Setting up the connection between Power Bi and Online SharePoint List

To connect Power BI to an online SharePoint list, you must use **Power BI Desktop** on a **Windows operating system**. This is because Power BI Web (Power BI Service), although accessible from any operating system via browser, does not support direct data source connections or data modeling. Power BI Web is primarily used for **viewing, sharing, and light editing** of reports and dashboards that have already been published from the desktop app. As a result, data must first be connected and transformed in Power BI Desktop before being uploaded to the cloud.

Power BI Web – What It Can Do:

- View, interact with, and filter published reports and dashboards.
- Create and edit dashboards by pinning visuals from reports.
- Collaborate and share reports in workspaces or via Microsoft Teams.
- Schedule automatic data refreshes (for supported sources).
- Use published datasets to create new reports directly in the browser.

Power BI Web – What It Cannot Do:

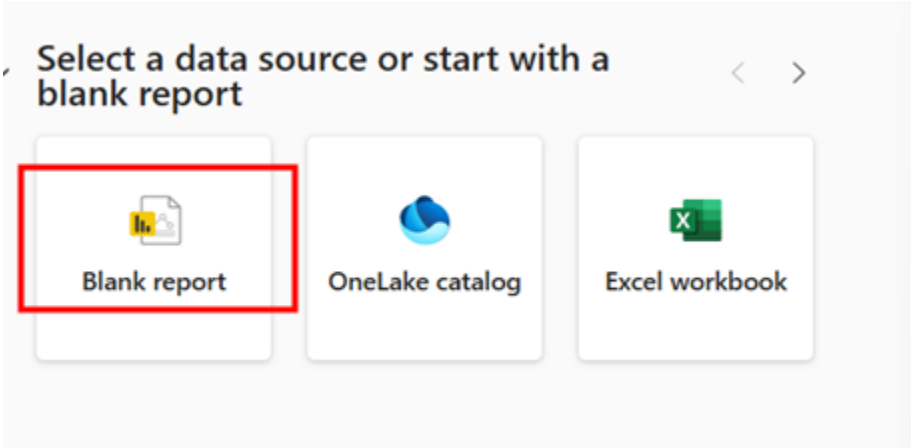
- Cannot connect to new data sources (e.g., SharePoint Online List, SQL).
- Cannot perform data transformations using Power Query Editor.
- Cannot modify or build data models (e.g., table relationships).
- Cannot write or manage DAX measures, calculated columns, or calculated tables.
- Cannot import data directly into a new dataset.

Power BI Desktop – What It Can Do:

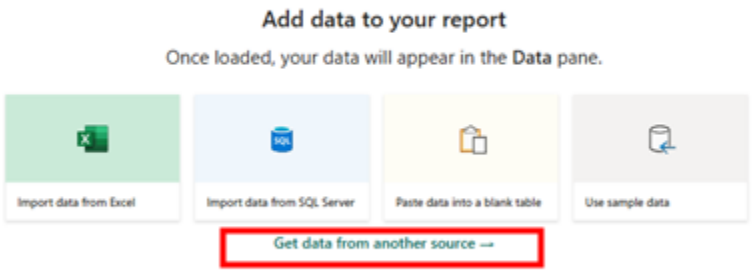
- Connect to a wide range of data sources, including SharePoint Online lists.
- Use Power Query to clean, transform, and shape raw data.
- Build and manage complex data models with relationships between tables.
- Create custom DAX measures, calculated columns, and tables.
- Design fully interactive and customizable report visuals.
- Perform advanced modeling techniques (e.g., incremental refresh).
- Publish reports to Power BI Web for online access, sharing, and collaboration

Steps:

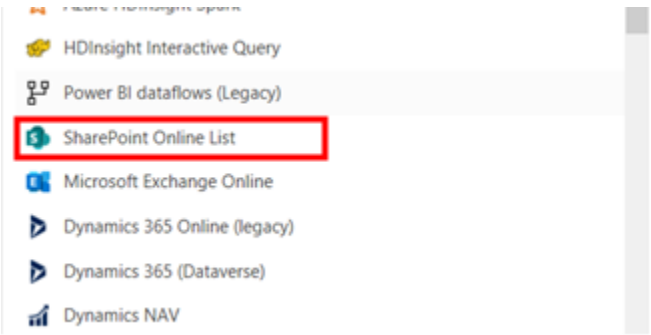
1. Open Power Bi Desktop and create a **new Blank report**



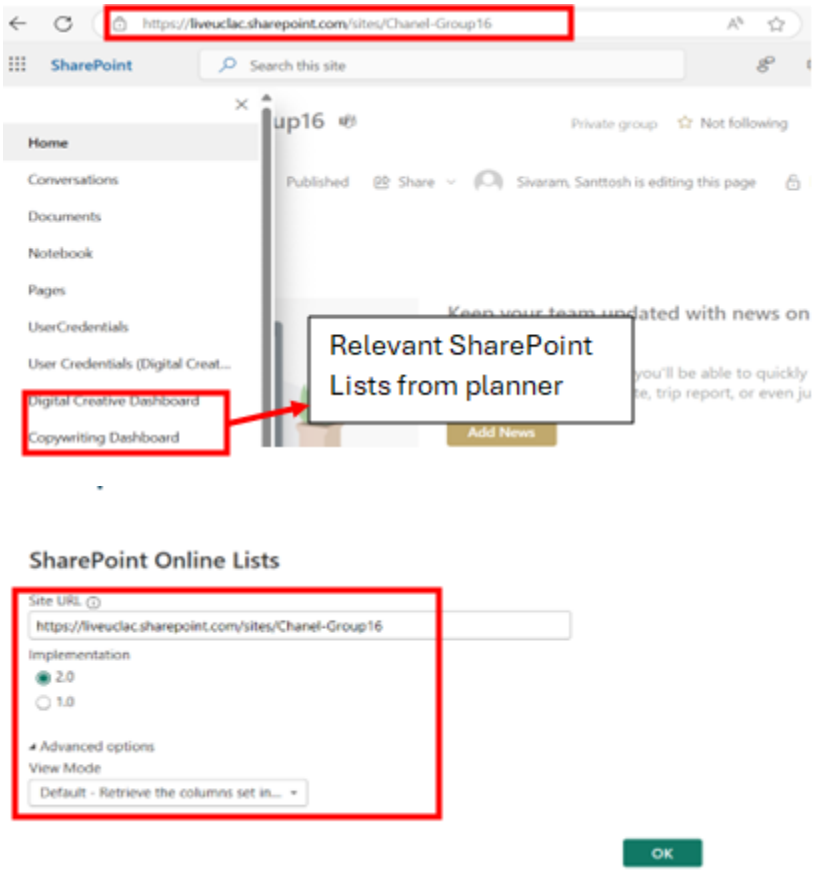
2. Select the option to **get data from another source**



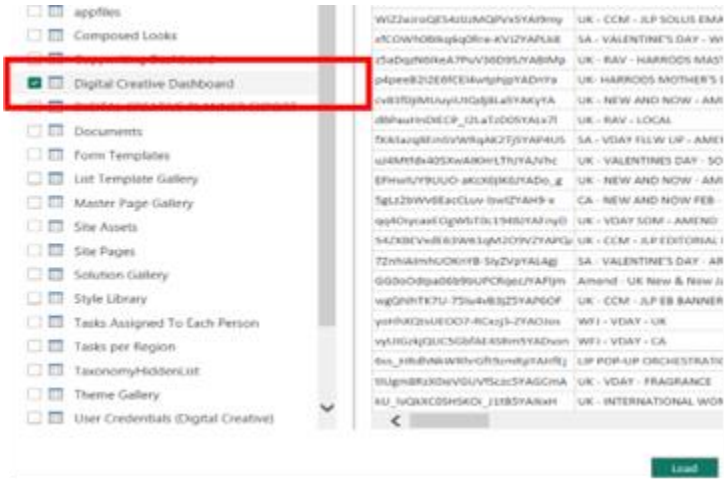
3. Select **SharePoint Online List**



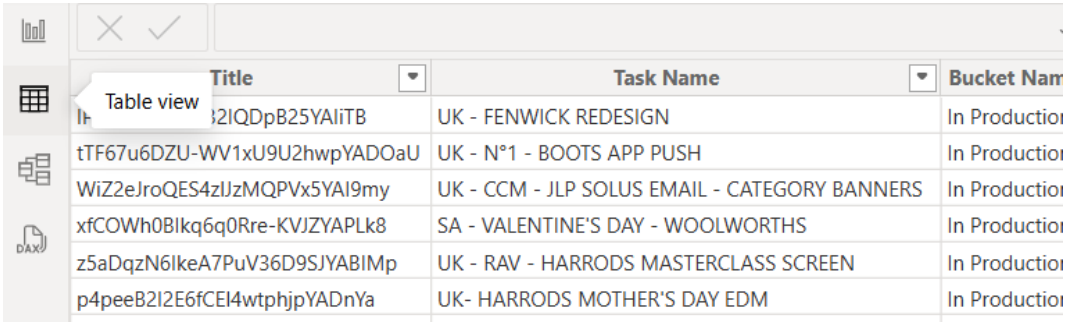
4. In the **SharePoint site URL** box, enter the URL of the site that contains the SharePoint list(s) you want to import into Power BI. Choose **Implementation 2.0** and view mode to **Default.**



5. Select the **relevant SharePoint List** to import to Power BI and click on **Load**.



6. SharePoint Online List is now connected to Power Bi. Click on **Table View** to check that all the necessary data is being loaded. The number of rows, columns and column names should align with the SharePoint List.

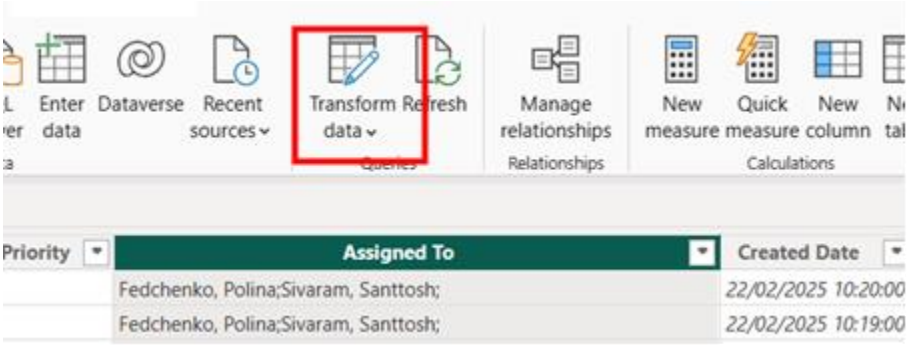


To create dashboards for both the Digital Creative and Copywriting teams, as well as individual dashboards for each team, repeat the steps above for each team's specific SharePoint list on a new power bi report.

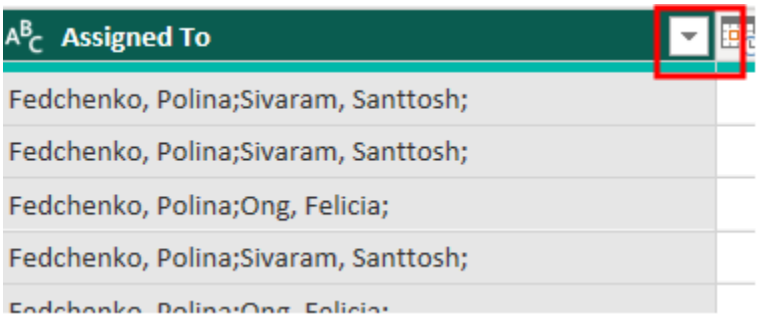
Setting Up Individual Report

Before applying any of the following steps to model the data for the graphs, the table must first be set up to include only the tasks assigned to the specific individual for whom the report is being built.

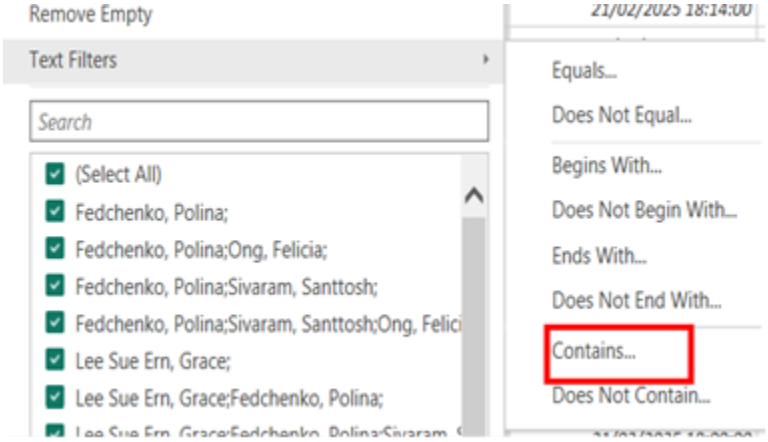
1. In the Home page, select **Transform data**.



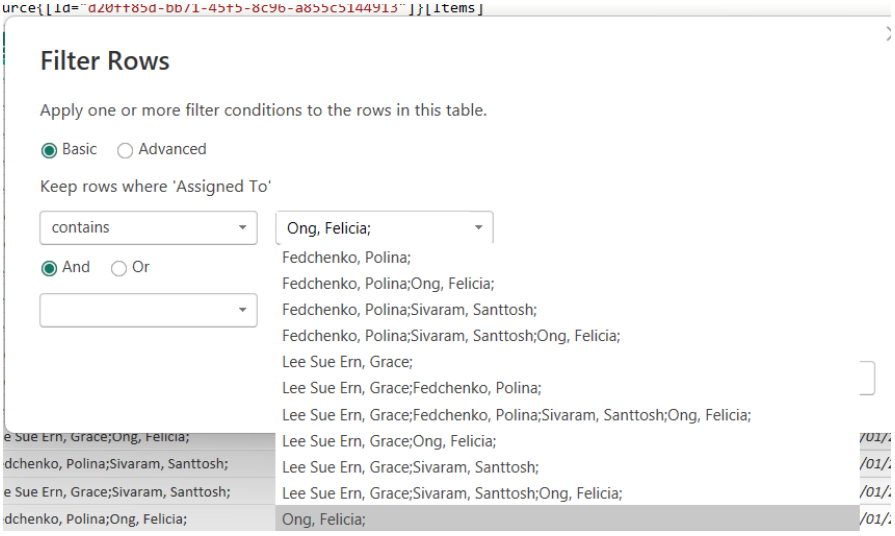
2. Select Assigned To column and click on the drop-down menu.



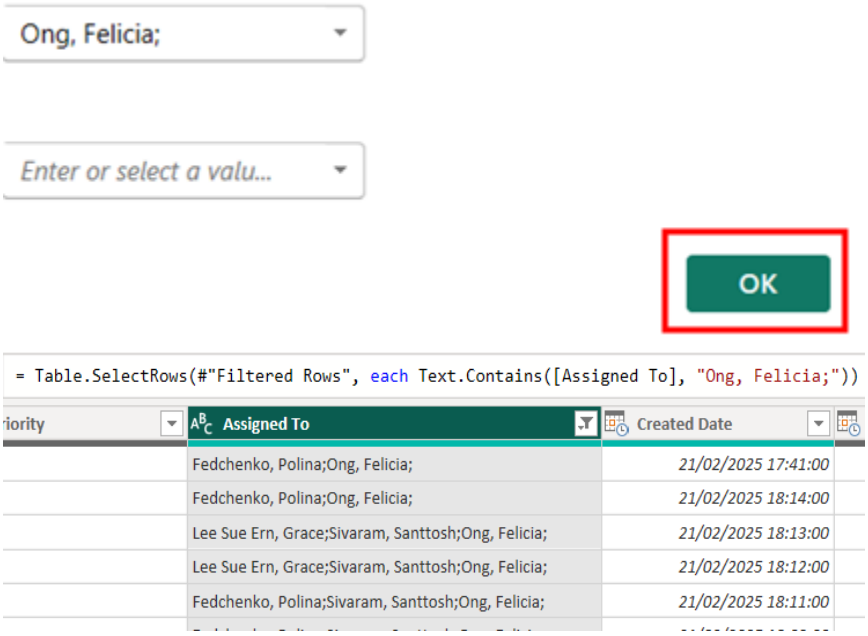
3. Under Text Filters, select the **contains** option



4. Select the individual's name from the drop-down menu next to "contains". If the name isn't listed, you can manually type it in.



5. Click OK and confirm that the rows are now filtered to show only the tasks that include the individual's name (e.g., "Ong, Felicia;")



Data Modeling Before Building Visuals (Individual Dashboard)

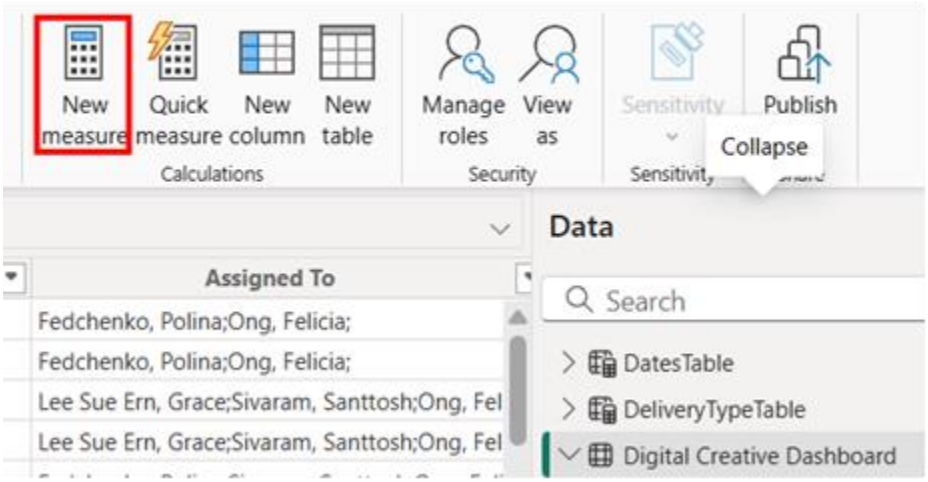
To build the different graphs for each Individual report:

- Total Number Tasks Assigned
- Proportions Of Tasks by Division
- Department Split for All Tasks
- Tasks Per Region
- Proportion Of Tasks Validated Vs Not
- Total Number of Tasks Validated
- Overall Tasks Year on Year
- Types Of Delivery
- Department Split for AMEND tasks

We will need to model the data to ensure the relevant fields are properly structured, cleaned, and formatted.
Repeat the steps below for both Digital Creative team and Copywriting team respectively, ensuring that each individual dashboard is on different power bi reports.

Total Number of Tasks Assigned to Individual

1. In the Home page, create a **new Measure.** Make sure the new measure is created under **Team Dashboard Table** (E.g. Digital Creative Dashboard)**.**



2. Type in the following General DAX formula to create total tasks measure:

   (Ensure that the Team Dashboard Table has been set up for the respective individual)

```
total_tasks = COUNT('Team Dashboard'[Assigned To])
```

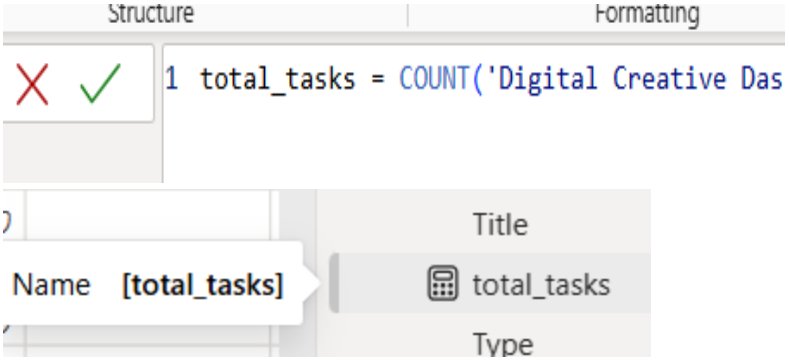
3. In the DAX formula,

   Replace team names:
   Replace “Team Dashboard” with **actual team names** like “Digital Creative Dashboard”, “Copywriting Dashboard”.

   Example:

```
1  total_tasks = COUNT('Digital Creative Dashboard'[Assigned To])
```

4. Press Commit and check that total tasks measure is created.



5. Repeat steps 1 to 4 for each of the individual in the team. Ensure that the table data is set up for the respective individual.

Explanation of the formula:

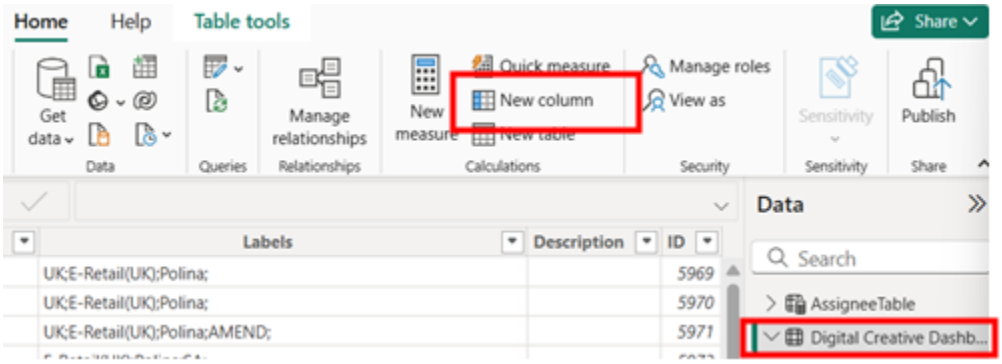
This formula creates a measure which counts how many tasks have an entry in the "Assigned To" column. This corresponds to the total number of tasks the individual has.

Key Function:

- **COUNT:**
  Counts the number of non-blank values in the specified column.

Proportion Of Tasks by Division

1. In the Home Page, create a **new Column.** Make sure the new column is created under **Team Dashboard Table** (E.g. Digital Creative Dashboard).



2. Type in the following General DAX column formula to create Division column:

```
Division =
SWITCH(
  TRUE(),
  CONTAINSSTRING('Team Dashboard'[Labels], "Division1"), "Division1",
  CONTAINSSTRING('Team Dashboard'[Labels], "Division2"), "Division2",
  CONTAINSSTRING('Team Dashboard'[Labels], "Division3"), "Division3",
  "Division3"
)
```

3. In the DAX formula,

   Replace team names:
   Replace “Team Dashboard” with **actual team names** like “Digital Creative Dashboard”, “Copywriting Dashboard”.

   Replace Division names:

   Replace “Division1”, Division2”, etc.. with **actual Division names** like “FASHION”, “FRAGRANCE AND BEAUTY”. Ensure that the replaced division names in the CONTAINSTRING function **aligns** with the division names used in the **labels of Microsoft Planner.**

   To add more Divisions:

   Copy the CONTAINSTRING block and modify it for the new Division.

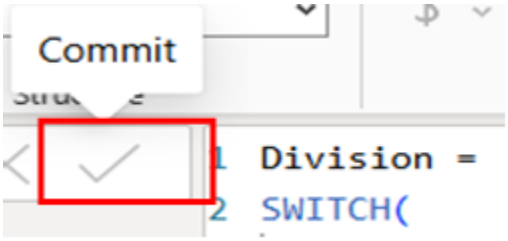
   Ensure to separate each CONTAINSTRING block with a comma.

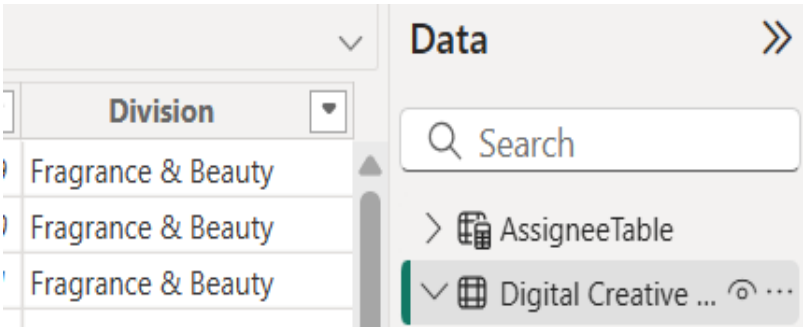
   Default division:
   In the given formula, the default division is set to "Division 3" if the labels of a task do not contain any of the other specified divisions
   It **should occur** at the end of the formula and **removed** if not needed.

Example:

```
Division =
SWITCH(
    TRUE(),
    CONTAINSSTRING('Digital Creative Dashboard'[Labels],
    "FASHION"), "Fashion",
    CONTAINSSTRING('Digital Creative Dashboard'[Labels],
    "WATCHES & FINE JEWELLERY"), "Watches & Fine Jewellery",
    CONTAINSSTRING('Digital Creative Dashboard'[Labels],
    "FRAGRANCE AND BEAUTY"), "Fragrance & Beauty",
    "Fragrance & Beauty"
)
```

4. Press Commit and check that a new Division column is created.





Explanation of the formula:

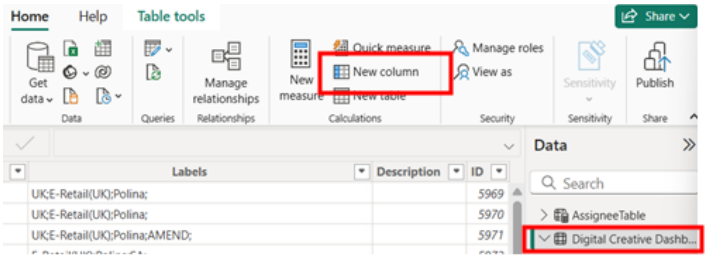
This formula creates a column that categorizes tasks into specific divisions based on the keywords found in the **"Labels"** field.

Key Functions:

- **CONTAINSSTRING**:
  Checks if a specific keyword (e.g., "FASHION", "WATCHES & FINE JEWELLERY") is found in the “Labels” field for each task**.**
- **SWITCH:**
  Evaluates multiple conditions and returns the first match it finds. If the "Labels" field contains a keyword (e.g., "FASHION"), the CONTAINSSTRING function will return TRUE, and SWITCH will assign the corresponding division (e.g., "Fashion"). If none of the conditions are met (i.e., the field doesn’t contain any of the specified keywords), SWITCH will return the default value, which in this case is "Fragrance & Beauty".

Department Split for All Tasks

1. In the Home page, create a **new Column.** Make sure the new column is created under **Team Dashboard Table** (E.g. Digital Creative Dashboard).



2. Type in the following General DAX column formula to create Department column:

```
Tasks by Department =

SWITCH(

  TRUE(),

  CONTAINSSTRING('Team Dashboard'[Labels], "Department1"),
"Department1",

  CONTAINSSTRING('Team Dashboard'[Labels], "Department2"),
"Department2",

  CONTAINSSTRING('Team Dashboard'[Labels], "Department3"),
"Department3",

  CONTAINSSTRING('Team Dashboard'[Labels], "Department4"),
"Department4",

)
```

3. In the DAX formula,

   Replace team names:
   Replace “Team Dashboard” with **actual team names** like “Digital Creative Dashboard”, “Copywriting Dashboard”.

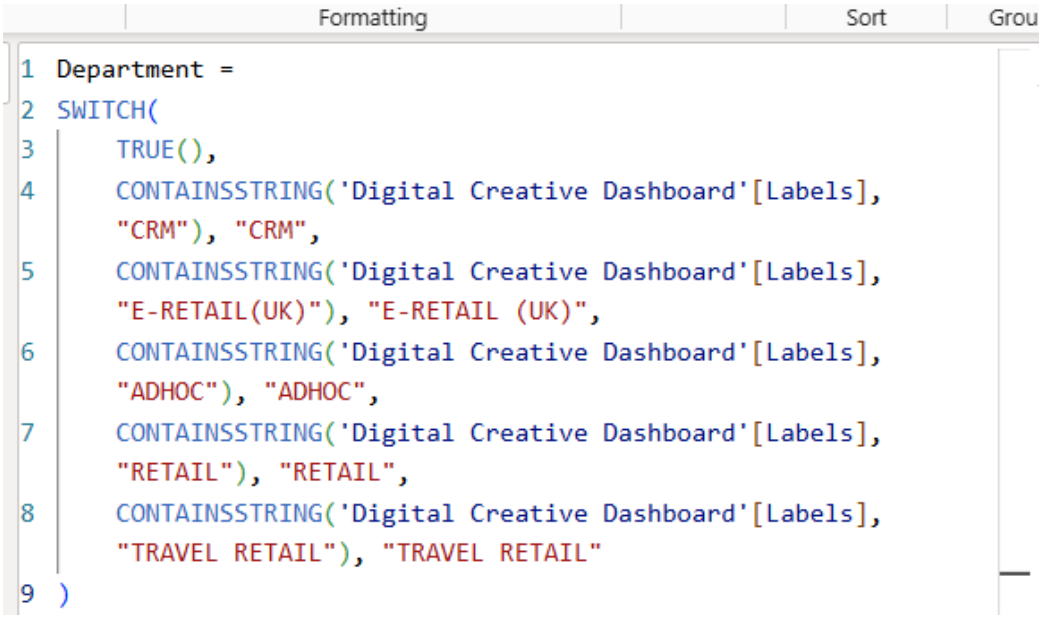
   Replace Department names:
   Replace “Department1”, Department2”, etc.. with **actual Department names** like “CRM”, “E-RETAIL(UK)”. Ensure that the replaced department names in the CONTAINSTRING function **aligns** with the department names used in the **labels of Microsoft Planner.**

   To add more Departments:

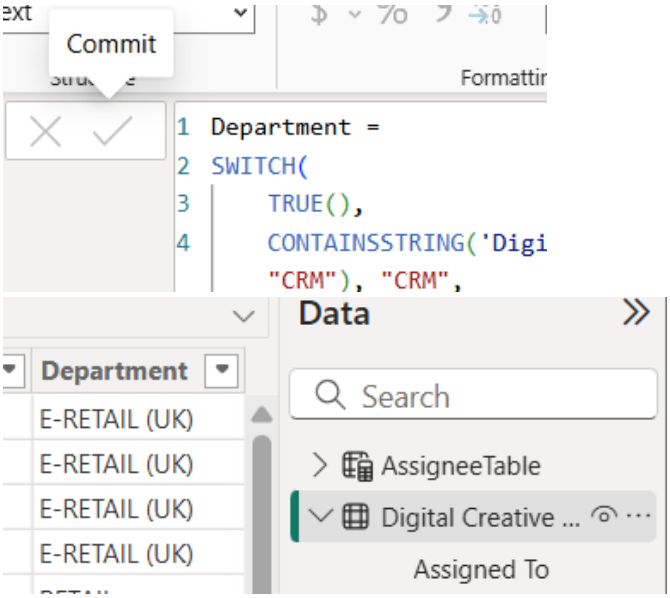
   Copy the CONTAINSTRING block and modify it for the new Department.
   Ensure to separate each CONTAINSTRING block with a comma.

   Default:
   If the labels of a task do not contain any of the departments specified in the formula, the department for that task will be left blank.

   Example:



4. Press Commit and check that a new Department column is created.



Explanation of the formula:

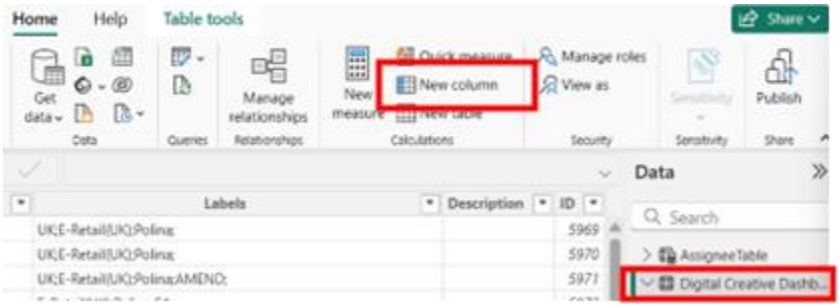
This formula creates a column that categorizes tasks into specific departments based on the keywords found in the **"Labels"** field.

Key Functions:

- **CONTAINSSTRING**:
  Checks if a specific keyword (e.g., "CRM", "E-RETAIL (UK)") is found in the "Labels" field for each task.
- **SWITCH:**
  Evaluates multiple conditions and returns the first match it finds. If the "Labels" field contains a keyword (e.g., "CRM"), the CONTAINSSTRING function will return TRUE, and SWITCH will assign the corresponding department (e.g., "CRM"). If none of the conditions are met (i.e., the field doesn't contain any of the specified keywords), SWITCH will return blank, leaving the department field empty.

Tasks Per Region

1. In the Home page, create a **new Column.** Make sure the new column is created under **Team Dashboard Table** (E.g. Digital Creative Dashboard)**.**



2. Type in the following General DAX column formula to create Region column:

```
Region =

SWITCH(

  TRUE(),

  CONTAINSSTRING('Team Dashboard'[Labels], "Region1") || CONTAINSSTRING('Team Dashboard'[Task Name], "Region1"), "Region1",

  CONTAINSSTRING('Team Dashboard'[Labels], "Region2") || CONTAINSSTRING('Team Dashboard'[Task Name], "Region2"), "Region2",

  CONTAINSSTRING('Team Dashboard'[Labels], "Region3") || CONTAINSSTRING('Team Dashboard'[Task Name], "Region3"), "Region3",

  CONTAINSSTRING('Team Dashboard'[Labels], "Region4") || CONTAINSSTRING('Team Dashboard'[Task Name], "Region4"), "Region4"

)
```

3. In the DAX formula,

   Replace team names:
   Replace “Team Dashboard” with **actual team names** like “Digital Creative Dashboard”, “Copywriting Dashboard”.

   Replace Region names:

Replace “Region1”, Region2”, etc.. with **actual Region names** like “UK”, “SA”. Ensure that the replaced region names in the CONTAINSTRING function **aligns** with the region names used in the **labels of Microsoft Planner.**

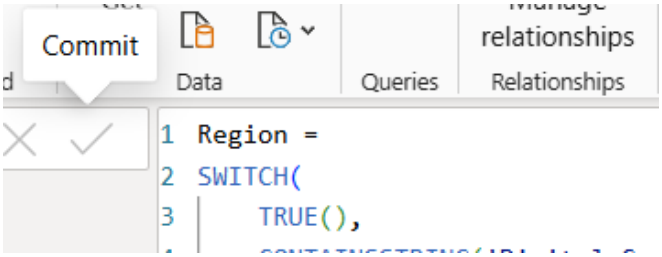
To add more Regions:
Copy the entire paired CONTAINSTRING block, including both conditions (checking the **"Labels"** and **"Task Name"** fields) and modify it for the new Region.
Ensure to separate each paired CONTAINSTRING block with a comma.

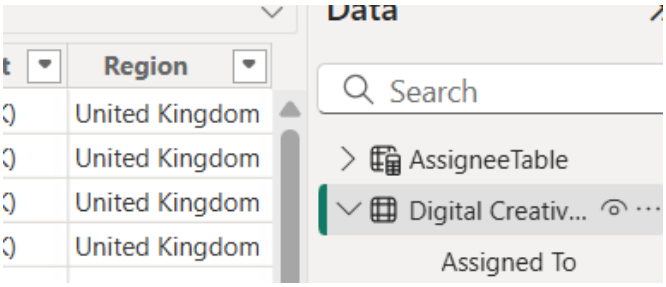
Default:
If the labels of a task do not contain any of the regions specified in the formula, the region for that task will be left blank.

Example:

```
Region =
SWITCH(
    TRUE(),
    CONTAINSSTRING('Digital Creative Dashboard'[Labels],
    "UK") || CONTAINSSTRING('Digital Creative Dashboard'[Task
    Name], "UK"), "United Kingdom",
    CONTAINSSTRING('Digital Creative Dashboard'[Labels],
    "SA") || CONTAINSSTRING('Digital Creative Dashboard'[Task
    Name], "SA"), "South Africa",
    CONTAINSSTRING('Digital Creative Dashboard'[Labels],
    "CA") || CONTAINSSTRING('Digital Creative Dashboard'[Task
    Name], "CA"), "Canada",
    CONTAINSSTRING('Digital Creative Dashboard'[Labels],
    "IRE") || CONTAINSSTRING('Digital Creative Dashboard'[Task
    Name], "IRE"), "Ireland"
)
```

4. Press Commit and check that a new Region column is created.





Explanation of the formula:

This formula creates a column that categorizes tasks into specific regions based on the keywords found in the **"Labels"** field or the **“Task Name”** field.

Key Functions:

- **CONTAINSSTRING**:

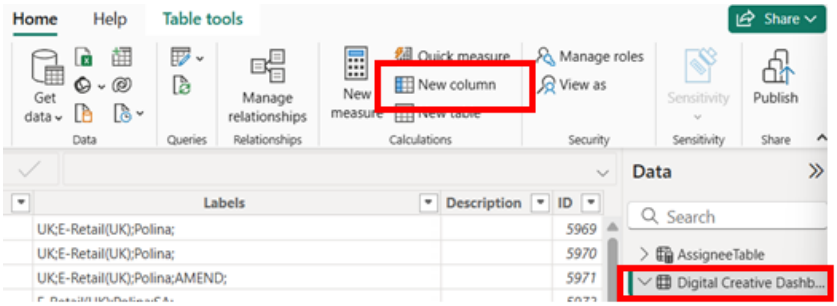
  Checks if a specific keyword (e.g., "UK", "SA") is found in the "Labels" field or the “Task Name” for each task.

- **|| (OR Operator)**:
  This means "or". It tells Power BI to check both fields. If the keyword appears in either the "Labels" field or the "Task Name" field, the condition will return TRUE.
- **SWITCH:**

Evaluates multiple conditions and returns the first match it finds. If the "Labels" field or the “Task Name” field contains a keyword (e.g., "UK"), the CONTAINSSTRING function will return TRUE, and SWITCH will assign the corresponding region (e.g., "United Kingdom"). If none of the conditions are met (i.e., the field doesn’t contain any of the specified keywords), SWITCH will return blank, leaving the region field empty.

Proportion Of Tasks Validated Vs Not

1. In the Home page, create a **new Column.** Make sure the new column is created under **Team Dashboard Table** (E.g. Digital Creative Dashboard)**.**



2. Type in the following General DAX column formula to create Validation Status column:

```
Validation Status =

IF(

  CONTAINSSTRING('Team Dashboard'[Bucket Name],
"YourValidationKeyword"),

  "YourValidationKeyword",

  "AlternativeLabelIfNotFound"

)
```

3. In the DAX formula,

   Replace team names:
   Replace “Team Dashboard” with **actual team names** like “Digital Creative Dashboard”, “Copywriting Dashboard”.

   Replace “YourValidationKeyword” and “AlternativeLabelIfNotFound”:

   Replace these placeholders with your preferred validation keywords, such as “Awaiting Validation” and “Not Validated”. Make sure that the keyword used inside the CONTAINSSTRING function exactly matches the **Bucket Name** used in **Microsoft Planner**. This ensures tasks are correctly categorized based on their validation status.

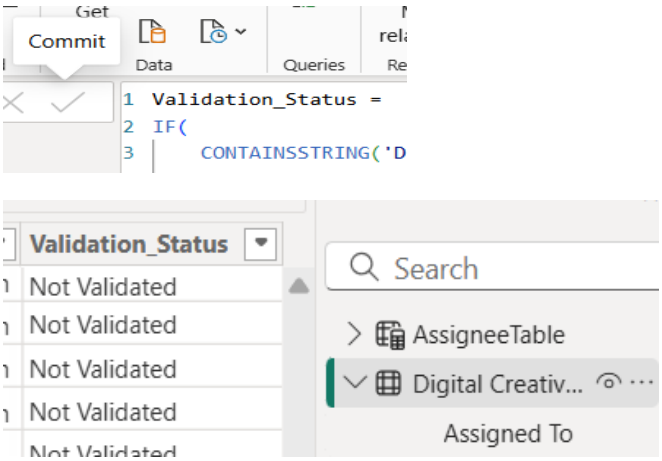
Default:

If the bucket name of a task does not contain the specified keyword used in the formula, the validation status for that task will be “AlternativeLabelIfNotFound”

Example:

```
Validation_Status =
IF(
    CONTAINSSTRING('Digital Creative Dashboard'[Bucket Name],
    "Awaiting Validation")," Awaiting Validation",
    "Not Validated"
)
```

4. Press Commit and check that a new Validation Status column is created.



Explanation of the formula:

This formula creates a column that categorizes tasks based on their **Bucket Name**.

Key Functions:

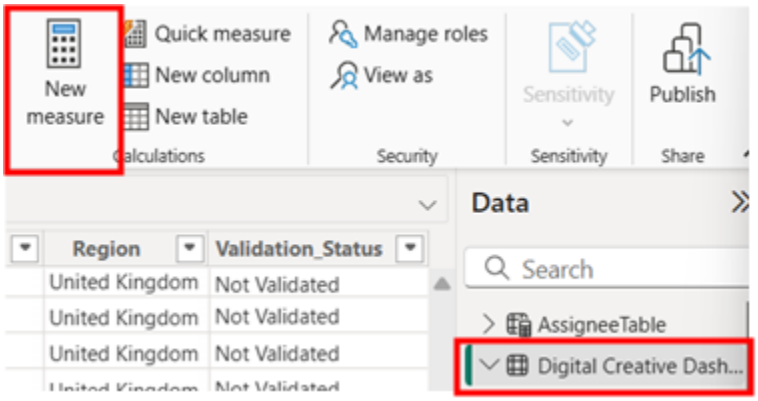
- **CONTAINSSTRING**:
  Checks whether the Bucket Name for each task contains the text "YourValidationKeyword" (e.g., "Awaiting Validation")

- **IF:**
  Evaluates the result of the CONTAINSTRING check. If CONTAINSTRING returns TRUE (meaning "Awaiting Validation" was found), it assigns "Awaiting Validation"

as the task's status. If it returns FALSE, it assigns the default value which is "Not Validated".

Total Number of Tasks Validated

1. In the Home page, create a **new Measure.** Make sure the new measure is created under **Team Dashboard Table** (E.g. Digital Creative Dashboard)**.**



2. Type in the following General DAX measure formula to create Validated Task Count measure:

```
ValidatedTasksCount =
COALESCE(
  CALCULATE(
    COUNTROWS('Team Dashboard'),
    'Team Dashboard'[Validation_Status] = "YourValidationKeyword",
    ALLSELECTED('Team Dashboard')
  ),
  0
)
```

3. In the DAX formula,

   Replace team names:
   Replace "Team Dashboard" with **actual team names** like "Digital Creative Dashboard", "Copywriting Dashboard".

Replace “YourValidationKeyword”:

Replace it with your preferred validation keyword, such as “Awaiting Validation”. Ensure that the keyword exactly matches the one used in both the Validation_Status column and the Bucket Name in Microsoft Planner

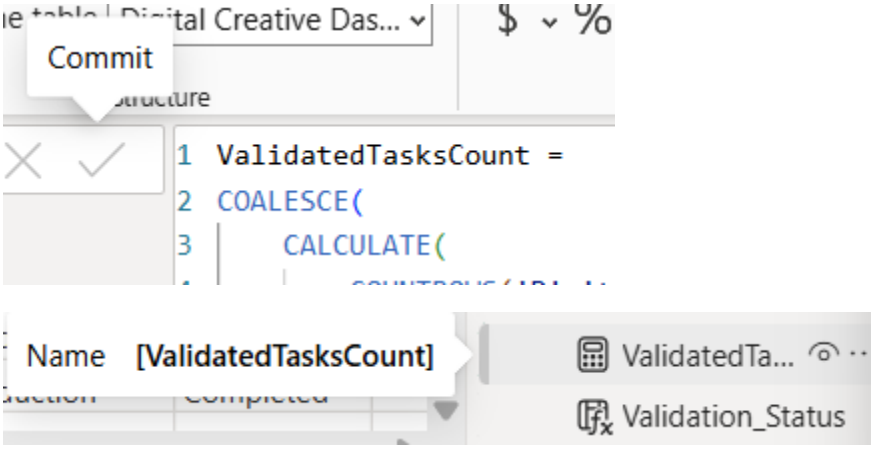
Default:

If no tasks meet the condition, the CALCULATE function returns blank. The COALESCE function then returns the default value of 0**.**

Example:

```
ValidatedTasksCount =
COALESCE(
    CALCULATE(
        COUNTROWS('Digital Creative Dashboard'),
        'Digital Creative Dashboard'[Validation_Status] =
        "Awaiting Validation",
        ALLSELECTED('Digital Creative Dashboard')
    ),
    0
)
```

4. Press Commit and check that ValidatedTasksCount measure is created.



Explanation of the formula:

This formula creates a measure which calculates the number of tasks that are validated.

Key Functions:

- **CALCULATE:**

  This function is used to do a calculation, but only under certain conditions. In this case, it's counting tasks only if the task is marked as "YourValidationKeyword" (e.g., "Awaiting Validation")

- **COUNTROWS:**
  Simply counts how many tasks (or rows) match the condition.

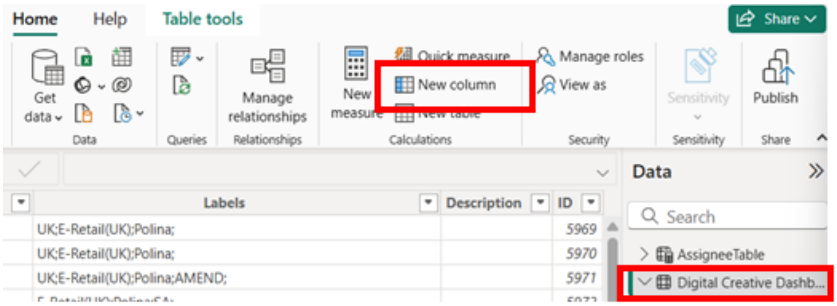
- **ALLSELECTED:**

  This makes sure the formula respects any filters or slicers the user has selected in the report (like date ranges, etc.). It means the count will change depending on what you've selected in the visuals.

- **COALESCE (..., 0):**
  This is a safety net. If no tasks are found that match the condition, the result would just return the default value of 0

Department Split for AMEND tasks

1. In the Home page, create a **new Column.** Make sure the new Column is created under **Team Dashboard Table** (E.g. Digital Creative Dashboard)**.**



2. Type in the following General DAX measure formula to create Departments (Amend) Column:

```
Department (Amend) =

  IF(CONTAINSSTRING('Team Dashboard'[Labels], "AMEND")
|| CONTAINSSTRING('Team Dashboard'[Task Name],
"AMEND"),

  'Team Dashboard'[Tasks by Department],

  BLANK()

  )
```

3. In the DAX formula,

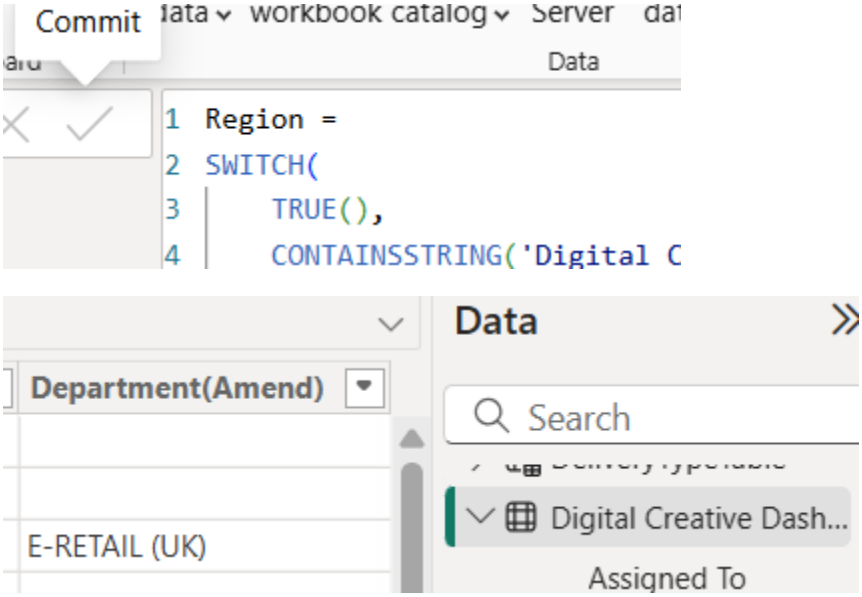
   Replace team names:
   Replace “Team Dashboard” with **actual team names** like “Digital Creative Dashboard”, “Copywriting Dashboard”.

   Default:
   If the task does not contain the specified keyword used in the formula, the department(amend) for that task will remain blank.

Example:

```
Region =
SWITCH(
    TRUE(),
    CONTAINSSTRING('Digital Creative Dashboard'[Labels], "UK") || CONTAINSSTRING('Digital Creative Dashboard'[Task Name], "UK"), "United Kingdom",
    CONTAINSSTRING('Digital Creative Dashboard'[Labels], "SA") || CONTAINSSTRING('Digital Creative Dashboard'[Task Name], "SA"), "South Africa",
    CONTAINSSTRING('Digital Creative Dashboard'[Labels], "CA") || CONTAINSSTRING('Digital Creative Dashboard'[Task Name], "CA"), "Canada",
    CONTAINSSTRING('Digital Creative Dashboard'[Labels], "IRE") || CONTAINSSTRING('Digital Creative Dashboard'[Task Name], "IRE"), "Ireland"
)
```

5. Press Commit and check that Department (Amend) column is created.



Explanation of the formula:

This formula creates a new column called Department (Amend) that helps categorize amend-related tasks by department.

Key Functions:

- **CONTAINSSTRING**:

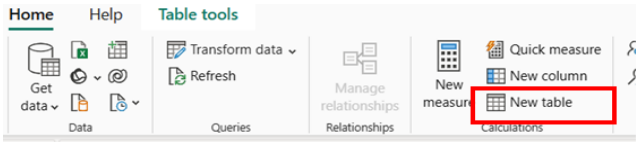
  Checks if the word "AMEND" appears in either the Labels or Task Name field of a task.

- **IF:**
  Evaluates the result of the CONTAINSTRING check. If CONTAINSTRING returns

TRUE (meaning "Amend" was found), it assigns the department of that task. If it returns FALSE, it assigns the default value which is "Blank"

Types Of Delivery

1. In the Home Page, create a **new Table**



2. Type in the following General DAX measure formula to create Delivery Type Table:

```
DeliveryTypeTable =

UNION (

  ADDCOLUMNS (

    FILTER ( 'Team Dashboard', CONTAINSSTRING ( 'Team Dashboard'[Labels],
"Delivery1_Keyword1" ) || CONTAINSSTRING ( 'Team Dashboard'[Task Name], "Delivery1_Keyword2" )
|| CONTAINSSTRING ( 'Team Dashboard'[Task Name], "Delivery1_Keyword3" ) ),

    "Type of Delivery", "Delivery1"

  ),

  ADDCOLUMNS (

    FILTER ( 'Team Dashboard', CONTAINSSTRING ( 'Team Dashboard'[Task Name],
"Delivery2_Keyword1" ) && NOT CONTAINSSTRING ( 'Team Dashboard'[Task Name],
"Delivery3_Keyword1" ) || CONTAINSSTRING ( 'Team Dashboard'[Task Name], "Delivery2_Keyword2" )
|| CONTAINSSTRING ( 'Team Dashboard'[Task Name], "Delivery2_Keyword3" ) ),

    "Type of Delivery", "Delivery2"

  )

)
```

3. In the DAX formula,

   Replace team names:
   Replace “Team Dashboard” with **actual team names** like “Digital Creative Dashboard”, “Copywriting Dashboard”.

   Replace Keyword Placeholders:
   Replace placeholders like "Delivery1_Keyword1", "Delivery2_Keyword1", etc. with actual keywords (E.g. “VIDEO”, “EMAIL”) that identify tasks for a specific delivery

type. Make sure these keywords match text found in either the **"Task Name"** or **"Labels"** columns.

Special Note – Using NOT CONTAINSSTRING to Avoid Keyword Overlap:
If two delivery types use **similar keywords**, you can use NOT CONTAINSSTRING to **exclude specific words** and avoid incorrect classification. (E.g. “Email”, “Solus Email”)

```
CONTAINSSTRING('Digital Creative Dashboard'[Task Name], "Email") &&
NOT CONTAINSSTRING('Digital Creative Dashboard'[Task Name], "Solus Email")
```

Replace Delivery Type Name:
Replace “Delivery1”, “Delivery2”, etc.. with **actual delivery types** like “Video”,” Email”

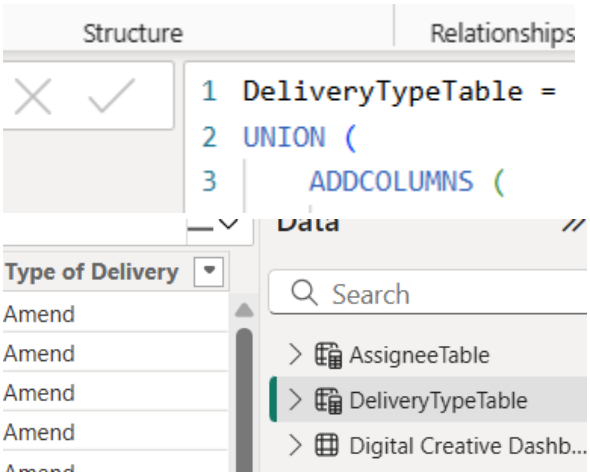
Add More Delivery Keywords (Within the Same Type):
To include more keywords for the same delivery type, copy the block using the || operator (which means "OR") along with the CONTAINSSTRING function and modify it for the new keyword.
Only use && NOT CONTAINSSTRING if you need to **exclude tasks** that might contain a **conflicting keyword** from another delivery type.
Ensure to separate each CONTAINSSTRING block with a comma.

Add More Delivery Types:
Copy the ADDCOLUMNS block and modify it for the new delivery type.
Ensure to separate each ADDCOLUMNS block with a comma.

Example:

```
DeliveryTypeTable =
UNION (
    ADDCOLUMNS (
        FILTER ( 'Digital Creative Dashboard', CONTAINSSTRING ( 'Digital Creative Dashboard'[Task Name], "EMAIL" ) && NOT CONTAINSSTRING ( 'Digital Creative Dashboard'[Task Name], "SOLUS EMAIL" ) || CONTAINSSTRING ( 'Digital Creative Dashboard'[Task Name], "TRIGGER" ) || CONTAINSSTRING ( 'Digital Creative Dashboard'[Task Name], "THANK YOU" ) ),
        "Type of Delivery", "Email"
    ),
    ADDCOLUMNS (
        FILTER ( 'Digital Creative Dashboard', CONTAINSSTRING ( 'Digital Creative Dashboard'[Task Name], "FILM" ) || CONTAINSSTRING ( 'Digital Creative Dashboard'[Task Name], "ANIMATION" ) || CONTAINSSTRING ( 'Digital Creative Dashboard'[Task Name], "SCREEN" ) ),
        "Type of Delivery", "Video"
    ),
    ADDCOLUMNS (
        FILTER ( 'Digital Creative Dashboard', CONTAINSSTRING ( 'Digital Creative Dashboard'[Task Name], "ASSET" ) || CONTAINSSTRING ( 'Digital Creative Dashboard'[Task Name], "RECEIPT" ) || CONTAINSSTRING ( 'Digital Creative Dashboard'[Task Name], "LANDING PAGE" ) || CONTAINSSTRING ( 'Digital Creative Dashboard'[Task Name], "HUB" ) || CONTAINSSTRING ( 'Digital Creative Dashboard'[Task Name], "DIGITAL SUPPORT" ) ),
        "Type of Delivery", "Asset"
    ),
    ADDCOLUMNS (
        FILTER ( 'Digital Creative Dashboard', CONTAINSSTRING ( 'Digital Creative Dashboard'[Task Name], "EB BANNER" ) ),
        "Type of Delivery", "EB Banners"
    ),
    ADDCOLUMNS (
        FILTER ( 'Digital Creative Dashboard', CONTAINSSTRING ( 'Digital Creative Dashboard'[Task Name], "BANNER" ) && NOT CONTAINSSTRING ( 'Digital Creative Dashboard'[Task Name], "EB BANNER" ) ),
        "Type of Delivery", "Banners"
    ),
    ADDCOLUMNS (
        FILTER ( 'Digital Creative Dashboard', CONTAINSSTRING ( 'Digital Creative Dashboard'[Task Name], "SOLUS EMAIL" ) ),
        "Type of Delivery", "Solus Email"
    ),
    ADDCOLUMNS (
        FILTER ( 'Digital Creative Dashboard', CONTAINSSTRING ( 'Digital Creative Dashboard'[Task Name], "SOCIAL" ) || CONTAINSSTRING ( 'Digital Creative Dashboard'[Task Name], "DISPLAY" ) && NOT CONTAINSSTRING ( 'Digital Creative Dashboard'[Task Name], "PREVIEW" ) ),
        "Type of Delivery", "Social Media"
    ),
    ADDCOLUMNS (
        FILTER ( 'Digital Creative Dashboard', CONTAINSSTRING ( 'Digital Creative Dashboard'[Task Name], "PREVIEW" ) ),
        "Type of Delivery", "Previews"
    ),
    ADDCOLUMNS (
        FILTER ( 'Digital Creative Dashboard', CONTAINSSTRING ( 'Digital Creative Dashboard'[Task Name], "MOCK-UP" ) ),
        "Type of Delivery", "Mock-up"
    ),
    ADDCOLUMNS (
        FILTER ( 'Digital Creative Dashboard', CONTAINSSTRING ( 'Digital Creative Dashboard'[Task Name], "UPDATE" ) || CONTAINSSTRING ( 'Digital Creative Dashboard'[Task Name], "REDESIGN" ) ),
        "Type of Delivery", "Page Update/Redesign"
    )
)
```

4. Press Commit and check that a new table DeliveryTypeTable with the column Type of Delivery is created:



Explanation of the formula:

This formula creates a table that categorizes tasks into different types of delivery based on specific keywords found in the "Task Name" or "Labels" fields.

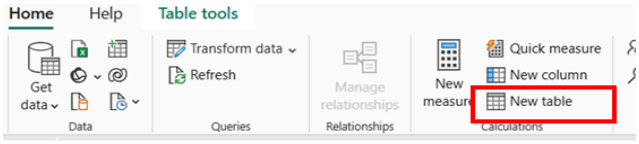
Key Functions:

- **FILTER**:
  Filters tasks to include only those that match a set of keywords associated with a specific delivery type (e.g., "FOLLOW UP", "EMAIL").
- **CONTAINSSTRING**:
  Checks whether the specified keyword appears in the "Task Name" or "Labels" field of a task.
- **NOT CONTAINSSTRING:**
  Used when two delivery types might share similar keywords. It helps exclude tasks that contain overlapping terms to avoid misclassification.
- **ADDCOLUMNS**:
  Adds a new column called "Type of Delivery", which assigns the delivery type label (e.g., "Social Media", "Video") to each task based on matched keywords.
- **UNION**:
  Combines all filtered task sets into one table. Since the new column for each delivery is labeled "Type of Delivery", the UNION function stacks the tasks for each delivery on top of one another.

Since each task can have multiple deliveries, the formula duplicates tasks for each delivery type. For example, if Task1 contains both “Video" and "Email”, there will be two rows for Task1 in the table—one with "Video" and one with "Email" in the "Type of Delivery" column. This way, each delivery type gets their own row for the same task, allowing us to easily count how many tasks each delivery type has.

Overall Number of Tasks

1. In the Home Page, create a **new Table**



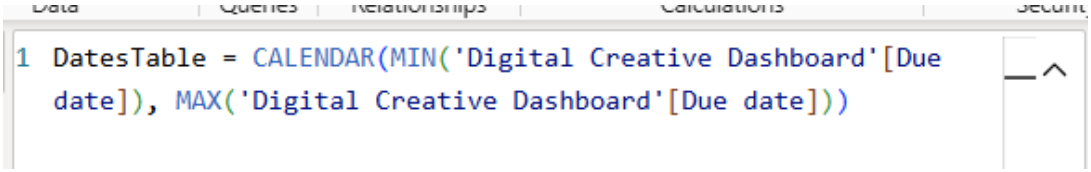
2. Type in the following General DAX measure formula to create DatesTable:

```
DatesTable = CALENDAR(MIN('Team Dashboard'[Due date]), MAX('Team Dashboard'[Due date]))
```

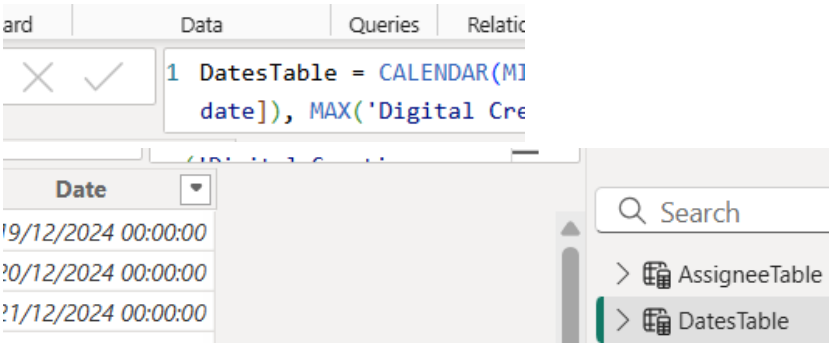
3. In the DAX formula,

   Replace team names:
   Replace “Team Dashboard” with **actual team names** like “Digital Creative Dashboard”, “Copywriting Dashboard”.

   Example:



4. Press Commit and check that a new table DatesTable with the column Date



Explanation of the formula:

This formula creates a new table called DatesTable that contains one row for every date between the earliest and latest due dates in the Digital Creative Dashboard dataset.

Key Functions:

- **MIN:**
  Finds the earliest due date in the 'Digital Creative Dashboard' table.
- **MAX:**
  Finds the latest due date in the 'Digital Creative Dashboard' table.
- **CALENDAR:**
  Generates a new table that includes every date between the start and end dates found using MIN and MAX.

This table gives us a complete list of dates covering the entire range of tasks in the dataset. It allows you to connect the DatesTable to other tables like AssigneeTable, DeliveryTypeTable, and Team Dashboard.

Once connected, you can:

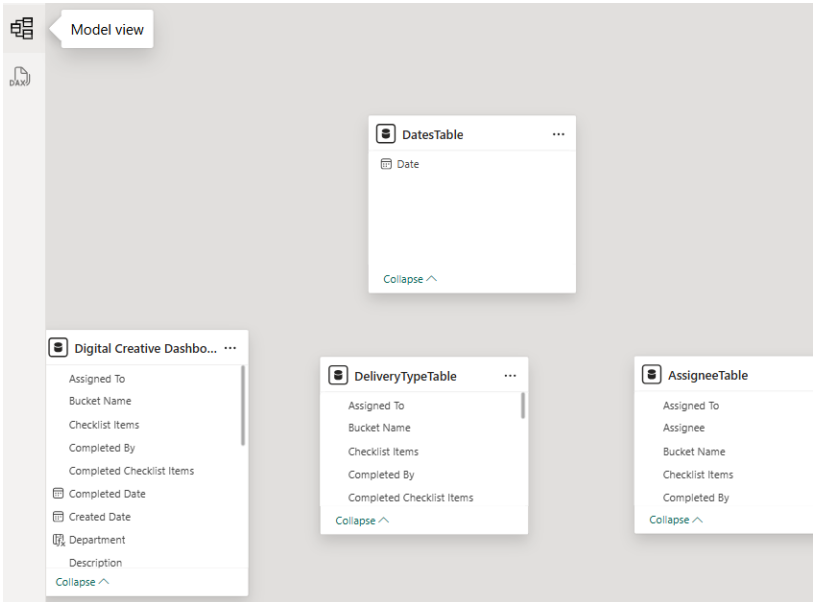
Filter all visuals by **date**

Perform **year-on-year** or **month-by-month** comparisons

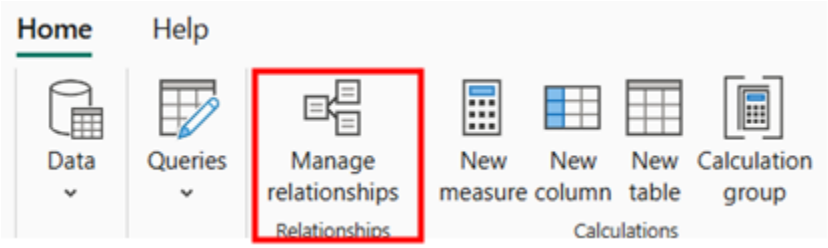
Building Relationships

Relationship between DatesTable and the rest:

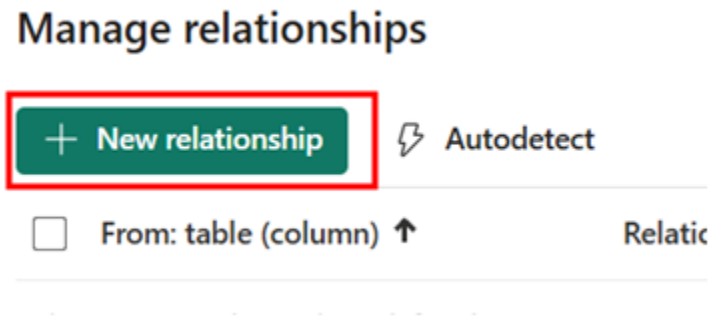
1. Open Model View.



2. In the Home Page, Manage Relationships



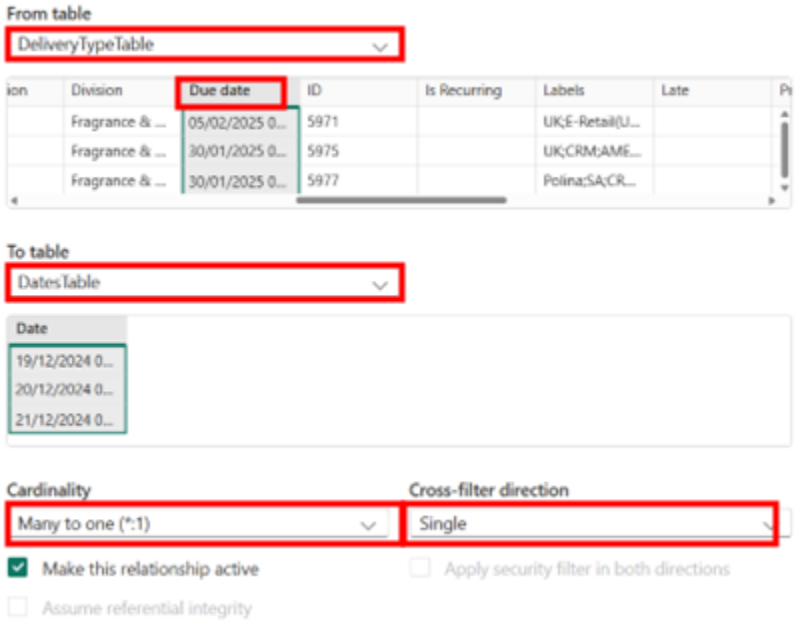
3. Create a new Relationship



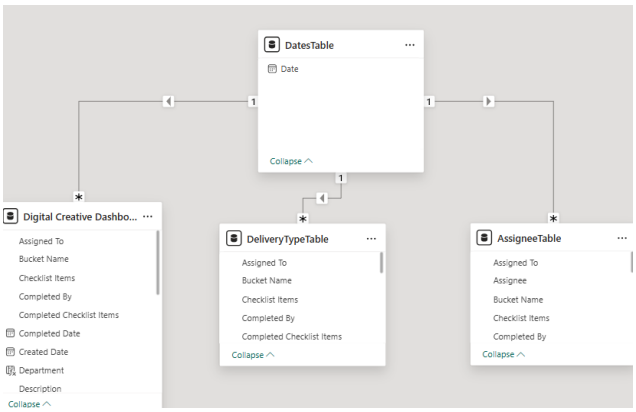
4. Create a relationship from the **DeliveryTypeTable/Digital Creative Dashboard/Copywriting Dashboard/AssigneeTable** to the DatesTable:
   - Select the **Due date** column from the DeliveryTypeTable
   - Select the **Date** column from the DatesTable
   - Set **Cardinality** to **Many to One (*:1)**
   - Set **Cross-filter direction** to **Single**
   - Ensure **"Make this relationship active"** is checked

   This relationship allows you to filter the DeliveryTypeTable by date fields (e.g., year, month) using the DatesTable.

Example:



5. Check that all the tables are connected to DatesTable in the Model View
   Example:

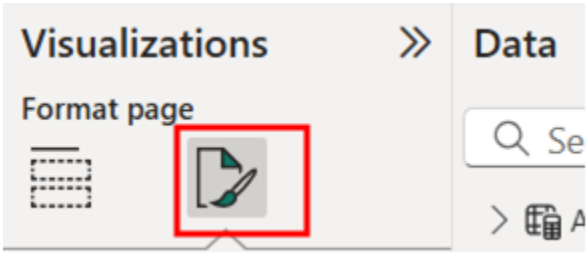


Setting up the Dashboard Visuals

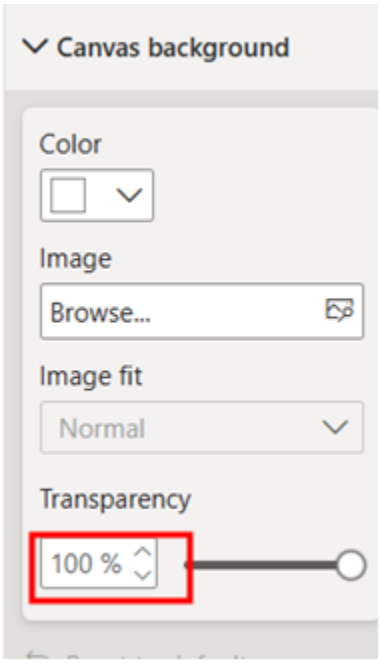
After modeling the data, we can now create the graphs and build the dashboard visuals. The following steps below can be applied to both Digital Creative Dashboard and Copywriting Dashboard to build the relevant individual graphs from each team.

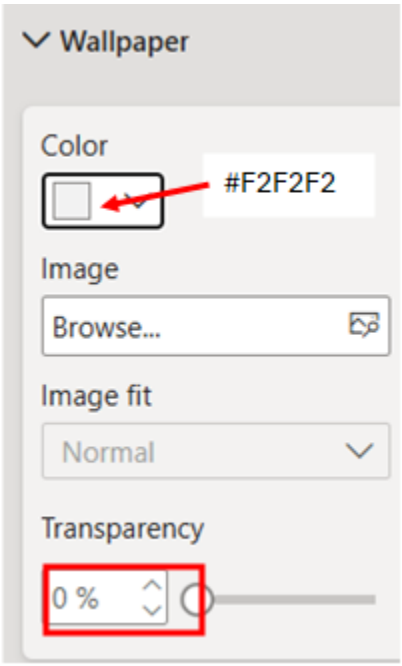
Setting Up the Dashboard's Background

1. In the Report view, select **Format page**

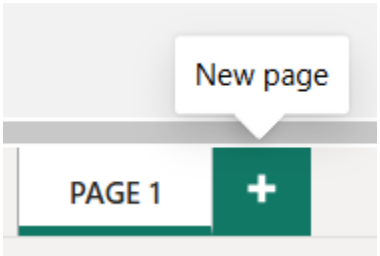


2. Under Canvas background and Wallpaper respectively, set the fields to the following:

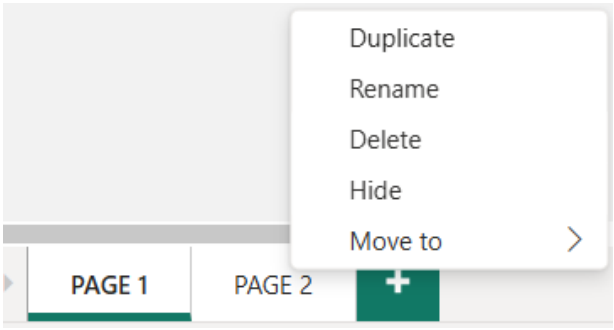




3. At the bottom of the page, add a new page.

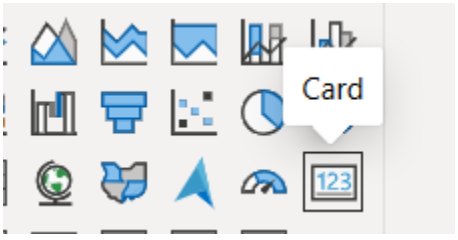


4. Rename both pages to PAGE 1 and PAGE 2 Respectively:

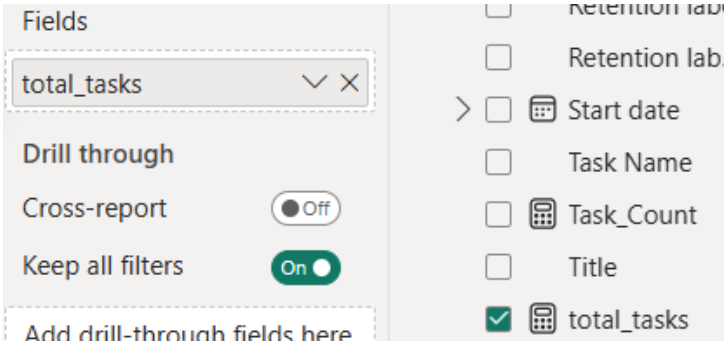


Total Number of Tasks Assigned

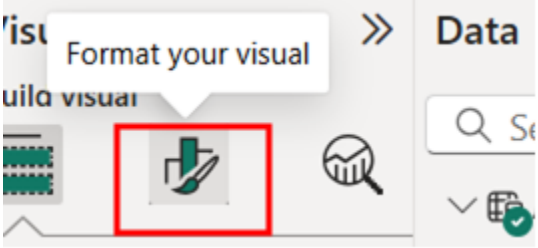
1. In the Report view, select the **card**



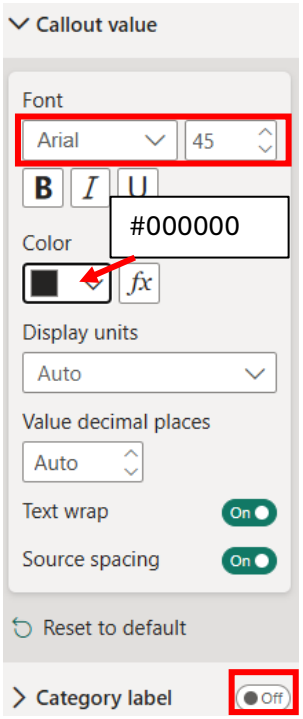
2. Under Team Dashboard, drag total tasks into the data field.



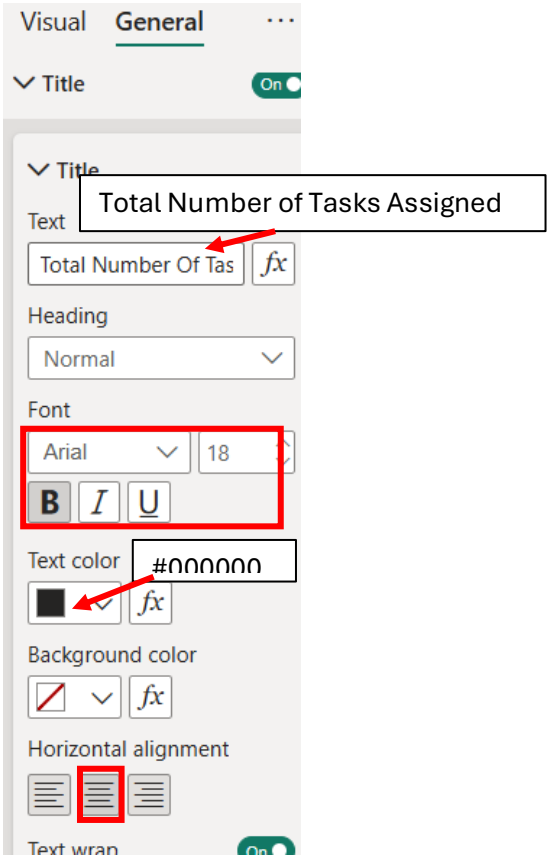
3. Select format your visual



4. Under Callout value and Category label, set the following fields:



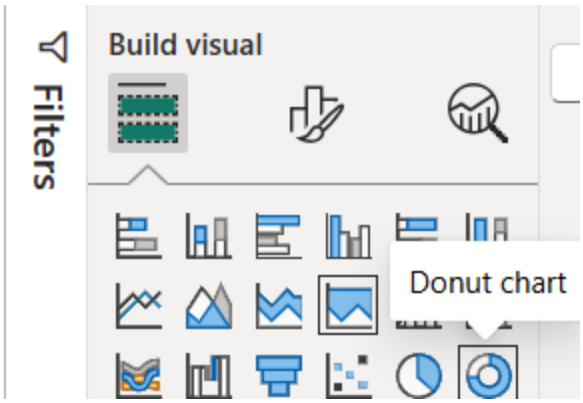
5. Under Title of General, set the following:



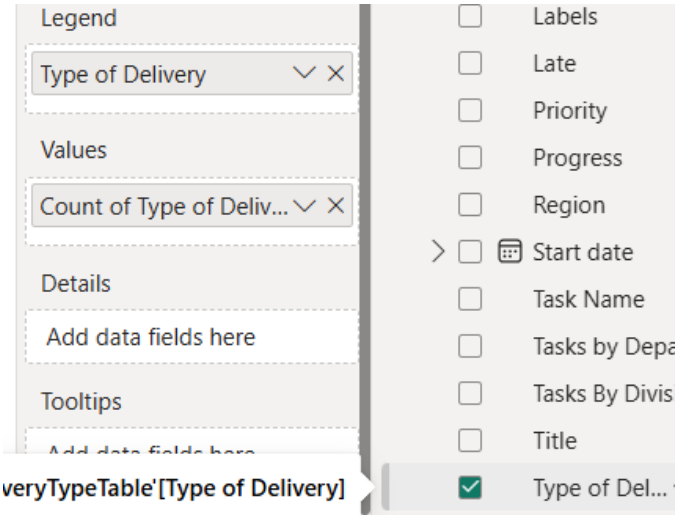
6. The final visuals of the graph:

Types Of Delivery

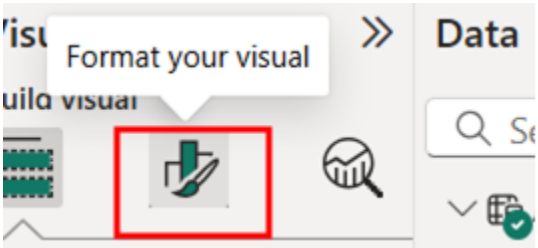
1. In the report view, select the **Donut chart**



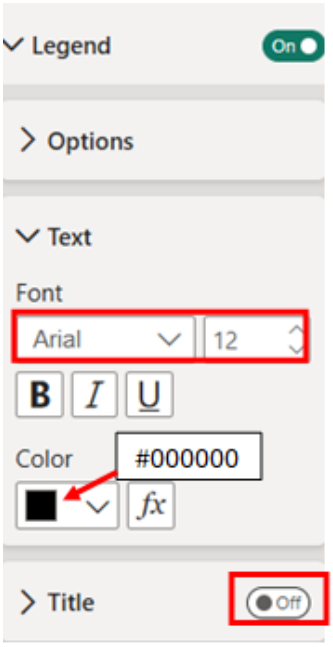
2. Under DeliveryTypeTable, drag Type of Delivery data field into both Legend and Values. The Values will automatically take count of Type of Delivery.



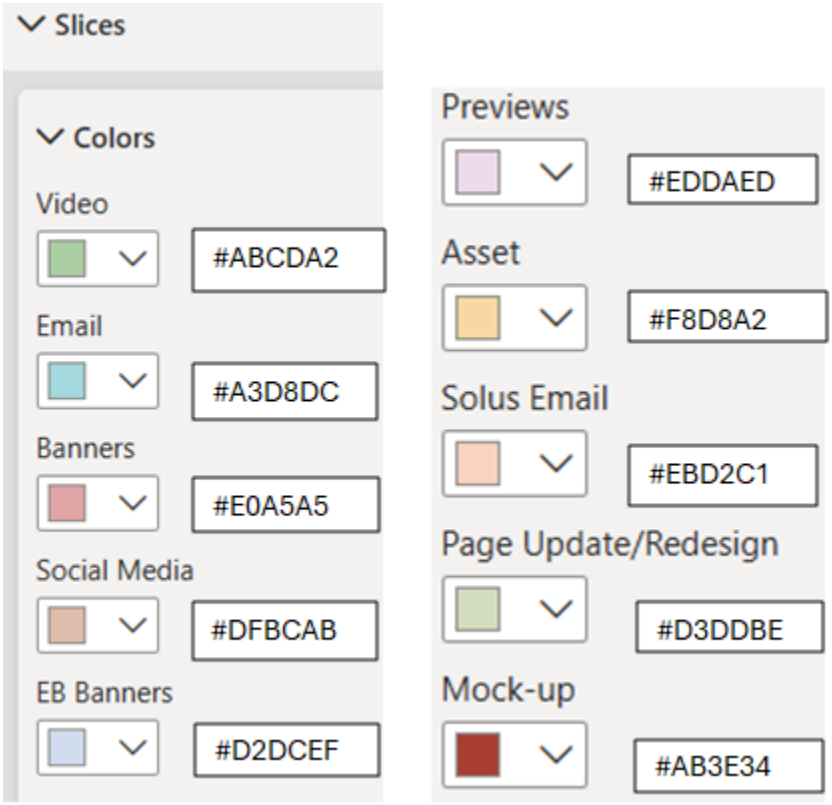
3. Select format your visual



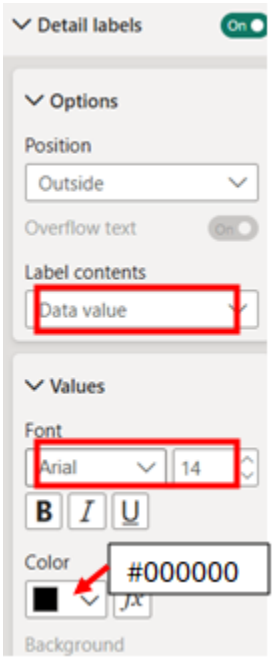
4. Under Legend section of visual, set the following fields:



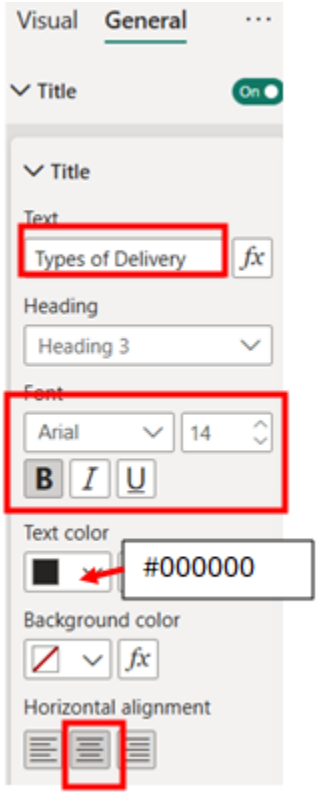
5. Under Slices of visual, set the following colors to the Types of Delivery:



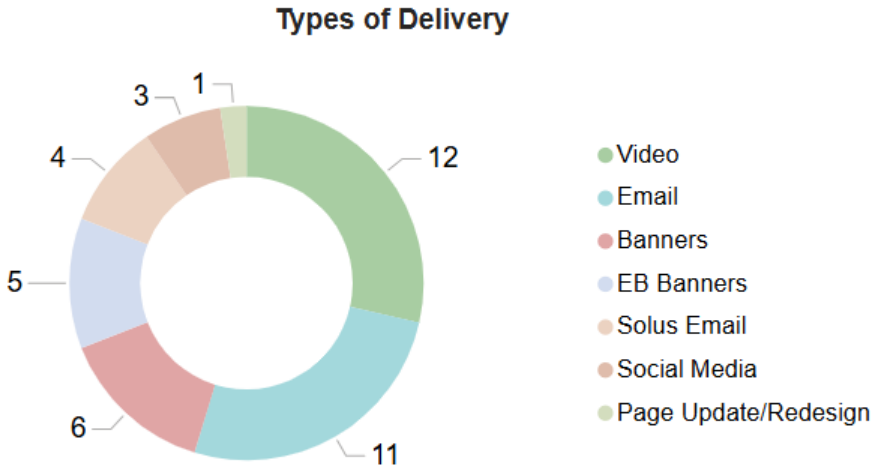
6. Under Detail labels of visual, set the following fields:



7. Under Title of general, set the following:

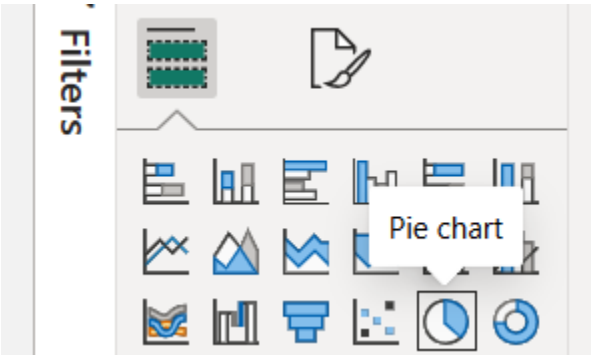


8. The final graph visuals:

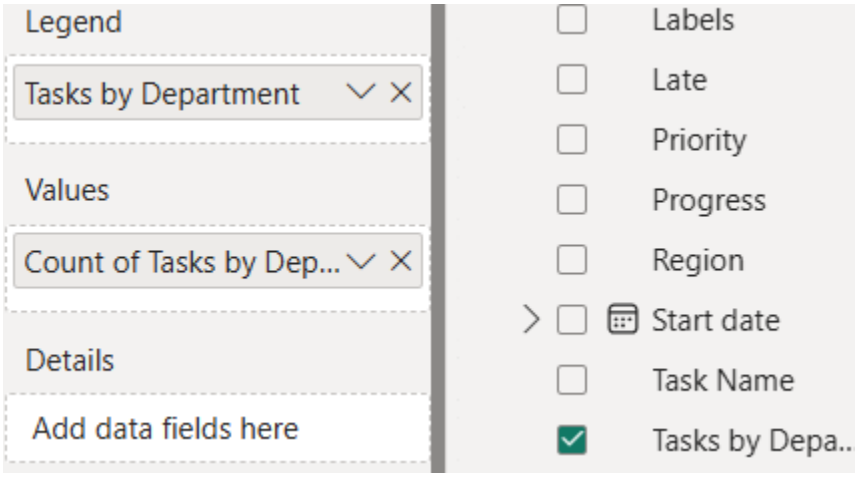


Department Split for All Tasks

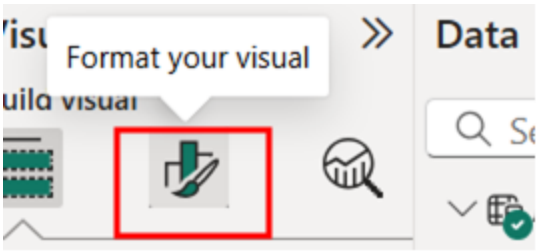
1. In the report view, select the **Pie chart**



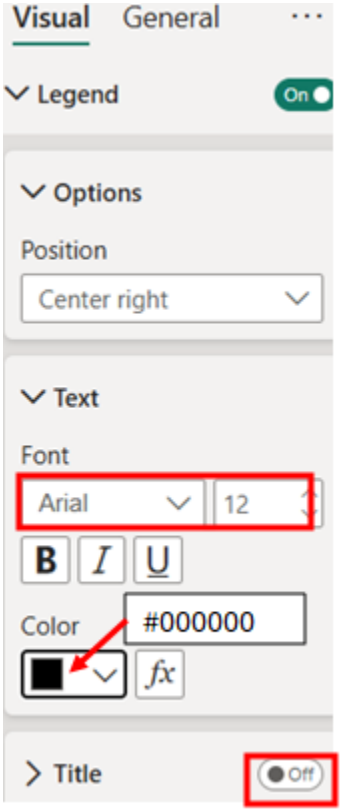
2. Under Team Dashboard, drag Tasks by Department data field into both Legend and Values. The Values will automatically take count of tasks by department.



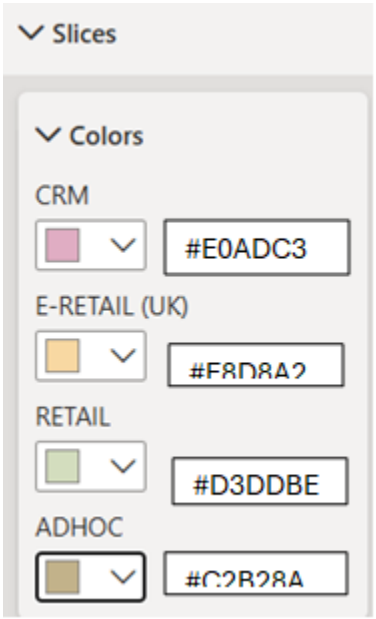
3. Select format your visual



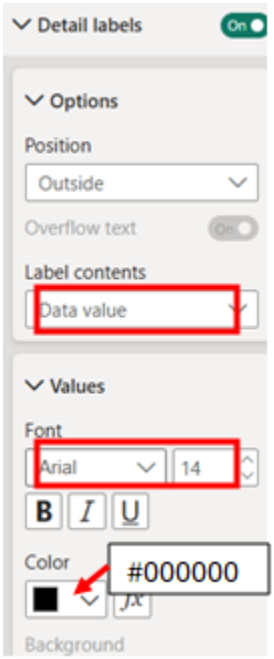
4. Under Legend of visual, set the following fields:



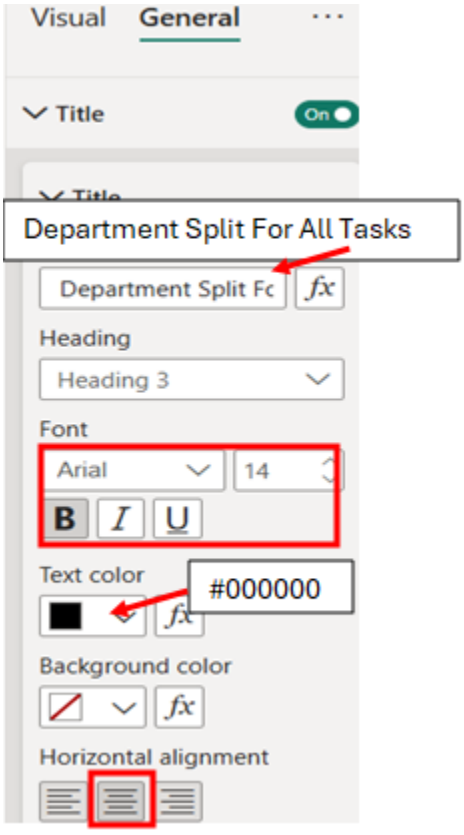
5. Under Slices of visual, set the following colors to the departments:



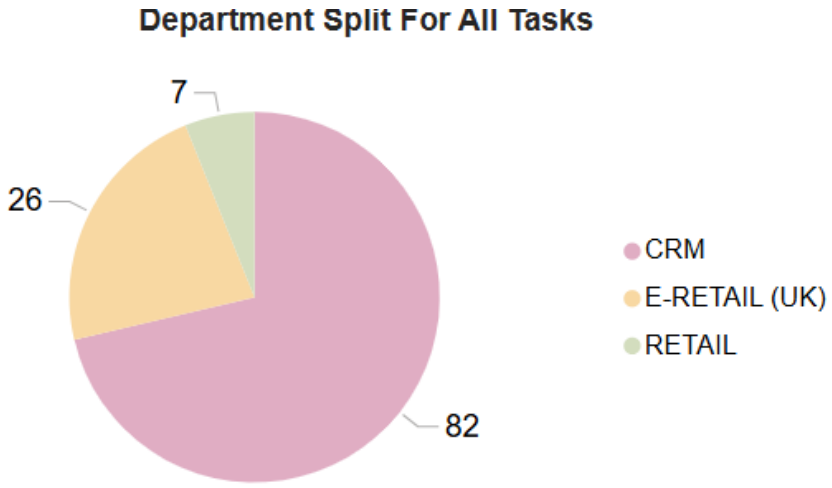
6. Under Detail labels of visual, set the following fields:



7. Under Title of general, set the following:

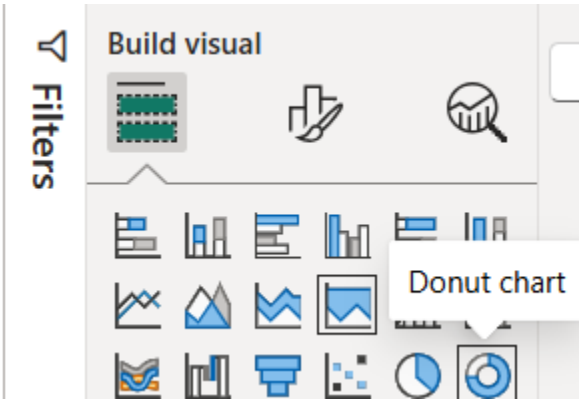


8. The final graph visuals:

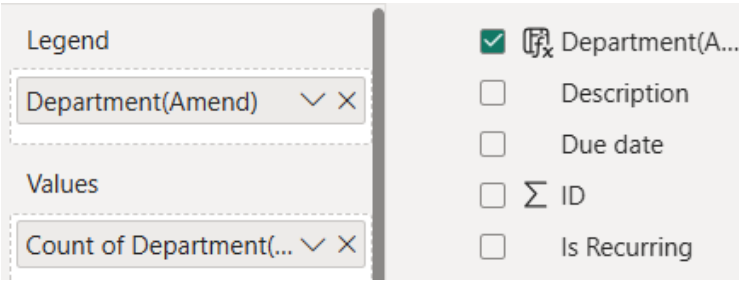


Department Split for AMEND Tasks

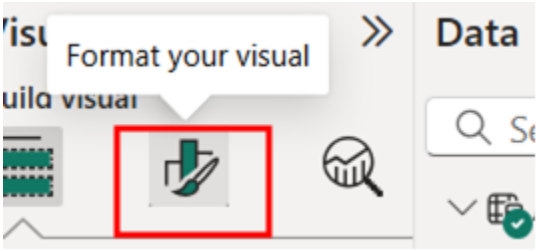
1. In the report view, select the **Donut chart**



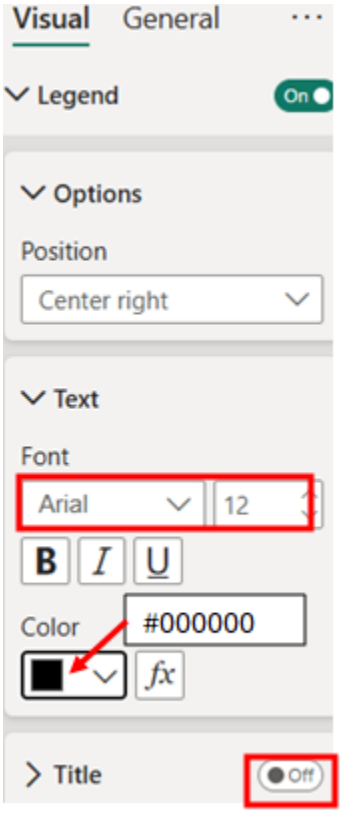
2. Under Team Dashboard, drag Department (Amend) data field into both Legend and Values. The Values will automatically take count of Department (Amend).



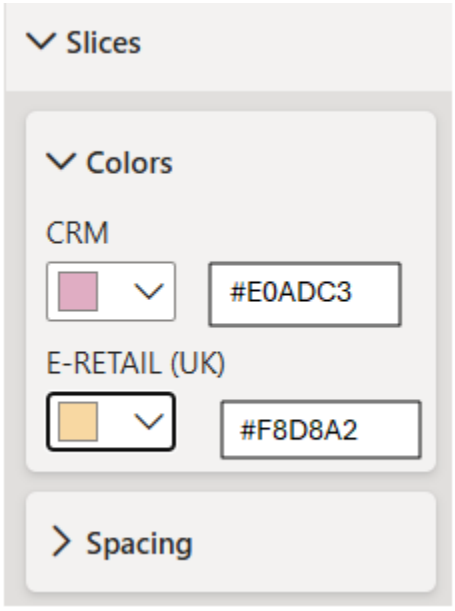
3. Select format your visual



4. Under Legend of visual, set the following fields:

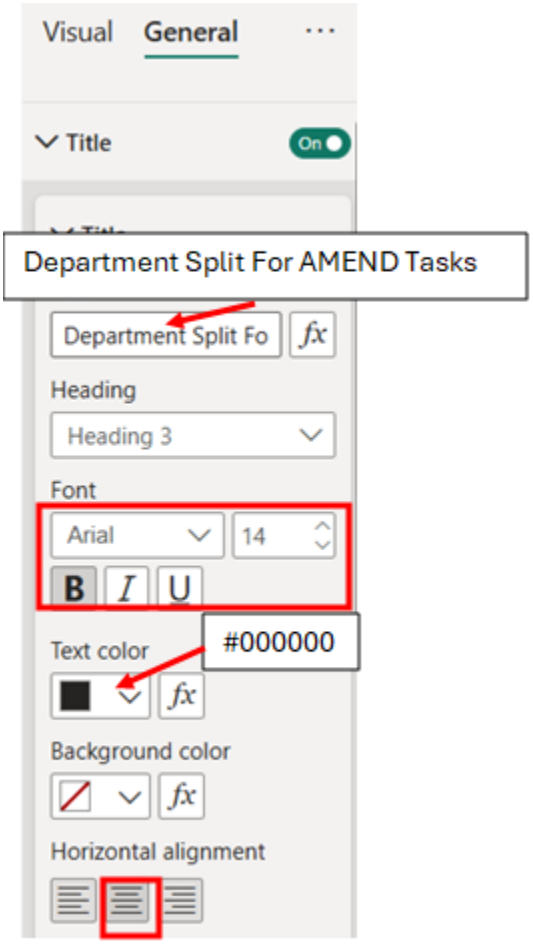


5. Under Slices of visual, set the following colors to the departments:

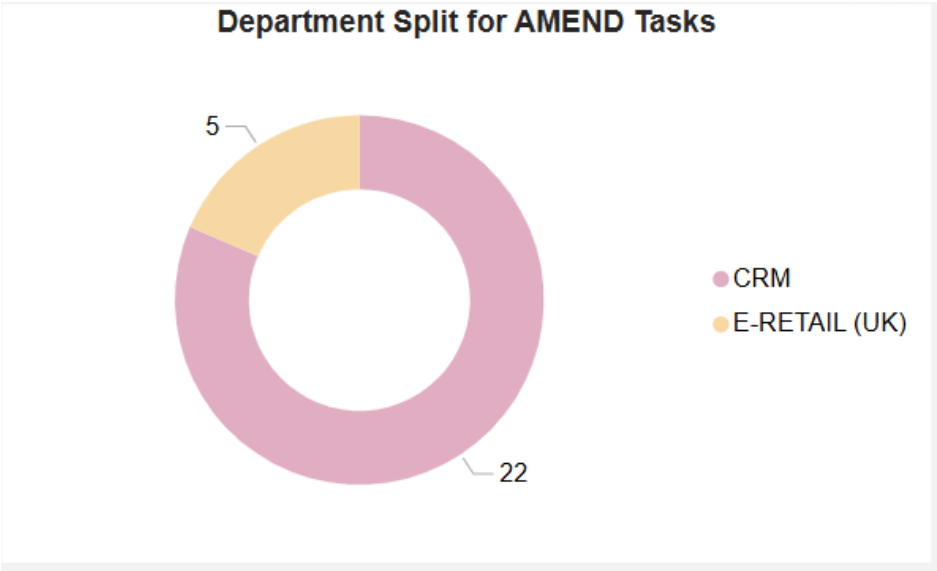


6. Under Detail labels of visual, set the following fields:

7. Under Title of general, set the following:

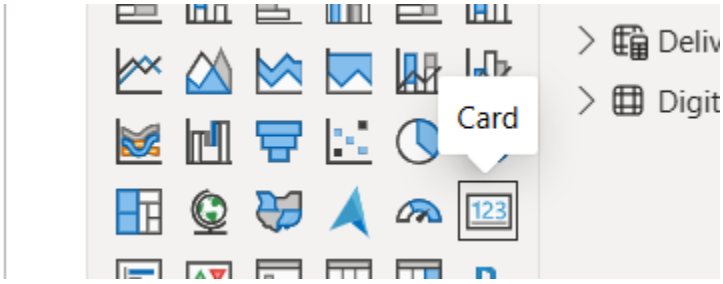


8. The final graph visuals:

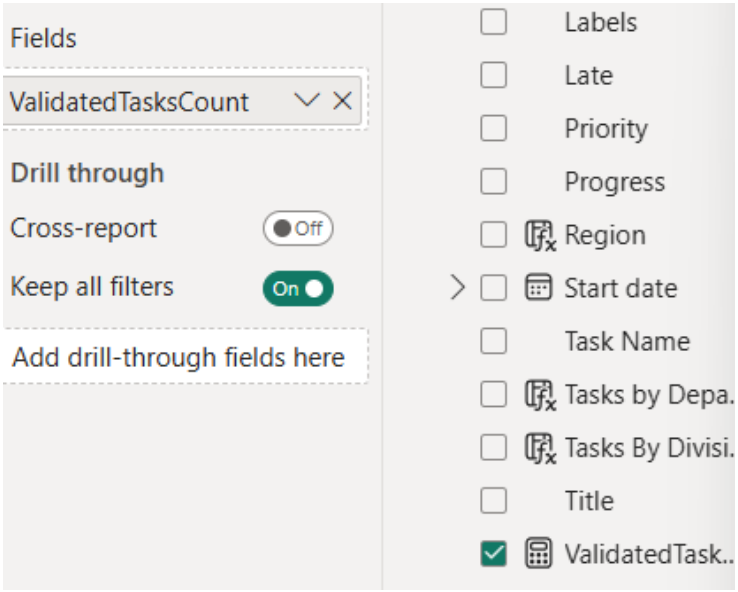


Total Number of Validated Tasks

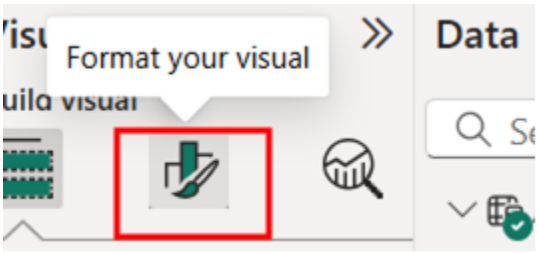
1. In the report view, select the **Card**



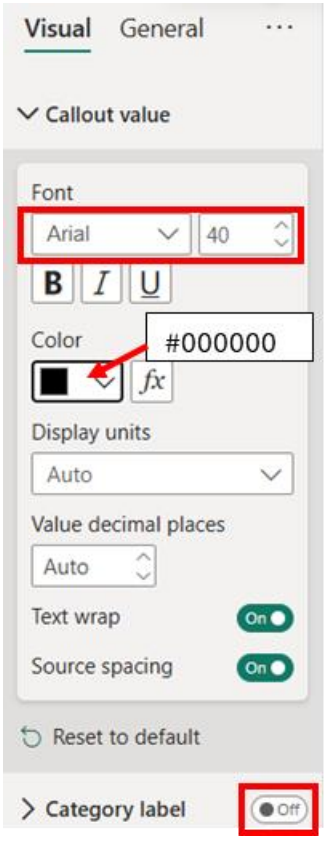
2. Under Team Dashboard, drag ValidateTasksCount data field into Fields.



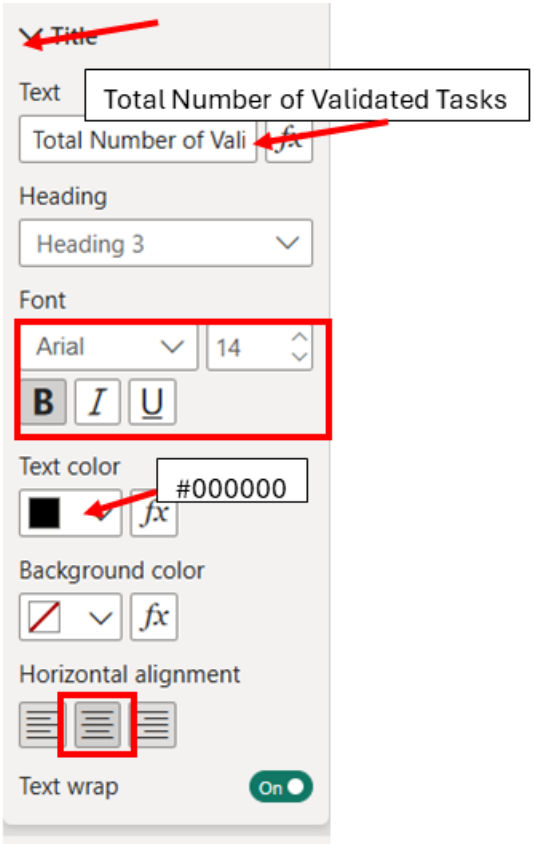
3. Select format your visual



4. Under Callout value and Category label, set the following fields:



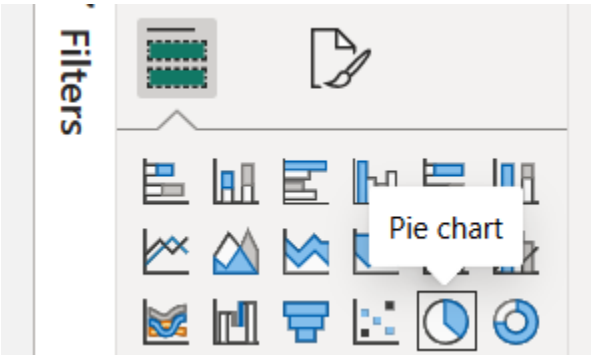
5. Under Title of general, set the following:



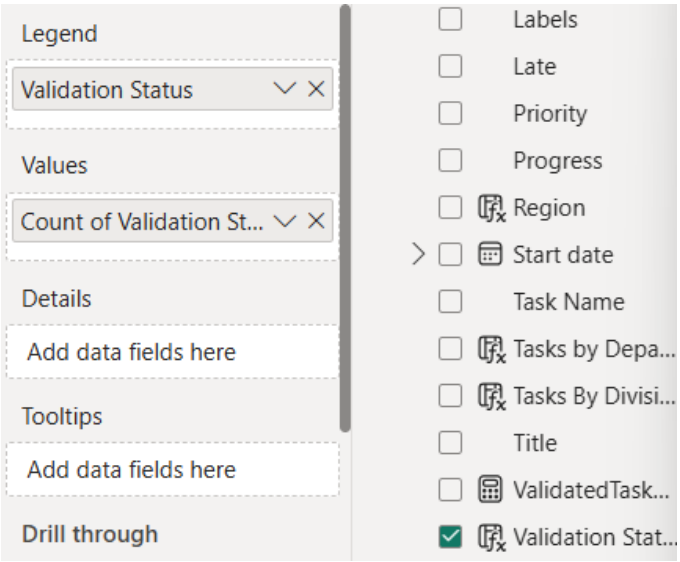
6. The final graph visuals:

Proportion of Tasks Validated VS Not

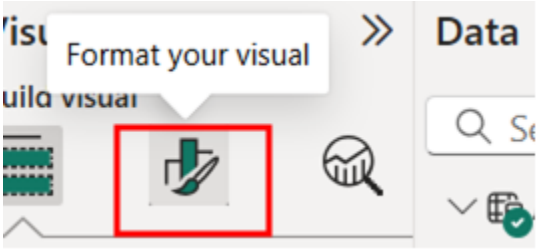
1. In the report view, select the **Pie chart**



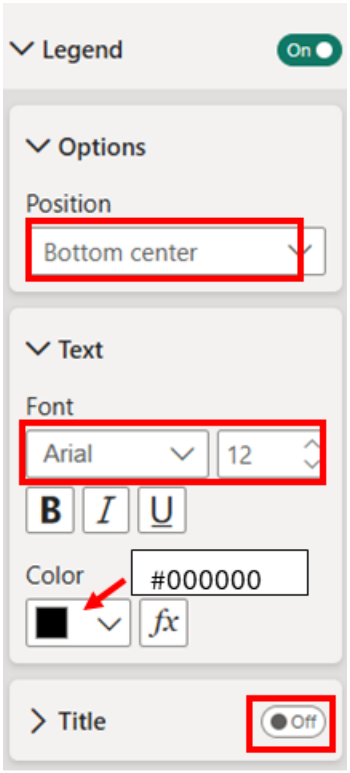
2. Under Team Dashboard, drag Validation Status data field into both Legend and Values. The Values will automatically take count of Validation Status.



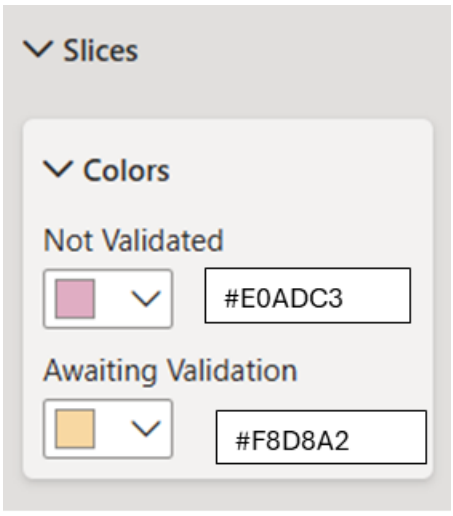
3. Select format your visual



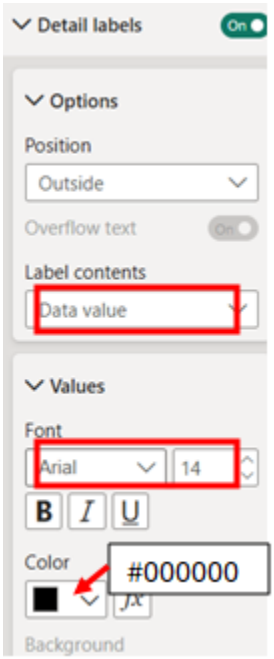
4. Under Legend of visuals, set the following fields:



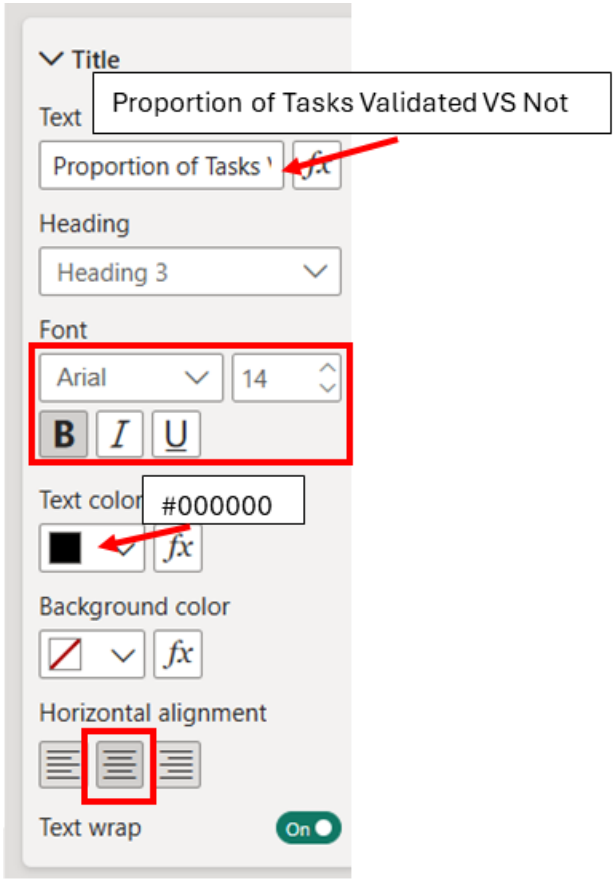
5. Under Slices of visual, set the following colors to the keywords:



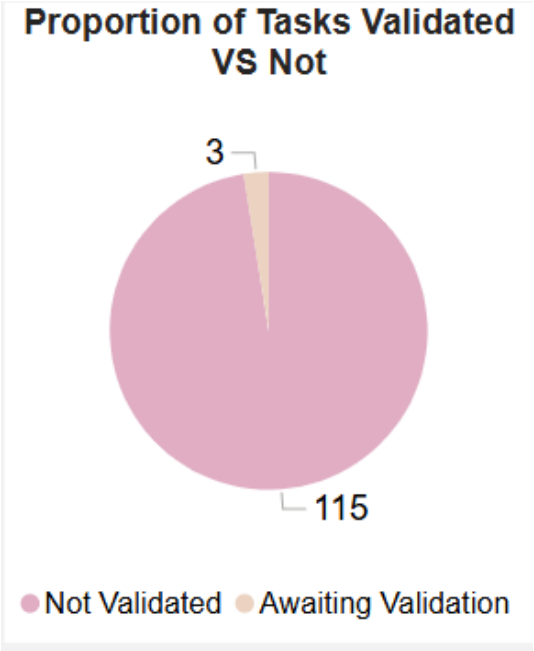
6. Under Detail labels of visual, set the following fields:



7. Under Title of general, set the following:

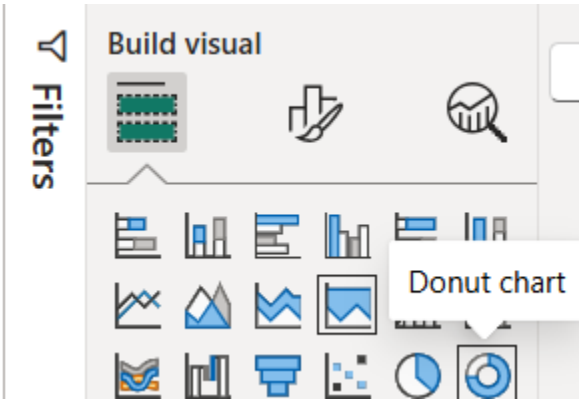


8. The final graph visuals:

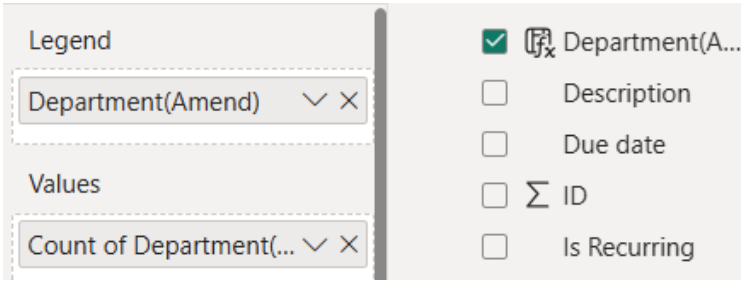


Proportion of Tasks by Division

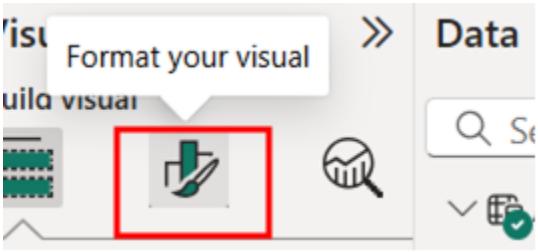
1. In the report view, select the **Donut chart**



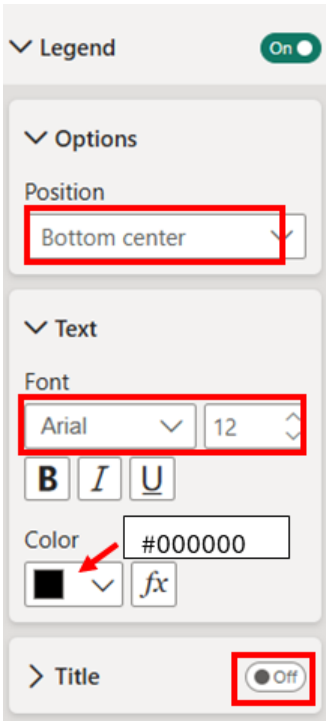
2. Under Team Dashboard, drag Task By Division data field into both Legend and Values. The Values will automatically take count of Tasks By Division.



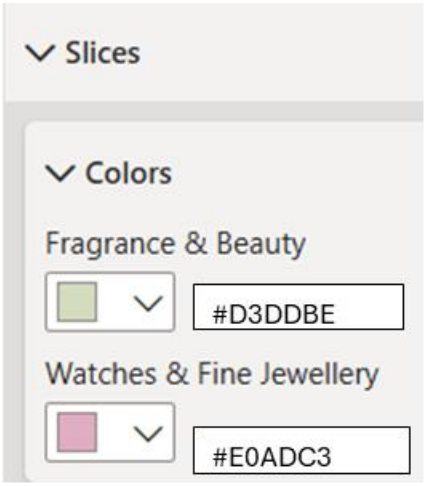
3. Select format your visual



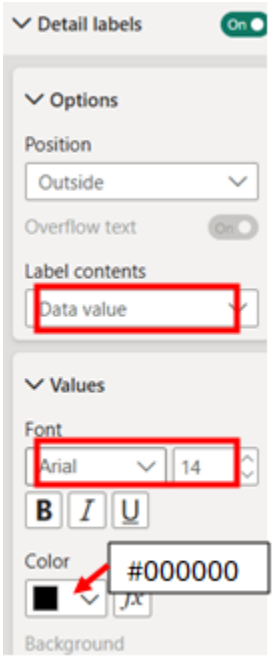
4. Under Legend of visuals, set the following fields:



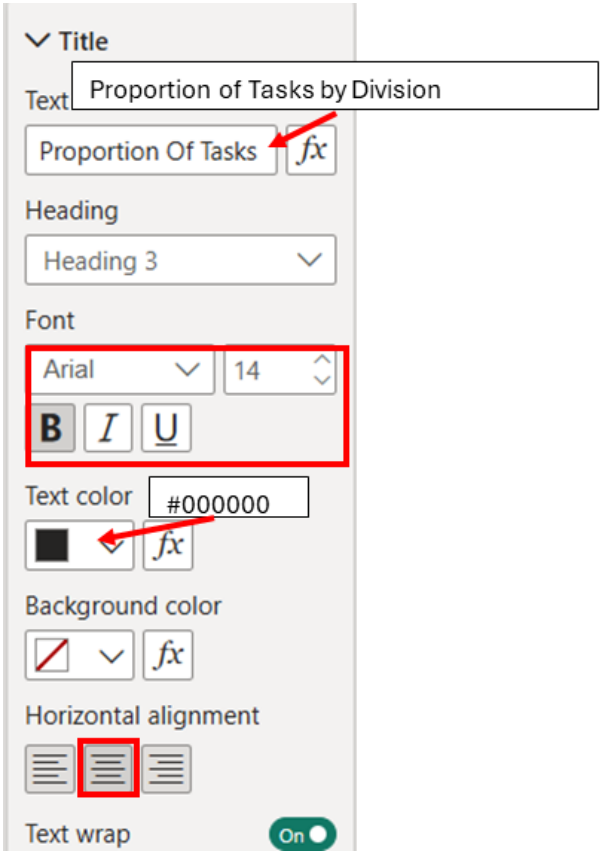
5. Under Slices of visual, set the following colors to the divisions:



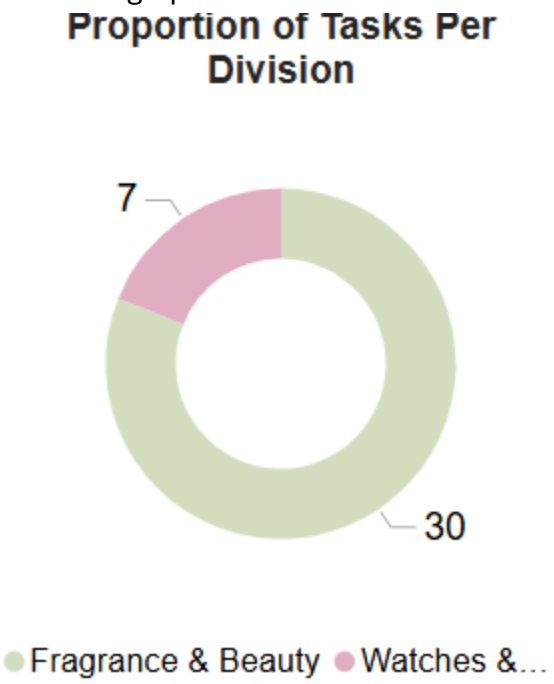
6. Under Detail labels of visual, set the following fields:



7. Under Title of general, set the following:

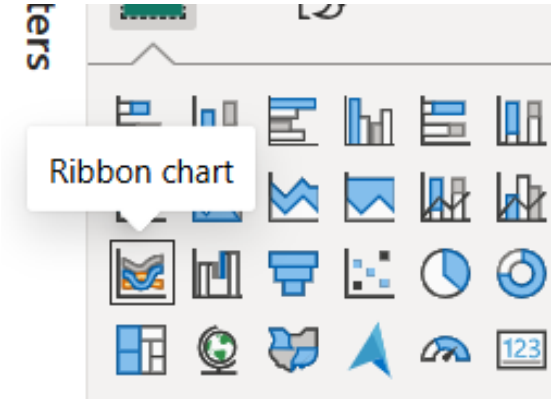


8. The final graph visuals:

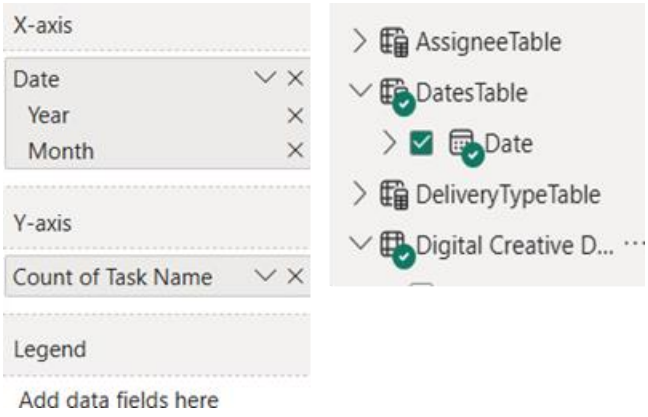


Overall Number of Tasks

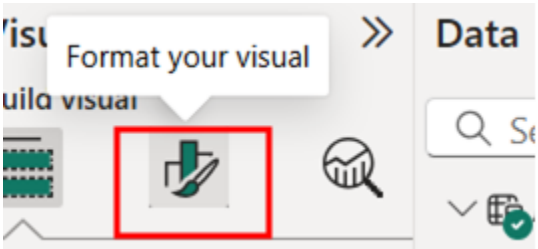
1. In the report view, select the **Ribbon chart**



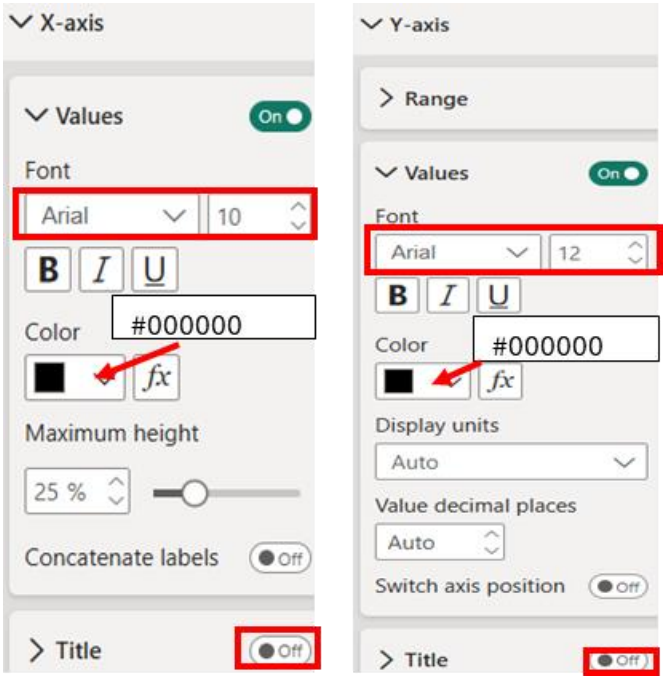
2. Under Team Dashboard, drag Task Name data field into Values. The Values will automatically take count of Task Name. Under DatesTable, drag Date data field into X-axis. Only Include the year and month.



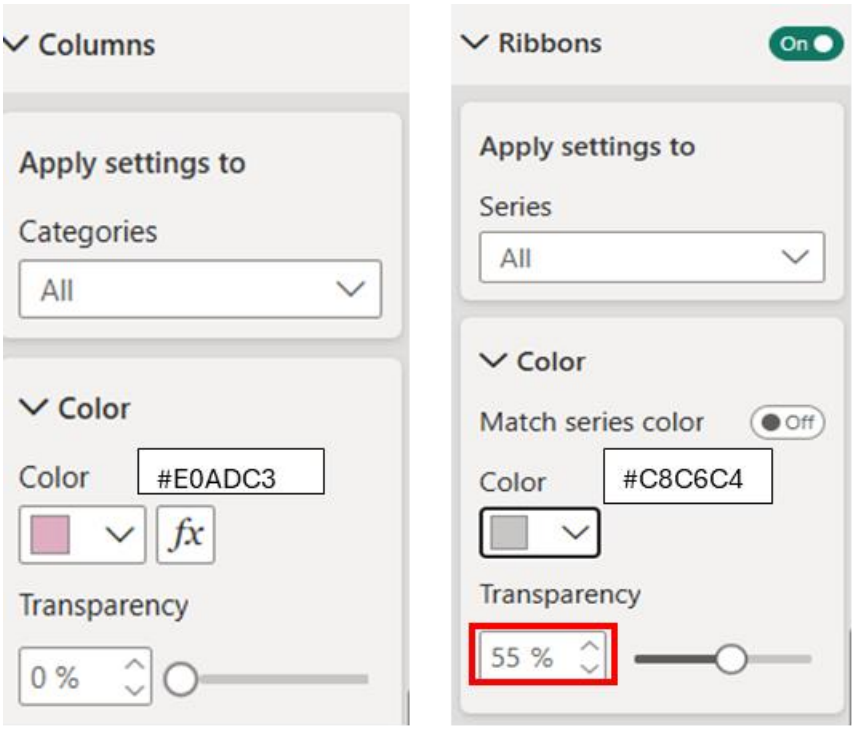
3. Select format your visual



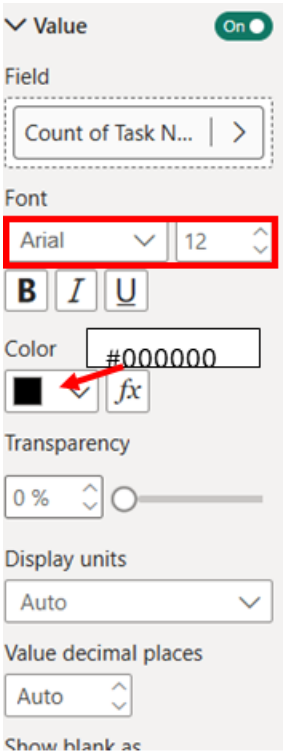
4. Under the visual segment, set the X-axis and Y-axis visuals with the following:



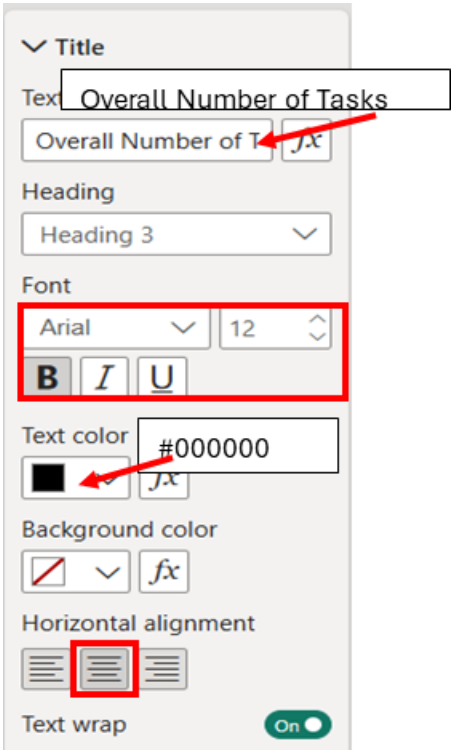
5. Under Columns and Ribbons of visual, set the following color and transparency:



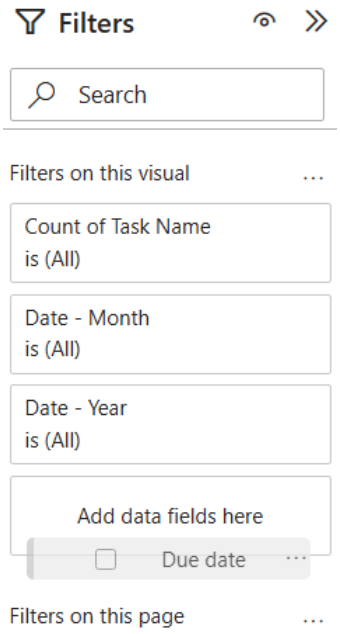
6. Under Data Labels of visual, set the following for values:



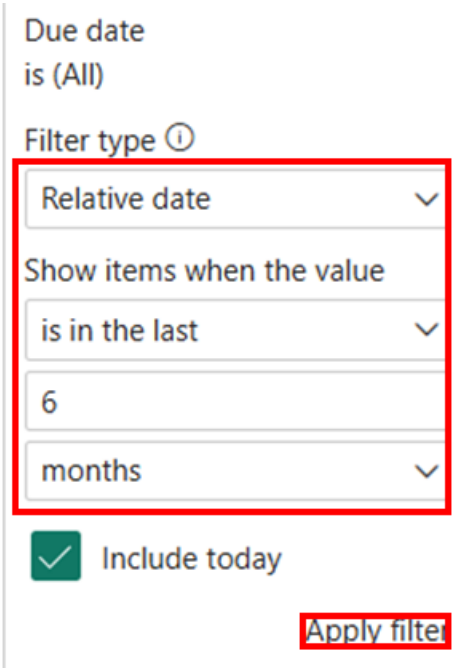
7. Under Title of general, set the following:



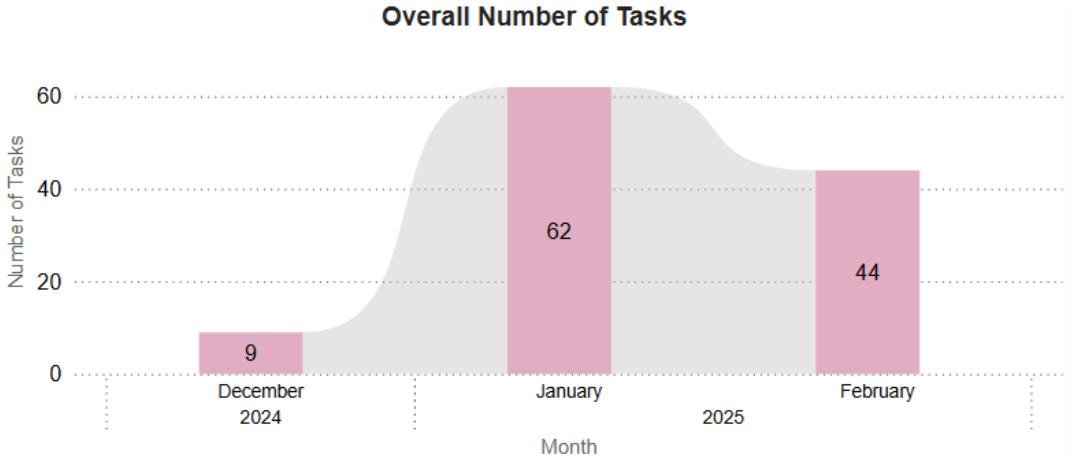
8. Open the Filters pane and drag the *Due date* field from the Digital Creative Dashboard Table:



9. Set the following filter fields and apply filter:

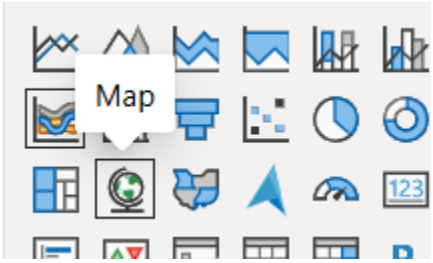


10. The final graph visuals:

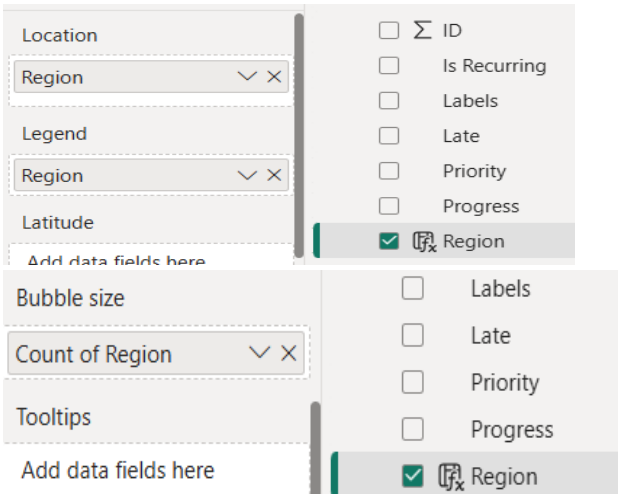


Tasks per Region

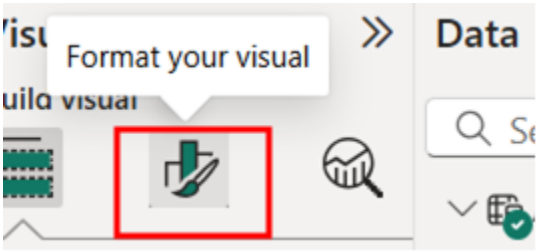
1. In the report view, select the **Map**



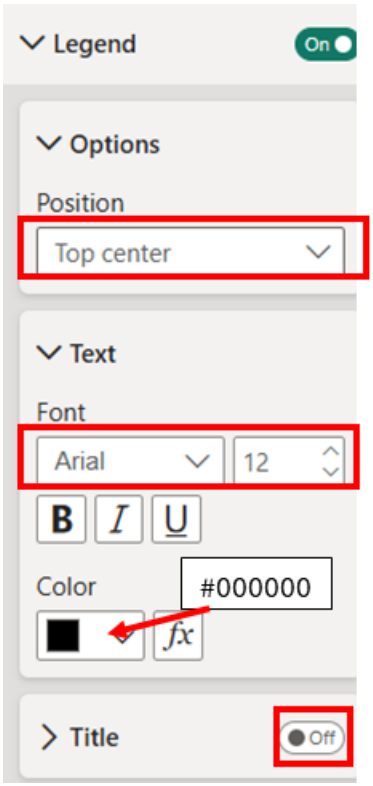
2. Under Team Dashboard, drag Region data field into both Location , Legend and Bubble Size. Bubble Size will automatically take the count of region.



3. Select format your visual

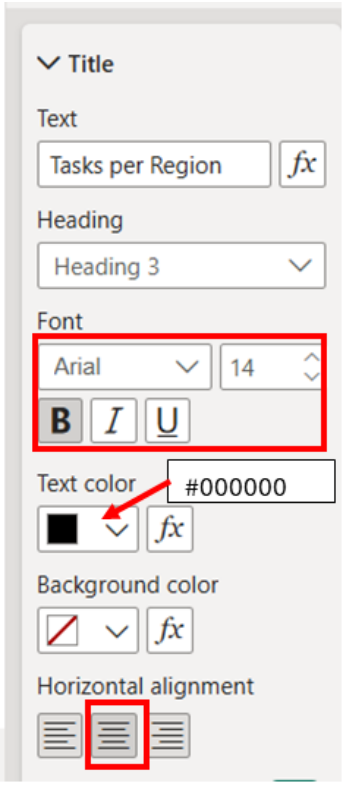


4. Under Legend of visual, set the following fields:



5. Under Bubbles of visual, set the following size and Colors:

6. Under Title of general, set the following:



7. The final graph visuals:

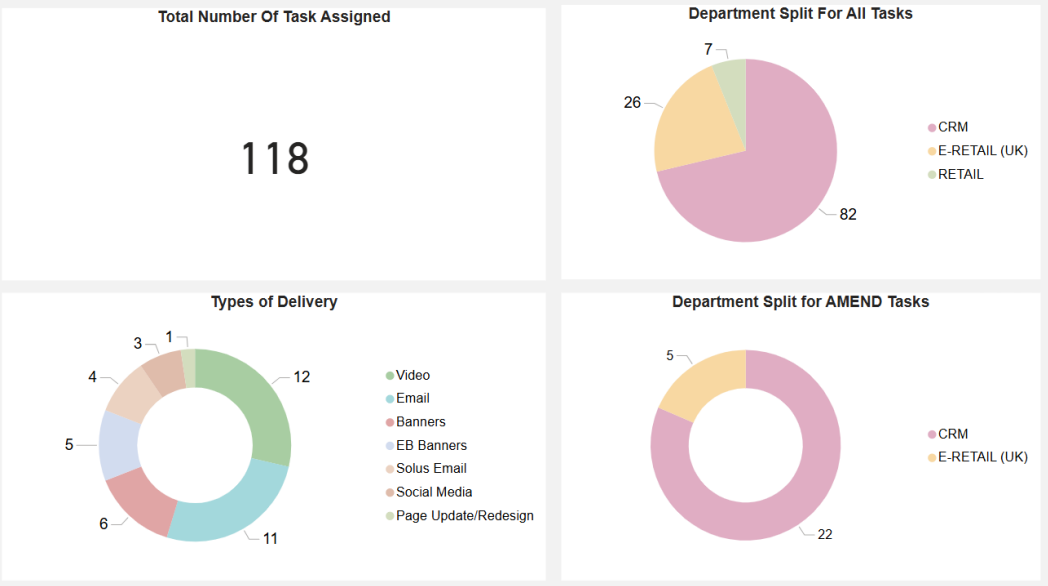
Final Dashboard

After creating the graphs, they can be rearranged according to personal preferences. Below is the final layout we agreed on, based on team feedback and a discussion on which graphs were considered most important.

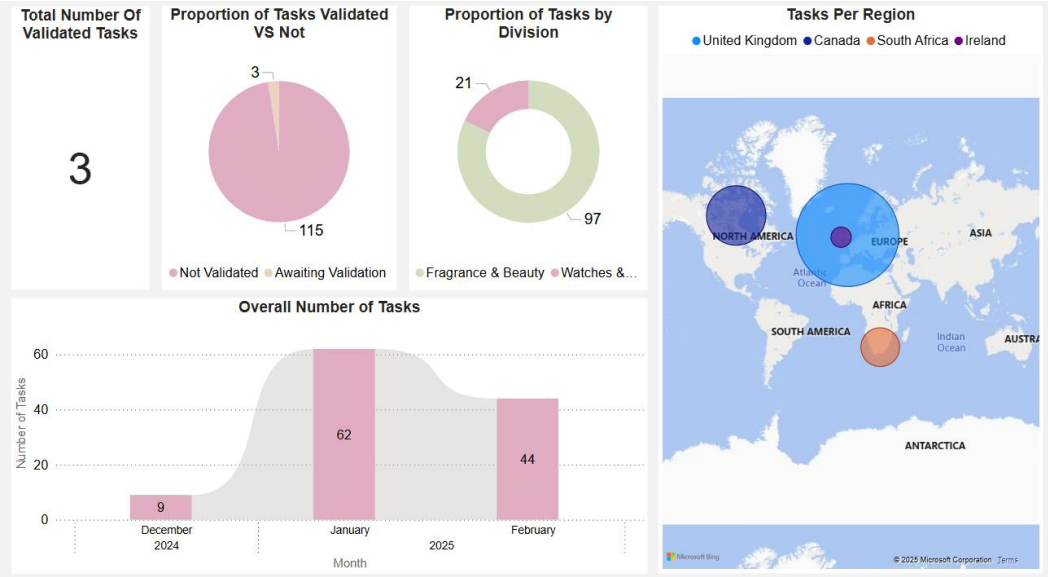
Digital Creative Team

Felicia

Page 1:

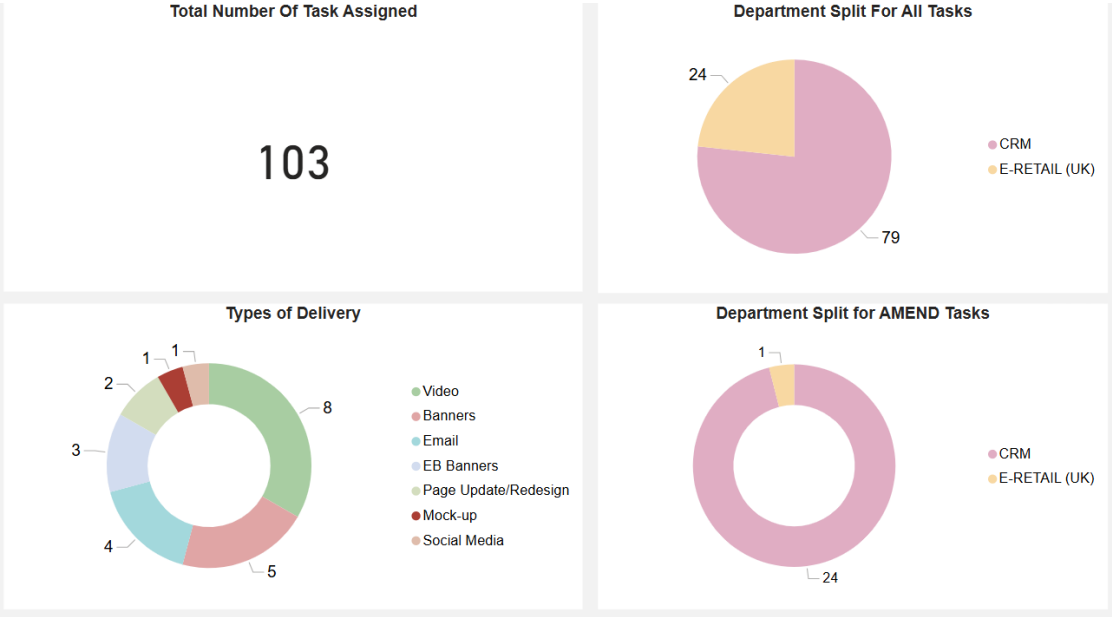


Page 2:

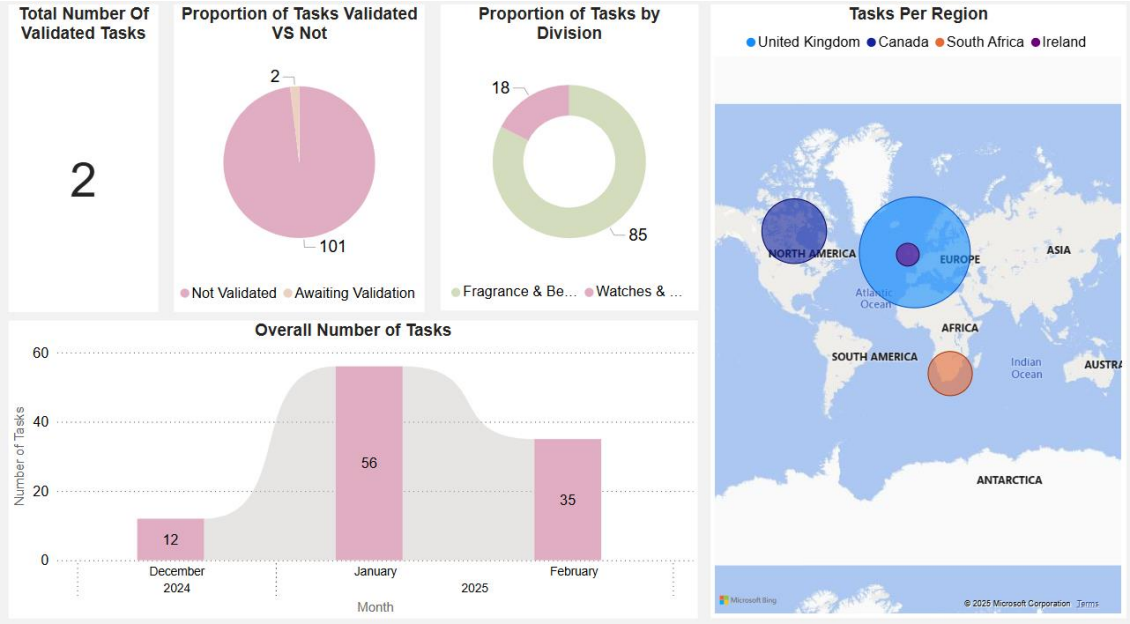


Santtosh

Page 1:



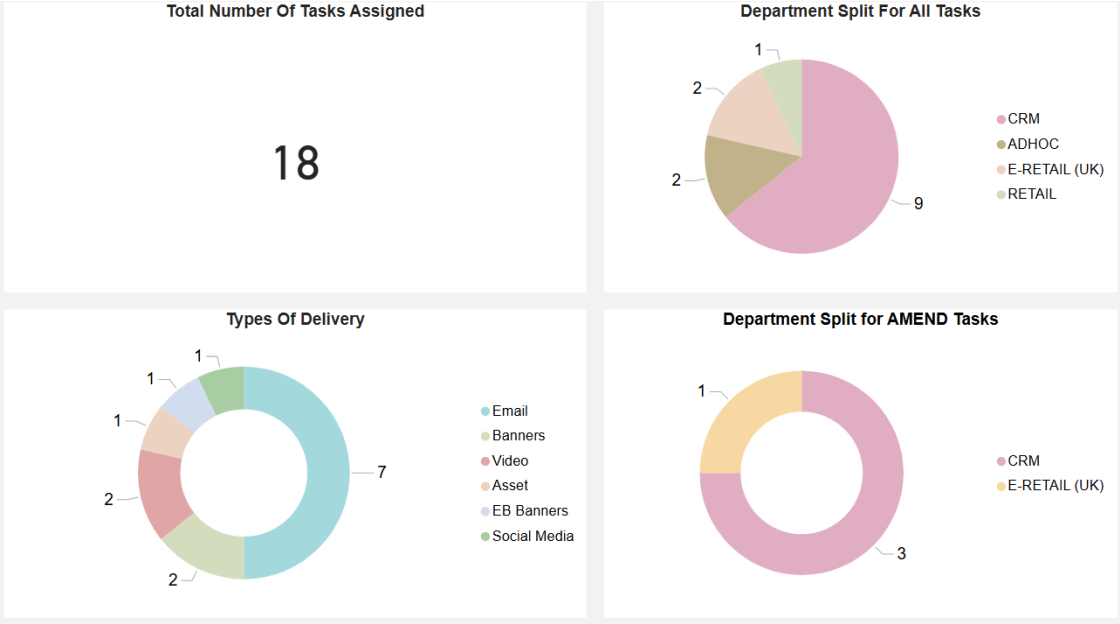
Page 2:



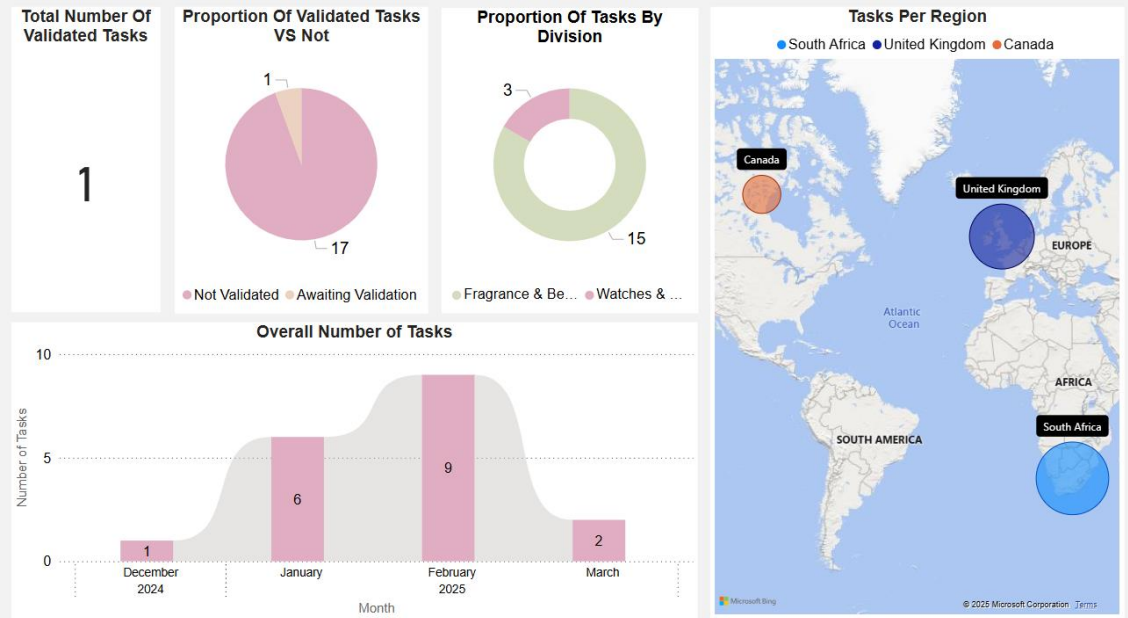
Copywriting Team

Polina

Page 1:

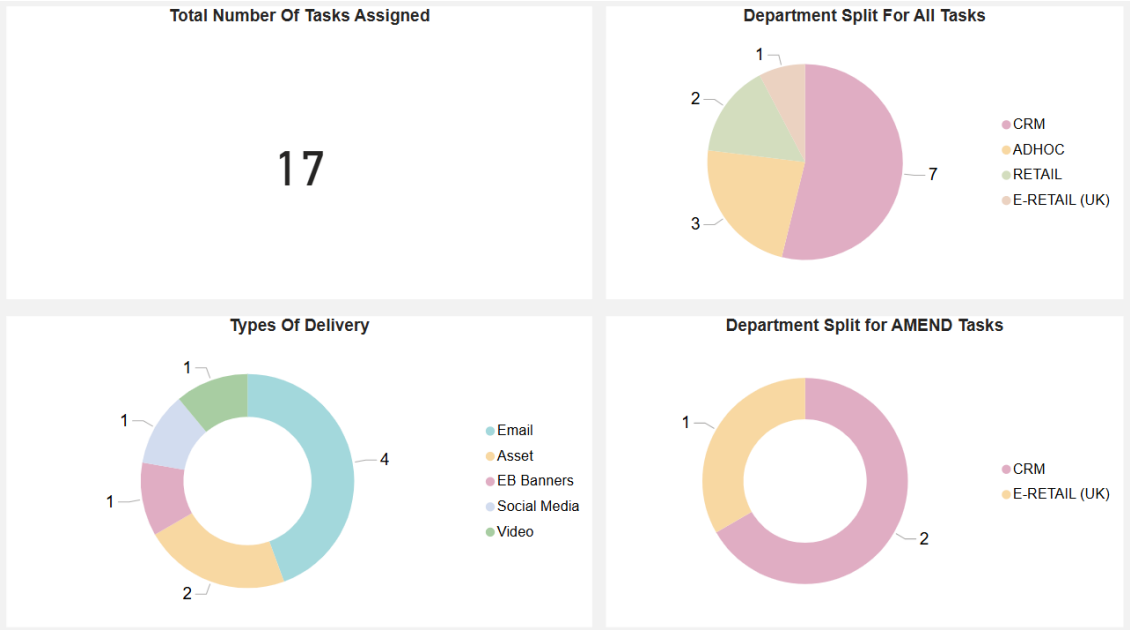


Page 2:



Grace

Page 1:


Total Number Of Tasks Assigned
17
Department Split For All Tasks
1
2
7
3
CRM
ADHOC
RETAIL
E-RETAIL (UK)
Types Of Delivery
1
1
4
1
2
Email
Asset
EB Banners
Social Media
Video
Department Split for AMEND Tasks
1
2
CRM
E-RETAIL (UK)