a red box), Remote API Setup, and Integrations. A red arrow points from the highlighted menu item to the right-hand panel. The right-hand panel is titled "Data Warehouse OData Service" and displays the following configuration details:

Data Warehouse OData Service	
Data Warehouse OData v2 Endpoint URL	http://p[REDACTED].ca.com/api/odata/[REDACTED]
Data Warehouse OData v4 Endpoint URL	http://p[REDACTED].ca.com/api/odata4/[REDACTED]
OData Authenticator	[REDACTED]

Here we can see the OData Endpoint URL and OData Authenticator, which are needed to setup the connection in Power BI Desktop.

02

Open Power BI Desktop and choose OData feed in the Get Data options.



03

The below pop-up opens and here under URL we need to paste the Endpoint URL .

OData feed

Basic Advanced

URL

http://ppm.pemari.ca.com/api/odata4/...

OK Cancel

04

Enter your login details to finalize the connection. Select Basic and provide your Clarity PPM User name followed by | and the OData Authenticator retrieved earlier (e.g. username|odataauthenticator). Finish with your Clarity PPM password and connect.

OData feed

http://ppm.pemari.ca.com/api/odata4/...

The password won't be encrypted when sent.

User name

username|odataauthenticator

Password

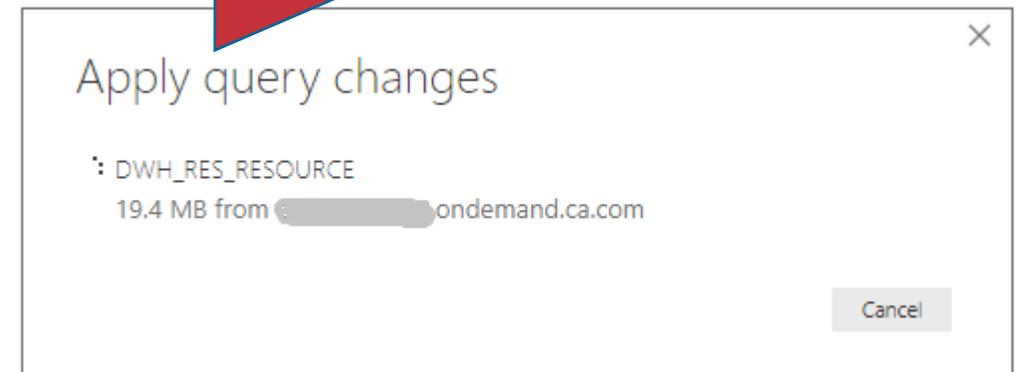
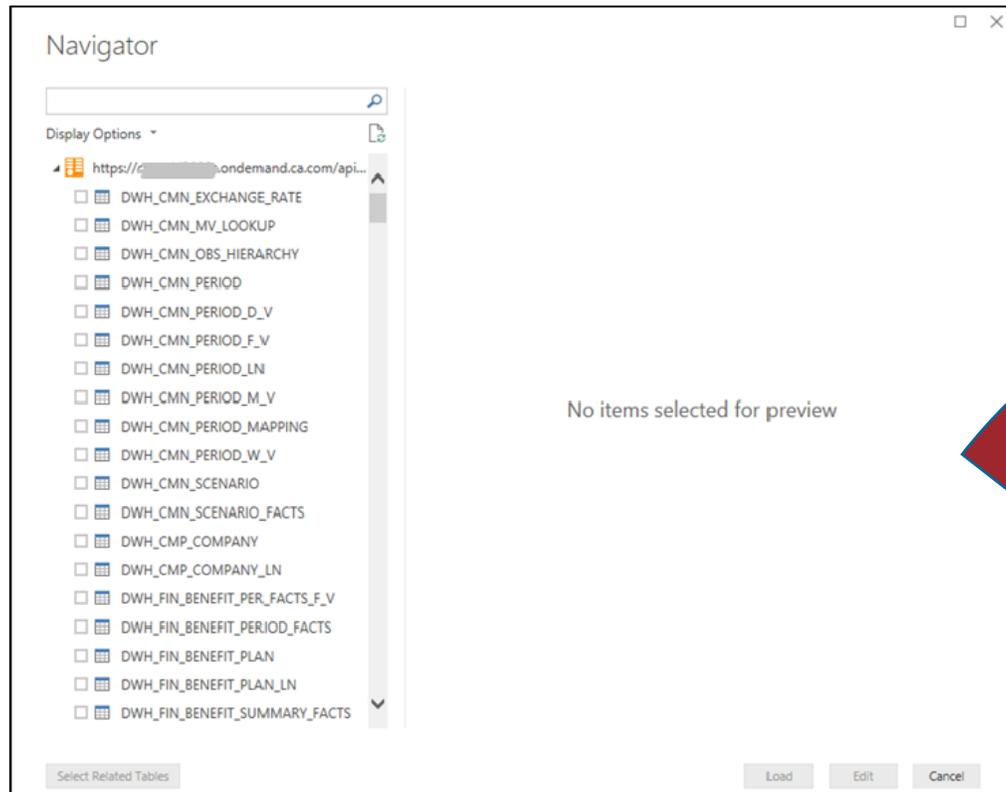
.....

Select which level to apply these settings to

http://ppm.pemari.ca.com/

Back Connect Cancel

You can select the tables which are required in the report and load it as per the necessity.
Apply the changes



06

Once loaded select the fields and visualization as per the requirement. You can also establish the relationships between the tables.
Once done finalize and share your report with others by publishing it.

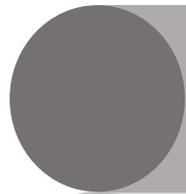
The screenshot displays the Power BI Desktop interface. The main window shows a data table with the following columns: FIRST_NAME, LAST_NAME, IS_ROLE, INPUT_TYPE_CODE, TRANSACTION_CLASS, and IS_OPEN_FOR_TE. The table contains 28 rows of employee data, including names like Abhishek Roy, Abhisekh Das, and Abhishek Agarwal, with various roles and transaction classes. A 'Total' row at the bottom shows a sum of 0.00 for IS_ROLE and 2,289.00 for IS_OPEN_FOR_TE.

The right-hand pane is divided into two sections: 'VISUALIZATIONS' and 'FIELDS'. The 'VISUALIZATIONS' pane shows various chart and table icons, with a search bar and a 'Revert to default' button. The 'FIELDS' pane shows a list of fields with checkboxes for selection. The following table represents the fields shown in the 'FIELDS' pane:

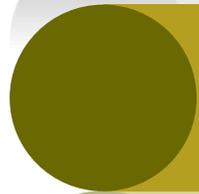
Field Name	Selection Status
EMAIL_ADDRESS	<input type="checkbox"/>
EMPLOYMENT_TYPE_KEY	<input type="checkbox"/>
ENTITY	<input type="checkbox"/>
ENTITY_KEY	<input type="checkbox"/>
FIRST_NAME	<input checked="" type="checkbox"/>
FIXED_PRICE	<input type="checkbox"/>
HIRE_DATE	<input type="checkbox"/>
INPUT_TYPE_CODE	<input checked="" type="checkbox"/>
INPUT_TYPE_CODE_KEY	<input type="checkbox"/>
IS_ACTIVE	<input type="checkbox"/>
IS_EXTERNAL	<input type="checkbox"/>
IS_OPEN_FOR_TE	<input checked="" type="checkbox"/>
IS_ROLE	<input checked="" type="checkbox"/>
LAST_NAME	<input checked="" type="checkbox"/>
LOCATION	<input type="checkbox"/>
LOCATION_KEY	<input type="checkbox"/>
MIDDLE_NAME	<input type="checkbox"/>
OFFICE_LOCATION	<input type="checkbox"/>
OFFSHORE	<input type="checkbox"/>
PRIMARY_ROLE	<input type="checkbox"/>
PRIMARY_ROLE_KEY	<input type="checkbox"/>
RESOURCE_CLASS	<input type="checkbox"/>

Sub Topics

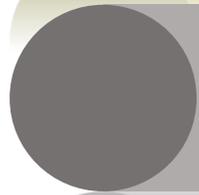
Connecting to Data Source



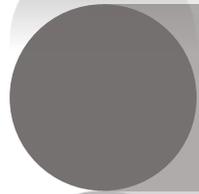
OData



SQL



Web



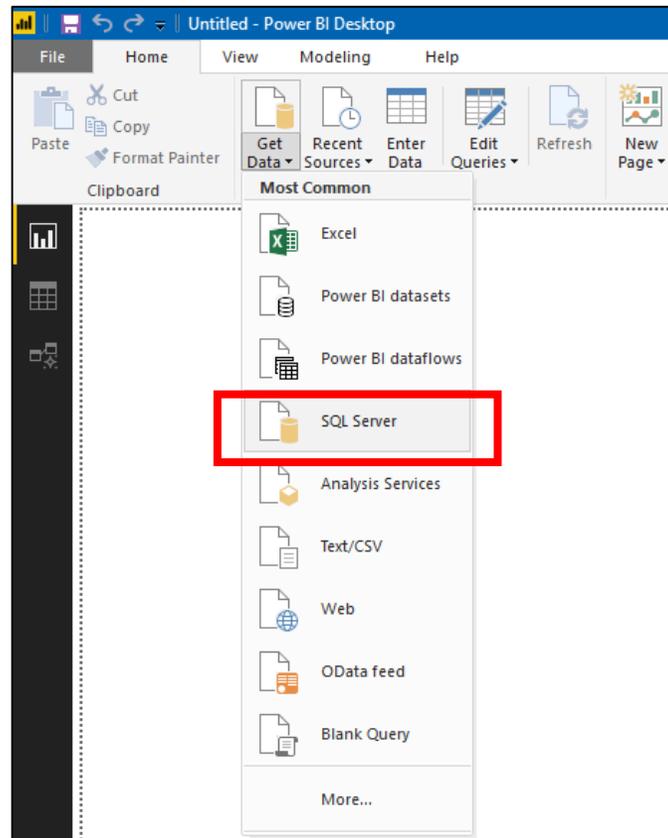
Excel

Connecting to SQL

Steps to connect with SQL database in Power BI :

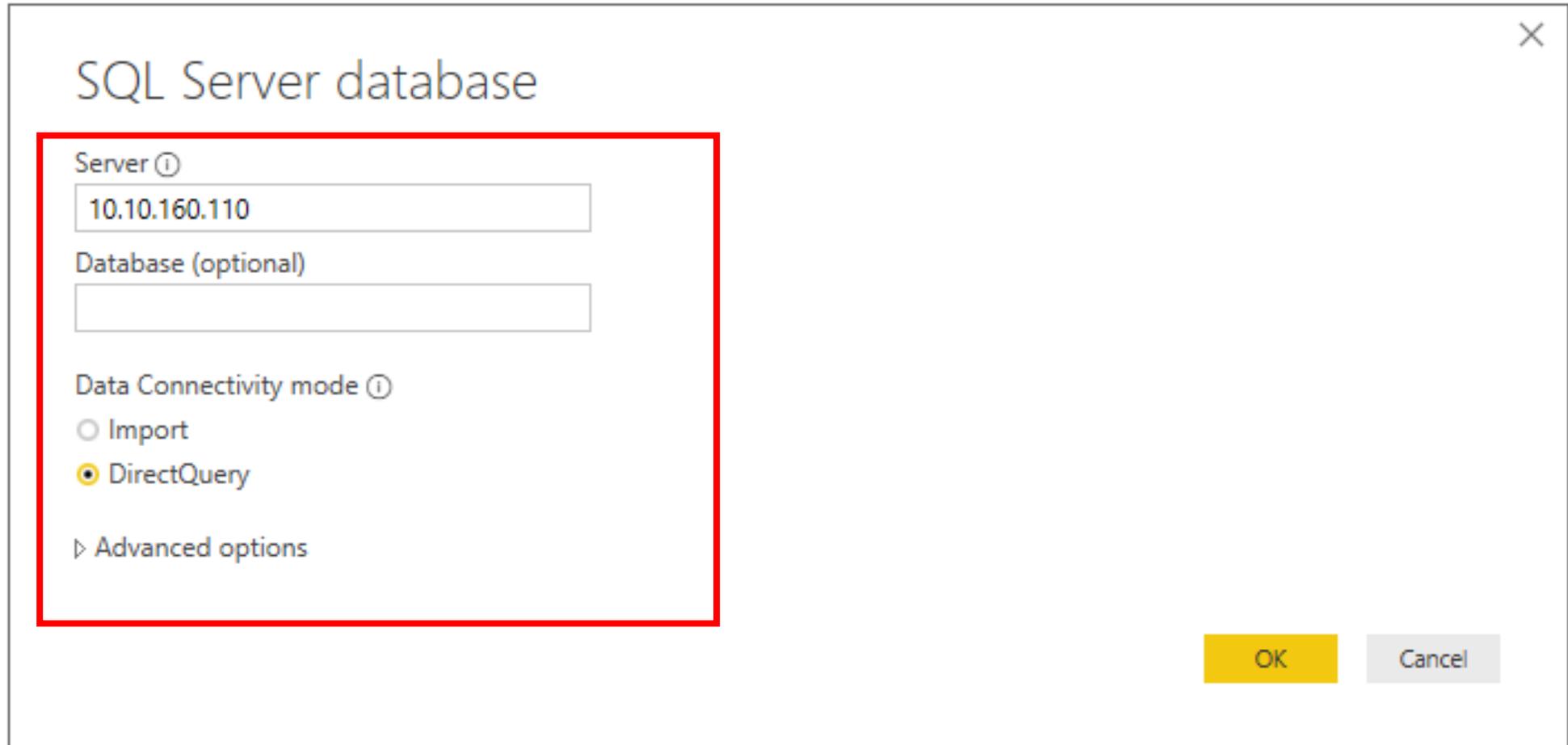
01

Click on Get Data option present in the header section of Power BI and choose SQL Server.



02

Below screen appears for SQL database connection and prompts you for the inputs. Once you have provided the details then processed and click on ok.



SQL Server database

Server ⓘ
10.10.160.110

Database (optional)

Data Connectivity mode ⓘ
 Import
 DirectQuery

▸ Advanced options

OK Cancel

03

If you want to query the database instead of selecting columns through different tables then while doing the connection select advanced option and write the SQL query.

SQL Server database

Server ⓘ
10.10.160.110

Database (optional)

Data Connectivity mode ⓘ
 Import
 DirectQuery

▲ Advanced options

Command timeout in minutes (optional)

SQL statement (optional, requires database)
select * from srm_resources

Include relationship columns
 Navigate using full hierarchy
 Enable SQL Server Failover support

OK Cancel

04

Provide the user name and password of the SQL database server.

The screenshot shows a Windows dialog box titled "SQL Server database". On the left, there is a sidebar with three options: "Windows", "Database", and "Microsoft account". The "Database" option is selected. The main area of the dialog displays the server address "10.10.160.111" with a folder icon to its left. Below this, there are two input fields: "User name" containing the text "niku" and "Password" containing six black dots. At the bottom of the dialog, there are three buttons: "Back" (disabled), "Connect" (highlighted in yellow), and "Cancel" (disabled).

05

If you have provided the database name then it will directly connect you to that database if not then it will prompt you to choose the one you want. Choose the one and proceed further.

Once you have successfully connected to the database then select the data table you want to include and you can Load, Edit and Cancel data.

The screenshot shows a 'Navigator' window with a tree view on the left and a table preview on the right. The tree view shows a folder structure for '10.10.160.110 [9]' and 'Clarity1212 [3007]'. The table preview shows the following data:

PRUID	PRID	PRCATEGORY	PRTYPECODEID	PRIS
N60RES1	1	null	null	
N60RES7	7	null	null	
N60RES8	8	null	null	
XOGRES5000001	5000001	null	null	
XOG6a67b315:14fc2651c78:-8000	5001001	null	null	
XOG67f324de:15e3808bb67:-8000	5002001	null	null	
N60RES5002002	5002002			null
N60RES5002003	5002003			null
XOG586803f:15e381f73ed:-8000	5003001	null	null	
N60RES5004001	5004001	null	null	
N60RES5004002	5004002	null	null	
XOG-ab93531:15e7aff6a17:-8000	5005001	null	null	
XOG596d1157:15ea8c9aabc:-8000	5006001	null	5000002	
XOG596d1157:15ea8c9aabc:-7fff	5006002	null	5000001	
XOGRES5007008	5007008	IT	5000001	
N60RES5002004	5002004			null
N60RES5002005	5002005			null
N60RES5002006	5002006			null
N60RES5002007	5002007			null
N60RES5002008	5002008			null

Below the table, there is a message: "The data in the preview has been truncated due to size limits." At the bottom of the window, there are buttons for 'Load', 'Edit', and 'Cancel'.

07

To create a report, select the fields that you want to appear in the report. Select the Visualizations (table) and drag the fields to the canvas.

The screenshot shows the Power BI Desktop interface. The main canvas displays a table visualization titled "Roles" with the following data:

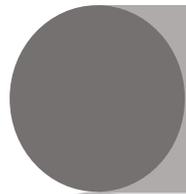
FULL_NAME	PRISROLE
Architect	1.00
Business Analyst	1.00
DBA	1.00
Developer	1.00
Network Engineer	1.00
Project Manager	1.00
Storage Architect	1.00
Test Engineer	1.00

The right-hand side of the interface features two panes: "VISUALIZATIONS" and "FIELDS". The "VISUALIZATIONS" pane shows various chart and table icons, with the table icon selected. The "FIELDS" pane contains a search bar and a list of available fields from the data source. The "VALUES" section is empty, and the "FILTERS" and "DRILLTHROUGH" sections are also empty.

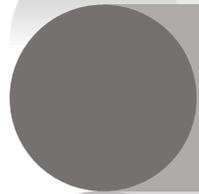
At the bottom of the interface, the status bar shows "PAGE 1 OF 1" and "Storage Mode: DirectQuery (click to change)".

Sub Topics

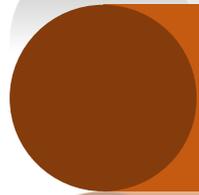
Connecting to Data Source



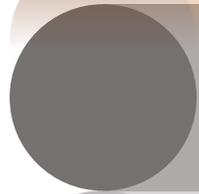
OData



SQL



Web



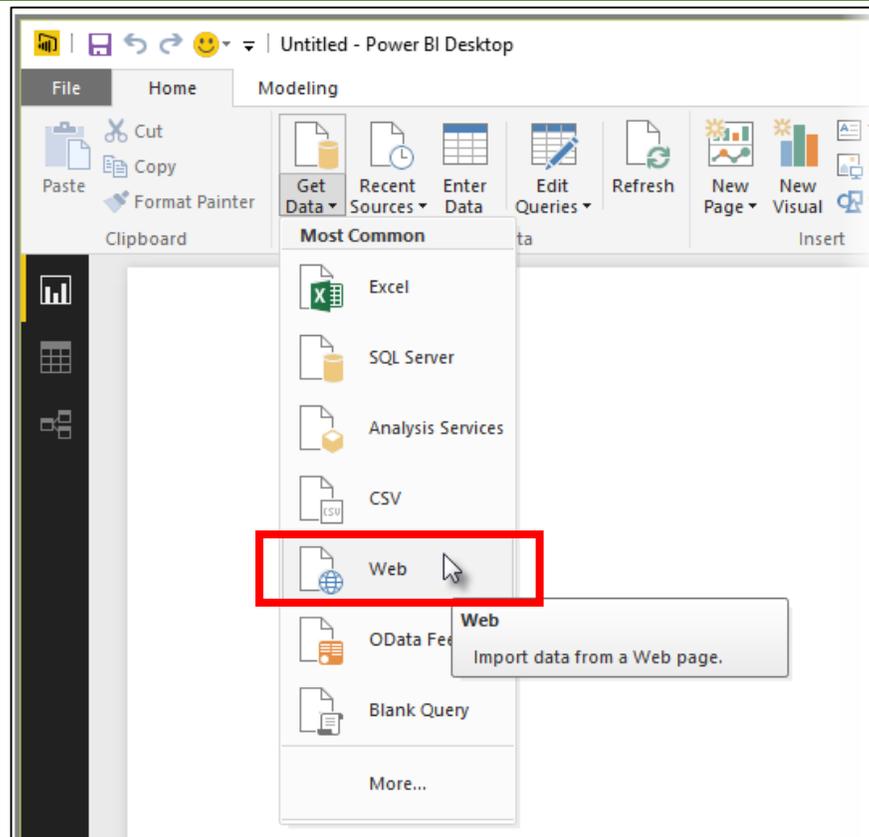
Excel

Connecting to Web

Steps to connect with Web in Power BI :

01

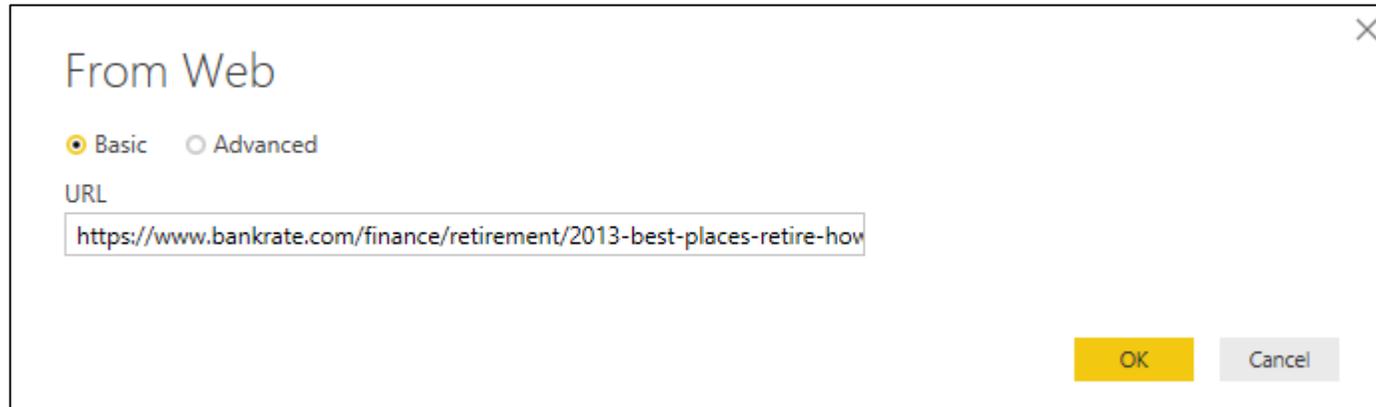
Click on Get Data option present in the header section of Power BI and Web.



02

A dialog appears, asking for the URL of the web page from which we want to import data. For example I have entered URL of a web page which contains the tabular data.

URL : <https://www.bankrate.com/finance/retirement/2013-best-places-retire-how-state-ranks.aspx>



From Web

Basic Advanced

URL

OK Cancel

03

Click ok after entering the URL . Over the Navigator window preview the data and edit or load it as per the requirement.

04

When we select **Load**, Power BI Desktop imports the selected items, and makes them available in the **Fields** pane, found on the right side of the Reports view in Power BI Desktop.

05

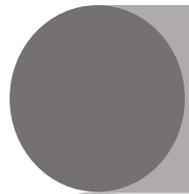
We can drag the fields onto the Report canvas and create the visualizations as we want.

The screenshot displays the Power BI Desktop interface. The main area shows a data table with the following columns: State, Rank, Overall score, Doctors per 100,000 population, and Cost of living (rank from CCER data). The table lists data for various states and a national average. On the right, the 'VISUALIZATIONS' and 'FIELDS' panels are visible. The 'FIELDS' panel shows a search bar and a list of fields including 'Average temp...', 'Cost of living (...)', 'Crimes (prope...', 'Doctors per 1...', 'Header', 'Hospital beds ...', 'Overall score', 'Rank', 'State', and 'State and loca...'. The 'VISUALIZATIONS' panel shows various chart types and options for adding data fields to values and filters.

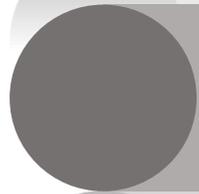
State	Rank	Overall score	Doctors per 100,000 population	Cost of living (rank from CCER data)
National average	Rank:	Hospital beds per 1,000 population*:	271.00	Cost of living (rank from CCER data):
State:	Rank:	Hospital beds per 1,000 population*:	Doctors per 100,000 population:	Cost of living (rank from CCER data):
State: Tennessee	Rank: 1	Hospital beds per 1,000 population*:	Doctors per 100,000 population: 263.55	Cost of living (rank from CCER data): 2
State: North Dakota	Rank: 10	Hospital beds per 1,000 population*:	Doctors per 100,000 population: 244.39	Cost of living (rank from CCER data): 27
State: Missouri	Rank: 11	Hospital beds per 1,000 population*:	Doctors per 100,000 population: 246.02	Cost of living (rank from CCER data): 12
State: Texas	Rank: 12	Hospital beds per 1,000 population*:	Doctors per 100,000 population: 214.23	Cost of living (rank from CCER data): 10
State: Kansas	Rank: 13	Hospital beds per 1,000 population*:	Doctors per 100,000 population: 222.55	Cost of living (rank from CCER data): 4
State: Oklahoma	Rank: 14	Hospital beds per 1,000 population*:	Doctors per 100,000 population: 173.50	Cost of living (rank from CCER data): 1
State: Ohio	Rank: 15	Hospital beds per 1,000 population*:	Doctors per 100,000 population: 266.74	Cost of living (rank from CCER data): 16
State: Montana	Rank: 16 (tie)	Hospital beds per 1,000 population*:	Doctors per 100,000 population: 220.57	Cost of living (rank from CCER data): 31
State: Pennsylvania	Rank: 16 (tie)	Hospital beds per 1,000 population*:	Doctors per 100,000 population: 305.35	Cost of living (rank from CCER data): 34
State: Georgia	Rank: 18	Hospital beds per 1,000 population*:	Doctors per 100,000 population: 217.45	Cost of living (rank from CCER data): 17
State: Florida	Rank: 19	Hospital beds per 1,000 population*:	Doctors per 100,000 population: 247.86	Cost of living (rank from CCER data): 30
State: Louisiana	Rank: 2	Hospital beds per 1,000 population*:	Doctors per 100,000 population: 262.66	Cost of living (rank from CCER data): 18
State: Illinois	Rank: 20	Hospital beds per 1,000 population*:	Doctors per 100,000 population: 280.15	Cost of living (rank from CCER data): 23
State: New Hampshire	Rank: 21	Hospital beds per 1,000 population*:	Doctors per 100,000 population: 274.87	Cost of living (rank from CCER data): 40
State: Iowa	Rank: 22 (tie)	Hospital beds per 1,000 population*:	Doctors per 100,000 population: 189.28	Cost of living (rank from CCER data): 15
State: Wyoming	Rank: 22 (tie)	Hospital beds per 1,000 population*:	Doctors per 100,000 population: 184.42	Cost of living (rank from CCER data): 32
State: Idaho	Rank: 24	Hospital beds per 1,000 population*:	Doctors per 100,000 population: 168.83	Cost of living (rank from CCER data): 8
State: South Carolina	Rank: 25	Hospital beds per 1,000 population*:	Doctors per 100,000 population: 229.79	Cost of living (rank from CCER data): 26
State: Indiana	Rank: 26	Hospital beds per 1,000 population*:	Doctors per 100,000 population: 216.94	Cost of living (rank from CCER data): 6
State: Nevada	Rank: 27	Hospital beds per 1,000 population*:	Doctors per 100,000 population: 187.76	Cost of living (rank from CCER data): 19
State: Arkansas	Rank: 28	Hospital beds per 1,000 population*:	Doctors per 100,000 population: 203.42	Cost of living (rank from CCER data): 3
State: District of Columbia	Rank: 29	Hospital beds per 1,000 population*:	Doctors per 100,000 population: 807.15	Cost of living (rank from CCER data): 49
State: South Dakota	Rank: 3	Hospital beds per 1,000 population*:	Doctors per 100,000 population: 219.06	Cost of living (rank from CCER data): 25

Sub Topics

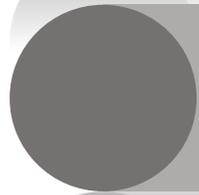
Connecting to Data Source



OData



SQL



Web



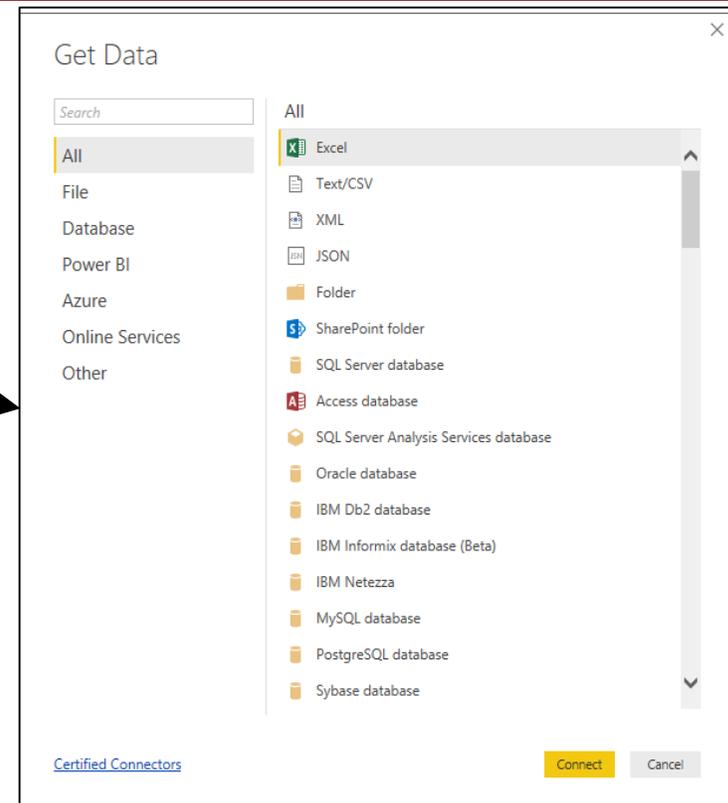
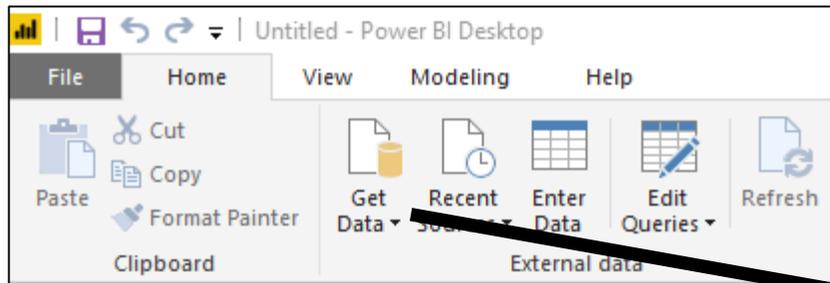
Excel

Connecting to Excel

Steps to connect with Excel in Power BI :

01

Choose data source as Excel in the Get Data option .



04

To create a report, select the fields that you want to appear in the report. Select the Visualizations (table) and drag the fields to the canvas.

Demo Report Resource Monthly Actuals

Resource_Unique_name	Year	Month	Monthly_Actual (hrs)
391935992450	2019	March	120.00
391897957990	2019	March	121.50
391807040000	2019	March	82.50
391801308780	2019	March	82.50
391777081350	2019	March	7.50
391761450750	2019	March	83.00
391751811880	2019	March	120.50
391731492100	2019	March	82.50
391687986930	2019	March	120.00
391653860120	2019	March	76.00
391250330130	2019	March	88.00
391244077890	2019	March	82.50
391221413520	2019	March	80.00
391217245360	2019	March	82.50
390977576160	2019	March	82.50
390967416270	2019	March	82.50
390869985530	2019	March	82.50
	2019	March	88.00
Total			1,564.50

Monthly_Actual (hrs) by Month

Month Month ● January ● February ● March

Monthly_Actual (hrs) by Investment_name

Sub Topics

Power BI Desktop



Connecting to Data Source



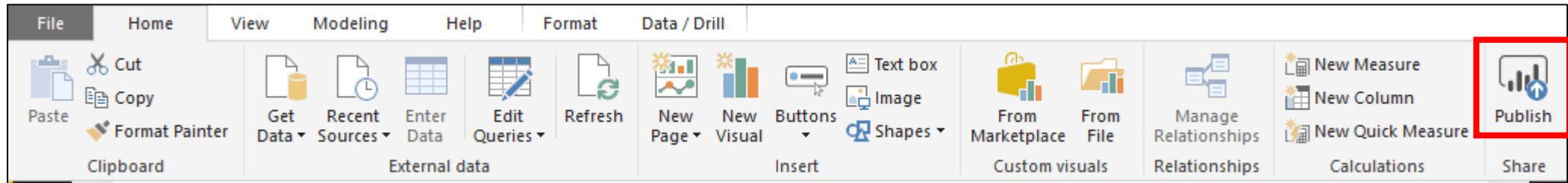
Publish from Power BI Desktop

Publish Report to Power BI

If you want to publish your Power BI report Power BI Cloud then follow below steps:

01

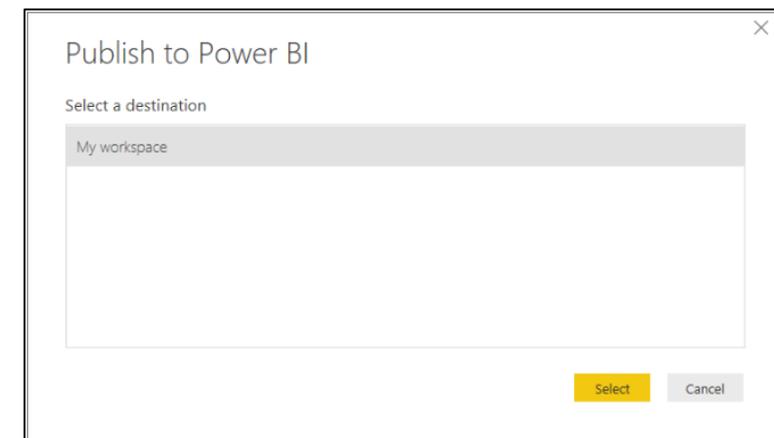
Publish the report that you have created on Desktop (click on publish icon present in BI header)



02

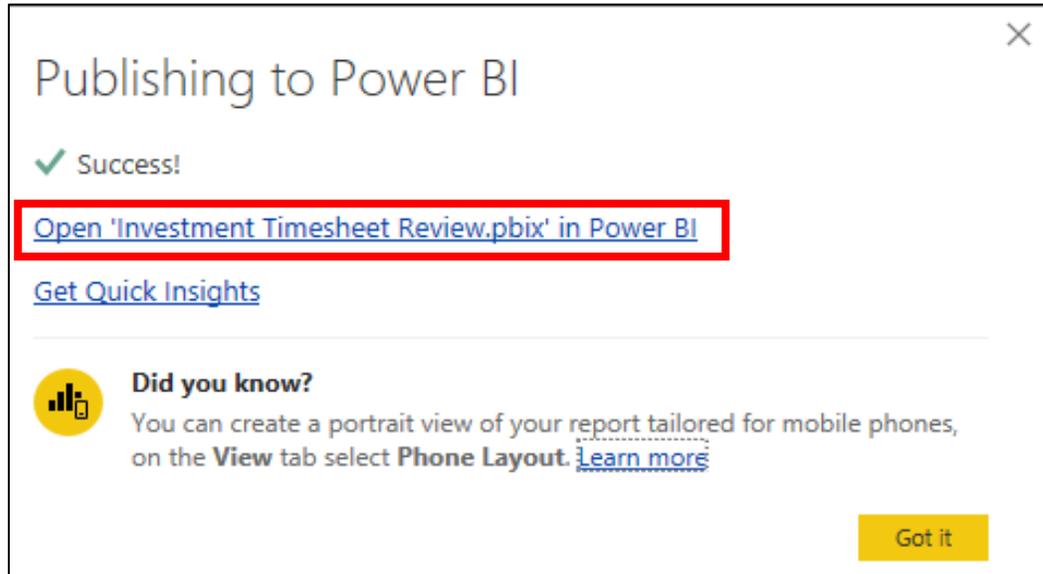
Once you click on publish it will ask you for destination choose the selected destination and click on select. The following screen will appear once the report get successfully published.

- Please Note you will be able to publish the report only if you have subscription of Power BI.



03

Click on the Open 'Report_Name' In Power BI.



04

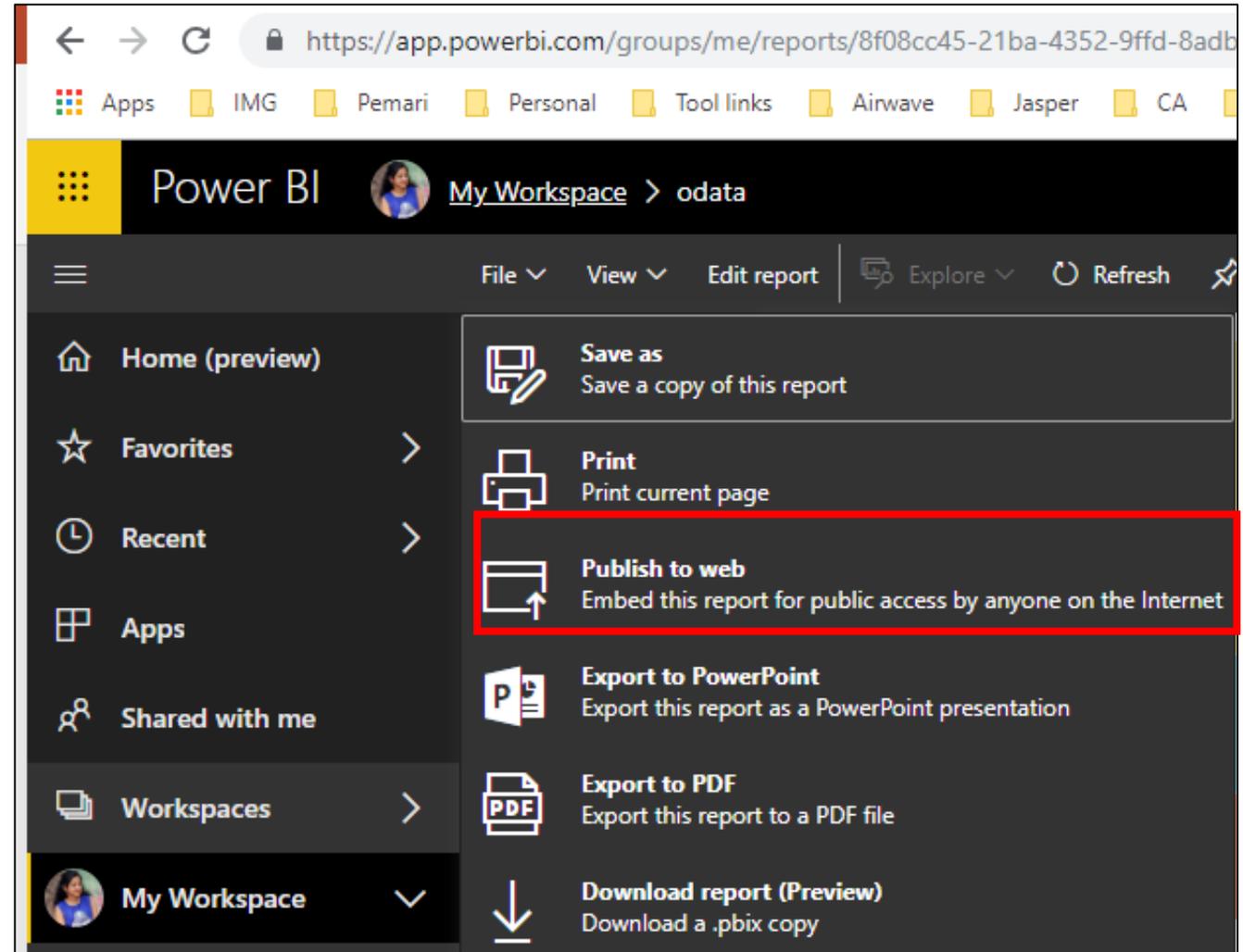
A browser will open and ask for sign in for the first time(sign in).

05

Click on File option present in the browser window open.

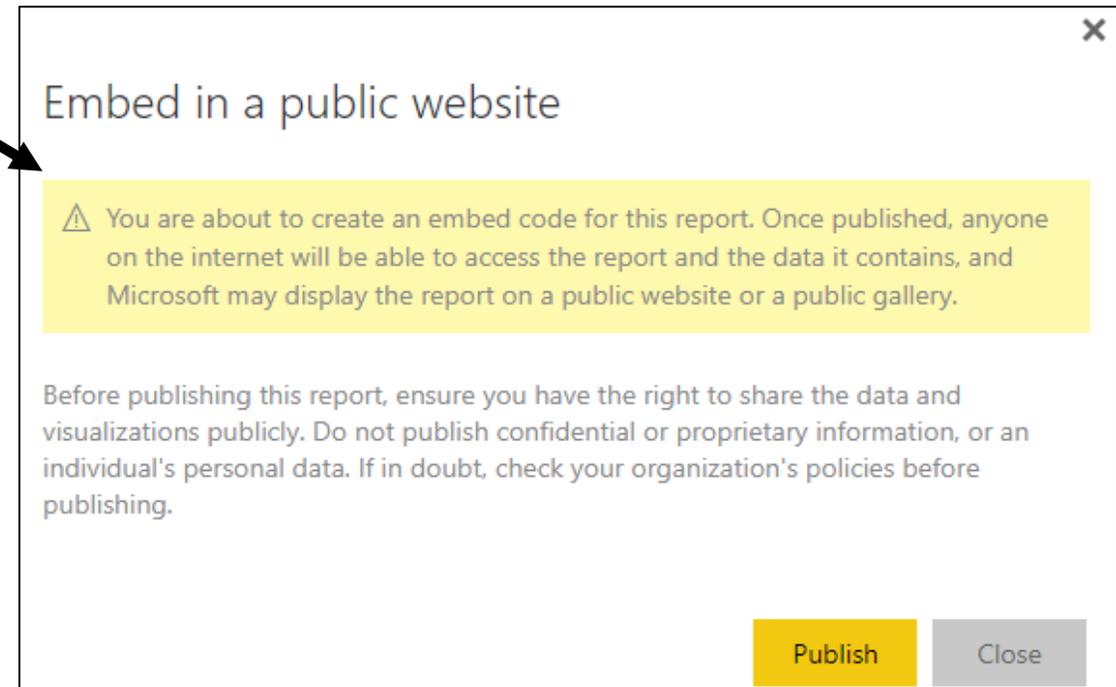
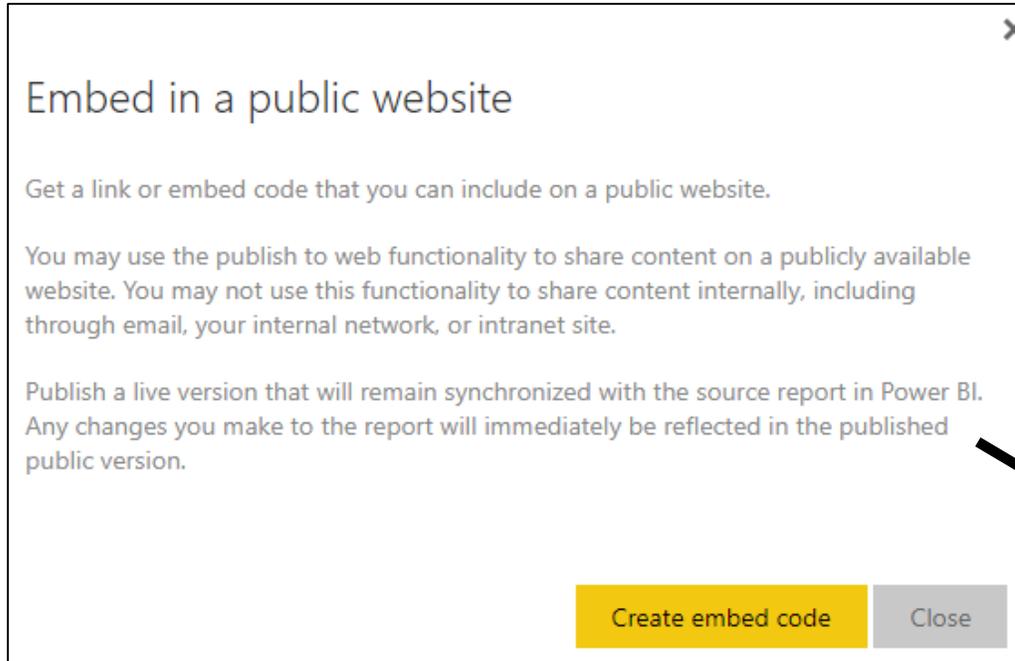
06

Click on Publish to Web option available.



07

Embed in a public website window opens. Click on Create and embedded.



08

Click on Publish.

A HTML code will be generated which can be used in website, blogs or HTML portlet in case of PPM.

✕

Success!

Link you can send in email

```
https://app.powerbi.com/view?r=eyJrljoiMWE1Yzk5OTUtNzU5Ny00ZThhLTg0ZTUt
```

Html you can paste into your blog or website

```
<iframe width="800" height="600" src="https://app.powerbi.com/view?r=eyJrljoi
```

Size

```
800 x 600 px
```

Close

Session Agenda

The power of BI with Microsoft Power BI

Power BI and Its Features

Power BI Service, Report Server

Power BI Desktop

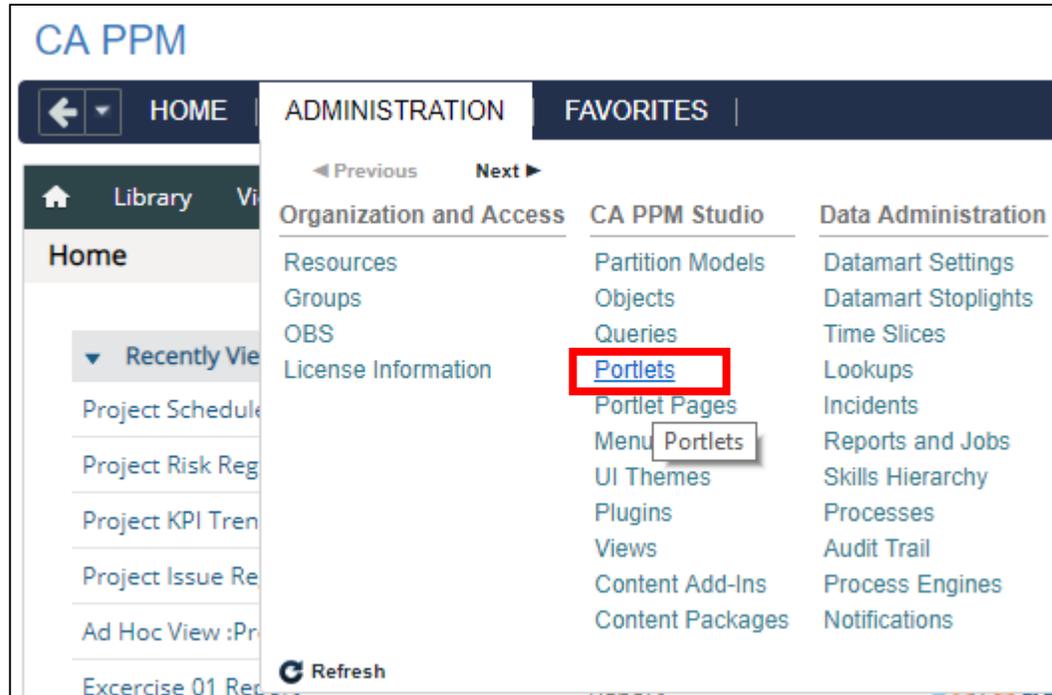
Integrating BI with PPM application

Integrating BI Reports in Clarity Classic UI

If you want to put your Power BI report in Clarity PPM then follow below steps:

01

Login to Clarity PPM and navigate to Admin > Portlets > New > HTML Portlet > Provide essential details.



In place of HTML code put the code which was generated on using embedded code in the Power BI. Remember to choose the category while creating the portlet (use business intelligence). Click on save and continue.

CA PPM

← HOME | ADMINISTRATION | FAVORITES |

General

Portlet: - Properties

* Portlet Name	HTML BI
* → * Portlet ID	html_bi
* Content Source	Customer ▼
* Category	Business Intelligence ▼
Description	
Active	<input checked="" type="checkbox"/>
* → Instance Type	General ▼
* HTML Code	1 <iframe width="800" height="600" src="https://app.powerbi.com/view?r=eyJrIjoibWE1Yzk5OTU0NzU5Ny00ZThhLTg0ZTU0Zjk5YjM3NzExMmQ1Ii: ▲

Click on Preview to view the report. The report will look like below.

Preview Portlet: HTML BI

INVESTMENT_MANAGER: All | INVESTMENT_TYPE_UPPER: All

INVESTMENT_ID	INVESTMENT_NAME	INVESTMENT_MANAGER	RESOURCE_NAME	RESOURCE_TYPE
PR1132	A Portfolio Initiative	Administrator, System	Abbott, Karl	Employee
AP1010	Altus Online Order	Turner, Bruce	Amos, Cheryl	Employee
PR1086	B2B Enhancements	Fleming, Nicole	Bergman, Alex	Employee
PR1028	CRM Contact Center Development	Riviera, Alex	Berry, Jason	Employee
PR1029	CRM Enhancements	Riviera, Alex	Carson, Anthony	Employee
PR1146	Eclipse Enhancements	Lewis, Dana	Childers, Valerie	Employee
PR1002	eCommerce Portal	Martin, Paul	Clark, Leigh	Employee
SV1001	Email	Stewart, Diane	Coleman, Joyce	Employee
PS1004	ePortal Project Integration	Madden, Paul	Cooper, Andy	Employee

POSTED_ACTUALS and PENDING_ACTUALS

Return

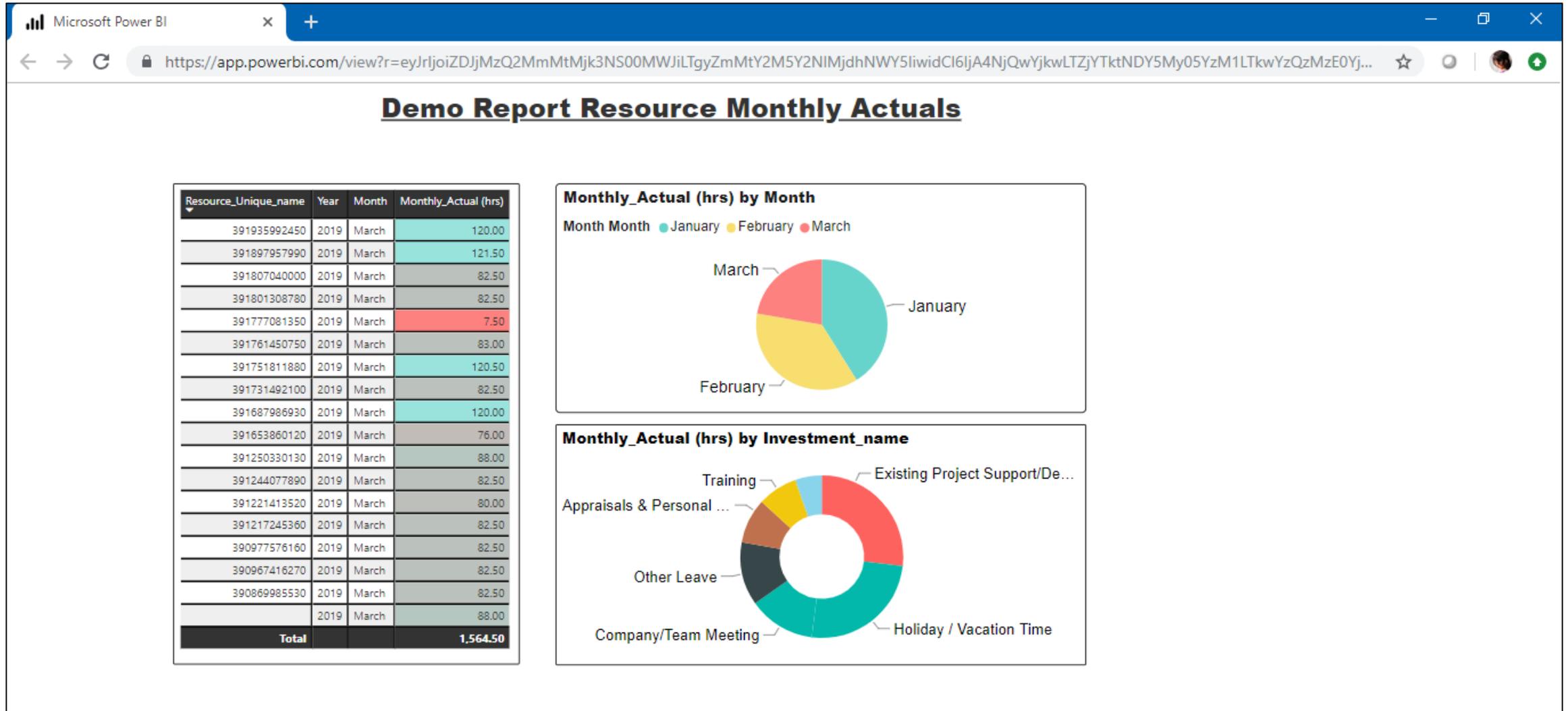
Integrating BI Reports in Clarity New UX

01

Login to Clarity New UX and navigate to Project > Links > provide essential details.

The screenshot displays the Clarity PPM interface for the 'AARD Payments Module'. The top navigation bar includes 'ANS', 'STAFF', 'CONVERSATIONS', 'DASHBOARD', 'ISSUES', 'CHANGES', 'RISKS', 'STATUS', 'LINKS', 'DOCUMENTS', and 'DETAILS'. The 'LINKS' tab is highlighted with a red box. Below the navigation bar, the 'GENERAL' section contains links for 'BU Portfolio', 'Drop Box', 'Executive Dashboard', 'Project Wiki', 'Project Team Meetings', 'Market Analysis', 'Google Docs', and 'Project SharePoint Site'. The 'PROJECT REPORTS AND DASHBOARDS' section is expanded, showing 'Power BI Report' and 'Portfolio Labor Cost'. A red box highlights the 'Power BI Report' link, with a red arrow pointing to a modal form. The modal form contains the following fields:

- URL (LINK ADDRESS): <https://app.powerbi.com/view?r=eyJrljoiZDJj...>
- LINK NAME: Power BI Report



References

- <https://docs.microsoft.com/en-us/power-bi/>
- <https://docops.ca.com/>

Questions?

THE POWER OF BI WITH MICROSOFT POWER BI

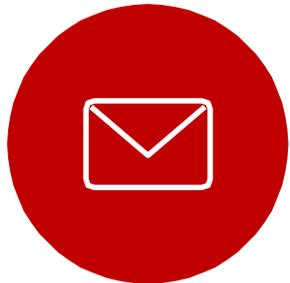
Thank you for attending

THE POWER OF BI WITH MICROSOFT POWER BI



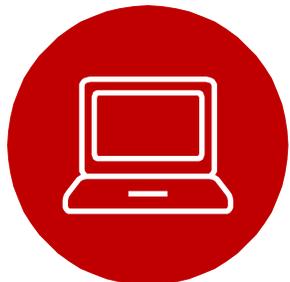
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Let us know how we can
improve!
Don't forget to fill out the
feedback forms!