POWER BIUSER GROUP SESSION 2

SEPTEMBER 16, 2021



Facilitated by:

Steve Dunlop Angus McLeod Roy Vasher



Agenda

- Introductions (new attendees)
- June 10th meeting feedback
- Super User Development Cycle Thomas Heltzel Wabash National
- Getting Data to the People That Need it Most
 — Bob Bierwagen MPI
- Import Analytics/EV Analytics Steve Dunlop Purdue/DCMME
- Joining User Group Sharing Contacts
- Open discussion and next meeting

Introductions – New Members

- Name, company, position
- Power BI knowledge and experience
- What do you want to get out of user group?

| No. | Type of User | Description |
|-----|------------------|--|
| | | |
| 1 | New | Never used, interested in learning how to use |
| | | |
| 2 | Novice | Started to use but not created any business reports yet |
| | | |
| 3 | Experienced User | Used for some time and developed business reports/dashboards |
| | | |
| 4 | Power User | Expert user and/or IT Developer |
| | | |
| 5 | Senior Manager | Interested in Capabilities for Business Reporting/Dashboards |

Feedback from June 10th Meeting

Question 1: What did you like best about the Kickoff meeting?

- Both the introductions (nice to see how others are using power bi) & the presentation connection to the community site
- Interested to hear the diverse arrange of people that were looking to utilize Power BI in their organization and where they are in the process.

Question 2: What could be improved or what changes could we make?

- Group is fairly spread in knowledge, may need some breakouts
- Maybe utilize only one case demo for the Kickoff meeting due to the audience mix.

Question 3: Are the other topics that we should include in future meetings?

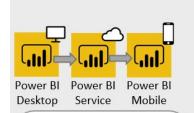
- This is a fairly big topic, power pivot I think is a good corollary topic
- Expanding to Power Apps will be helpful to me. This is the only area I don't feel I am an expert yet.
- Storytelling with Data | Cole Nussbaumer Knaflic |
 Talks at Google
 https://www.youtube.com/watch?v=8EMW7io4rSI
- I think the most beneficial topic for our team would be going over Use Cases, or discussing what others in the group are planning to accomplish with the program.
- Maybe structure future meetings to allow for more time for users/developers to go through steps with an advisor.

Power BI 'Super User Development Cycle'

Thomas Heltzel – Wabash National

POWER BI 'SUPER USER DEVELOPMENT CYCLE'

THOMAS HELTZEL - WABASH NATIONAL



6. Publish report

- •Grant access to target audience
- Secure as needed
- Schedule data refresh

1. Understand the business need

- Objectives
- •Success criteria
- Project plan







- •What data is required?
- •What data is available?
- Data quality? (complete, correct, up-to-date)



SharePoint



Text/CSV



SSMS

5. Report building

- Design report
- Create visuals
- Verify that business needs are met



Report View (in Power BI Desktop)

3. Data preparation

- Clean as needed
- •Merge and summarize
- Reshape



Power Query Editor (in Power BI Desktop)

4. Data modeling

- Define relationships (connect related tables)
- Measures and calculations





Data View (in Power BI Desktop)

Model View

Power BI Desktop



Power BI Service

Datasets*



Power BI Mobile

Mobile App

Datasets

Data Modeling

Visualizations

Reports

Visualizations

Reports

Dashboards

Share results

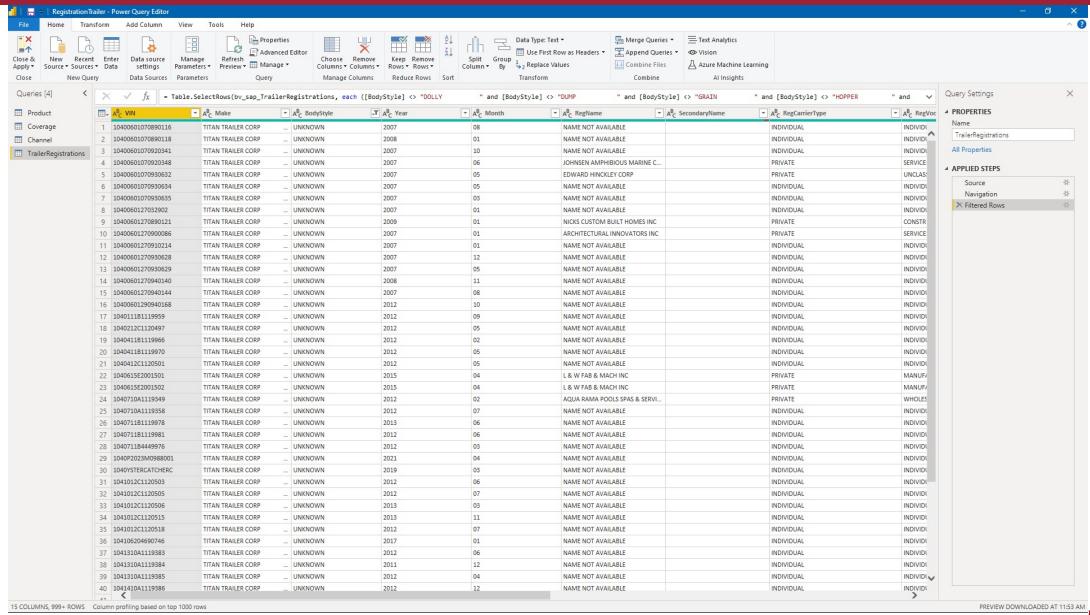
Access data

Primary function

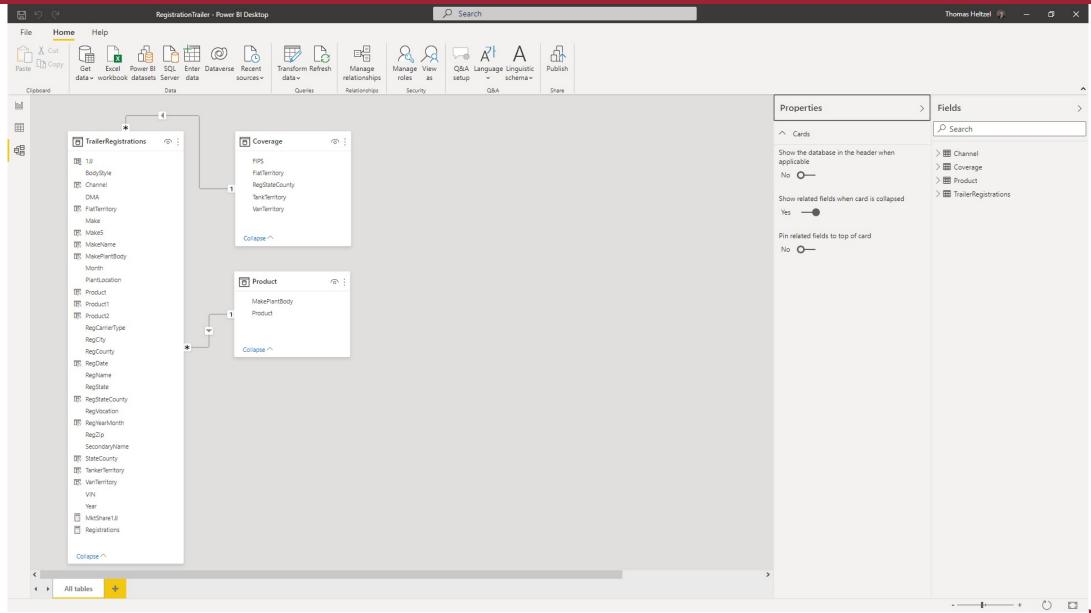
Capability



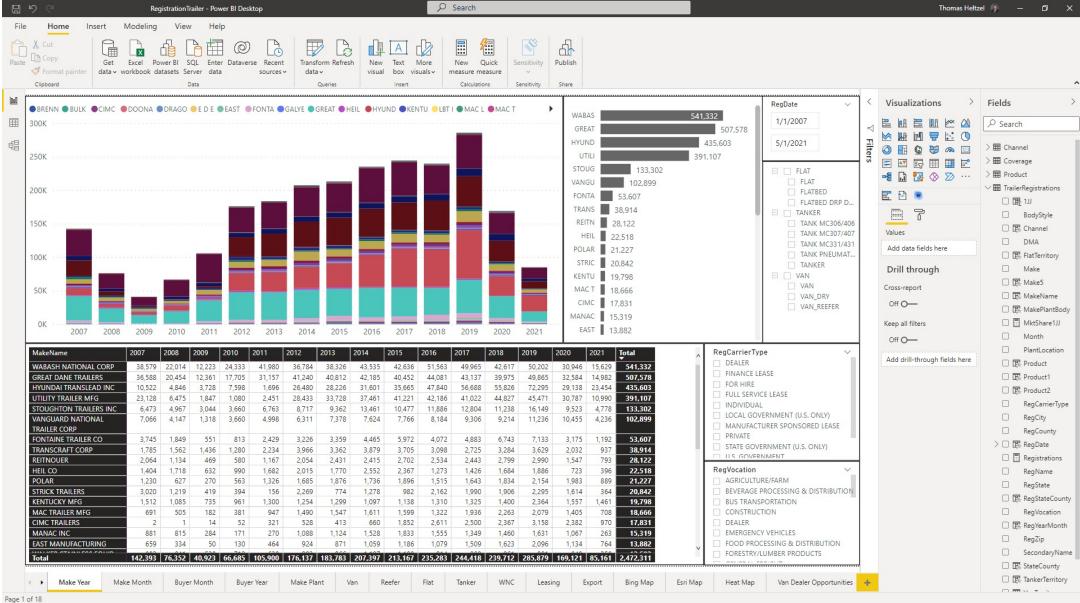
POWER BI - DESKTOP POWER QUERY



POWER BI – DESKTOP DATA MODEL

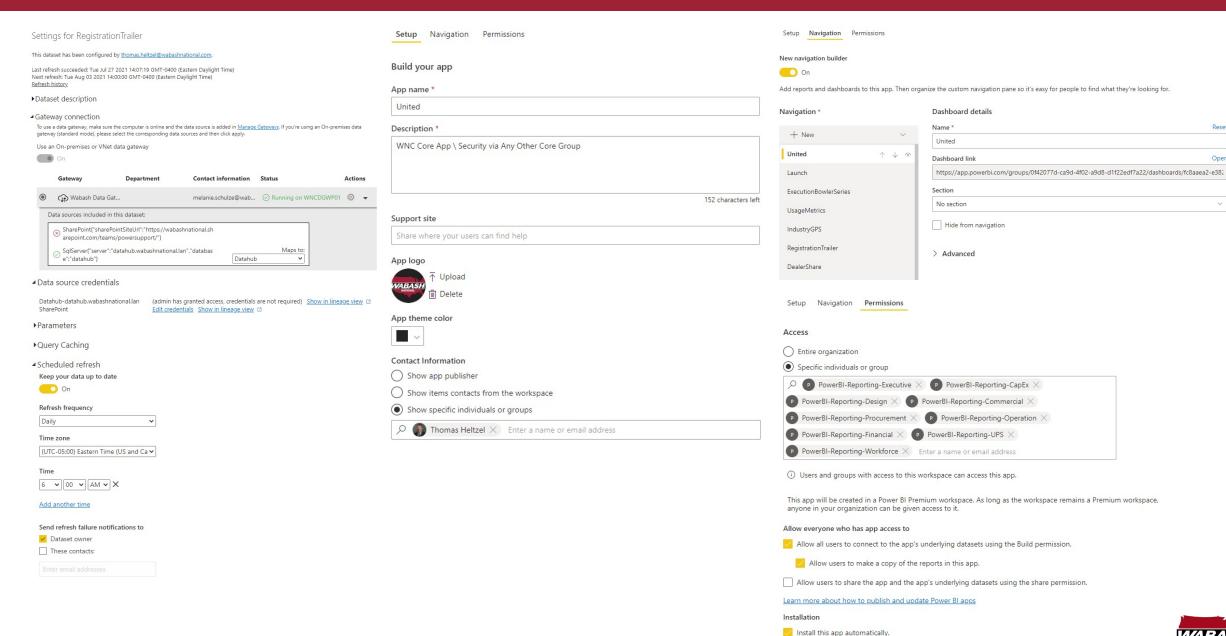


POWER BI - DESKTOP REPORT VIEW





Power BI – Service Workspace [Premium Apps Used by Wabash National]





Open

Getting Data to the People That Need it Most

Purdue Power BI User Group September 16, 2021



Speaker Bio



Speaker Bio:

Bob has over 35 years of executive experience in in software and technology in both the software and manufacturing industries. His career includes executive leadership roles in product development, product management, marketing, operations, sales management and technology. Bob has also operated his own small business as a direct marketer and software reseller. His unique combination of background and experience has provided the ideal qualifications for his current role at MPI Corporation as VP of Digital Strategies where he is leading the company's efforts in IIoT and Advanced Analytics.



MPI Corporation





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MPI Corp Business Analytics Strategy

- Much more than just getting Power BI setup
 - Cultural transformation effort that is critical for our future
- Not just a one-time event
 - For continued success analytics needs committed effort and resource
- Not just an IT project to meet Executive Direction
 - Must involve staff that will be using the data
 - Must include a high degree of ownership for those using the data
- Multiple methods for distributing data and Dashboards
 - Distribution via e-mail
 - Integrated solutions using MS Teams
- Governance needs to include continuous improvement component
 - IT or Management cannot own analytics alone or it will fade away
 - Data cannot be used to beat people up, rather to improve processes



MPI Corp Primary Motivation for Power BI



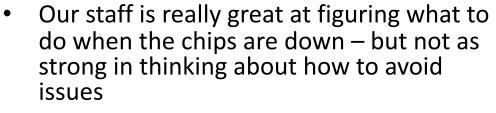
Reactive



Compliance



Recording data



- Our team is very diligent in following instructions, but bringing up new team members is not a current strength
- As we have a high longevity factor with our team, much of what is done has become tribal knowledge which also makes it difficult for new team members
- While our team is diligent in recording key data in production, it is primarily used when we need to figure out what happened - and not to improve processes on a regular basis
- Newer and younger staff are surprised we are not using technology and data daily for insight



MPI Corp Objectives for Power BI & Analytic Tools



Proactive



Engagement

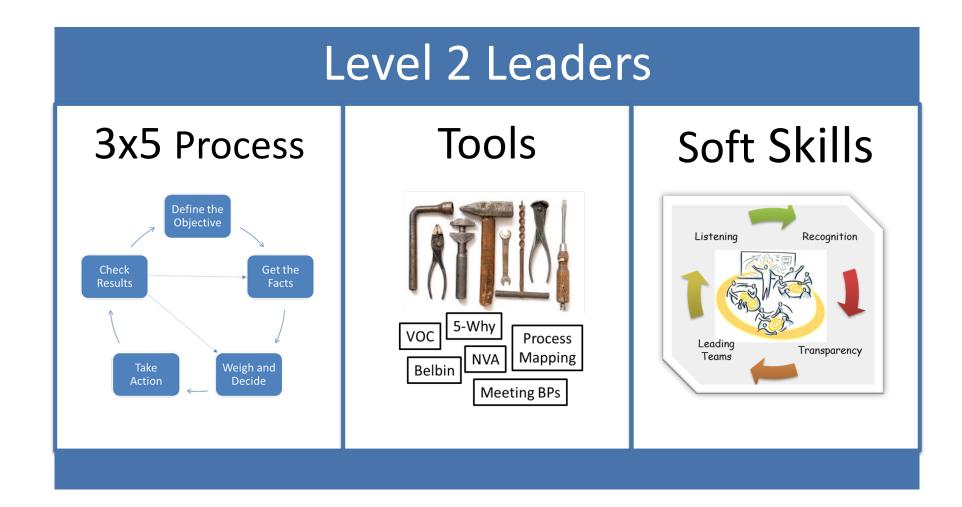


Using data

- Provide data for our staff to understand what is happening in real-time and alert to issues in time to mitigate them during production
- Provide data visualization and analysis tools that support a true CI ownership by staff
- Help staff drive improvements in our processes and methods, not just comply to procedures and requirements
- Provide insights from the data we collect and begin to proactively attack problems at a root cause level, not just treat symptoms
- Use data to help improve new staff training and subject matter expertise rather than rely on tribal knowledge that takes years to develop
- Create an environment where the next generation of workers has the tools and data to quickly contribute to company success

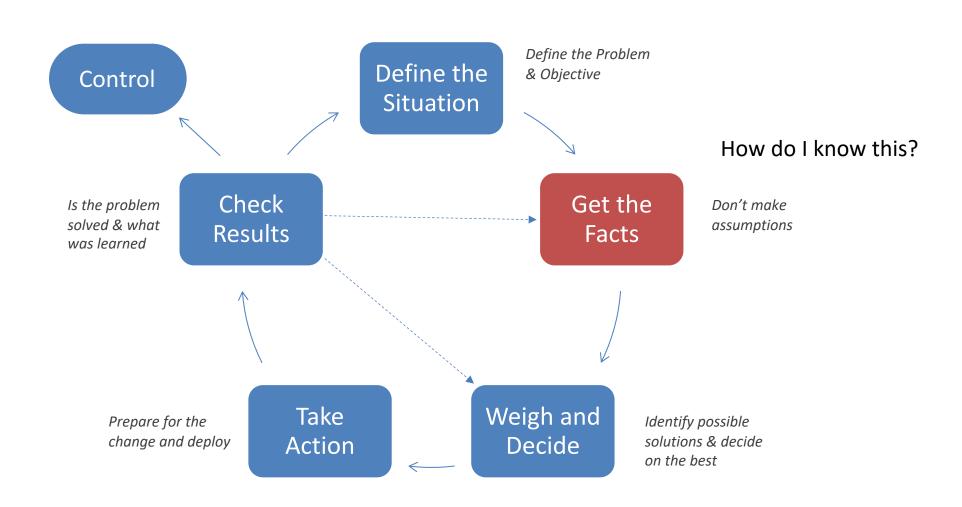


Step 1: Equip Leaders in Three Key Areas





Step 2: Train staff to use the MPI 3 X 5 Toolbox – 5 Steps





Step 3: Talk to staff and provide the data they need



Have a low-key conversation regarding what would help someone

- Quick discussion and demo on Power BI examples
- Don't get caught up in how, focus on what they need and why
- Guide, but don't force any direction
- Ask them to define what a successful outcome would look like



Create a simple Dashboard and review with user

- Show them how it works
- Review visualizations that they might like
- Talk about what data slicers and filters would help them



Bring back an updated dashboard and repeat the process

- Let them run with it for a while
- Repeat the process again



Step 4: Learn or identify expertise in Data Modeling

To succeed with analytics data modelling knowledge is critical

- Either learn the basics yourself or identify available expertise
- MS has a ton of straight forward video tutorials to learn with

The data model is rarely the same as what someone would do in Excel

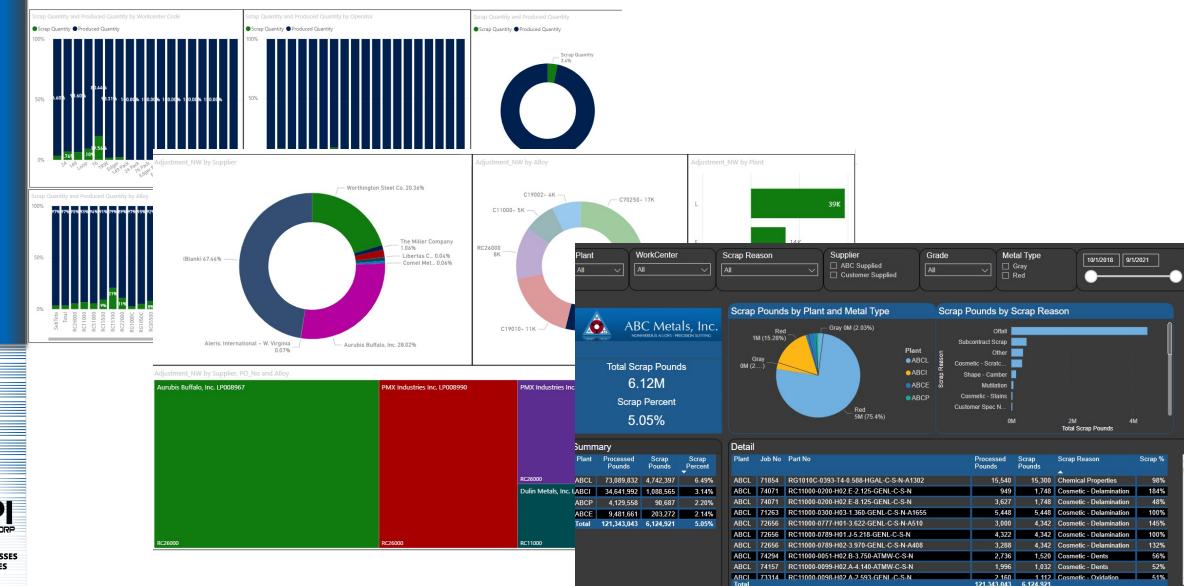
- The right model gives great data and great performance
- The right model will provide visuals that people can trust
- The right model will make ongoing improvements easy to do

Any ERP or MES database is relational and not designed for analytics

- Any power user in Excel or Power Pivot can build strong models
- The model is not something most end users understand
- Attempting to involve them in the process will totally confuse them



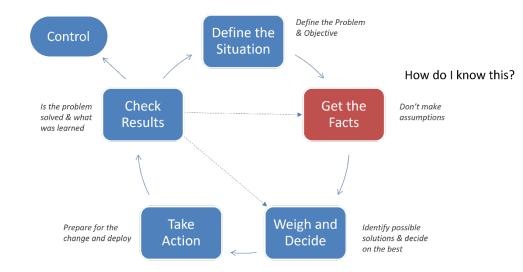
Step 5: Start building prototypes in an Agile fashion





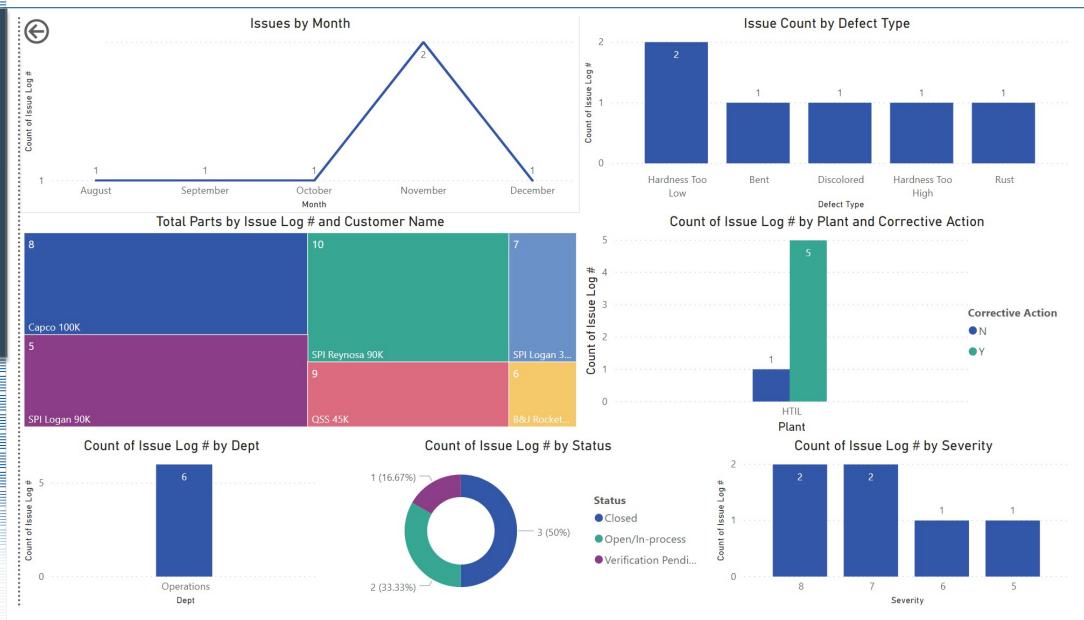
Step 6: Apply 3x5 process for continuous improvement

- A Dashboard project is not done until the user owns it and uses it
 - Use Power BI Desktop to author and distribute at first
- After 30 days sit down with user and see what can be improved
 - Use the 5 step model we discussed earlier
 - Again, always what and why, not how
 - Introduce Key Influencer visualizations to your Dashboard
 - Again, always have a definition of what success looks like
 - At that point, consider whether Power BI Pro might make sense
 - Consider whether other users can benefit for the Dashboard
- This is the right time to document any specific ROI or benefit
 - Share that with other users across the company
 - Share that with Level 2 leaders
 - Use the opportunity to create discussions that cross over
 - traditional department boundaries
 - hierarchical relationships between supervisor and staff levels



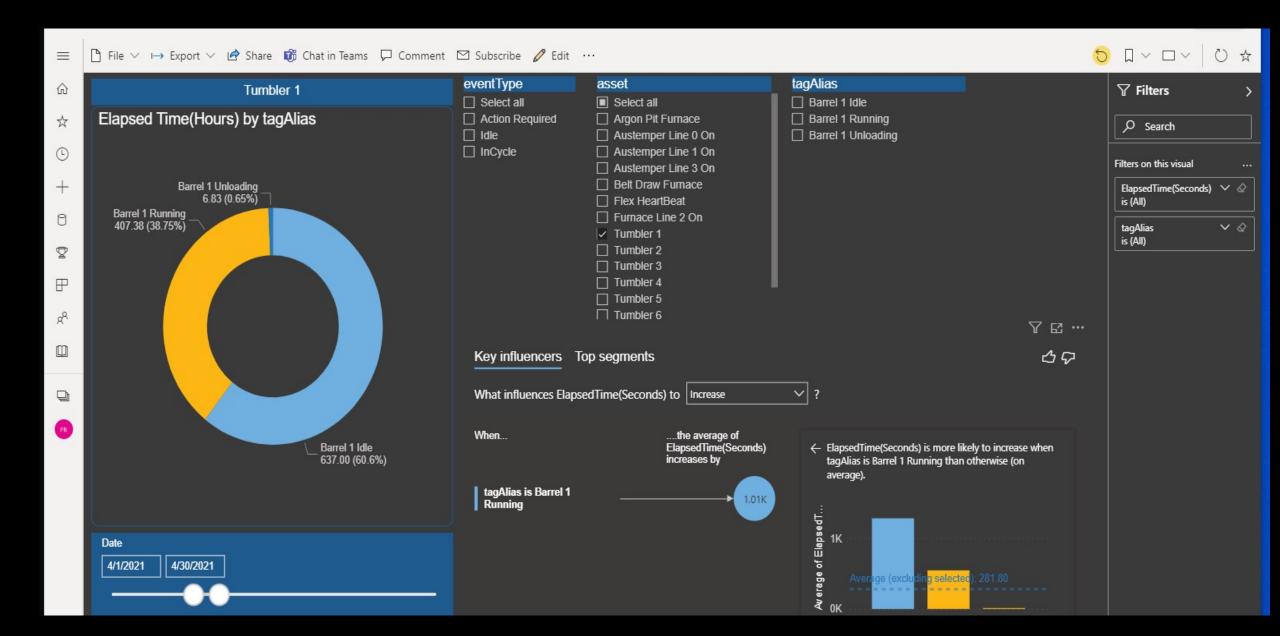


Quality Dashboard





Power BI Dashboard Tumbler 1 from Plex IIoT Exhaust API's



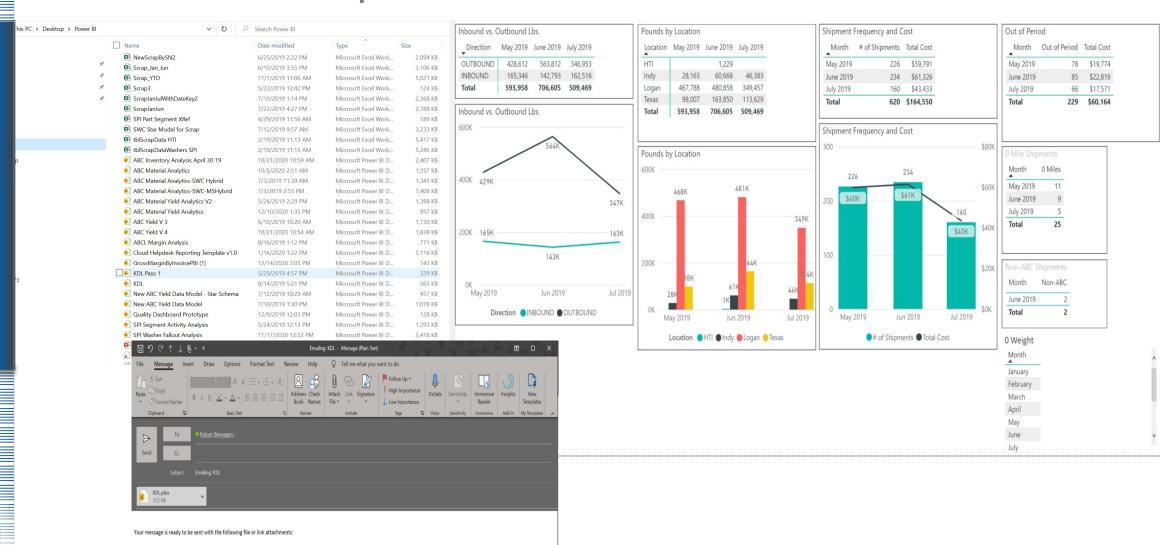
Power BI MPI Scrap Key Influencer Analytics





Power BI Desktop and E-mail Distribution

Note: To protect against computer viruses, e-mail programs may prevent sending or receiving certain types of file attachments. Check your e-mail security settings to determine how attachments

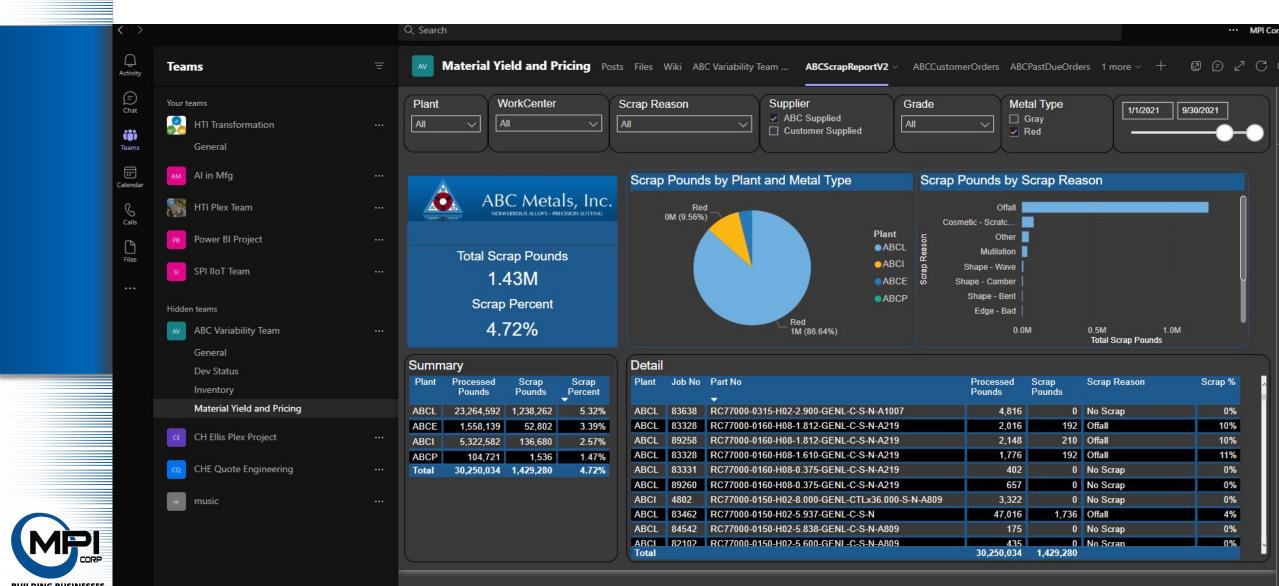




are handled.

Power BI Pro and Teams

ENRICHING LIVES



Power BI Pro Distribution Subscription E-mail

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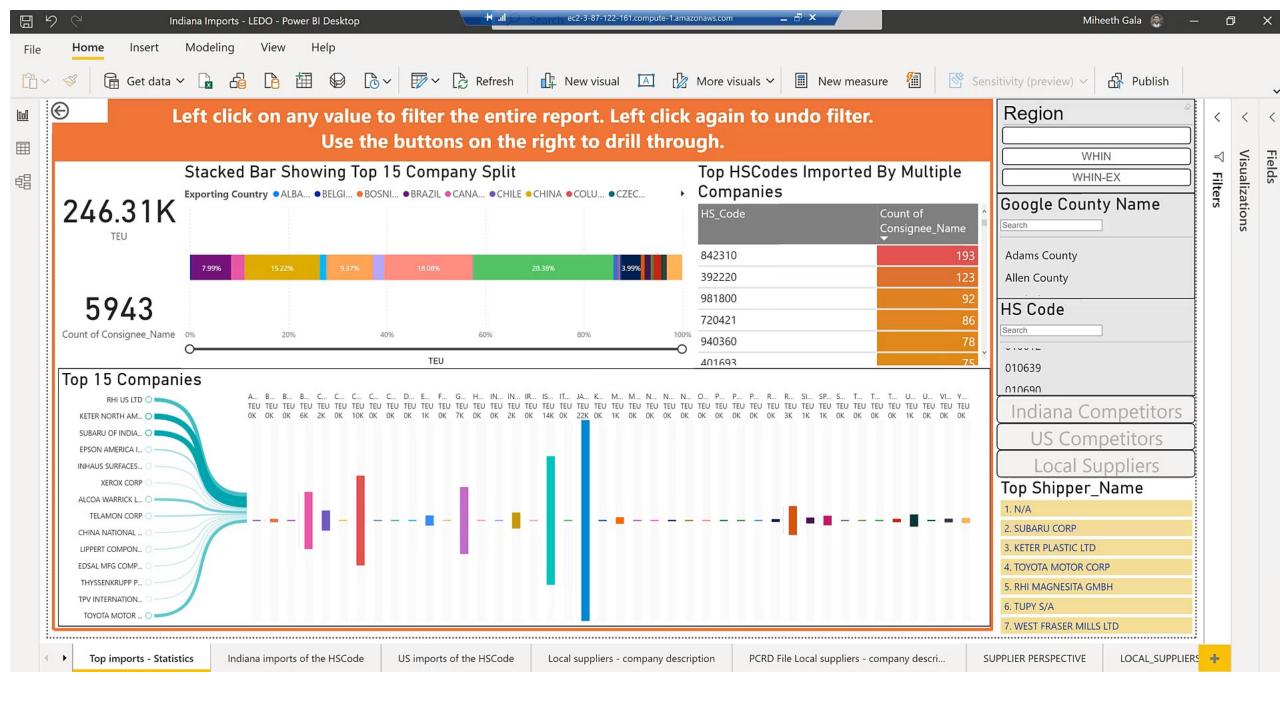


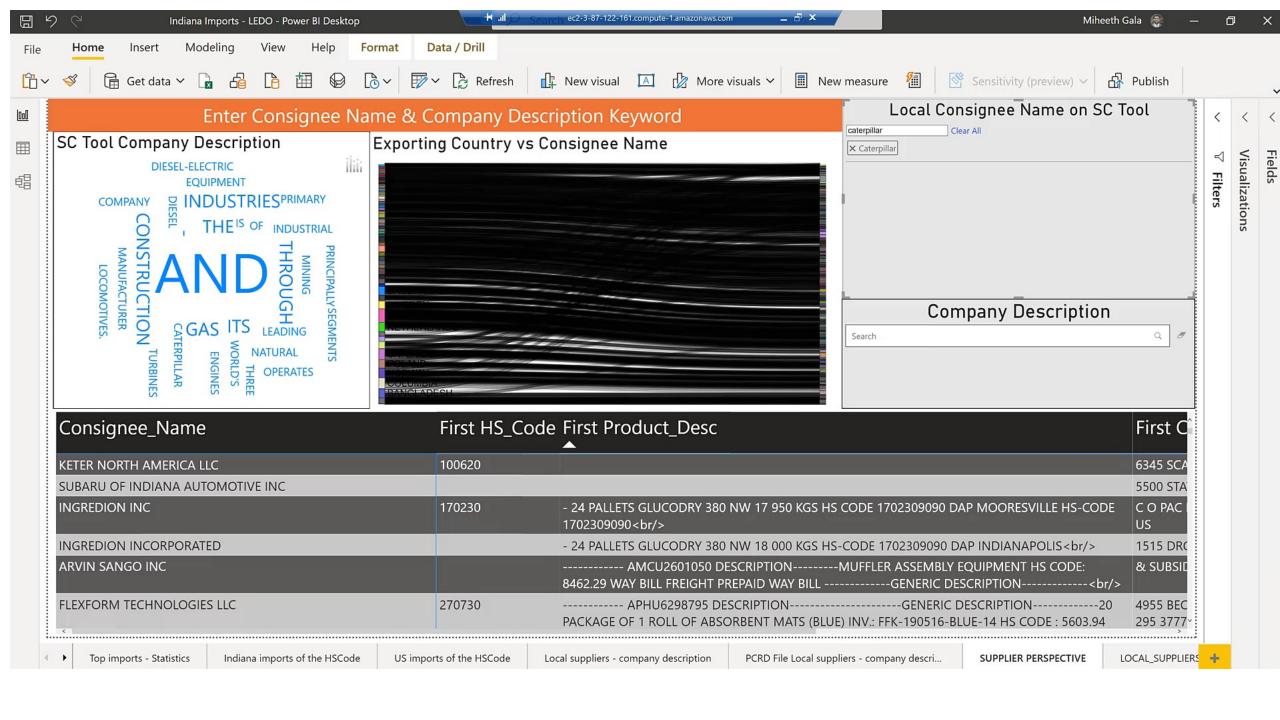




Import Analytics

Steve Dunlop – Purdue DCMME





"Our" Power BI User Group

- Become a Community Member then a Group Member
 - Central Indiana Power Platform User Group
 - https://community.powerbi.com/t5/Central-Indiana-Power-Platform/gh-p/pbi centralIndiana usergroup
- Share Contact Info with other Power BI Members?

Open Discussion and Next Steps

 Comments from participants and discuss tweaks based on feedback

Next Meeting?

POWER BIUSER GROUP SESSION 2 THE END



