

InLoox + Power BI

Making Better Decisions with Intelligent Data Visualizations

An InLoox Whitepaper

Content

1. What is Power BI? 3

2. InLoox and Power BI: Intelligent visualizations of your project data 4

2.1 Requirements 4

2.2 Connect InLoox with Power BI 4

2.2.1 Authentication: Access Token 5

2.2.2 Create an access_token parameter 6

3. How to create a report in Power BI 7

3.1 Load new data source 7

3.2 Update data preview 9

3.3 Transform data sources 10

3.4 Link data sources 11

3.5 A quick overview of the user interface 13

4. Sample reports: A step by step guide 14

4.1 Preparations 14

4.2 Report 1: Project status 15

4.3 Report 2: Booked versus planned effort 22

4.4 Report 3: Open tasks 29

5. Publish and share reports 35

6. Export and import reports 38

7. Create a dashboard in Power BI 39

7.1 Pin individual elements from an existing report to a dashboard 40

7.2 Pin a whole report page to a dashboard 40

7.3 Customize the dashboard design 41

© InLoox GmbH

1. What is Power BI?

Power BI is Microsoft's cloud-based reporting service for business intelligence and it's integrated in Office 365 (Microsoft 365). The local (on-premise) version "Power BI Report Server" is available with Power BI Premium. With Power BI, users can visualize, consolidate and analyze large amounts of data ("big data") to create powerful charts, reports and dashboards. Connectors allow you to connect Power BI to many on-premise and cloud data sources, such as

- Dynamics 365
- SQL Server
- Excel
- SharePoint
- Salesforce
- OData feed
- and many more

For more information and help articles, see the Power BI documentation: https://docs.microsoft.com/en-us/power-bi/

You can link InLoox with Power BI via the open API, so you can edit and visualize your InLoox data directly in the Power BI. You can easily create individual reports and dashboards for your InLoox projects, which enable you to identify trends in advance and make better decisions. The advantage of Power BI is that it's integrated into Office 365. So you can share reports and dashboards with specific groups in your organization. You can share individual reports with specific groups of people or with the entire organization as you have full control over the permissions. If you already use Office 365 and your employees are already familiar with Power BI, they can easily create InLoox reports there. Another advantage of Power BI is that you can connect data sources variably – a feature that is currently unavailable in the standard InLoox dashboard.



InLoox Web **Power BI**

2. InLoox & Power BI: Intelligent data visualizations

In this whitepaper you'll learn how to create a new report and familiarize yourself with Power BI by recreating three report templates.

2.1 Requirements

InLoox now! account

To link InLoox with Power BI, you need an InLoox now! Professional or Enterprise account. If you don't have an account yet, you can create a new one here: https://app.inlooxnow.com

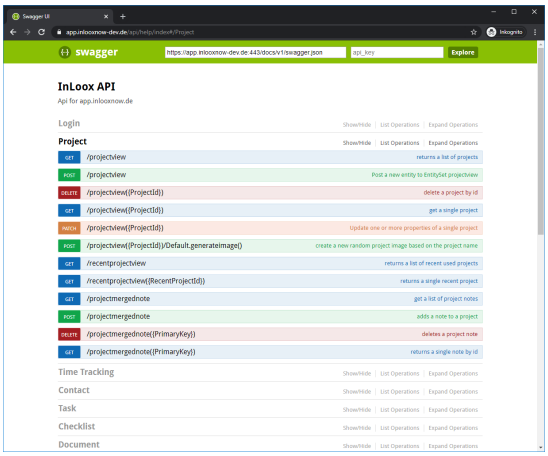
Power BI Desktop App

To design reports, please download the Power BI Desktop App. The app is not another client but it's the program with which you can create and publish reports. Published reports can be viewed in the Power BI online service and the mobile app. You can get the Power BI Desktop App from the Microsoft store or download it here: https://powerbi.microsoft.com/en-us/desktop/

2.2 Connect InLoox with Power BI

The connection between InLoox and Power BI is established via the InLoox Web API (web interface). You can find a publicly accessible documentation of the InLoox API here: https://api.inlooxnow.de/api/help/index

There you'll find all data sources ("views") we offer. You can load these data sources directly into Power BI.

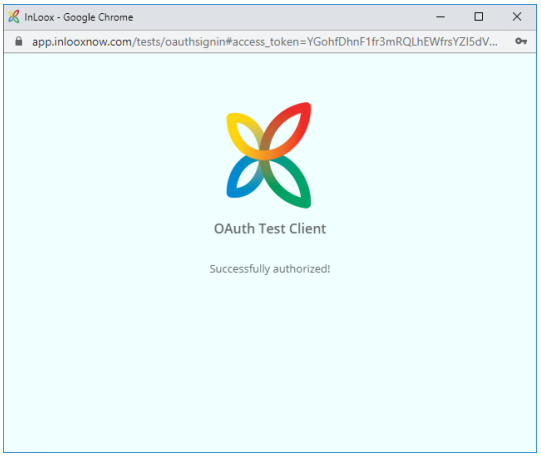


2.2.1 Authentication

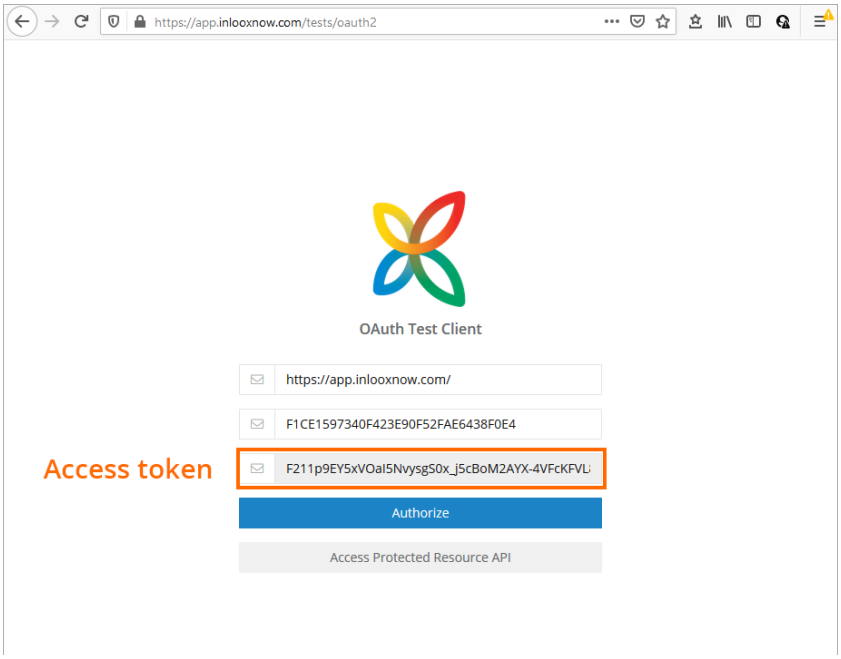
2.2.1 Authentication

Before you can load InLoox data sources into Power BI, you must first authenticate your InLoox account. **Follow these steps to authenticate your account:**

- Open this link: https://app.inlooxnow.com/tests/oauth2



- Click **Authorize** —> Authentication always applies to the account you are currently logged in with. If you're already logged into the correct InLoox now! account, the access token appears directly. Otherwise you must log in first. When the message **"Successfully authorized"** appears, you can close the authentication window.
- You will now see the access token valid for your account. The access token combines the account with the user you are logged in with. This means that you can only work with InLoox project data for which you have permissions when you create reports in Power BI. **Copy the entire string using the shortcuts CTRL+A and CTRL+C.**

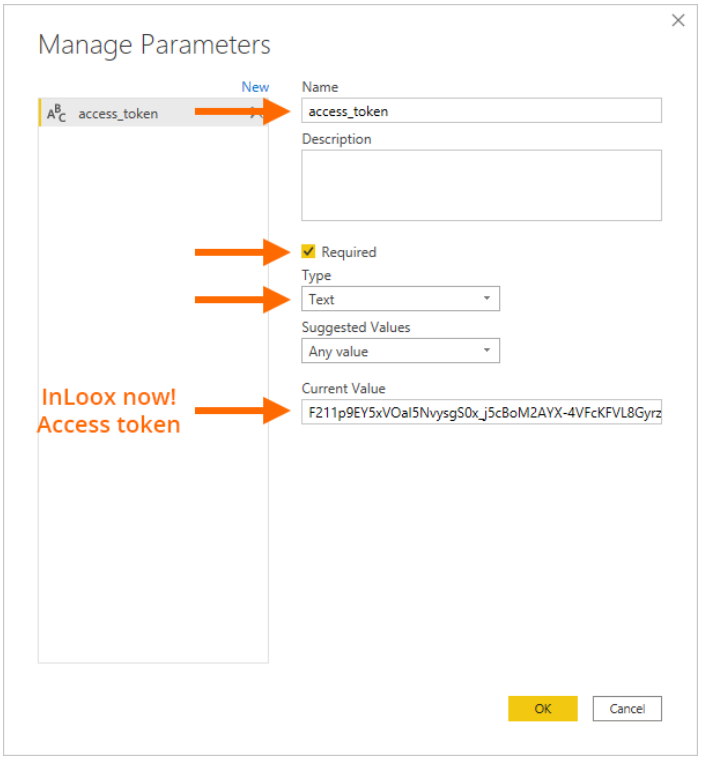


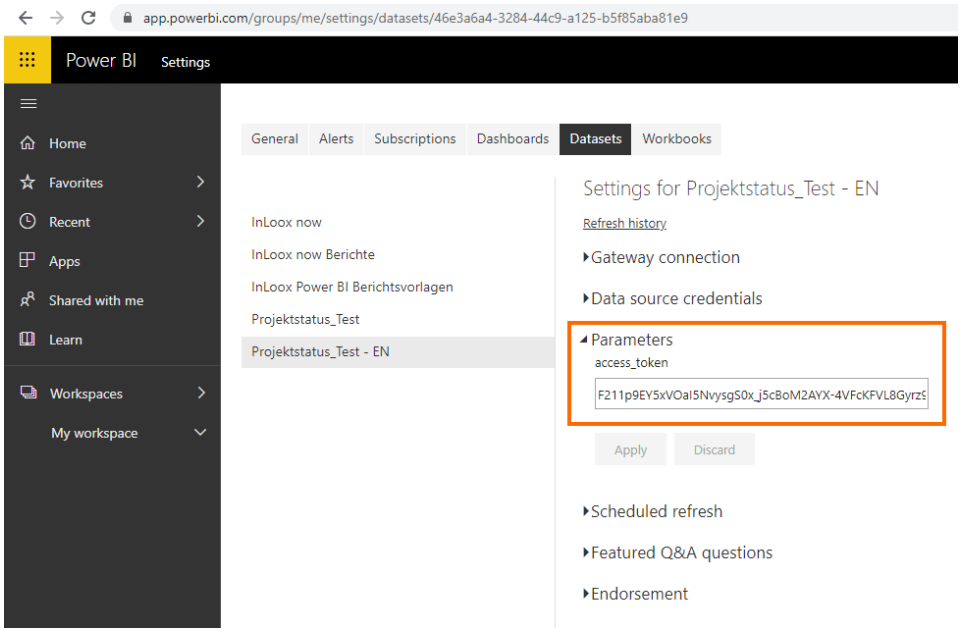
2.2.2 Create an access_token parameter

Since we need the same access token for all data sources that we'll link to Power BI, we first create an access_token parameter. This has the benefit that you have to edit the access token only once if you have to change it later. The InLoox now! access token is valid for a very long time but will expire at some point. When this happens, you can change the access token centrally and don't have to edit it in each data source individually. Creating an access token parameter also allows you to create connections between data sources.

Follow these steps to create an access_token parameter:

1. Open the Power BI Desktop App
2. Click on **Transform data**
3. Right click in the queries area > Click on **New Parameter**
4. **Manage parameter:**
   Name: access_token
   Required: active
   Type: Text
   Suggested Value: Any value
   Current Value: Enter your access token here





You can also find the access token parameter in the Power BI web interface, where you can easily update the token for all data sources:

https://app.powerbi.com/ > **Select Workspace > Datasets > More Options > Settings > Parameter**

3. How to create a report in Power BI

Before you create a report, it's important that you consider what information you want to visualize in your report or rather what information should the report provide. It's advisable to create a rough concept and to define goals beforehand, such as

- I want to compare actual and planned work efforts
- I would like to see which projects in which department are currently in progress
- I would like to see my open and upcoming tasks and their total effort

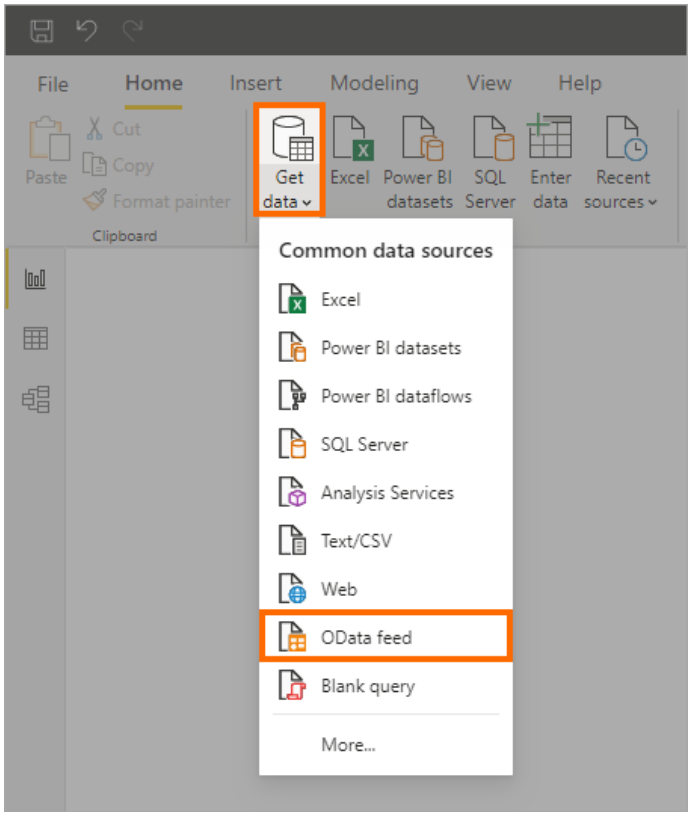
Based on these goals, you can decide which data sources you need and how they need to be linked to each other so that Power BI can display the right results.

3.1 Load new data source

You can add and edit data sources in the Power Query editor.

Follow these steps to add a new data source to Power BI:

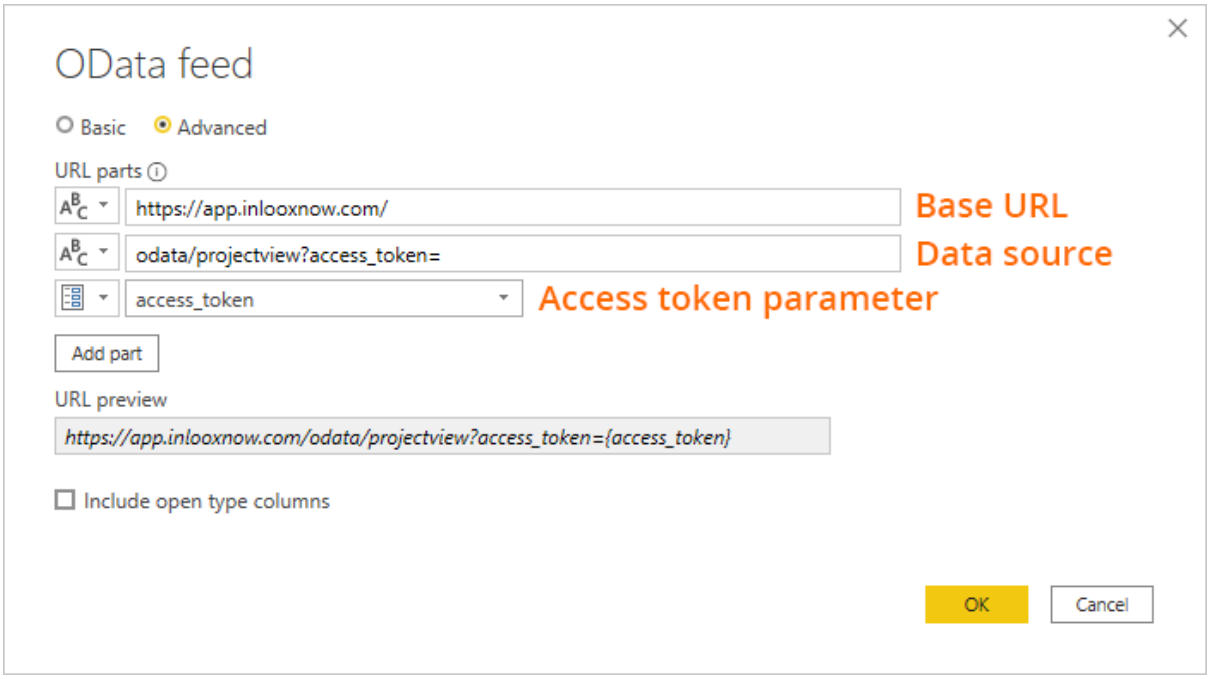
1. Click **Get data** or **New source**
2. Select **OData feed**
3. Click **Advanced** and enter the following:
   Base URL of the service (= InLoox Web App): https://app.inlooxnow.de/



Specify data source, i.e. the view you want to see. For projects that's projectview: odata/projectview?access_token=

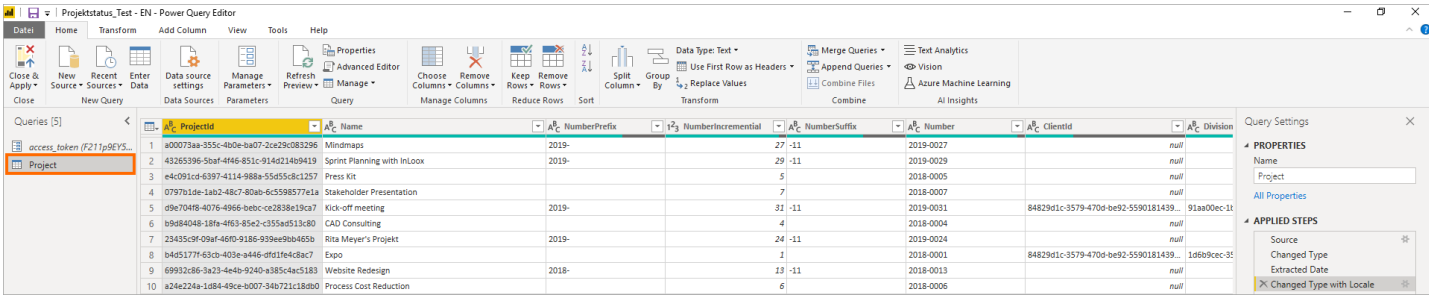
Add access_token parameter: Add part > Parameter > access_token

IMPORTANT: The **input is case sensitive**, so please make sure that everything is in lower case. Otherwise the query won't work. If you get an error message, please check the spelling.



4. When you're are asked for the access to the OData feed, you can select **anonymous authentication** because we have already authenticated our account via the Web URL.

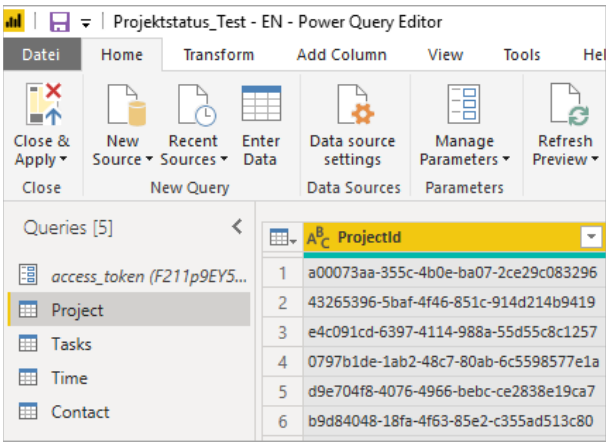
5. You now see a **preview of the project data**. Close the window with **OK**.

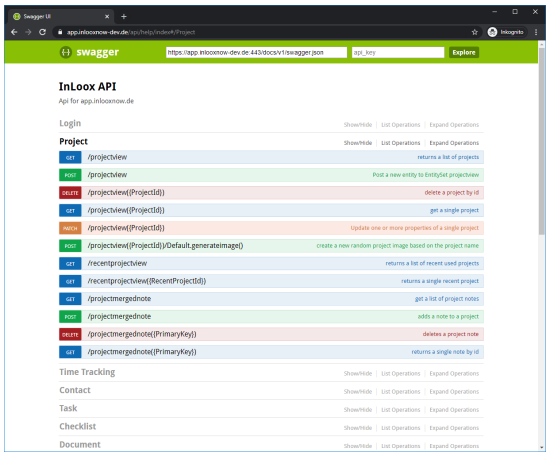


For better overview, you can **rename the data sources (= queries):**

Right click on data source > Rename

To load **another data source**, repeat the steps described above and replace the data source, e.g. workpackageview (=tasks), actionview (=time), contact (=contacts) etc. You can find all InLoox data sources here: https://app.inlooxnow.de/api/help/index





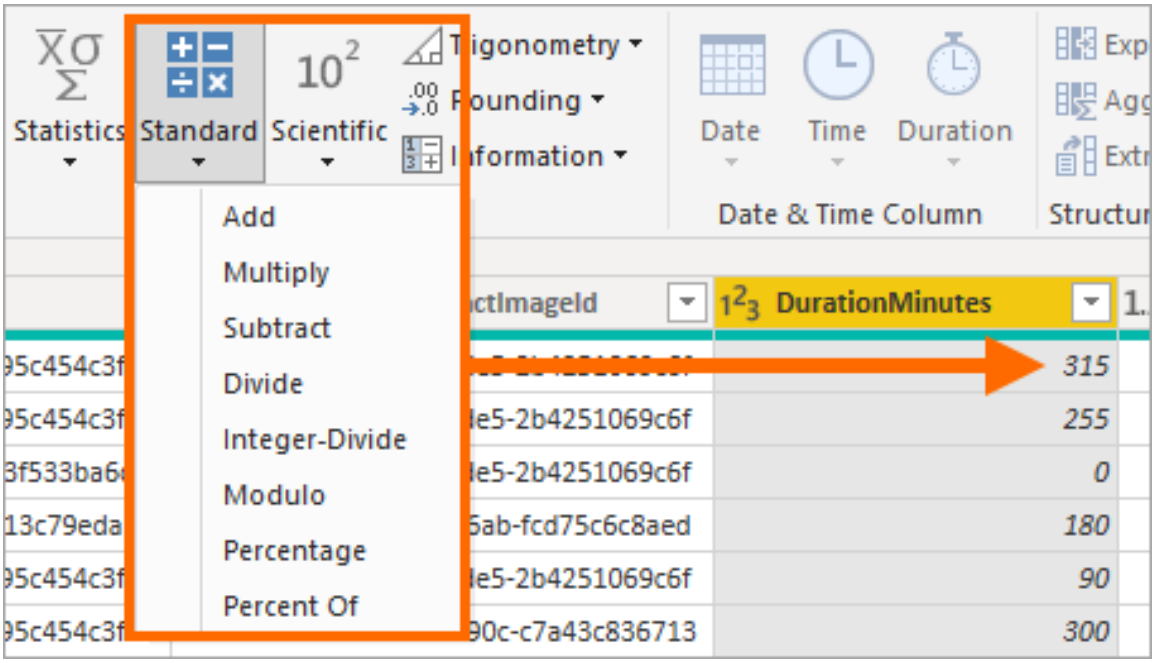
3.2 Update data preview

In Power BI, data is only cached and queried via cache. This means that **data sources are not updated automatically** and your results may be outdated. So if you change something in InLoox, the changes are not automatically visible in Power BI. The great advantage is that the program is very fast (which you will notice if you have a lot of data). You can refresh the page manually at any time using the **Refresh** button in the menu bar. You can also set an automatic update interval for your published reports.

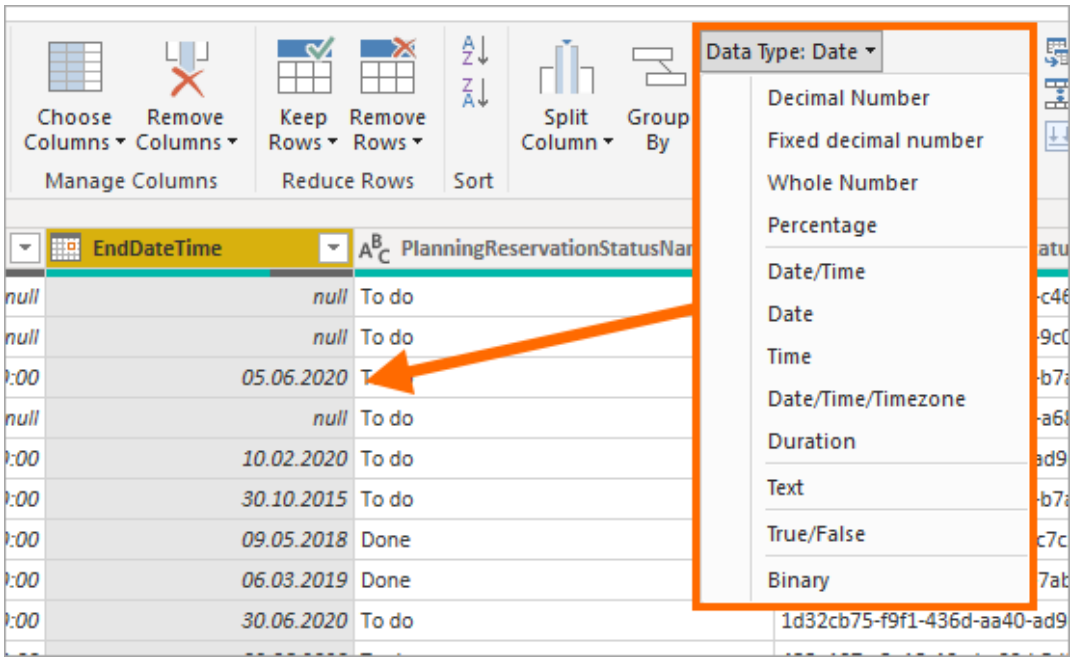
3.3 Transform data sources

You can edit data sources in the Power Query editor. Here are a few examples of what you can do:

- Perform **logical or arithmetic operations** (e.g. convert DurationMinutes to hours)



- Add **custom fields**
- **Change the data type** of a column (e.g. date values, TRUE/FALSE, text, decimal number etc.)



3.4 Link data sources

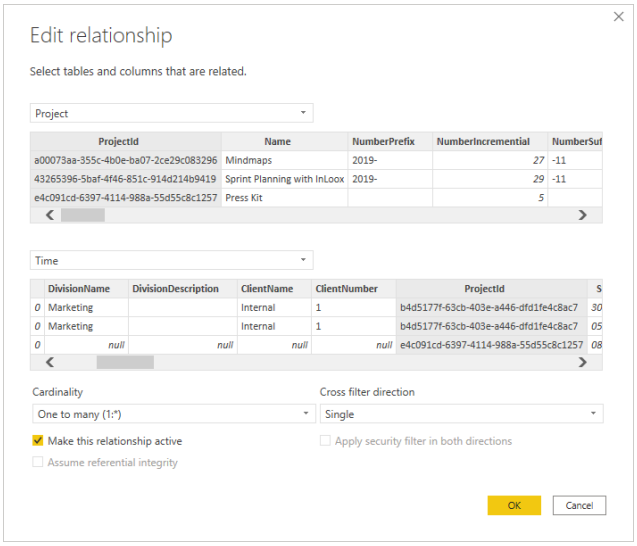
You can **display visualizations from different data sources** in a report and **define relationships and connections between the sources**. You can always tell which data source(s) a visual is based on by the check mark next to the respective data source in the fields list.

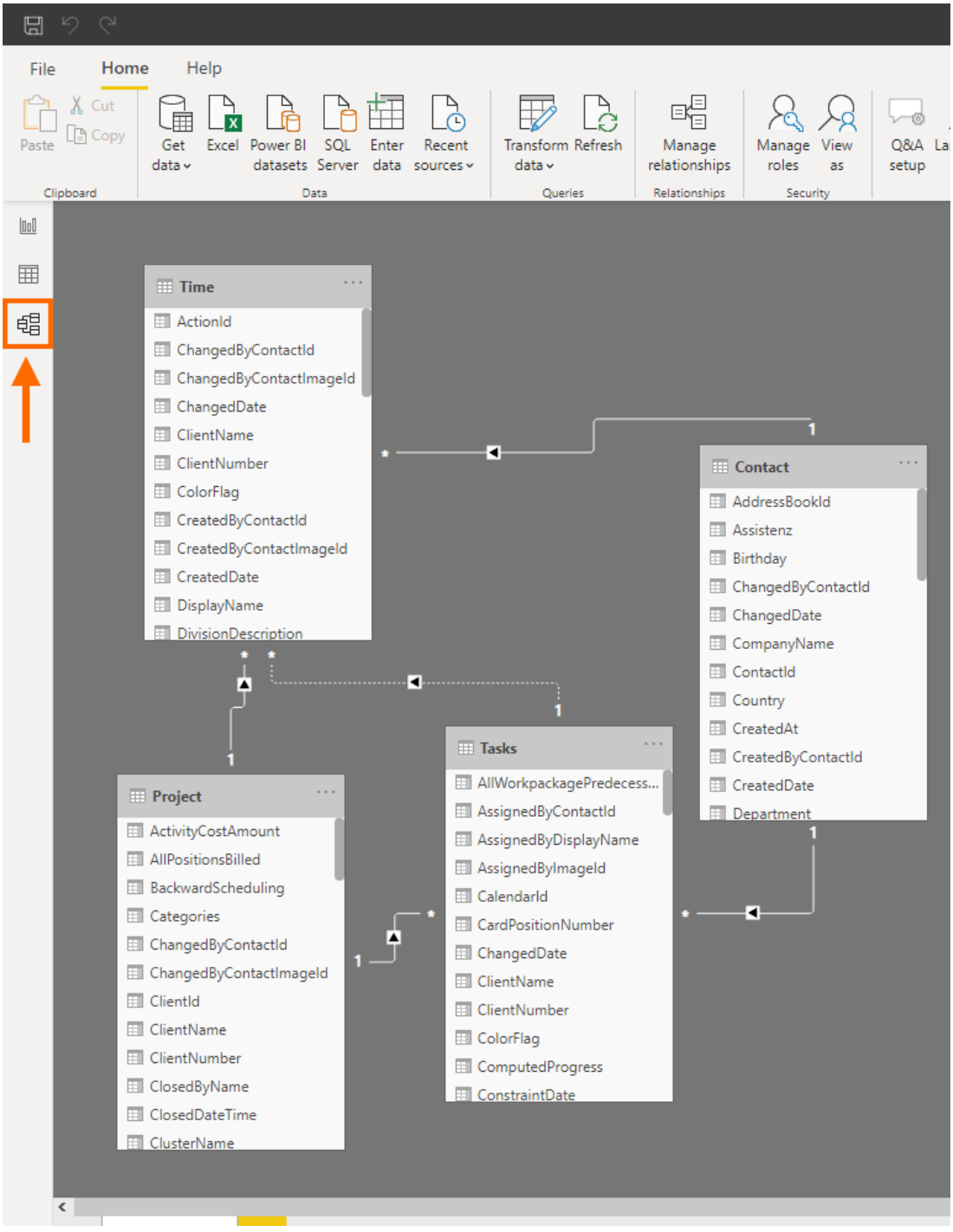
The great advantage of Power BI is that you can select the data you need from different data sources. **By connecting the individual data sources, the visuals adapt automatically.** This means that, for example, when you filter out different projects, the views adapt so that the data from the filtered out projects is no longer displayed. If you are unsure whether a relationship is correct, you can easily check this by checking your InLoox project to see if the data is congruent. You can also make a change in the project and check in Power BI whether the change is displayed correctly.

Power BI can detect relationships automatically in many cases and can link the data intelligently. However, these standard relationships are not always correct or relevant for your report. So before you design your report, you should think carefully about which relationships you need. Power BI only allows one active relationship between two tables at a time but you can mark existing relationships as inactive and new relationships as active if needed.

This is how you manage relationships between data sources:

- Click on the following icon: 
- You now see all existing relationships. You can **delete** or **edit relationships** or **create new** ones.
- **Example relationship: Project —> Time**
  If you want to link the data source Project (projectview) with the source Time (actionview), you must know their relationship to each other, i.e. a project can have many time tracking entries but a time tracking entry can only be assigned to one project at a time. This means that we have to set the following: **Cardinality = One-to-many**
  One field you can use to link Project and Time is ProjectId

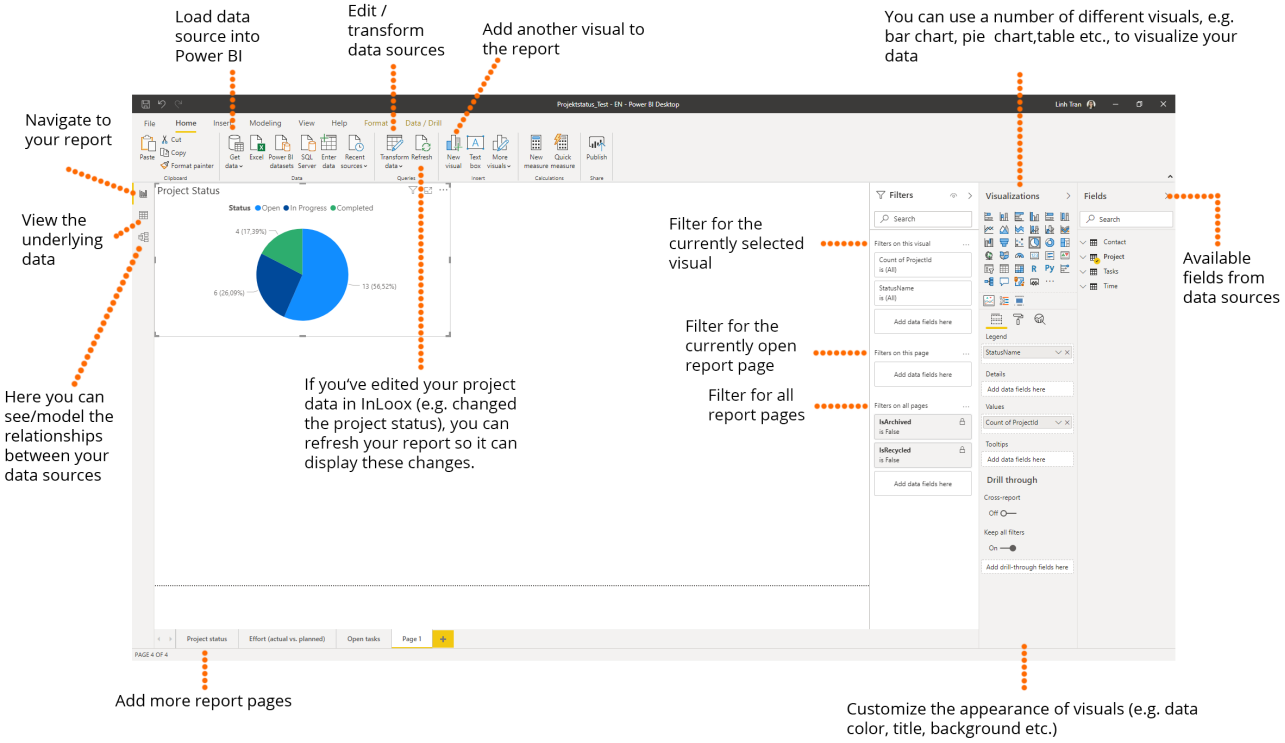




Read more about managing relationships in Power BI: https://docs.microsoft.com/en-us/power-bi/transform-model/desktop-create-and-manage-relationships

3.5 A quick overview of the user interface

Power BI's user interface is pretty intuitive. The following graphic gives you an overview of the most important elements:



Add a new visual

Follow these steps to add a new visual to your report:

- Select the desired visual by **clicking on the respective icon in the Visualizations section**
- Adjust the size of your visual as desired and **move the visual by drag and drop**
- **Add data fields:** you must always at least add one value
- You can also **rename the data fields** for greater clarity, as some fields in the different data sources have the same name. Simply move your mouse over the field to see the original name.
- You can **customize the appearance of your visual as you wish (Format)**

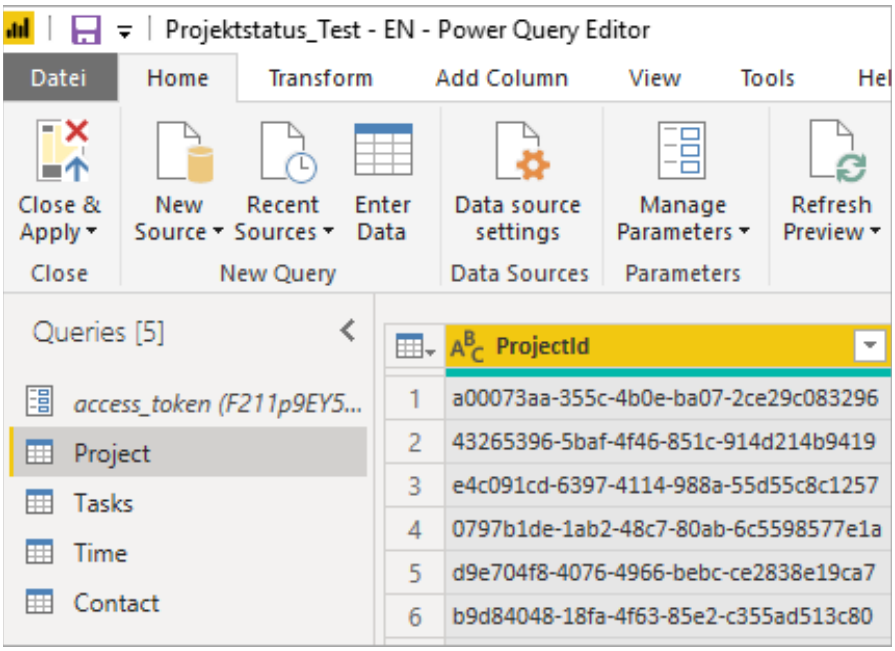
4. Sample reports: A step by step guide

Following the brief introduction to Power BI, this chapter is going to explain how you can create custom reports. We have designed three InLoox reports for you and will explain step by step how you can recreate them. These reports are also available as templates which you can download here: InLoox Power BI Templates

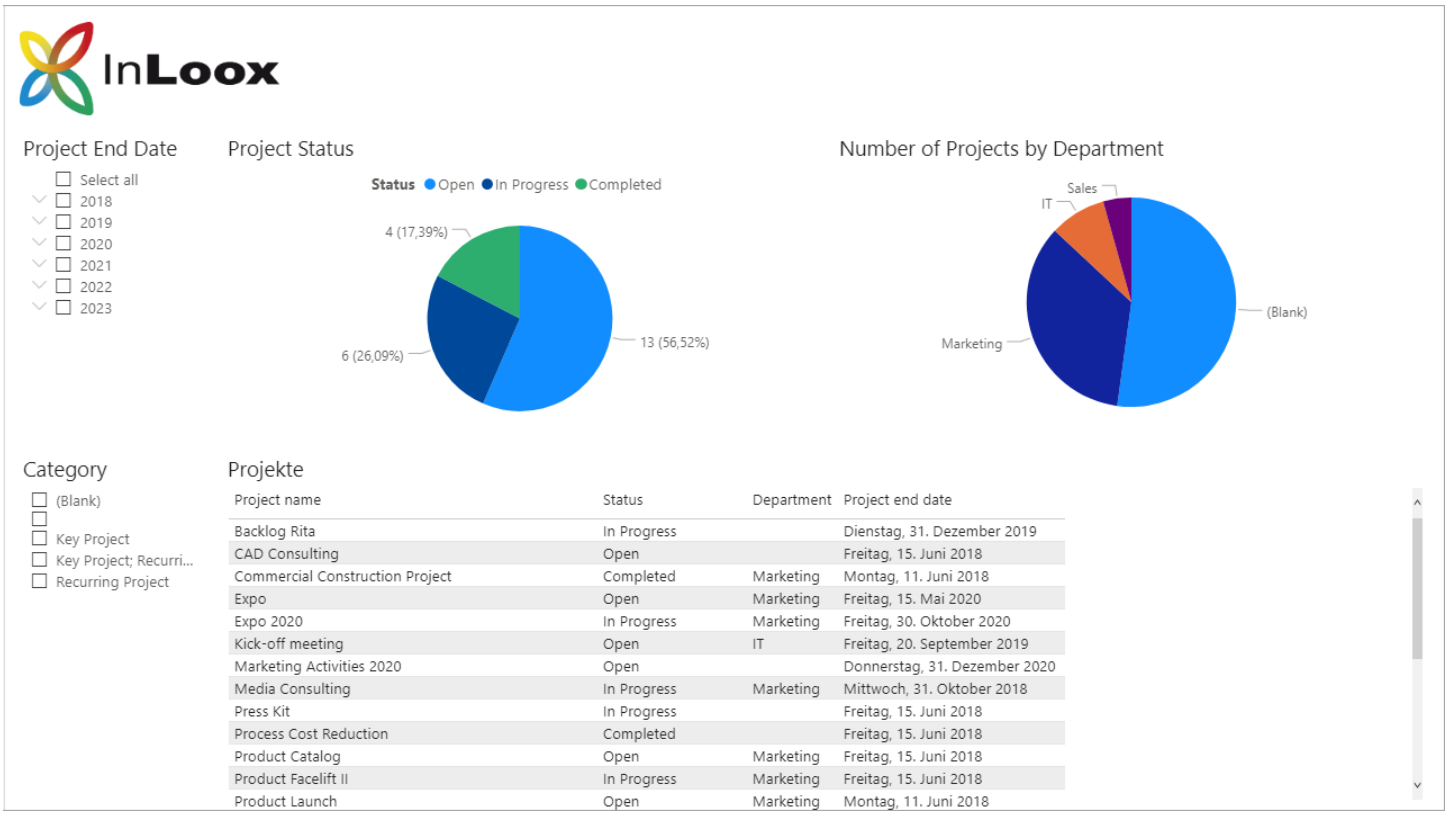
4.1 Preparations

Before we can start designing the report, we need the correct data sources. For the three sample reports, please load the following InLoox data sources into Power BI:

- **Project** = https://app.inlooxnow.com/odata/projectview?access_token={access_token}
- **Tasks** = https://app.inlooxnow.com/odata/workpackageview?access_token={access_token}
- **Time** = https://app.inlooxnow.com/odata/actionview?access_token={access_token}
- **Contact** = https://app.inlooxnow.com/odata/contact?access_token={access_token}



4.2 Report 1: Project status



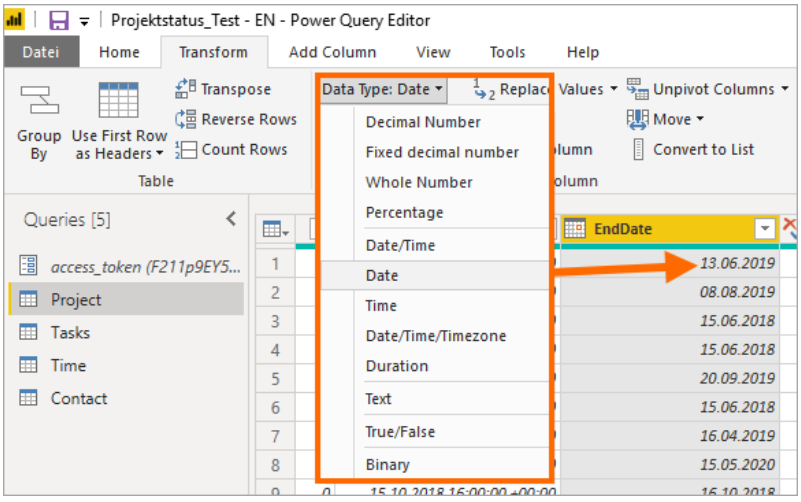
In the first report we'd like to display all active projects, including their status and the project end date. We also want to see how the projects are distributed across the departments of the organization.

For this report we need the following data source:

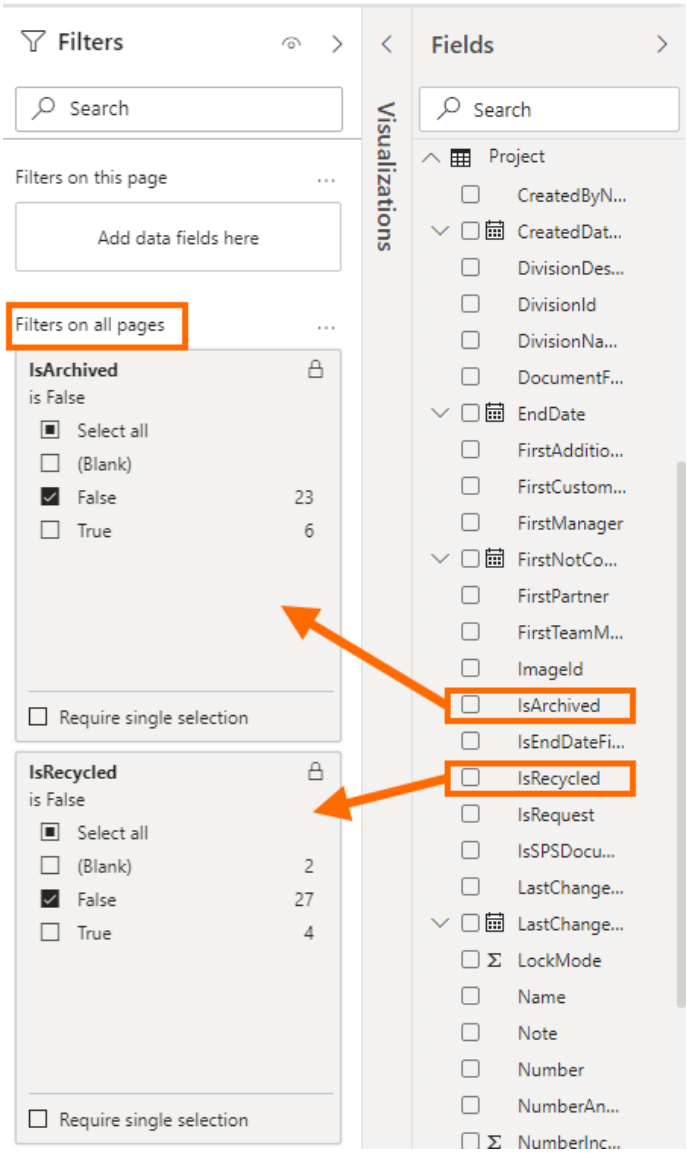
Project = projectview

1. First we need to change the data type of the **EndDate** field of the data source Project in the Power Query editor:

Transform data > Project > Select the EndDate column > Start tab: Data type = Date



2. Now we need to set **filters for all pages** so that only active projects are displayed. This means that only projects that haven't been archived or moved to the recycle bin should be displayed. We set the filter for all pages since this is also relevant for the other reports (report pages).

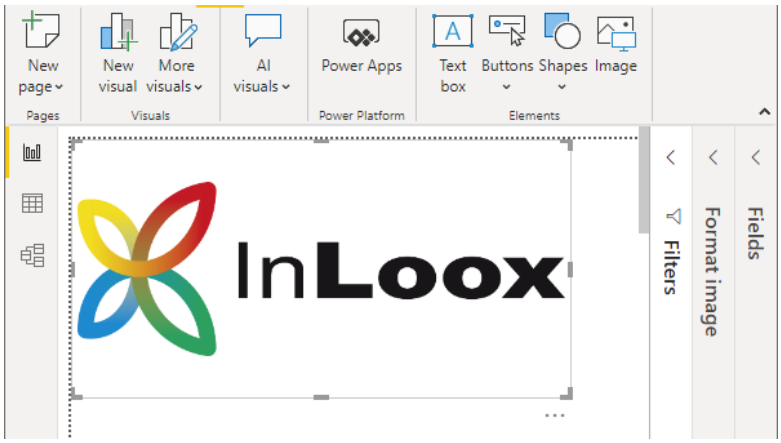


- Under Project, drag the field IsArchived into the area "Filters on all pages" and set a check mark next to False = **IsArchived is False**
- Under Project, drag the field IsRecycled into the area "Filters on all pages" and set a check mark next to False = **IsRecycled is False**

You can lock the filters for editing by clicking on the lock symbol. This ensures that users with whom you share the report can't disable the filter.

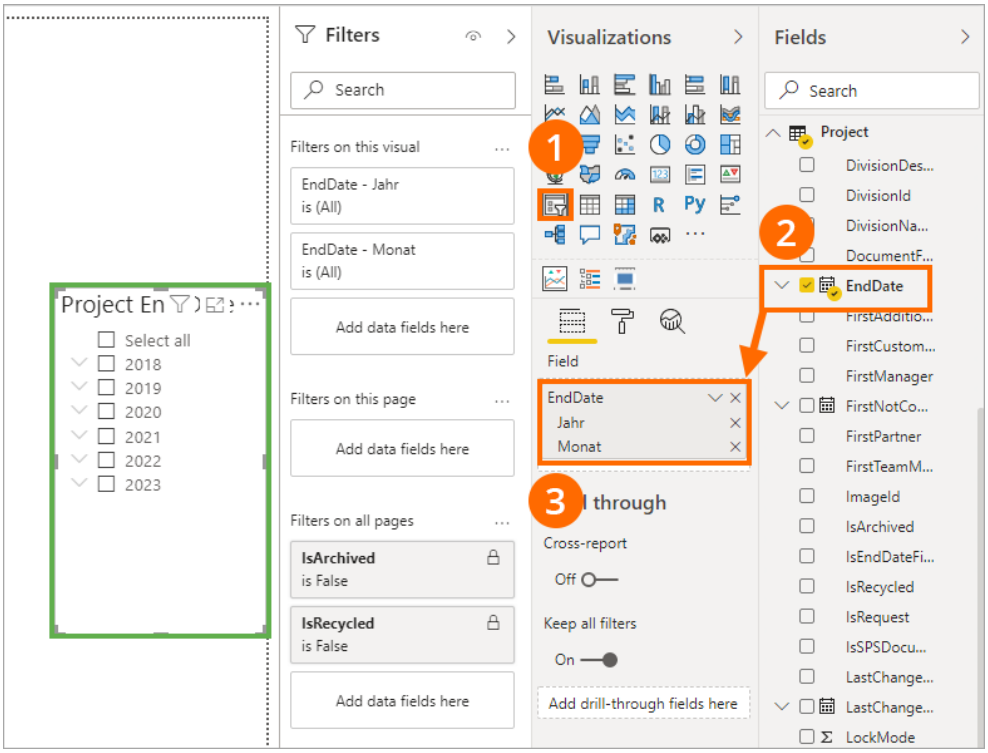
3. (optional) Insert your logo:

Insert > Image > Select image

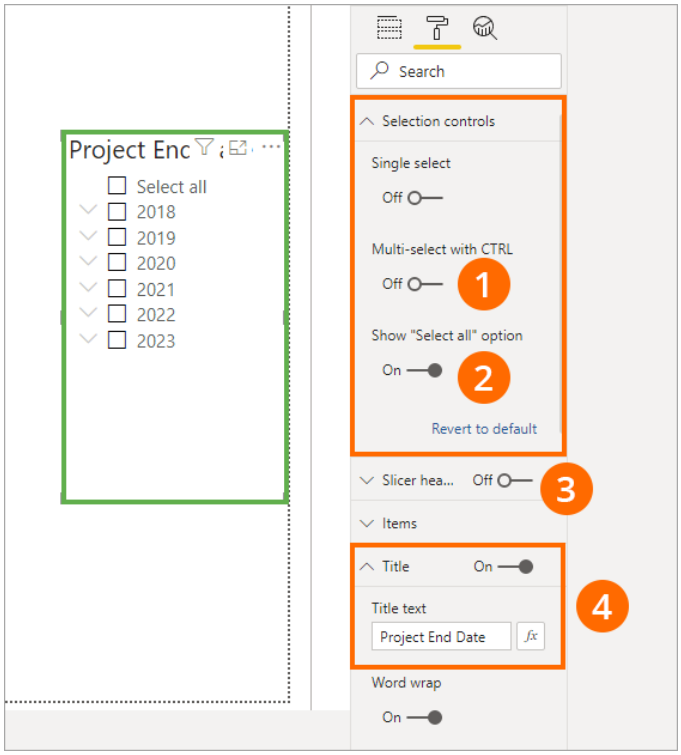


4. Visual #1: Project end date – Slicer

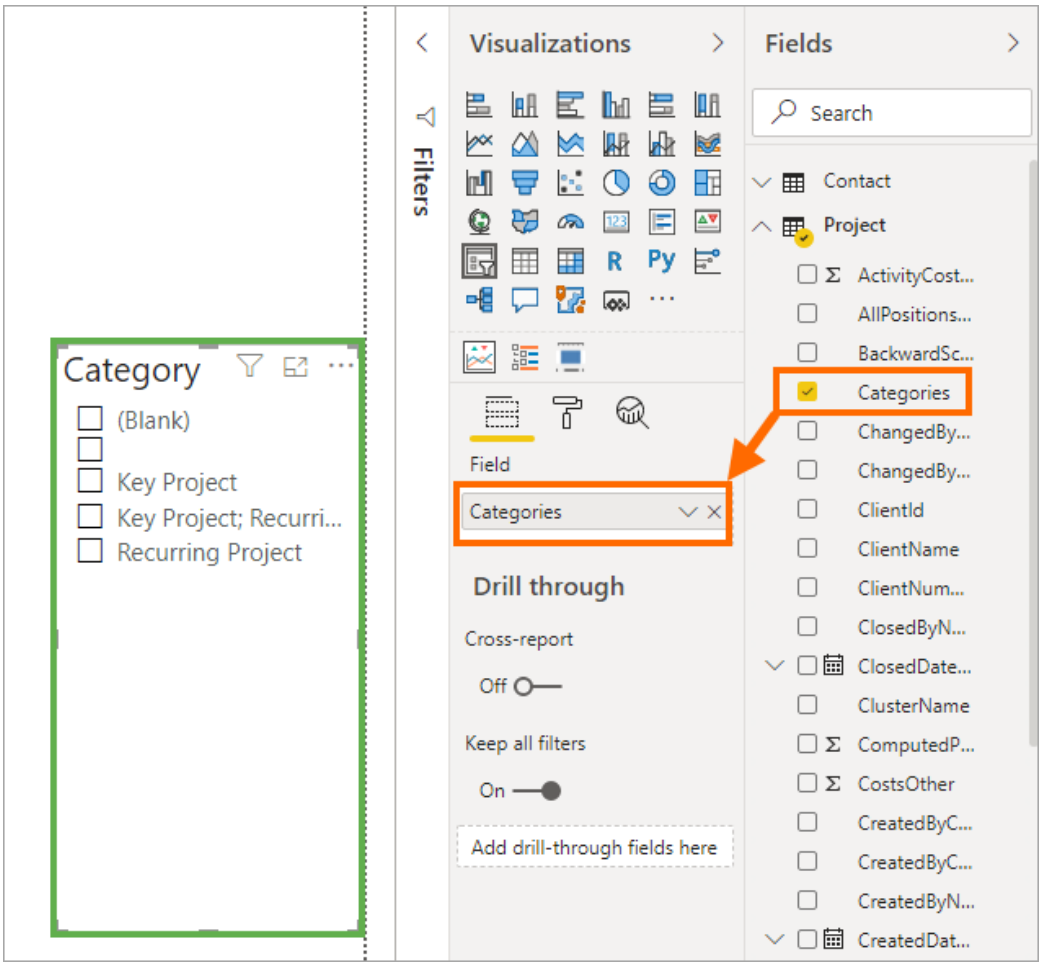
- Select the visual **Slicer**
- **Fields**: Insert the **EndDate** field (**Project** > EndDate)
  - ⇒ Click the arrow in the field and select **Date Hierarchy**
  - ⇒ Remove quarter and day by clicking on the X



- Format:
  - ⇒ **Selection controls**
    1. Single select: Off
    2. Mutli-select with CTRL: Off
    3. Show “Select all” option: On
  - ⇒ **Slicerhead**: Off
  - ⇒ **Title**: On > Title text: Project end date

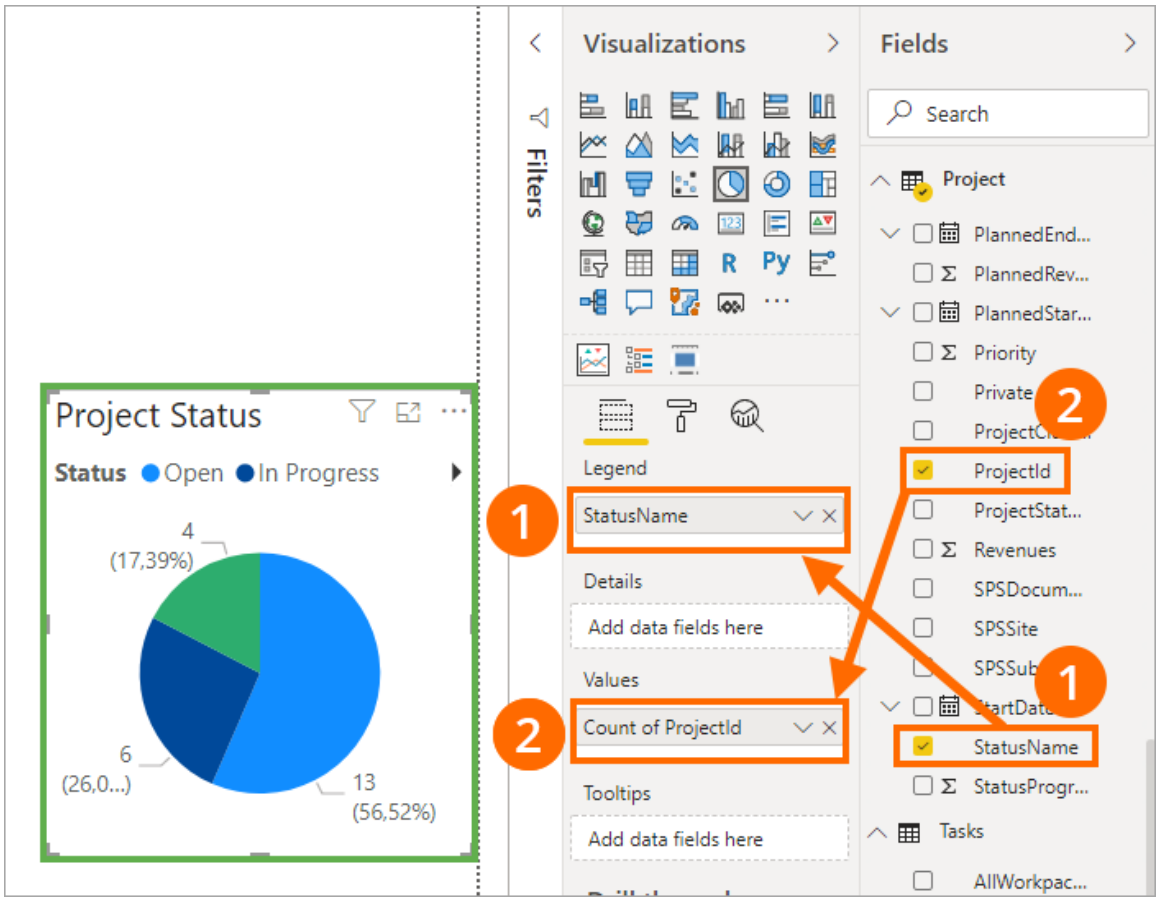


5. Visual #2: Project category – Slicer



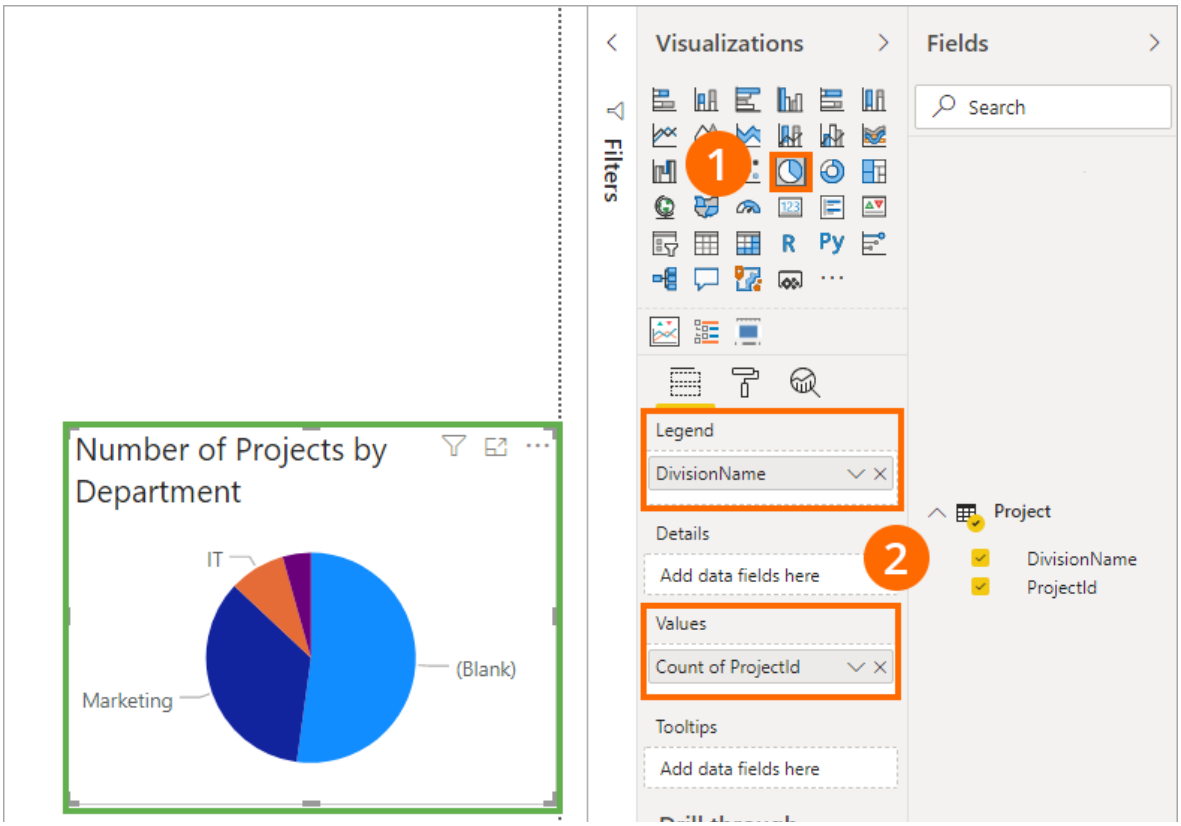
- Click **New visual** to add a new visual: **Start** > **New visual**
- Select the visual **Slicer**
- **Fields**: Insert the Categories field (Project)
- Format:
  - ⇒ **Selection controls:**
    1. Single select: Off
    2. Mutli-select with CTRL: Off
    3. Show "Select all" option: On
  - ⇒ **Slicerhead**: Off
  - ⇒ **Title**: On > Title text: Category

6. Visual #3: Project status – Pie chart

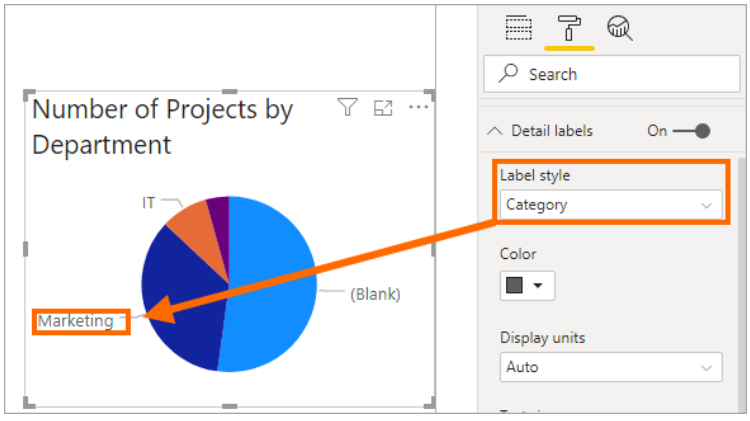


- **Start** > **New visual**
- Select the visual **Pie chart**
- **Fields**:
  - ⇒ **Legend**: Insert the field StatusName (Project)
  - ⇒ **Values**: Insert the field ProjectId (Project)
- **Format**:
  - ⇒ **Legend**:
    1. Position: Top centered
    2. Title: On
    3. Legend name: Status
  - ⇒ **Data colors**: Here you can customize the colors of the different statuses
  - ⇒ **Detail labels**: On > **Label style**: Data value, percent of total
  - ⇒ **Title**: On > Title text: Project status

7. Visual #4: Number of projects by department – Pie chart

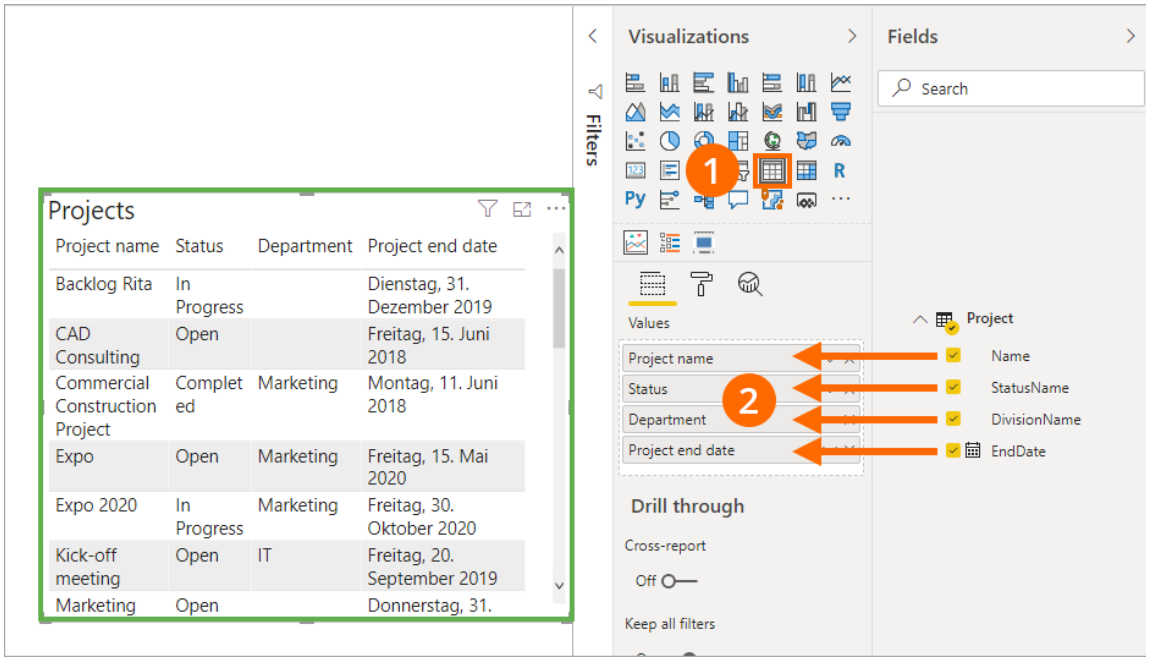


- **Start** > **New visual**
- Select the visual **Pie chart**
- **Fields**:
  - ⇒ **Legend**: Insert the field Division**Name** (**Project**)
  - ⇒ **Values**: Insert the field **Project**Id (**Project**)
- **Format**:
  - ⇒ **Legend**: Off
  - ⇒ **Data colors**: Here you can customize the colors of the different statuses



  - ⇒ **Detail labels**: On > Label style: Category
  - ⇒ **Title**: On > Title text: Number of Projects by department

8. Visual #5: Project list – Table



- **Start** > **New visual**
- Select the visual **Table**
- **Fields**: Insert the following **values (=columns of the table)** from the data source **Project**:
  - ⇒ **Name** = Project name
  - ⇒ **StatusName** = Status
  - ⇒ **DivisionName** = Department
  - ⇒ **EndDate** = Project end date > Click on the arrow next to the field and select End-Date so that only the date is displayed (see Step 1: Data transformation)

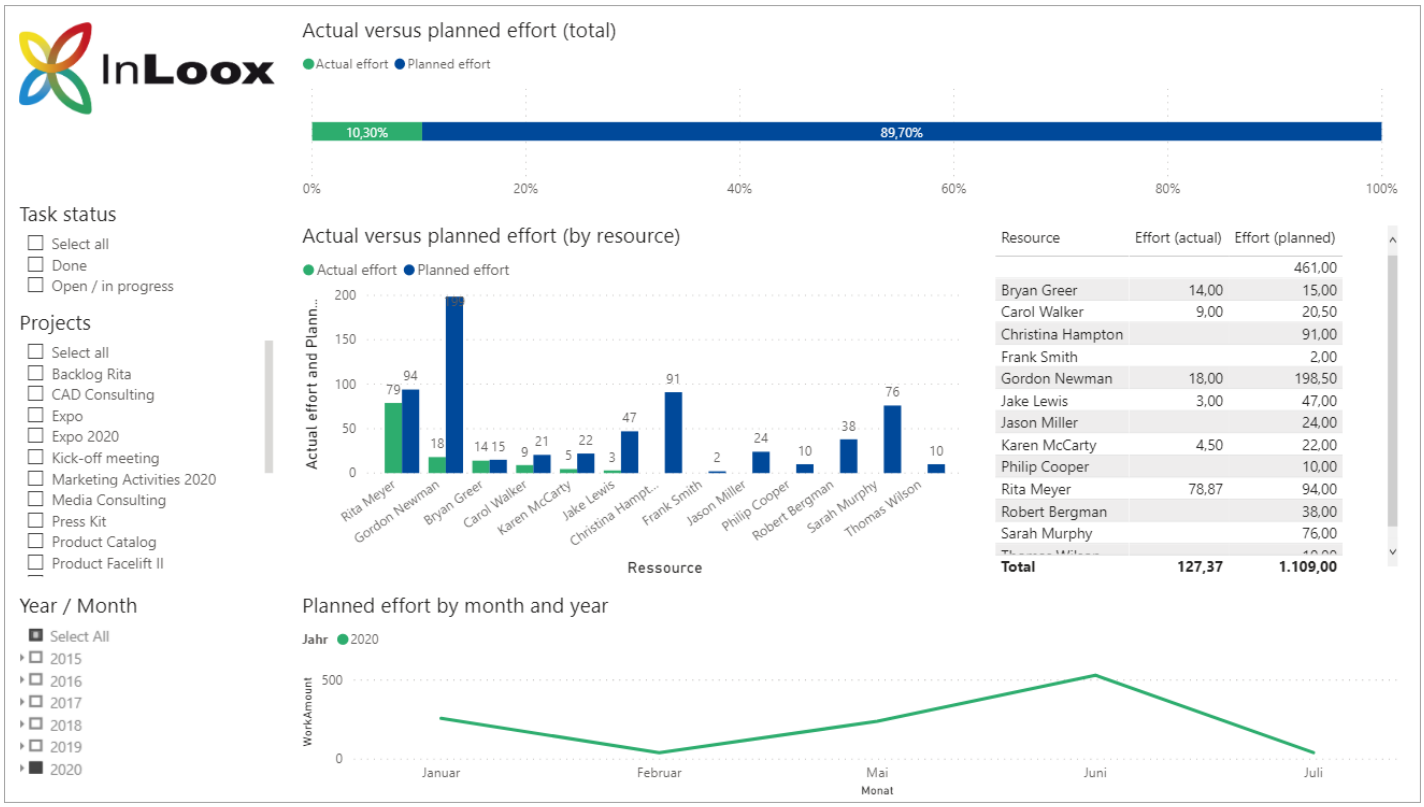
NOTE: You can change the names of the column headers with a double click on the fields (alternatively: right click on a field > Rename). You can easily change the order of the fields (columns) via drag and drop.

- **Format**:
  - ⇒ **Style**: Here you can change the style of the table
  - ⇒ **Grid**: Here you can change e.g. the outline color
  - ⇒ **Title**: Projects

9. Arrange the visuals in the workspace via drag & drop and change the size as required.

4.3 Report 2: Booked versus planned effort

To plan projects reliably, it's important the actual effort (time tracking) matches the planned effort. Only if project managers can estimate the effort accurately, can the project be completed successfully, i.e. on time, on budget and within scope. The project manager can see whether their effort estimates were correct by using the project team members' time tracking entries. So at the end of the project you can see whether you may have under or overestimated the workload. You can use this empirical data for future projects and to plan more reliably.



The second example report compares **time tracking entries with the planned effort**. We also get an **overview of how the workload is distributed over the year** across all projects.

For this report, we'll need the following data sources:

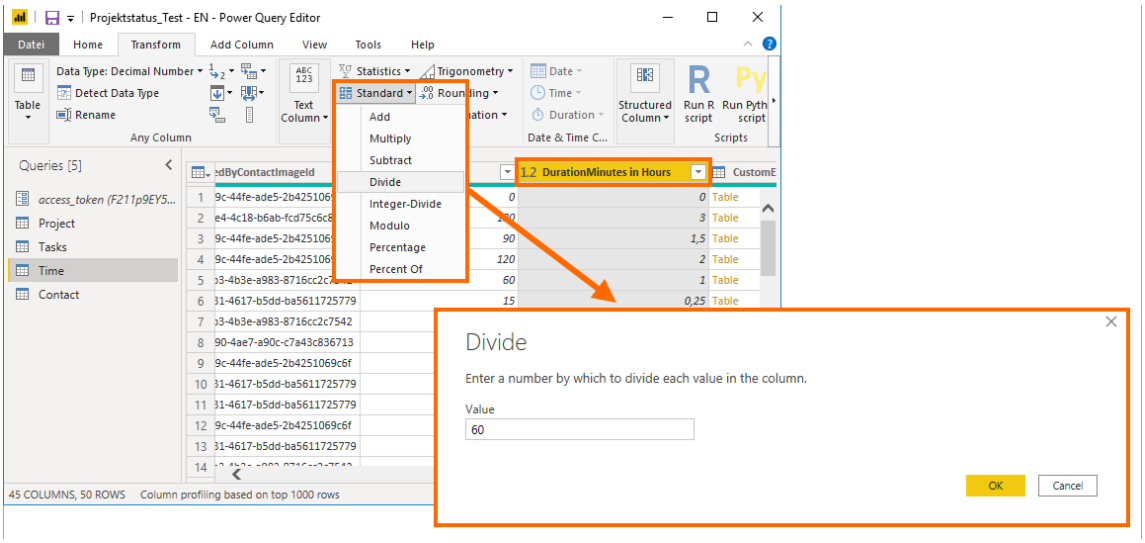
- Project = projectview
- Times = actionview
- Tasks = workpackageview
- Contacts = contact

We need the field **DurationMinutes** from the **time tracking (actionview)** for the actual effort (= time tracking entries). For the planned effort, we need the field **WorkAmount** from **Tasks**. The data source **Contacts** offers the field **DisplayName** (resource names). We need the data source **Project** so that we can filter by projects using the field **Name**.

1. First copy the field DurationMinutes (= actual effort) of the data source Time in the Power Query editor. Since the planned effort (WorkAmount) in the data source **Tasks** is displayed in hours, but the actual effort is displayed in minutes, we need to transform the actual effort.

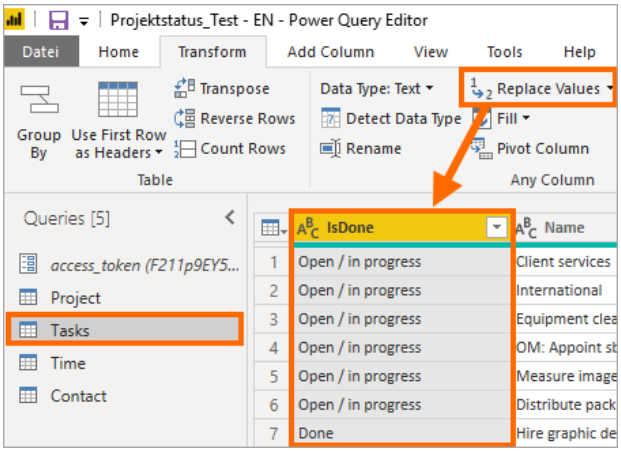
- Right click on the column header **DurationMinutes** > Click **Duplicate column**
- Rename the copied column to "**DurationMinutes in Hours**": **Right click on column header > Rename**
- Perform an operation on this column: **Select the entire column > Transform tab > Number Column > Standard: Divide > Enter 60**

  ⇒ Now the DurationMinutes are displayed in hours

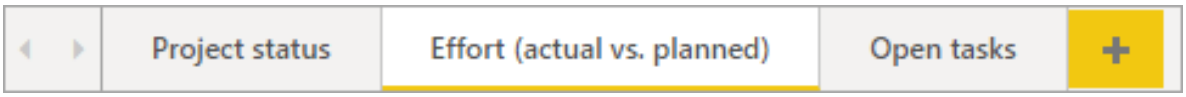


2. Transform the values of the IsDone field of the data source Tasks in the Power Query editor:

- **Transform data** > Tasks
- Select the **column IsDone > Change the data type to "Text"**
- Select the **column IsDone > Replace values > Replace "true" with "Done"**
- Select the **column IsDone > Replace values > Replace "false" with "Open / in progress"**
- Save your changes with **Close and apply**

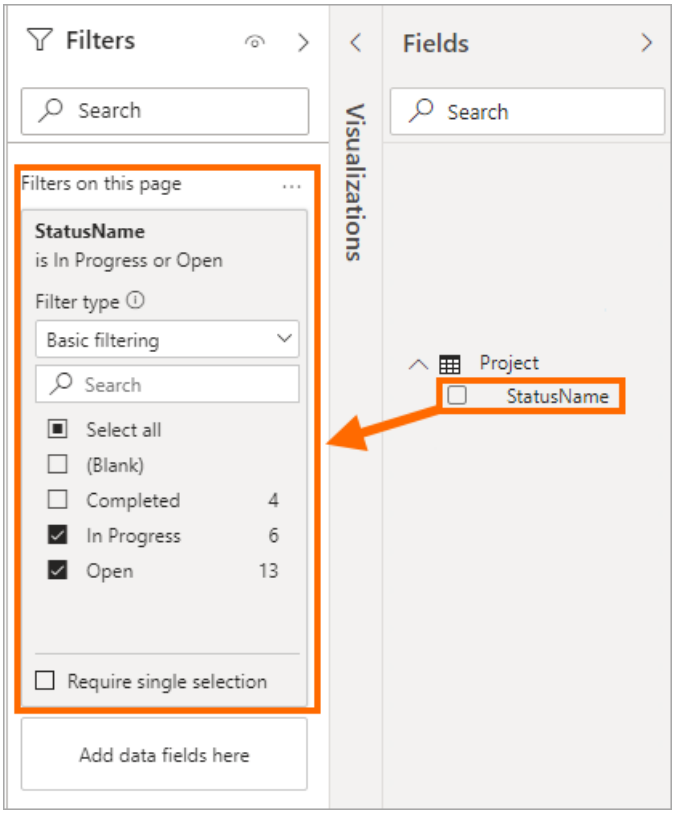


3. Add another **report page**



4. **Filters on this page**: We only want to see actual and planned expenses for projects that are currently in progress. Therefore, we set a filter for the whole page:

- Drag the field **StatusName** (Projects) into the filter area "**Filters on this page**"
- **Check the box "In progress"** or the statuses that you have defined as "In progress"



5. (optional) Insert **logo**:

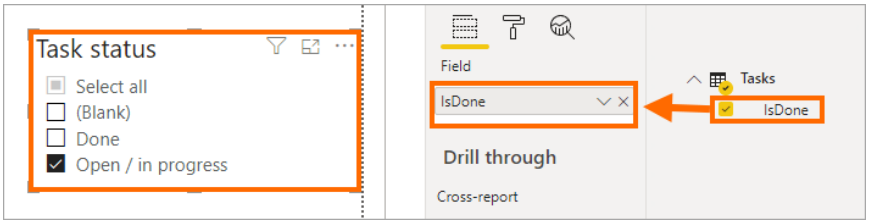
Insert > Image > Select image

6. Visual #1: Task status – Slicer

- Select the visual **Slicer**
- Fields: Insert the field IsDone (Tasks)
- **Format**:

⇒ **Selection controls**

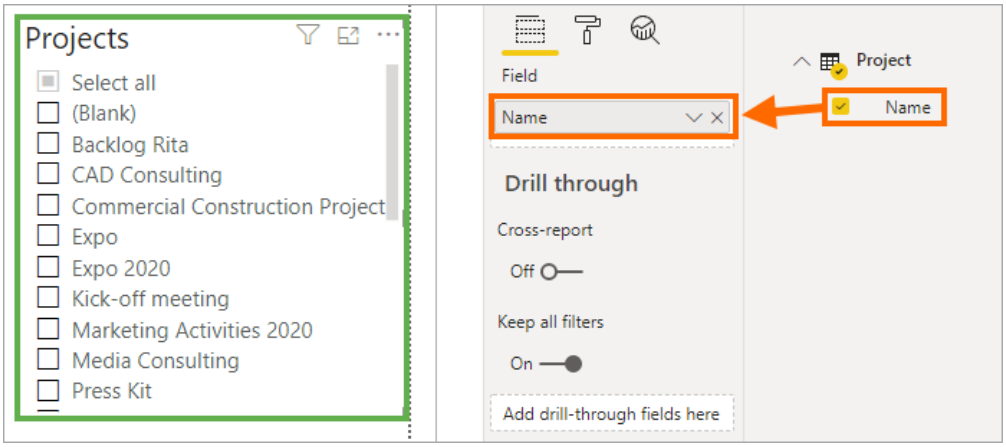
1. 1. Single select: Off
2. 2. Multi-select with CTRL: Off
3. 3. Show "Select all" option: On



⇒ **Slicerhead**: Off

⇒ **Title**: On > Title text: Task status

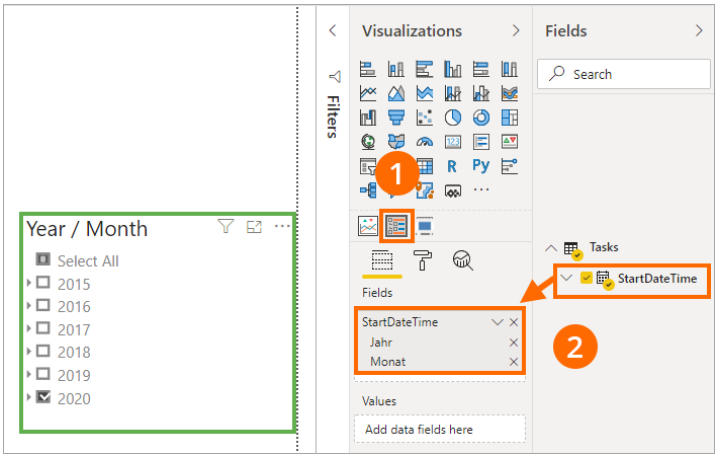
7. Visual #2: Projects – Slicer



- **Start** > **New visual**
- Select the visual **Slicer**
- **Fields**: Insert the field Name (Project)
- **Format**:
  - ⇒ **Selection controls**
    1. Single select: Off
    2. Multi-select with CTRL: Off
    3. Show “Select all” option: On
  - ⇒ **Slicerhead**: Off
  - ⇒ **Title**: On > Title text: Projects

8. Visual #3: Year /Month – HierarchySlicer

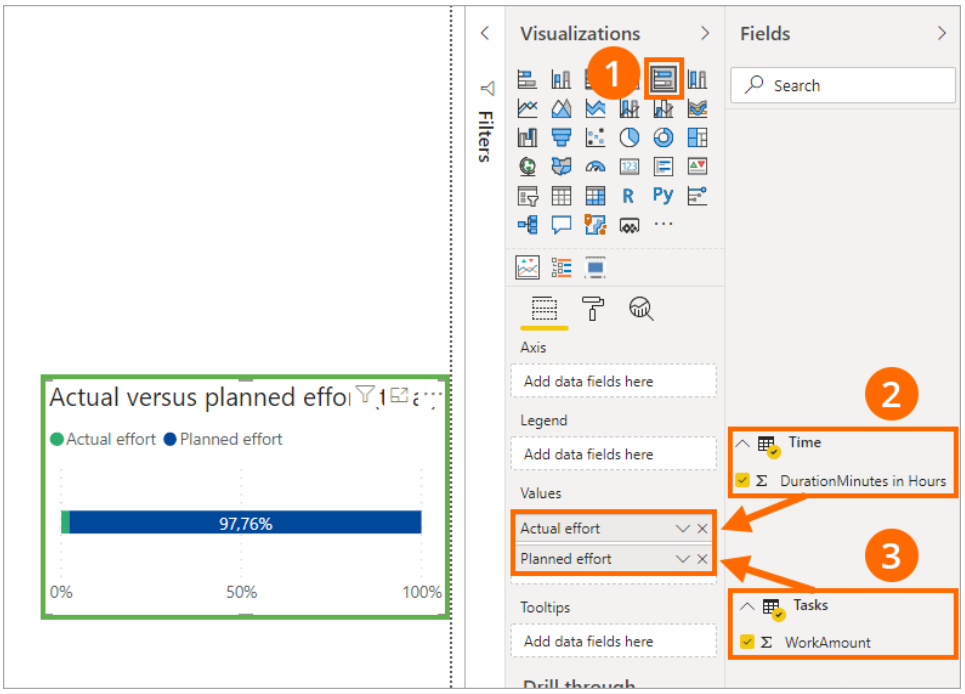
In addition to the standard visuals, Power BI offers a number of other visuals that you can add to the Power BI Desktop App. Some of these visuals are Power BI certified. For this visual, we use the HierarchySlicer:



- Click on the **three dots in the Visualizations section** to download more visuals
  - ⇒ Click **Get more visuals** > **Enter “HierarchySlicer” in the search box** > **Click Add to download the visual**
- **Start** > **New visual**
- Select the visual **HierarchySlicer**

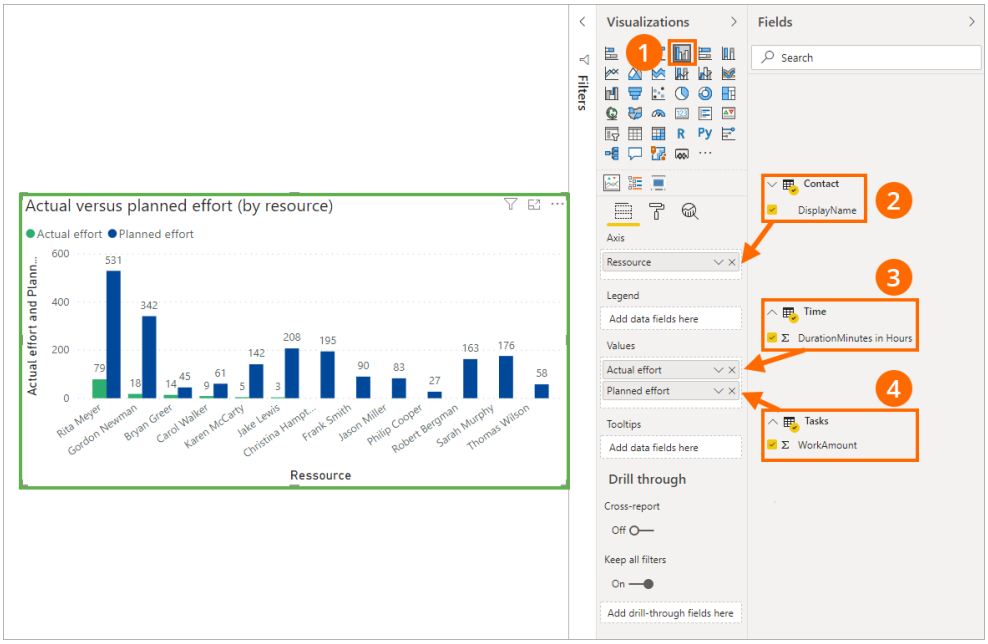
- **Fields**: Insert the field StartDateTime (Tasks) and remove Quarter and Day by clicking on the X
- **Format**:
  - ⇒ **Slicerhead**: Off
  - ⇒ **Title**: On > Title text: Year / Month

9. Visual #4: Actual versus planned effort (total) – 100% Stacked bar chart



- **Start > New visual**
- Select the visual **100% Stacked bar graph**
- Fields > Values:
  - ⇒ Insert the field DurationMinutes in Hours (Time)
  - ⇒ Insert the field WorkAmount (Tasks)
- **Format**:
  - ⇒ **Legend**: On > Position: Top
  - ⇒ **Data labels**: On
  - ⇒ **Title**: On > Title text: Booked versus planned hours (total)

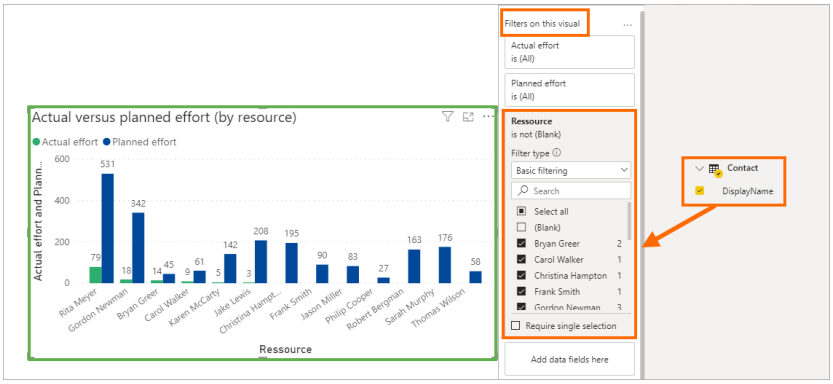
10. Visual #5: Actual versus planned effort in hours (by resource) – Clustered column chart



- **Start** > **New visual**
- Select the **Clustered column chart**
- **Filters on this visual:** We only want to display the efforts and actual times of tasks that have been assigned to a resource. So we filter out all efforts with "Blank" as resource.

  ⇒ Add the field DisplayName (Contacts) to the filter section "**Filters on this visual**"

  ⇒ **Select all resources except "Blank"**



- **Fields**:

  ⇒ **Axis**: Insert the field DisplayName (Contacts)

  ⇒ **Values**:

  1. Insert the field DurationMinutes in Hours (Tasks)
  2. Insert the field WorkAmount (Tasks)

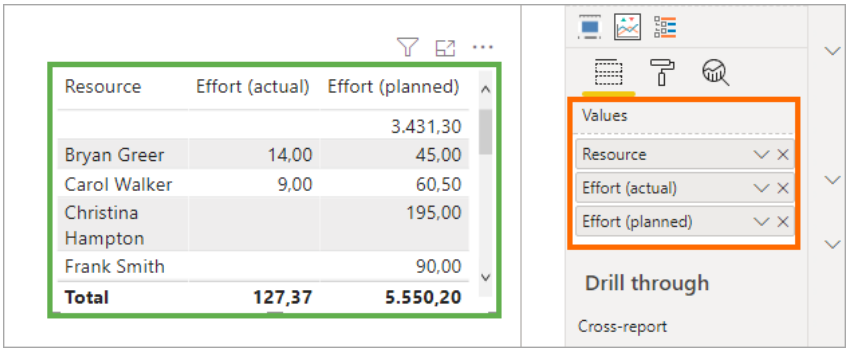
- **Format**:

  ⇒ **Data labels**: On

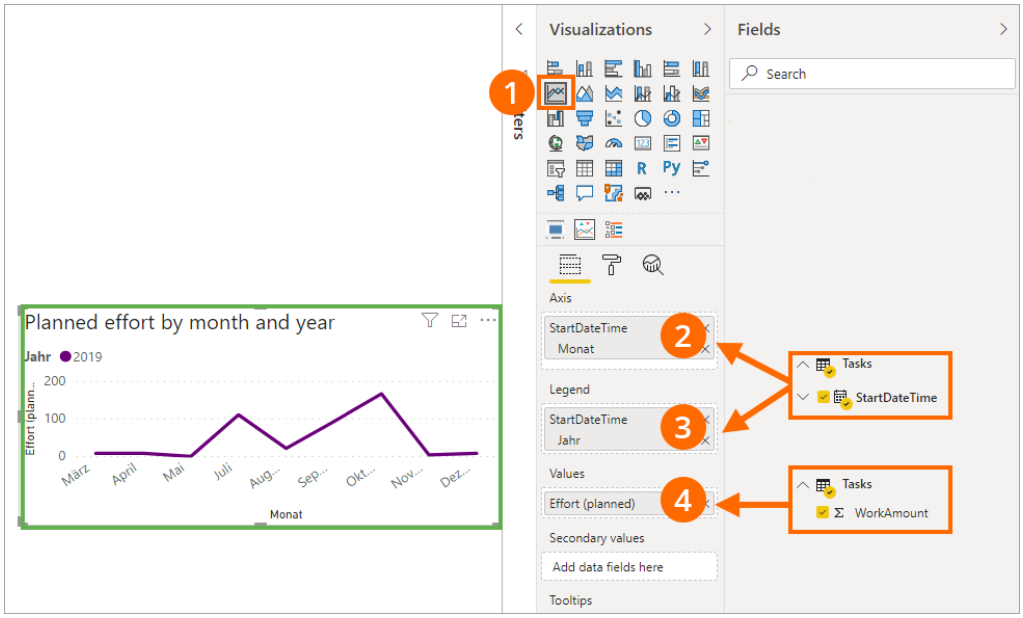
  ⇒ **Title**: On > Title text: Actual versus planned effort in hours (by resource)

11. Visual #6: Booked versus planned effort in hours (by resource) – Table

- **Start** > **New visual**
- Select the visual **Table**
- **Fields** > **Values:**
  - ⇒ Insert the field Display-Name (Contact) and rename it to "**Resource**"
  - ⇒ Insert the field DurationMinutes in Hours (Time) and rename it to "**Effort (actual)**"
  - ⇒ Insert the field WorkAmount (Tasks) and rename it to "**Effort (planned)**"



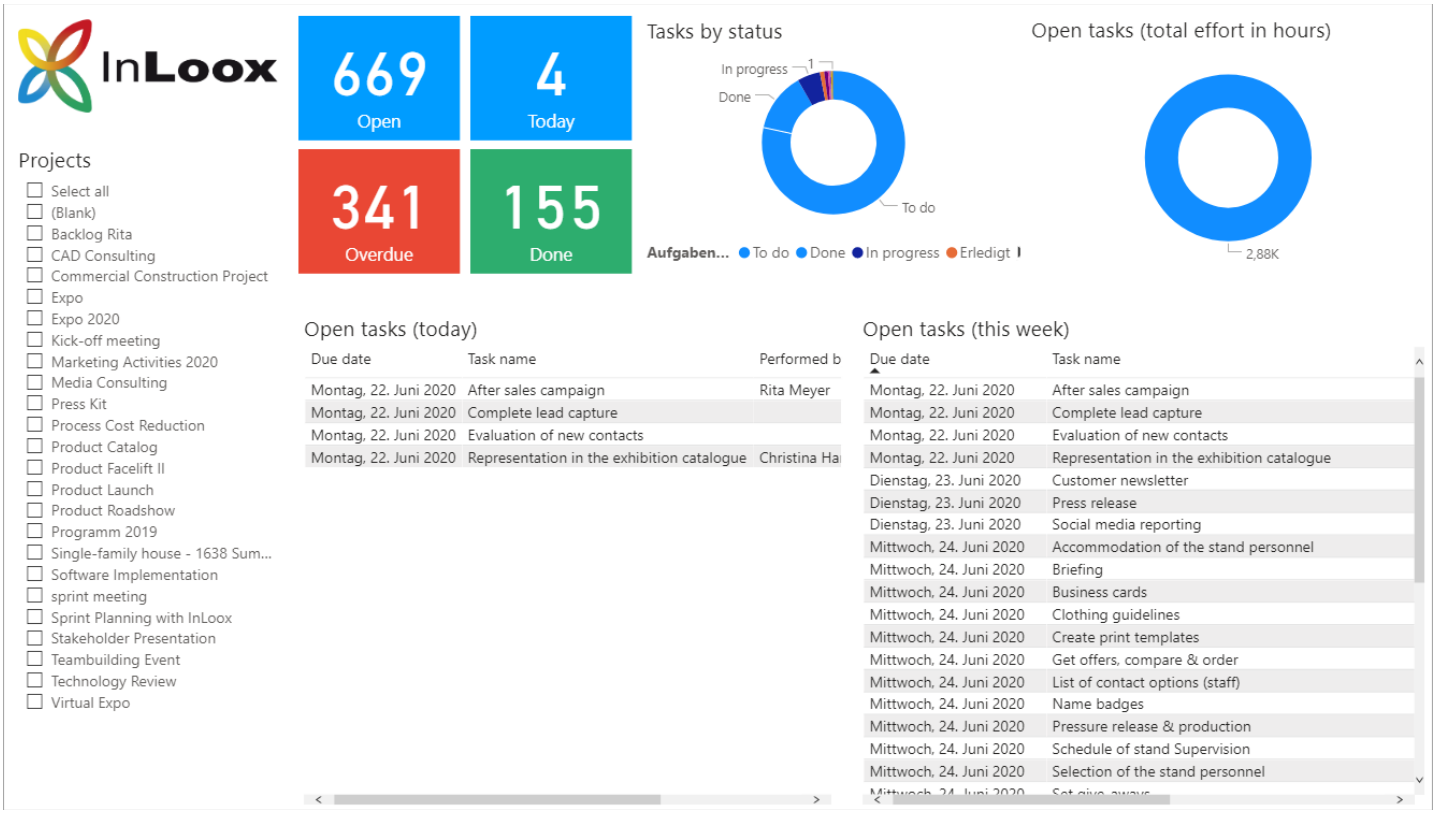
12. Visual #7: Planned effort by month and year – Line chart



- **Start** > **New visual**
- Select the visual **Line chart**
- **Fields**:
  - ⇒ **Axis**: Insert the field StartDateTime (Tasks) and remove Year, Quarter and Day by clicking on the X
  - ⇒ **Legend**: Insert the field StartDateTime (Tasks) > Click on the arrow next to the field and select **Date hierarchy**
  - ⇒ **Values**: Insert the field WorkAmount (Tasks)

4.4 Report 3: Open tasks

How many tasks are still open, how many are overdue, which tasks have to be completed today and which tasks are due this week? These are questions we answer with the third sample report. The report gives you an overview of all open and pending tasks across all projects.



We need the following data sources for this report:

Tasks = workpackageview

Project = projectview

To be able to filter by projects, we need the field Name from the data source Project. We need the following fields from the data source Tasks: IsDone, PlanningReservationStatusName, WorkAmount, EndDateTime, Name, ContactName

1. (optional) Insert logo

   Insert > **Image** > **Select image**

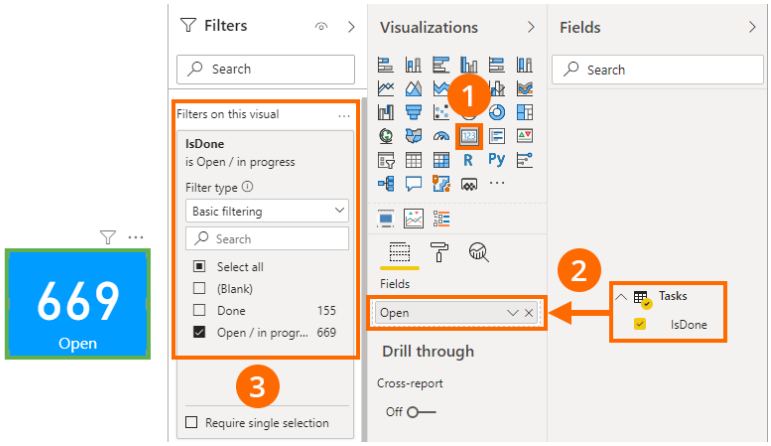
2. Visual #1: Projects – Slicer

- **Start** > **New visual**
- Select the visual **Slicer**
- **Fields**: Insert the field Name (Project)

- **Format**:
  - ⇒ **Selection controls:**
    1. Single select: Off
    2. Multi-select: Off
    3. Show "Select all" option: On
  - ⇒ **Slicerhead**: Off
  - ⇒ **Title**: On > Title text: Projects

3. Visual #2: Number of open tasks – Card

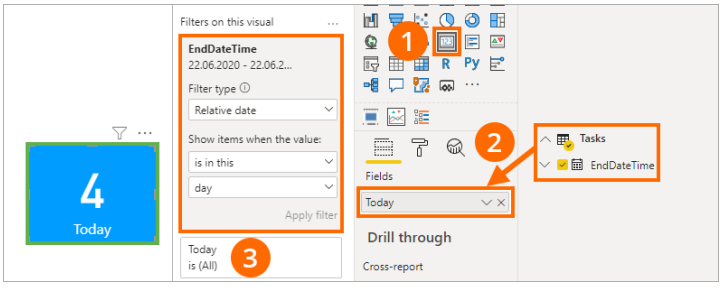
- **Start > New visual**
- Select the visual **Card**
- **Fields**: Insert the field IsDone (Tasks) > Click on the arrow next to the field and select "Count"
- **Filters on this visual:**
  - ⇒ **Field**: IsDone (Tasks)
  - ⇒ **Filter type**: Basic filtering
  - ⇒ Select "**Open / in progress**" or "false" to only display tasks that have not yet been completed



- **Customize the appearance** of the visual as required (i.e. background color)

4. Visual #3: Number of tasks due today – Card

- **Start > New visual**
- Select the visual **Card**
- **Fields**: Insert the field EndDateTime (Tasks) > Click on the arrow next to the field and select "Count"
- **Filters on this visual**:
  - ⇒ **Field**: EndDateTime (Tasks)
  - ⇒ **Filter type**: Relative date
  - ⇒ Show items when the value: **is in this | day**



- **Customize the appearance** of the visual as required (i.e. background color)

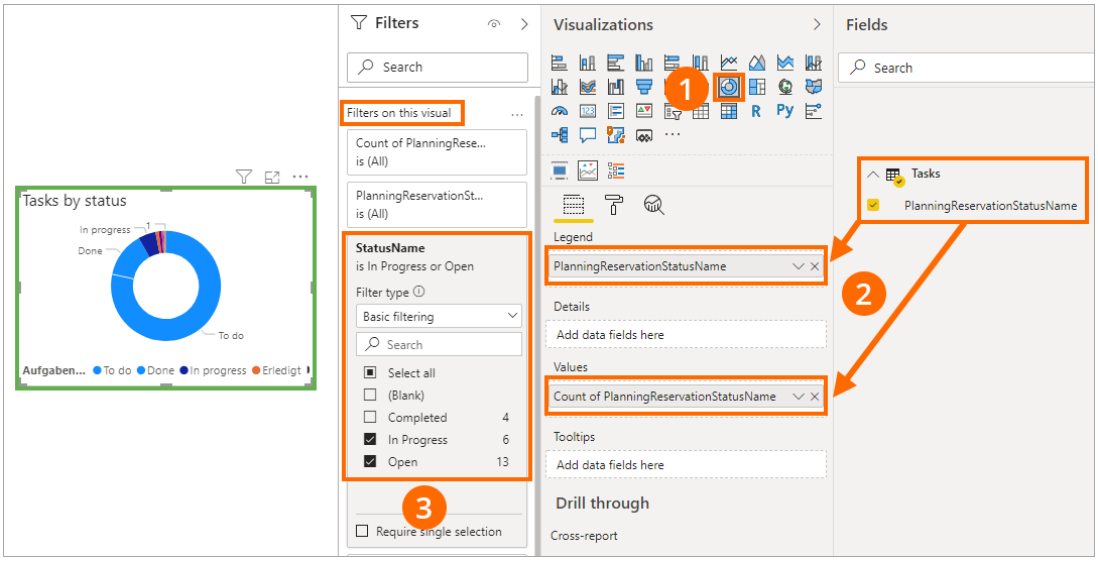
5. Visual #4: Number of overdue tasks – Card

- **Start** > **New visual**
- Select the visual **Card**
- **Fields**: Insert the field EndDateTime (Tasks) > Click on the arrow next to the field and select "Count"
- **Filters on this visual:**
  - ⇒ Field: EndDateTime (**Tasks**)
  - ⇒ Filter type: **Relative date**
  - ⇒ Show items when the value: **is in the last | 2 | years** (you can select an individual time period here)
  - ⇒ **IMPORTANT**: Do NOT check the box "Include today", as we want to get the number of OVERDUE tasks
- **Customize the appearance** of the visual as required (i.e. background color)

6. Visual #5: Number of completed tasks – Card

- **Start** > **New visual**
- Select the visual **Card**
- **Fields**: Insert the field IsDone (Tasks) > Click on the arrow next to the field and select "Count"
- **Filters on this visual**:
  - ⇒ Field: IsDone (Tasks)
  - ⇒ Filter type: **Basic filtering**
  - ⇒ **Select "Done" or "true"** to only show the completed tasks
- **Customize the appearance** of the visual as required (i.e. background color)

7. Visual #6: Open tasks by status – Donut chart



- **Start** > **New visual**
- Select the visual **Donut chart**
- **Fields**:
  - ⇒ **Legend**: Insert the field PlanningReservationStatusName (Tasks)
  - ⇒ **Values**: Insert the field PlanningReservationStatusName (Tasks)
- **Filters on this visual**:
  - ⇒ Field: StatusName (Project)
  - ⇒ Filter type: **Basic filtering**
  - ⇒ Select “Open/In progress” —> All statuses that mark project as „not done“
- **Format**:
  - ⇒ **Legend**: On > Position: Bottom center
  - ⇒ **Detail labels**: On > Label style: **Category**
  - ⇒ **Title**: On > Title text: Open tasks by status

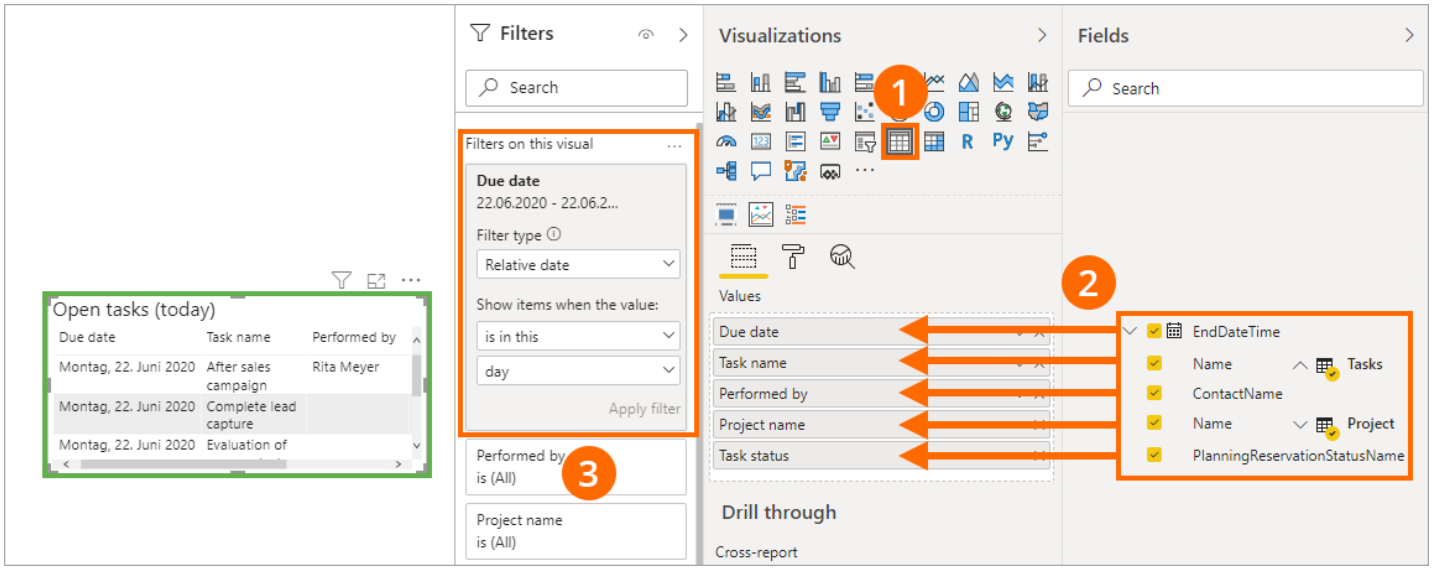
8. Visual #7: Open tasks (effort in hours) – Donut chart

- **Start** > **New visual**
- Select the visual **Donut chart**
- **Fields** > **Values**: Insert the field WorkAmount (Tasks)
- **Filters on this visual:**
  - ⇒ **Field**: StatusName (Project)
  - ⇒ **Filter type:** Basic filtering

⇒ Select **“Open / In progress”**—> All statuses that mark project as „not done“

- **Format**:
  - ⇒ **Legend**: On
  - ⇒ **Detail labels**: On > Label style: Data value
  - ⇒ **Title**: On > Title text: Open tasks (effort in hours)

9. Visual #8: List of open tasks due today – Table



- **Start > New visual**
- Select the visual **Table**
- **Fields > Values**:
  - ⇒ **Due date** = EndDateTime (Tasks) > Click on the arrow next to the field and select Due Date or EndDateTime
  - ⇒ **Task name** = Name (Tasks)
  - ⇒ **Performed by** = ContactName (Tasks)
  - ⇒ **Project name** = Name (Project)
  - ⇒ **Task status** = PlanningReservationStatusName (Tasks)
- **Filters on this visual:**
  - ⇒ Field: EndDateTime (Tasks)
  - ⇒ Filter type: **Relative date**
  - ⇒ Show items when the value: **is in this | day**
- **Customize the appearance** of the visual as required

10. Visual #9: List of open tasks due this week – Table

- **Start** > **New visual**
- Select the visual **Table**
- **Fields** > **Values:**
  - ⇒ **Due Date** = EndDateTime (Tasks) > Click on the arrow next to the field and select Due Date or EndDateTime
  - ⇒ **Task name** = Name (Tasks)
  - ⇒ **Performed by** = ContactName (Tasks)
  - ⇒ **Project name** = Name (Project)
  - ⇒ **Task status** = PlanningReservationStatusName (Tasks)
- **Filters on this visual**:
  - ⇒ Field: EndDateTime (Tasks)
  - ⇒ Filter type: **Relative date**
  - ⇒ Show items when the value: **is in this** | **week**
- **Customize the appearance** of the visual as required

5. Publish and share reports

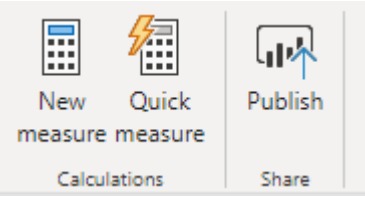
5.1 Publish reports

After creating reports in the Power BI Desktop App, you can publish them to the Power BI online service and share them with specific people or with your entire organization.

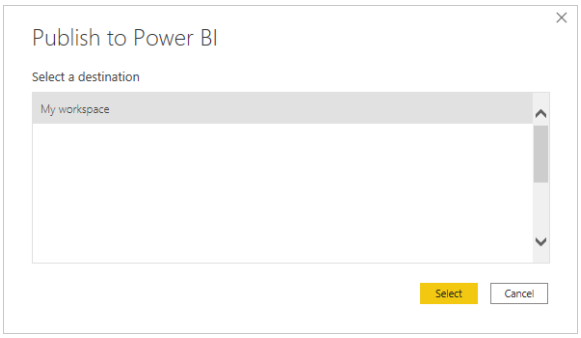
If you already use Office 365, you are automatically signed in to Power BI with your Office 365 credentials. If you aren't already signed in, please sign in to your Office account.

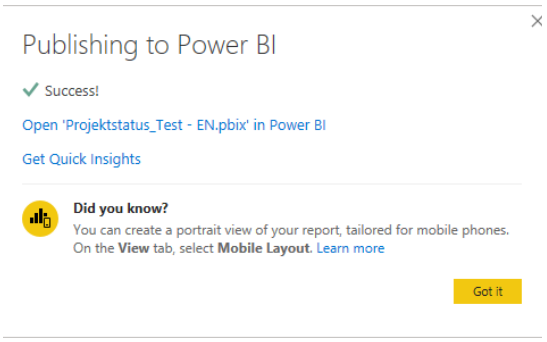
Follow these steps to publish a report:

- **Publish** > **Publish to Power BI**



- **Select the workspace** in which you want to publish your report
- Now you can **open your report in the Power BI Web** and **Mobile App**

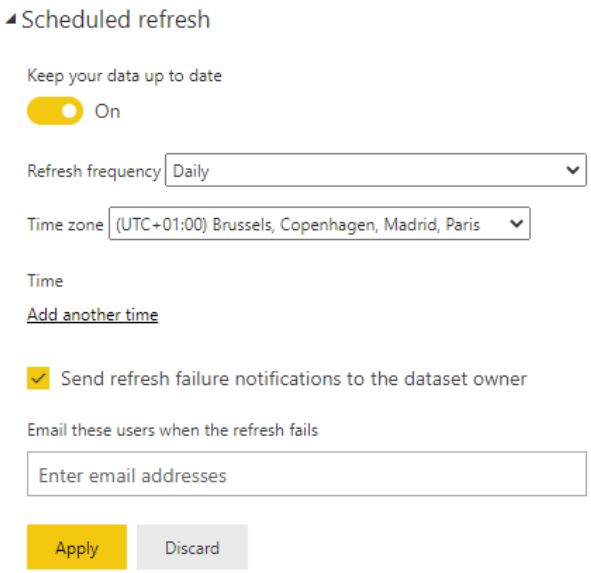




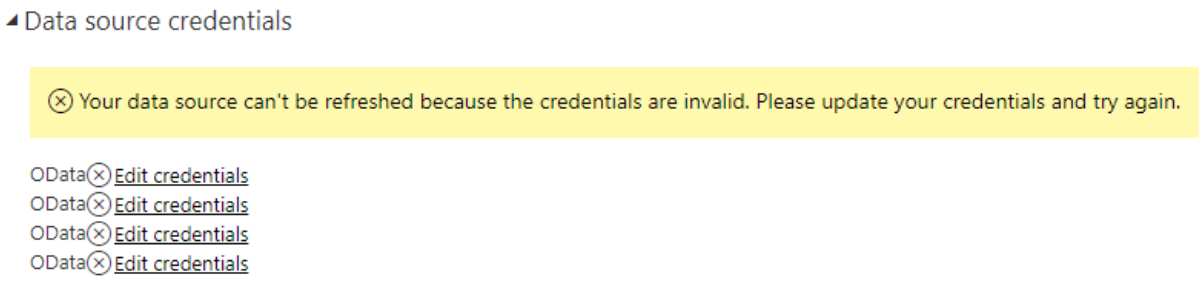
Set scheduled refresh

You can set a scheduled refresh for your published reports. This means that your data sources are updated at regular time intervals and you and anyone with whom you've shared the report will always see the most current data.

- Open the Power BI online service: https://app.powerbi.com/
- **Select the workspace** in which you have published your report
- Select **Datasets** > **Select the correct dataset** (has the same name as the report) > **Actions: More options** > **Settings** > **Scheduled refresh**



⇒ **ATTENTION**: If the "Scheduled refresh" section is grayed out, open the **Data source credentials** and check whether your login information is up to date. If the following error message appears:



Click on each **"Edit credential" with an X** to it and confirm by clicking on "Sign in". Now you can **activate the scheduled refresh and set the update frequency**.

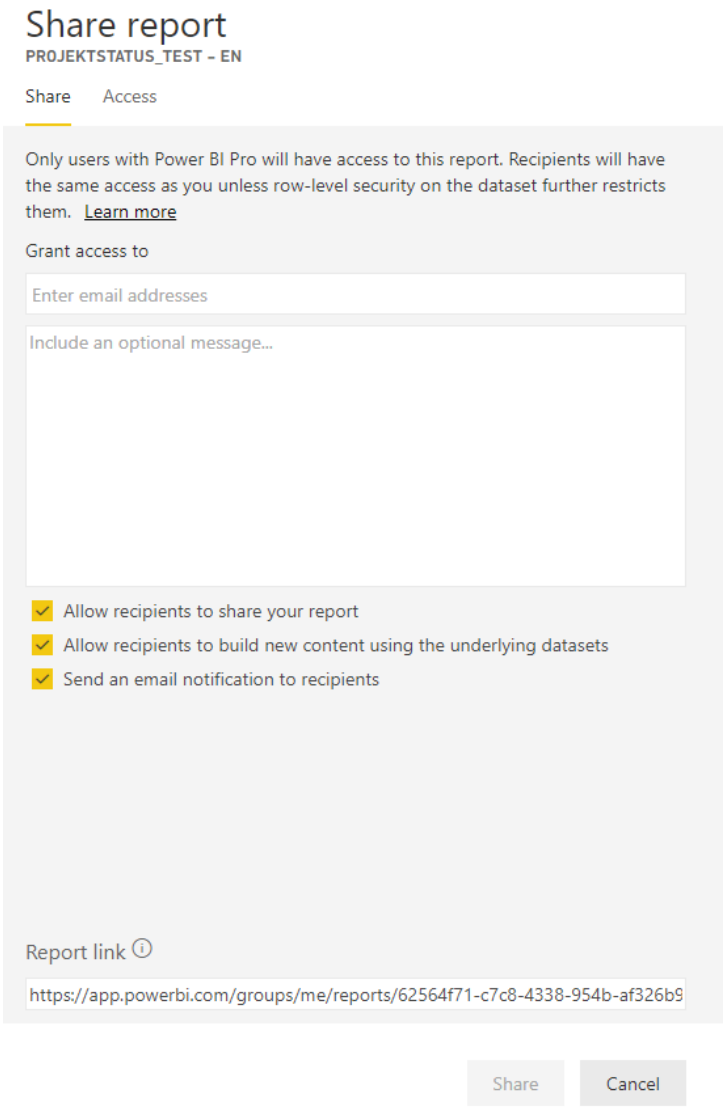
5.2 Share reports

You can share a report with everyone or only certain people in your organization.

ATTENTION: The users with whom you share the report see the exact same data as you do, i.e. they use your InLoox permissions (via your Access Token) to access the report. Of course, this only applies to this report in Power BI and does not change the InLoox permissions. Users will continue to only see what they are authorized to see in InLoox.

Here is how you share a report:

- Open the Power BI Web App: https://app.powerbi.com/
- **Select the desired report > Share**
- You can **allow recipients to share your report** or for them to **build new content using the underlying datasets.** You can also **send the report via email** to recipients.



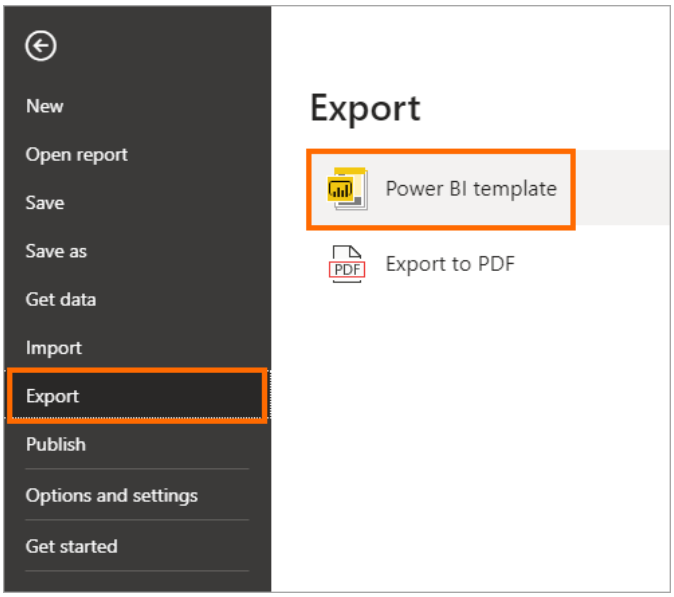
6. Export and import reports

Export reports

You can export Power BI reports as a PDF or as Power BI template (.pbit) file.

Follow these steps to export a Power BI template:

> **File** > **Export** > **Power BI Template** > (optional) Enter a **template description** > **Name your template** and **select the storage location** > **Confirm with OK**



Import reports

You can also import Power BI templates that have been shared with you.

Follow these steps to import Power BI templates to the Power BI Desktop App:

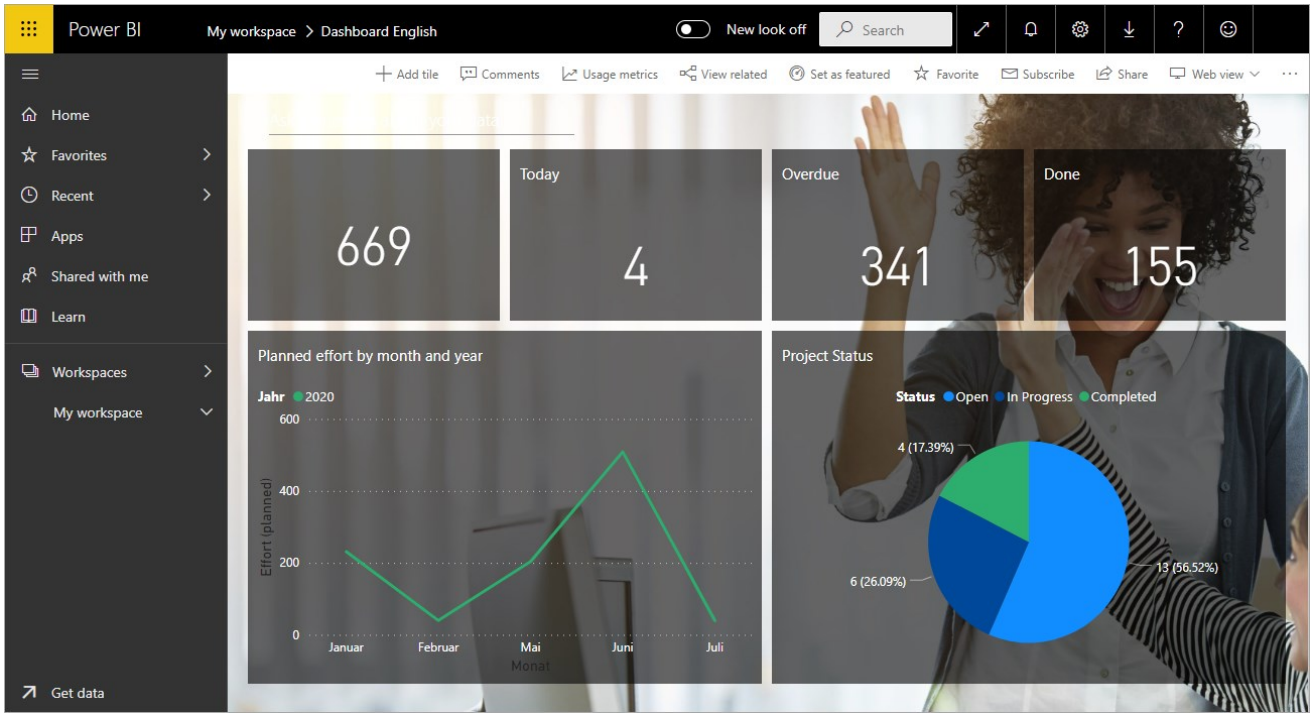
> **File** > **Import** > **Power BI Template** > **Select the template file (.pbit or .pbix)** > **Confirm with OK**

If the template contains parameters, such as the access_token parameter, you will be prompted to define/enter the parameter value when you open the template.

7. Create a dashboard in Power BI

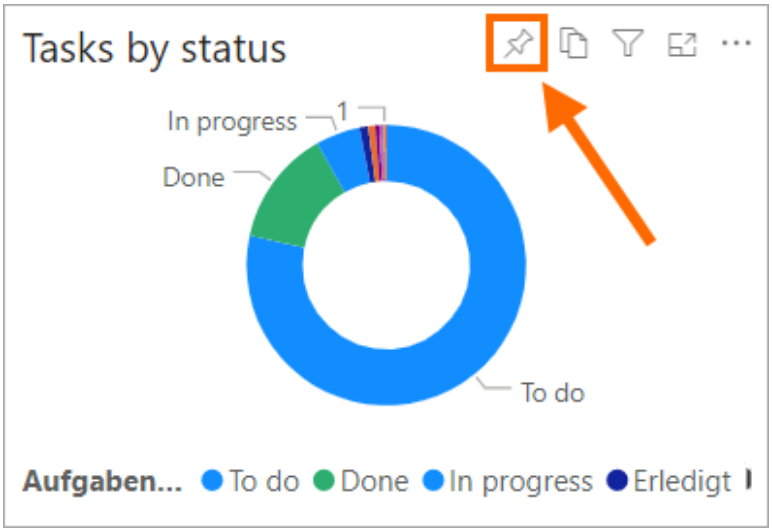
As mentioned in the beginning, dashboards in Power BI are not the same as dashboards in In-Loox. Power BI dashboards are an agglomeration of specific information form specific reports. Therefore, dashboards are not available in the Power BI Desktop App. However, you can create dashboards in Power BI's online service. There are several ways to create dashboards:

- From scratch
- Based on a report
- Using a dataset
- By duplicating an existing dashboard



7.1 Pin individual elements from an existing report to a dashboard

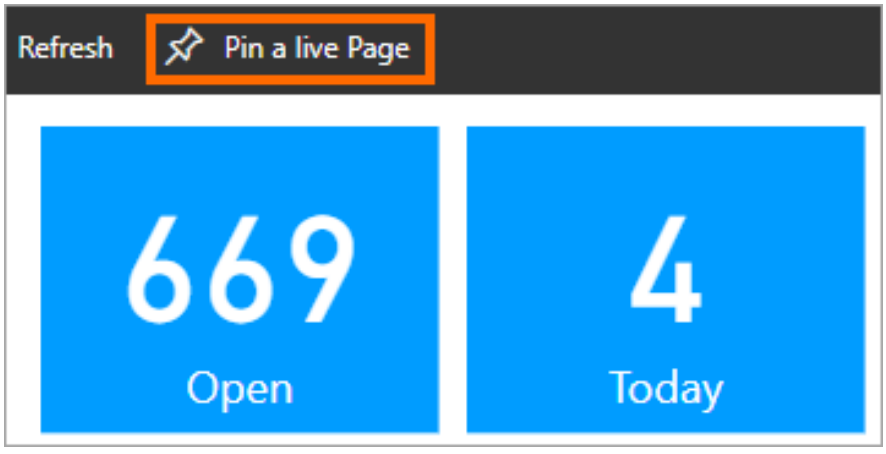
Follow these steps to pin individual elements from an existing report to a dashboard:



- Open the Power BI Web App: https://app.powerbi.com/
- **Navigate to the desired report**
- **Move the mouse over the visual** you want to add to the dashboard
- You will see various icons on the upper right-hand corner of the visual, including a thumbtack icon > **Click on the thumbtack icon**
- Select whether you want to **pin the visual to an existing dashboard or to a new one**
- You'll find all dashboards in the **"Dashboards" section of the respective workspace**
- **Inside the dashboard:** The individual visuals appear as tiles in the dashboard. You can change the size of the tiles by dragging them with your mouse and you can change the position of the tiles via drag and drop

7.2 Pin a whole report page to a dashboard

Follow these steps to pin a complete report to a dashboard:



- Open the Power BI Web App: https://app.powerbi.com/
- **Navigate to the desired report**
- Click on **Pin a live Page**
- Select whether you want to **pin the report page to an existing dashboard or to a new one**
- **You'll find all dashboards in the "Dashboards" section of the respective workspace**

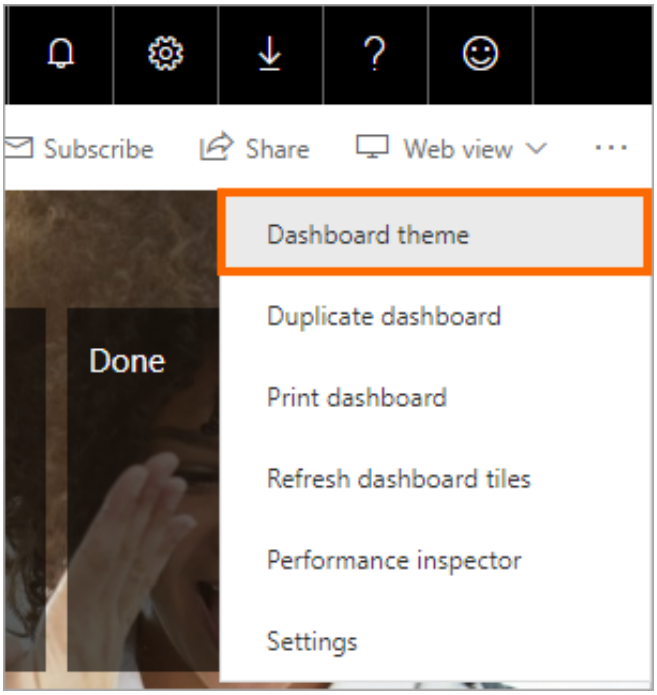
- **Inside the dashboard**: The individual visuals appear as tiles in the dashboard. You can change the size of the tiles by dragging them with your mouse and you can change the position of the tiles via drag and drop

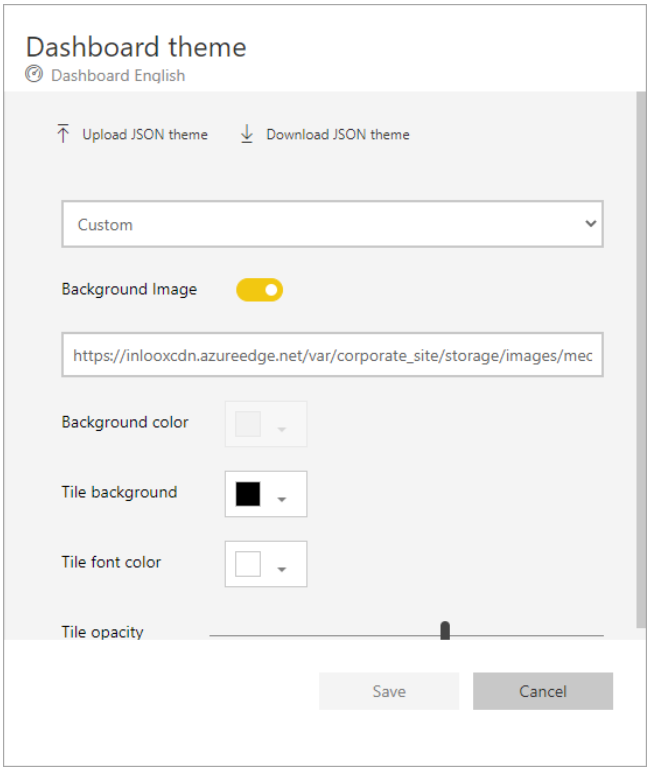
7.3 Customize the dashboard design

You can customize the appearance of your dashboards. For example, you can adjust the color and opacity of the tiles.

Here's how you can customize a dashboard's appearance:

- **Open the dashboard**
- Click on the **three dots on the upper right-hand corner of the page > Click on Dashboard theme > Select one of the standard themes or create a custom theme**





About InLoox

InLoox was founded in 1999 and develops project management solutions integrated in Microsoft Outlook that simplify and accelerate business processes. The convenient Outlook integration makes InLoox the central platform for project and day-to-day business. Its ease of use makes every-day work easier and project managers, teams and decision-makers can rely on InLoox's powerful planning, controlling and monitoring functions - on the desktop, on the Web and on their smartphones.

More than 60,000 users in over 65 countries trust InLoox. InLoox customers include AVIS, CHRIST Wash Systems, German Red Cross, LIEBHERR, Novartis, Pentax Europe, STOROpack, SEAT, Siemens, US Airways, Verizon and many more. InLoox is based in Munich, Germany and has offices in San Francisco, USA.

Contact:

Postal adress: Walter-Gropius-Straße 17
80802 München

Phone: +49 (0) 89 358 99 88 - 0
Fax: +49 (0) 89 358 99 88 - 99

E-mail: info@inloox.com
Website: https://inloox.com

Get your **30-day free** trial:

https://www.inloox.com/