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Power BI; Templates for Program and Portfolio Management

This document will allow us to download and install the templates for controlling the Portfolio and Project Program, which can be downloaded at:

<https://www.plexosproject.com/examples/PlexosPPMTemplates.zip>

Installing Power BI templates

Once the templates have been downloaded, extract and copy their contents to the desired location.

Two templates are provided: **ProjectTemplate.pbix** and **Plexos_PPM.pbix**.

The first template is designed for analyzing individual projects and utilizes *XML* files as the data source. These *XML* files can be found within the downloaded folder. The second template is dedicated to portfolio-level analysis and leverages the **PlexosPPM.accdb** *MS Access* file as its data source. The *MS Access* database is installed by default in the user's documents folder:

`C:\Users\[username]\Documents\Plexos\PPM\.`

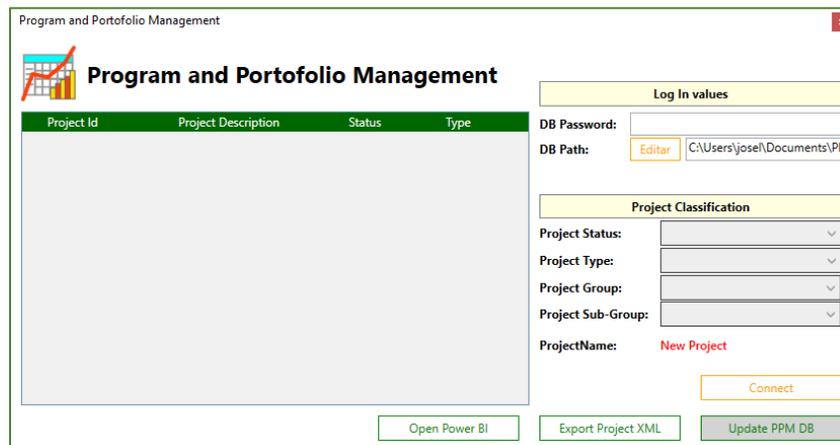


Figure 1 PPM management

Once you have opened the PPM manager dialog in Plexos, you can edit the location of the *PlexosPPM.accdb* file, using the **Edit** of the **DB Path**. Similarly, if you want to change the default values for the organization, project type and add a password, open and edit its content with your *MS Access* application (*MS Access* is required to access these features).

Export a single project:

1. Click on **Export Project XML**,
2. Rename your XML file,
3. Open the template **ProjectTemplate.pbix** with **Power BI**,
4. Set the data source setting,

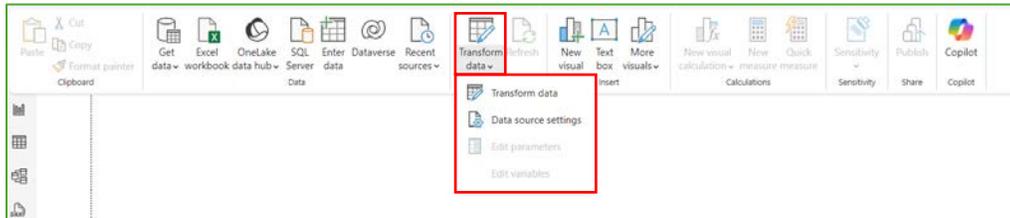


Figure 2 Change the data source

5. Change your data source path,

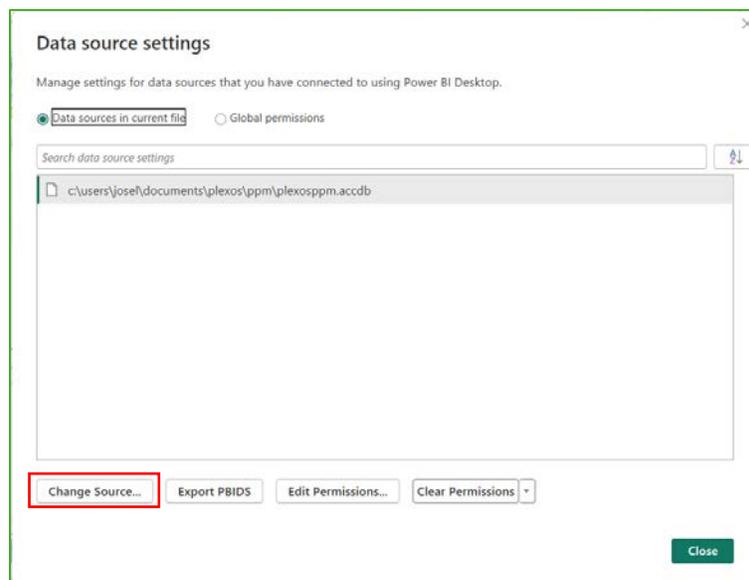


Figure 3 data source path

6. Close and apply the changes,
7. Save the report with the desired name,
8. If your organization has an online **Power BI** account, publish your report to your organization's **Power BI** web account. If you don't have one, you can view it from your desktop application,
9. You can now access your project from any location by clicking on **Open Power BI** or with your web browser.

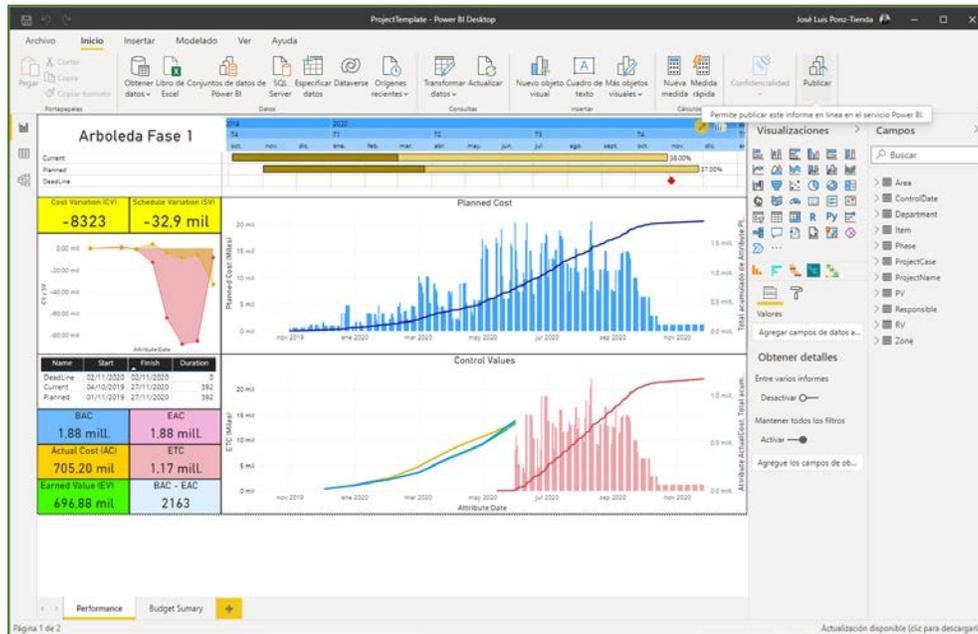


Figure 4 Project Report in Power BI

Update the database of projects (PPM):

1. Set your data source location and password **PlexosPPM.accdb** (Figure 1),
2. Click on **Connect**,
3. Click on **Export Project XML**,
4. The fields *status*, *type*, *group* y *sub-group* will be filled out automatically with the current values into the DB.
5. Edit and change the desired values if needed.
6. Click on **Update PPM DB**,
7. Open the template **Plexos_PPM.pbix** con **Power BI**,
8. Change the data source (only in case of being the first time),

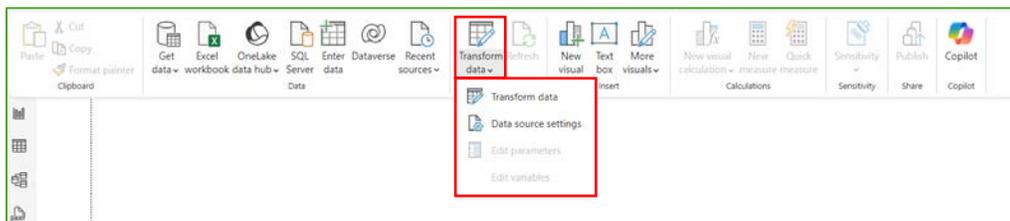


Figure 5 Change the data source

9. Change your data source path by setting the file **PlexosPPM.accdb** path to the path where it was exported, by default:

`C:\Users\[username]\Documents\Plexos\PPM\PlexosPPM.accdb`

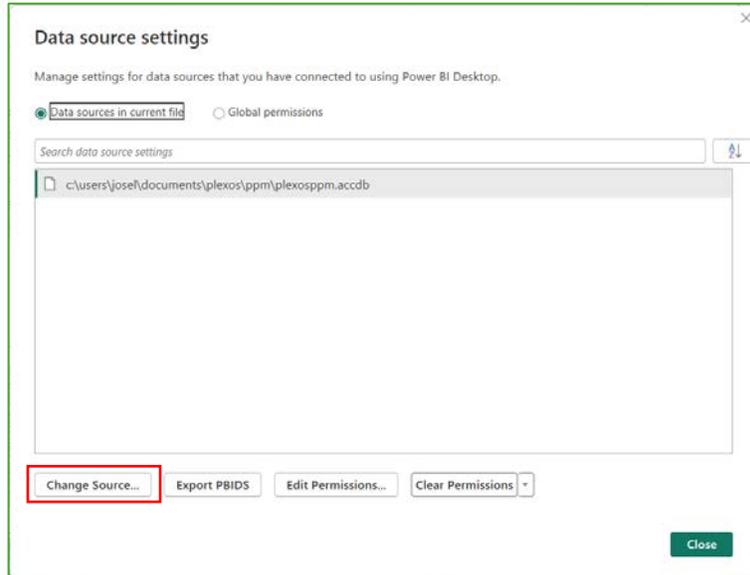


Figure 6 Data source setting for database of projects

10. Close and apply the changes,
11. Save the report,
12. If your organization has an online *Power BI* account, publish your report to your organization's *Power BI* web account. If you don't have one, you can view it from your desktop application.
13. Now, You can now access your PPM from any location by clicking on **Open Power BI** or with your web browser.

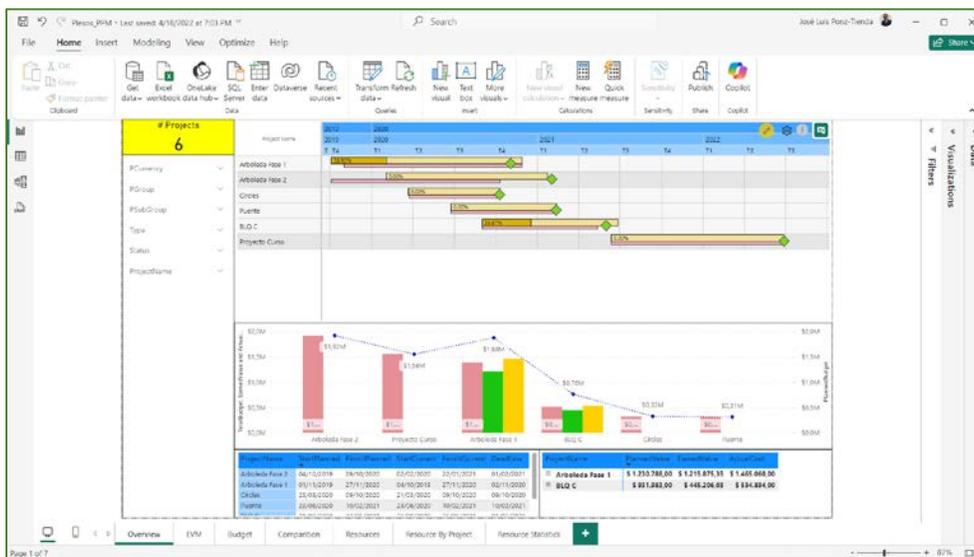


Figure 7 Program and Portfolio Report in Power BI