



A Tour of Power BI Reports You Can Use Today

June 17, 2021



Welcome!



Show and tell day!



Agenda

1

Welcome to the community!

2

Why business intelligence?

3

Microsoft's Power BI report templates

4

Wipfli's Power BI volunteer reports

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Next steps

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Vision

A world where less resources are spent moving data and more time spent leveraging data to achieve the Sustainable Development Goals.

Mission

To nurture the growth of a vibrant nonprofit data model ecosystem and to more effectively achieve the SDGs through business, nonprofit, and individual collaboration.

**A community for partners
and nonprofit users to
collaborate and grow**

Online community

CDM FOR NONPROFITS COMMUNITY

Announcements

Common Data Model for Nonprofits community an. ✓ Joined

NEW CONVERSATIONS ALL CONVERSATIONS FILES SEARCH

Update Question Poll Praise Announcement

Share something with this group...

Amanda Cunningham – January 15 at 11:09 AM
It's almost the weekend! Before you sign off make sure you check out the PICnet blog post on the Nonprofit Common Data Model virtual event happening next week - an event so nice, it's being held twice! [#NonprofitCDM](#)

Free Webinar: The Nonprofit CDM as a Global Impact Game-Changer, **Thursday, January 21st at 10am & 8pm ET**

<https://www.soapboxengage.com/blog/1969-virtual-event-the-nonprofit-cdm-as-a-global-impact-game-changer>

MEMBERS (9)

INFO

[Click here to edit this section.](#)

GROUP ACTIONS

[View Group Insights](#)

NETWORK RESOURCES [Add](#)

[CDM for Nonprofits E...](#)

<https://www.yammer.com/cdmfornonprofitscommunity>

Information hub

Nonprofit CDM

[Home](#) [About](#) [Events](#) [Community](#) [Contact](#) [Join](#)

Data Model for the Modern Nonprofit

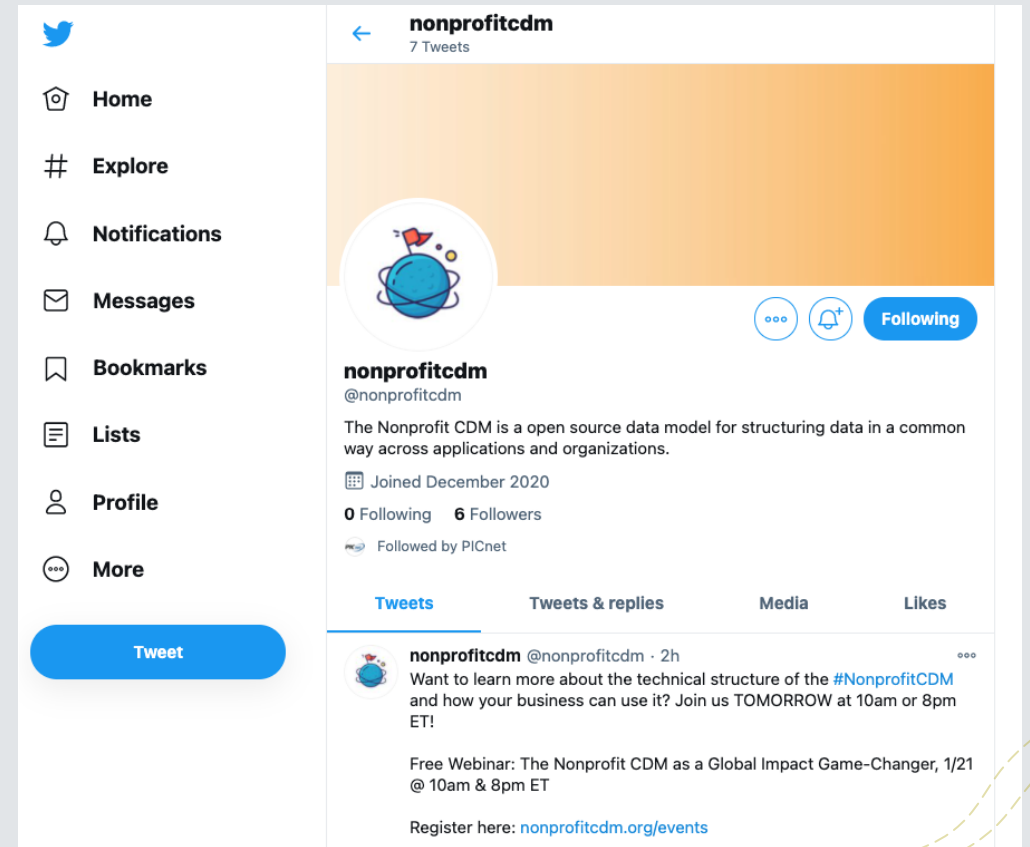
The Nonprofit CDM is a open source data model for structuring data in a common way across applications and organizations.

[JOIN THE COMMUNITY](#)

[LEARN MORE](#)

<https://www.nonprofitcdm.org>

Social media



@NonprofitCDM

The data model

MicrosoftDocs / common-data-model-and-service

Watch 18 Star 24 Fork 41

Code Issues 12 Pull requests 1 Actions Projects Wiki Security Insights

master common-data-model-and-service / common-data-model / schema / core / applicationCommon / foundationCommon / crmCommon / accelerators / nonProfit / overview.md

llawwai fix the website entity issue Latest commit 5f16f52 on Aug 7, 2020 History

7 contributors

27 lines (20 sloc) | 645 Bytes

title	description	author	ms.service	ms.reviewer	ms.topic	ms.date	ms.author
overview of nonProfit - Common Data Model Microsoft Docs	nonProfit is a folder that contains standard entities related to the Common Data Model.	llawwai	common-data-model	deonhe	article	8/7/2020	weiluo

Overview of nonProfit

CDM 'nonProfit' Accelerators

Sub-folders

Name
nonProfitCore
nonProfitForSales

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Why Power BI, business intelligence?



See the full picture



Bring details to life



Make decisions from data



Share insights

Reminder on Power BI

The screenshot shows the Microsoft Nonprofits website. At the top, there is a navigation bar with the Microsoft logo, a 'Nonprofits' header, and several menu items: 'Products', 'Microsoft Cloud for Nonprofit', 'Resources', 'More', and a 'Get started' button. On the right side of the navigation bar, there are links for 'All Microsoft', a search icon, a shopping cart icon, and a 'Sign in' button with a user profile icon.

Below the navigation bar, a notification banner reads: 'Microsoft 365 Business—now available for free for nonprofits.' with a 'Get started' link and a close icon.

The main content area features a large banner image of a person in a suit using a laptop. The laptop screen displays a Power BI dashboard with various charts and graphs. Overlaid on the left side of the banner is the text: 'Power BI data visualization'. Below this, a sub-headline reads: 'Visualize data from multiple sources with Microsoft Power BI—spot trends as they happen so you can track and improve programming.' At the bottom left of the banner is a 'Get started >' button.

Below the banner, the text 'Power BI capabilities' is visible, followed by a row of four grey rectangular boxes representing different capabilities.

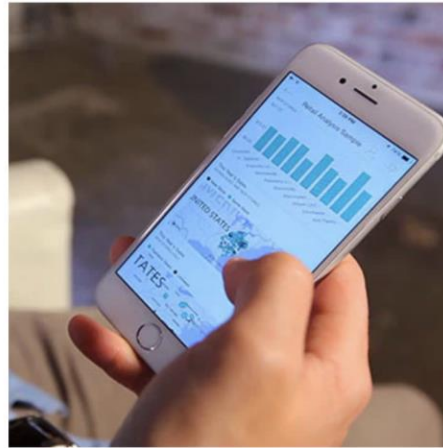
Power BI options and pricing



Power BI Desktop

Free

Connect to hundreds of external data sources, build custom visualizations, publish to the Power BI service, and embed your

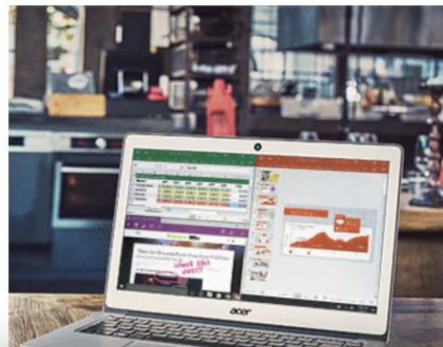


Power BI Pro

\$3.00 user/month

All the features of Power BI Desktop plus 360-degree real-time views, auto updates, data collaboration, data access governance, and content distribution.

[Get started >](#)



Power BI Premium

Capacity pricing per node/month

All the features of Power BI Pro, plus the ability to publish reports, unlock more capacity as needed, and distribute and embed content

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Power BI and the NCDM / F&E

The screenshot shows the GitHub interface for the repository 'microsoft/fundraising-and-engagement'. The file list includes:

- ..
- FundraisingAndEngagement.LinkedinSalesNavigator.zip - LinkedIn Sales Navigator Configuration Sample (last month)
- FundraisingAndEngagement.Sample.Data.zip - Sample data - removed padlock, web api url, webjob url (5 months ago)
- FundraisingandEngagement.PowerBI.Templates.zip** - Add files via upload (8 months ago)
- README.md - LinkedIn Sales Navigator installation guide (last month)

The file 'FundraisingandEngagement.PowerBI.Templates.zip' is highlighted with a yellow circle. Below the file list, the 'README.md' content is visible, starting with the title 'Fundraising and Engagement Samples' and a table with columns 'Sample' and 'Description'.

Power BI resources for nonprofits

Power BI resources for nonprofits



Nonprofit templates for Power BI

Learn what is possible for nonprofit data visualization, analytics, and insights with illustrative templates for case management, volunteer management, field resource management, and donation management.

[Download templates >](#)



Find a partner

Whether you want help choosing the right Microsoft cloud solution or the best deployment option, Microsoft partners are standing by to help you get started.

[Find a partner >](#)



Power BI Training

Teach yourself at your own pace with training videos tailored to nonprofits.

[Access Nonprofit training >](#)

Questions about nonprofit offers?

Microsoft representatives can help you find the right products for your organization and address inquiries related to eligibility and technical support.

[Contact us >](#)

Power BI resources for nonprofits

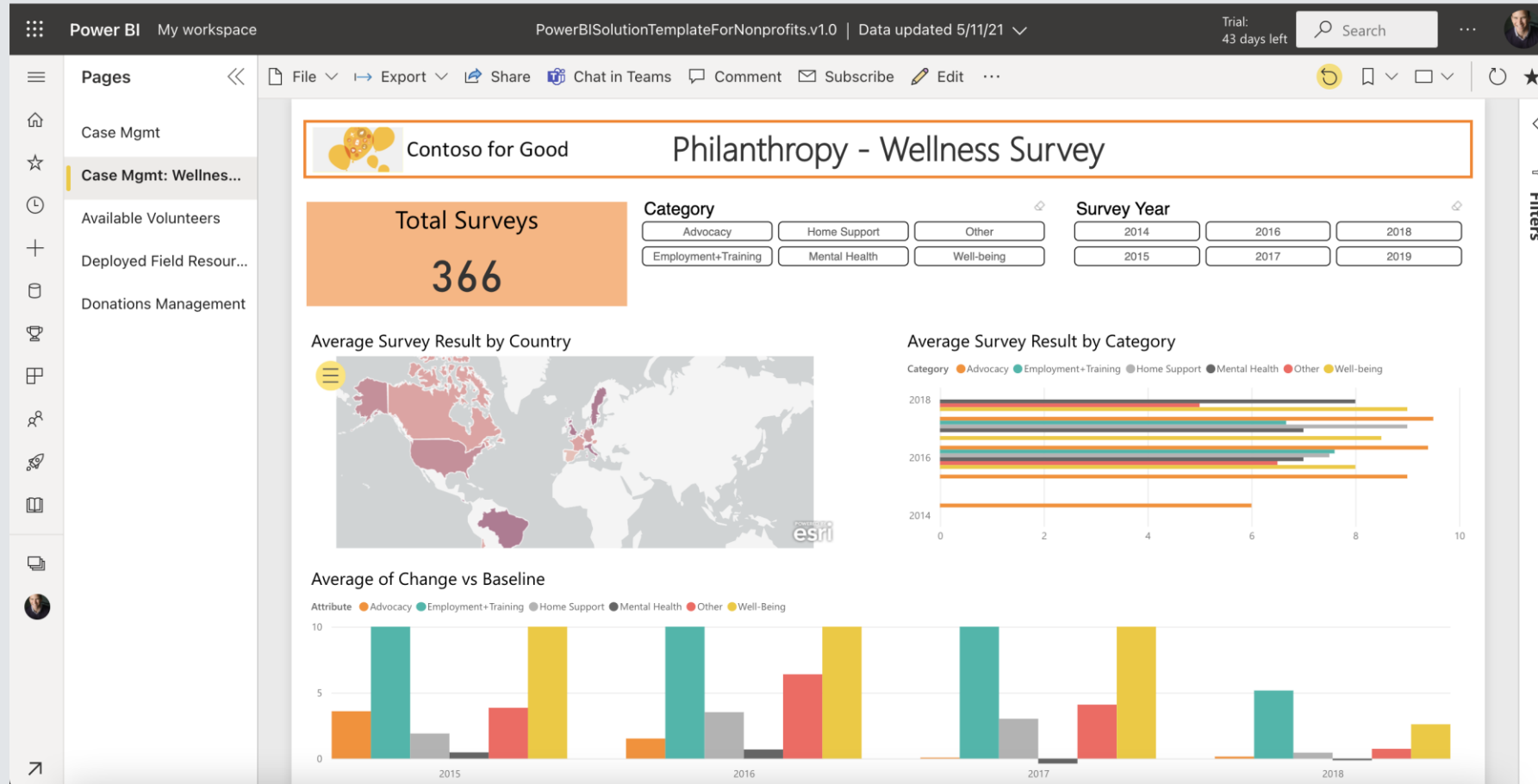
The screenshot shows a web browser window with the URL <https://www.microsoft.com/en-us/nonprofits/power-bi>. The page title is "Power BI resources for nonprofits". The main content area features a section titled "Nonprofit templates for Power BI" with a sub-heading "Learn what is possible for nonprofit data analytics, and insights with illustrative templates for financial management, volunteer management, field management, and donation management". Below this is a "Download templates" link. A "Questions about nonprofit offers?" section follows, with a paragraph stating "Microsoft representatives can help you find the right products for your organization and address inquiries related to eligibility and technical support." and a "Contact us" link.

Overlaid on the page is a file save dialog box. The "Save As:" field contains the text "PowerBISolutionTemplateForNonpr". The "Format:" dropdown is set to "Zip archive". The dialog also shows a sidebar with "Favorites" (Desktop, coziemek, Documents, Downloads, Applications, Clients, Vendors) and "Locations" (iCloud Drive, Google..., Network). The "Format:" dropdown is set to "Zip archive". At the bottom of the dialog are "New Folder", "Cancel", and "Save" buttons.

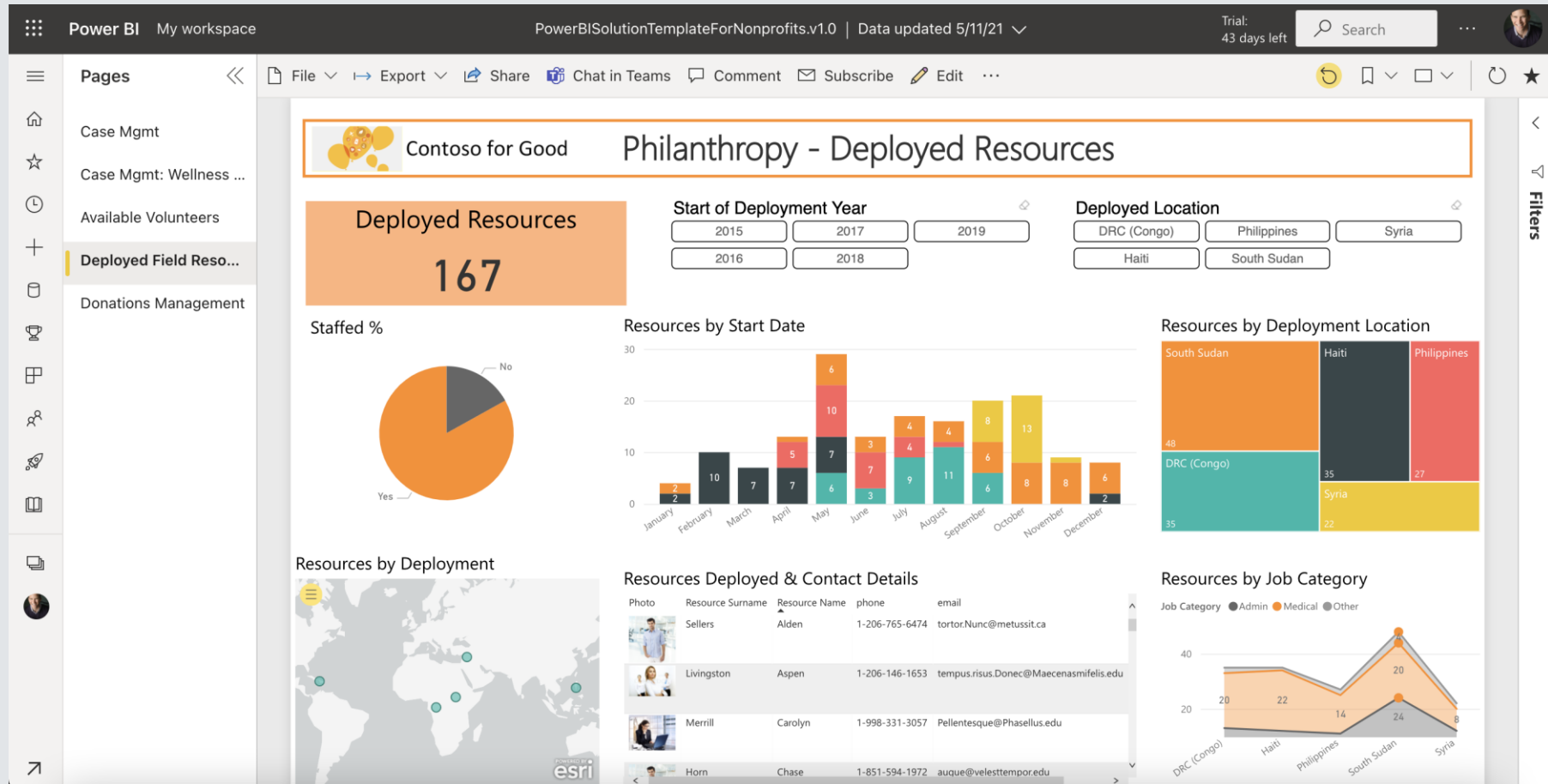
Case management



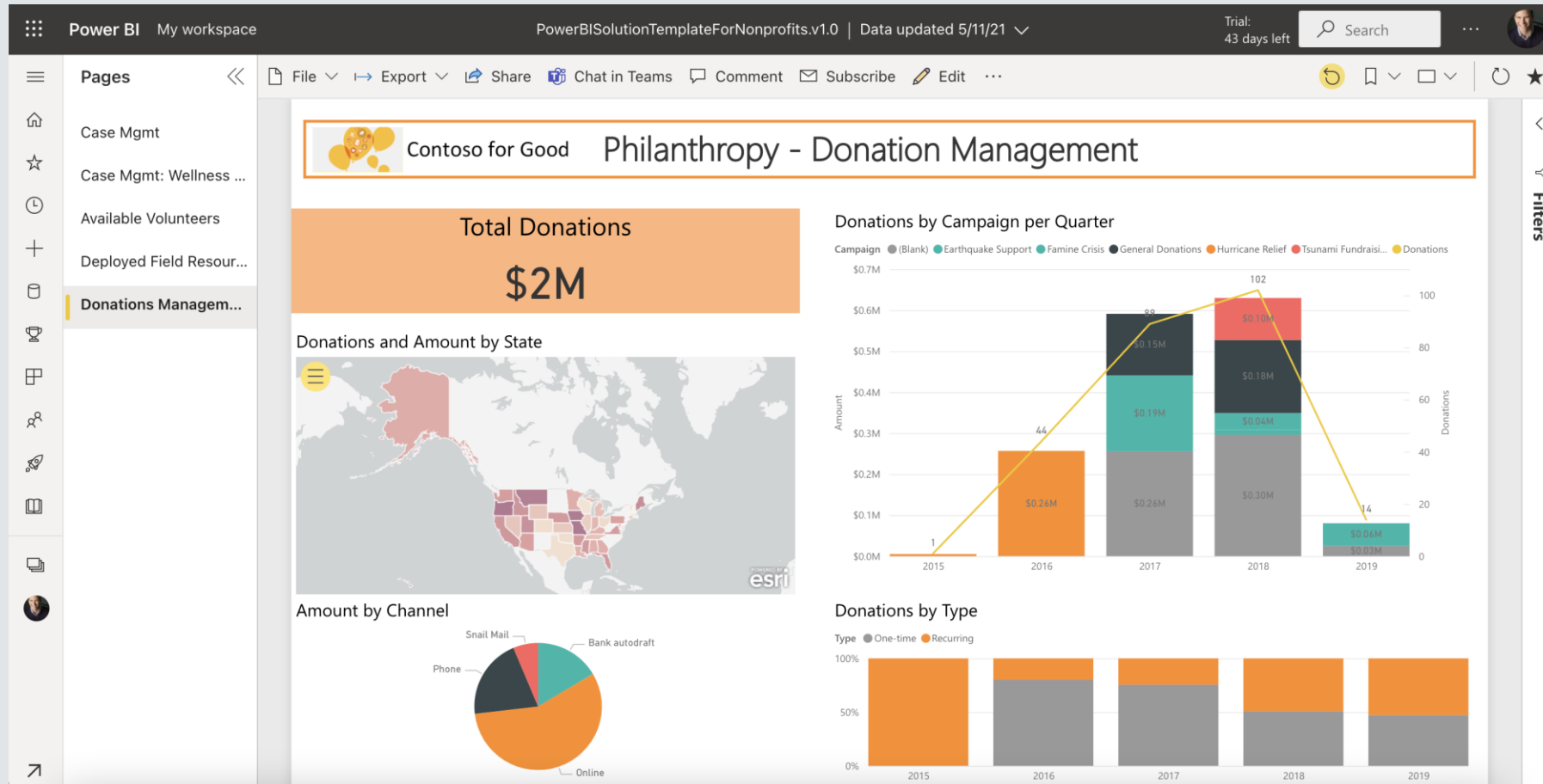
Case management



Field resources



Donations and fundraising





Demo time!

+

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Getting to know AppSource

Microsoft | AppSource More ▾

Search

☆ 🌐 ? 😊 RO

Get the right app for your business needs

Find solutions that enable innovation, drive business outcomes, and help you get more done with what you already have.

Explore business solutions now [See all apps](#)

Categories Industries Products

- AI + Machine Learning
- Analytics
- Collaboration
- Compliance & Legal
- Customer Service
- Finance
- Geolocation
- Human Resources
- Internet of Things
- IT & Management Tools
- Marketing
- Operations & Supply Chain

Power BI reports in AppSource

The screenshot displays the Microsoft AppSource interface. At the top, there is a search bar with the text "Search AppSource apps" and a search icon. To the left of the search bar, the Microsoft logo and "AppSource" are visible, along with a "More" dropdown menu. Below the search bar, there are navigation icons for favorites, a globe, a question mark, a smiley face, and a user profile icon labeled "RO".

On the left side, there is a "Search filters" section with a search icon and a list of filter categories: "Categories (1)", "Industries", "Products (1)", "Trials", "Pricing Model", and "Ratings".

The main content area is titled "All results (548)" and displays a grid of report cards. Each card includes a thumbnail image, the report title, the creator's name, a brief description, a star rating with the number of reviews, and a "Get it now" button with a star icon. The reports shown are:

- Microsoft Sample - Sales & Marketing**: By Microsoft Corporation, Power BI. Sample app for Microsoft Power BI - Sales & Marketing. Rating: 4 stars (14). Free.
- Microsoft 365 Usage Analytics**: By Microsoft Corporation, Power BI. Analyze usage and adoption trends of Microsoft 365 services... Rating: 4 stars (130). Free.
- Word Cloud**: By Microsoft Corporation, Power BI visuals. Create a fun visual from frequent text in your data. Rating: 4 stars (132). Free.
- Google Analytics Report**: By Havens Consulting Inc, Power BI. Google Analytics Report. Rating: 4 stars (38). Free.
- Infographic Designer**: By Microsoft Corporation, Power BI visuals. Beautify your reports with easy-to-create infographics. Rating: 4 stars (90). Free.
- Microsoft Project Web App**: By Microsoft Corporation, Power BI. Unlock insight from Project Web App to help manage projects... Rating: 4 stars (50).
- Power KPI Matrix**: By Microsoft Corporation, Power BI visuals. Monitor balanced scorecards and unlimited number of metrics an... Rating: 4 stars (128).
- Gantt**: By Microsoft Corporation, Power BI visuals. A type of bar chart which illustrates a project timeline or... Rating: 4 stars (144).
- Timeline Slicer**: By Microsoft Corporation, Power BI visuals. Graphical date range selector to use for filtering dates. Rating: 4 stars (222).
- Github Repository Usage**: By Microsoft Corporation, Power BI. Visualize different types of repository usage: commits, acti... Rating: 4 stars (26).

Nonprofit solutions in AppSource

The screenshot shows the Microsoft AppSource interface. At the top, there's a search bar with 'Search AppSource apps' and a user profile icon. Below the search bar, the text 'Apps results' is displayed, followed by 'Showing 172 results in apps View 88 related results in consulting services'. On the left, a filter sidebar shows 'Filters Clear all' and a search input with 'non'. Under 'Industries (1)', 'Nonprofit & Public Sector (1)' is selected, and under 'Nonprofits', the checkbox is checked. The main area shows 'All results (172)' with a grid of app cards. The first row includes: 'Fundraising and Engagement' (By Microsoft Dynamics 365, 4.5 stars, 16 reviews, Free, Test drive), 'Dynamics 365 Nonprofit Accelerator' (By Microsoft Apps, 4.5 stars, 35 reviews, Free, Test drive), 'Payroll for Dynamics 365 Business Central' (By Liveware Solutions Pty Ltd Dynamics 365, Australian Payroll Solution for Microsoft Dynamics 365 Business Central, Free trial), 'Apptivo' (By Apptivo, Web app, 4.5 stars, 39 reviews, Free, Get it now), and 'Applicant Tracking System' (By Precedent HR, Web app, 4.5 stars, 1 review, Free trial). The second row shows: 'E-Library Management' (By intalio), 'Dynamics for', 'PBX Asterisk +', 'The Portal Connector', and 'GrantVantage - Grants'.

Wipfli

WIPFLI

[COVID-19](#) [EVENTS](#) [INSIGHTS](#) [NEWS](#) [CLIENT PORTAL](#) [PAY BILL](#)

Search ...

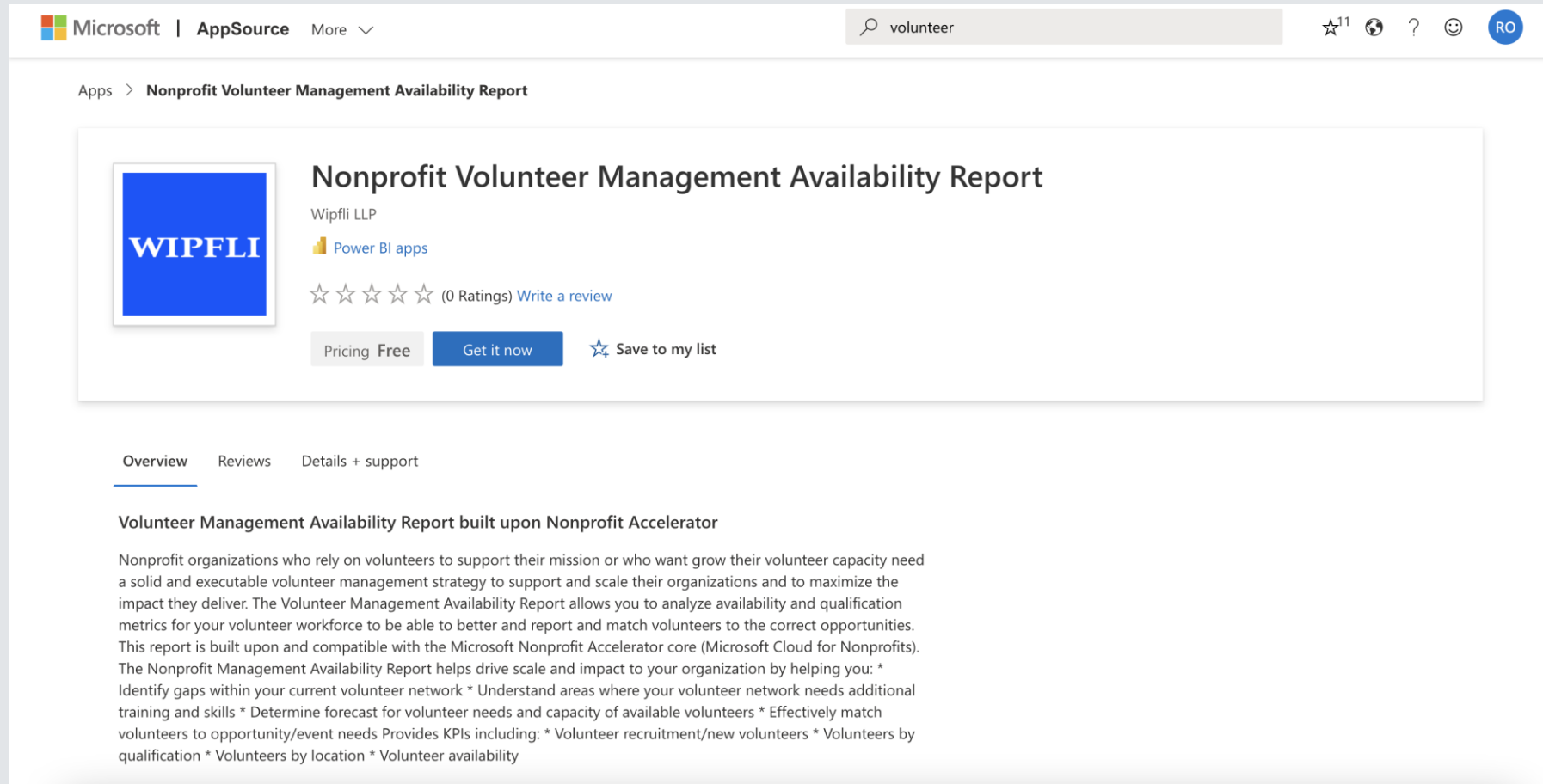


[INDUSTRIES](#) [SERVICES](#) [SOFTWARE SOLUTIONS](#) [ABOUT](#) [CAREERS](#) [CONTACT](#) [LOCATIONS](#)

Curiosity. Clarity.

Results.

Volunteer Availability



The screenshot shows the Microsoft AppSource interface for the 'Nonprofit Volunteer Management Availability Report' app. The page header includes the Microsoft logo, 'AppSource', and a search bar containing the word 'volunteer'. The app's name is displayed in the breadcrumb trail. The app card features the Wipfli logo, the app title, the developer 'Wipfli LLP', and a 'Power BI apps' badge. It shows a rating of 0 stars and a 'Write a review' link. Pricing is listed as 'Free', and there are buttons for 'Get it now' and 'Save to my list'. Below the app card, there are tabs for 'Overview', 'Reviews', and 'Details + support'. The 'Overview' tab is active, showing a sub-heading 'Volunteer Management Availability Report built upon Nonprofit Accelerator' and a detailed paragraph about the app's capabilities and features.

Microsoft | AppSource More ▾

volunteer

Apps > Nonprofit Volunteer Management Availability Report

Nonprofit Volunteer Management Availability Report

Wipfli LLP

Power BI apps

☆☆☆☆ (0 Ratings) [Write a review](#)

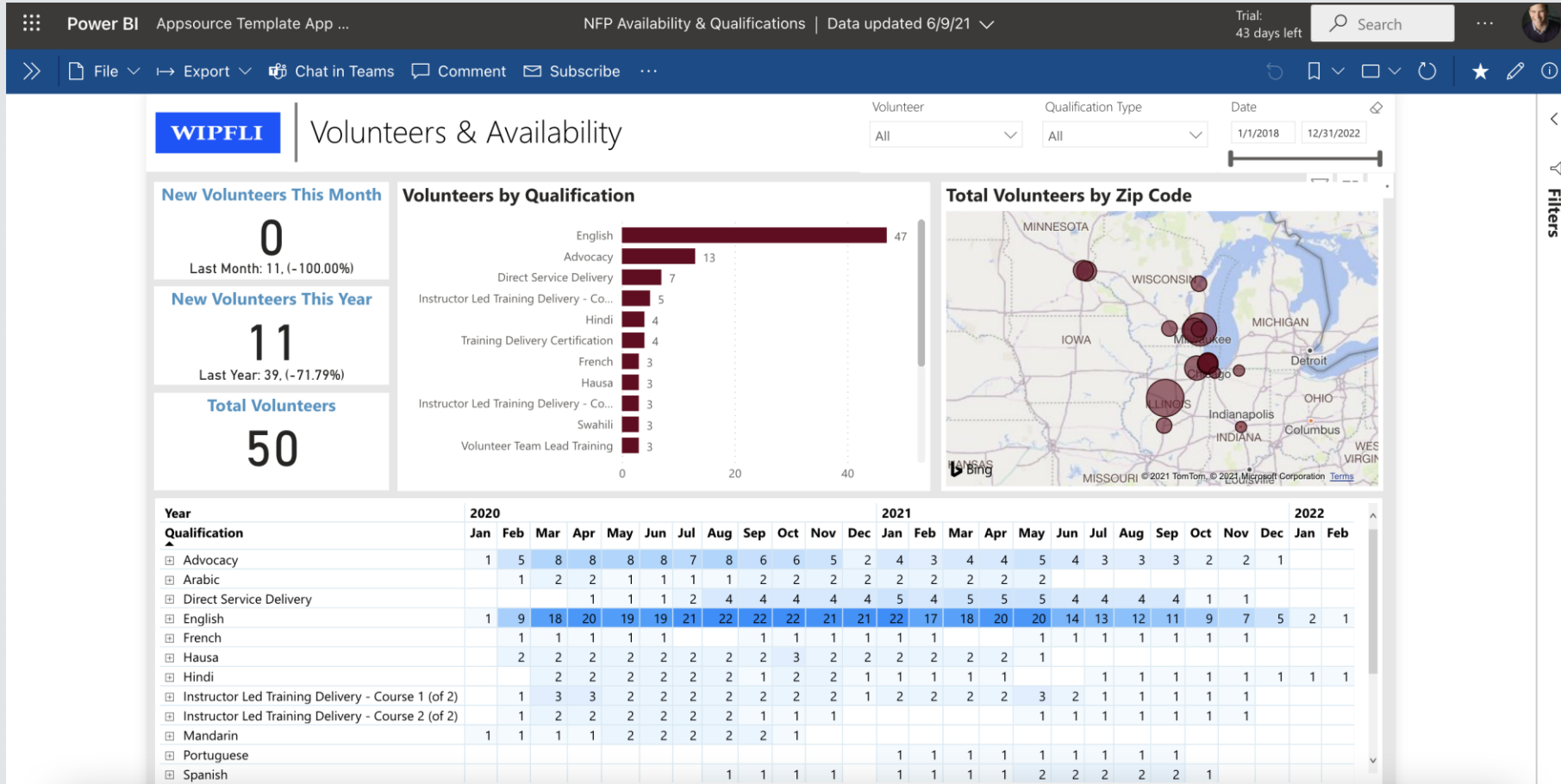
Pricing Free [Get it now](#) [Save to my list](#)

[Overview](#) [Reviews](#) [Details + support](#)

Volunteer Management Availability Report built upon Nonprofit Accelerator

Nonprofit organizations who rely on volunteers to support their mission or who want grow their volunteer capacity need a solid and executable volunteer management strategy to support and scale their organizations and to maximize the impact they deliver. The Volunteer Management Availability Report allows you to analyze availability and qualification metrics for your volunteer workforce to be able to better and report and match volunteers to the correct opportunities. This report is built upon and compatible with the Microsoft Nonprofit Accelerator core (Microsoft Cloud for Nonprofits). The Nonprofit Management Availability Report helps drive scale and impact to your organization by helping you: * Identify gaps within your current volunteer network * Understand areas where your volunteer network needs additional training and skills * Determine forecast for volunteer needs and capacity of available volunteers * Effectively match volunteers to opportunity/event needs Provides KPIs including: * Volunteer recruitment/new volunteers * Volunteers by qualification * Volunteers by location * Volunteer availability

Volunteer Availability



Volunteer Events

The screenshot shows the Microsoft AppSource interface for the 'Volunteer Mgmt -Event Registration & Participation' app. The page header includes the Microsoft logo, 'AppSource', and a search bar with the text 'volunteer'. The app's name is prominently displayed, along with the developer 'Wipfli LLP' and a 'Power BI apps' badge. There are five empty star icons and '(0 Ratings) Write a review' text. Below this, there are three buttons: 'Pricing Free', 'Get it now', and 'Save to my list'. The 'Overview' tab is selected, showing a detailed description of the app's purpose for nonprofit organizations.

Microsoft | AppSource More ▾

volunteer

Apps > Volunteer Mgmt -Event Registration & Participation

Volunteer Mgmt -Event Registration & Participation

Wipfli LLP

Power BI apps

☆☆☆☆☆ (0 Ratings) Write a review

Pricing Free Get it now ☆ Save to my list

Overview Reviews Details + support

Volunteer Management Event Registration and Participation Report built upon Nonprofit Accelerator

Nonprofit organizations who rely on volunteers to support their mission or who want to efficiently utilize their volunteer base need a solid and executable volunteer management strategy to support and scale their organizations and to maximize the impact they deliver. The Volunteer Management Event Registration & Participation Report enables nonprofits to analyze engagement and participation metrics to boost opportunity preparedness and drive success. This report is built upon and compatible with the Microsoft Nonprofit Accelerator core (Microsoft Cloud for Nonprofits). The Volunteer Management Event Registration & Participation Report powers involvement and increases optimization of opportunities by helping you: * Identify gaps in event scheduling, registrations and required qualifications. * Pinpoint high performing programs and delivery frameworks. * Forecast engagement to allow for efficient event planning. Provides Key Performance Indicators including: * Days Booked & Total Participation Hours * Volunteers by Required Qualifications * Registrations and Participation Over Time * Confirmed and Pending Registrations

Bonus Power BI reports!

- + Sponsorship and fundraising report
- + Incoming inquiries report

Andy Potasek

Wipfli





Demo time!

+

Q&A time!



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Resources to get started

+ **Nonprofit Power BI templates from Microsoft**

+ <https://www.microsoft.com/en-us/nonprofits/power-bi>

+ **AppSource nonprofit apps**

+ <http://bit.ly/nfp-appsource>

+ **Wipfli volunteer templates**

+ <http://bit.ly/wipfli-powerbi-volunteers>

How to get involved?

1

Join the community

www.nonprofitcdm.org/join

2

Register for our our workshops

www.nonprofitcdm.org/events

3

Follow us on Twitter

twitter.com/NonprofitCDM

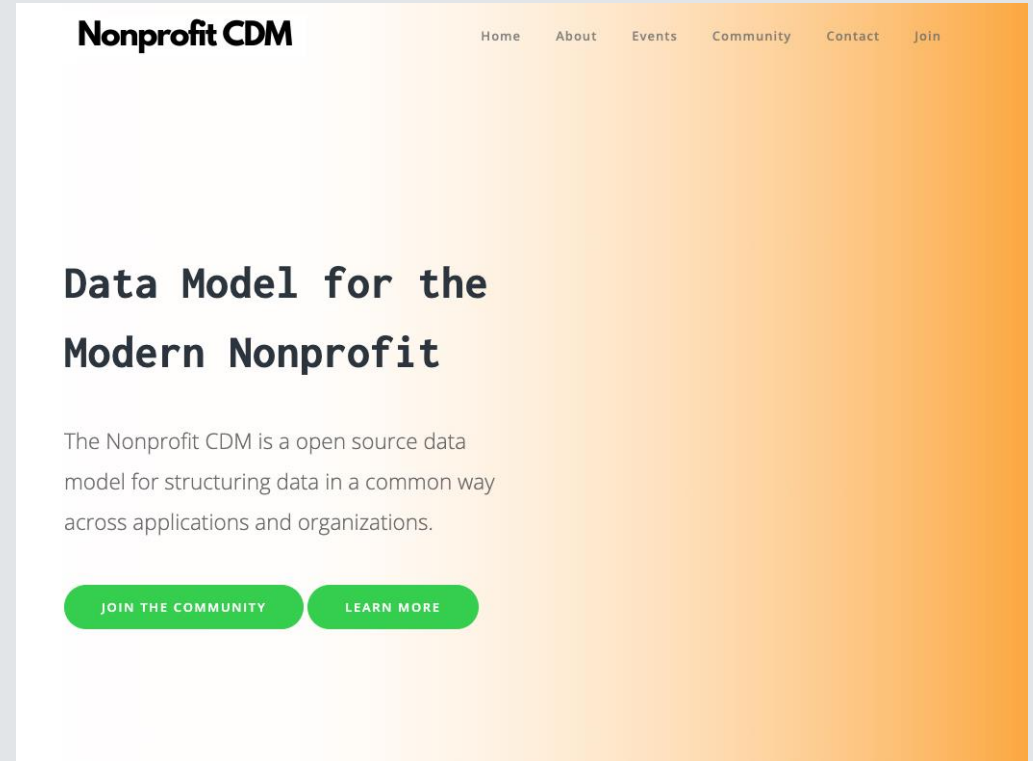


Thank you!

info@nonprofitcdm.org
www.nonprofitcdm.org

Join the community!

<https://www.nonprofitcdm.org/join>



The screenshot shows the homepage of the Nonprofit CDM website. The header features the logo 'Nonprofit CDM' on the left and a navigation menu with links for 'Home', 'About', 'Events', 'Community', 'Contact', and 'Join' on the right. The main content area has a large heading 'Data Model for the Modern Nonprofit' and a sub-heading 'The Nonprofit CDM is a open source data model for structuring data in a common way across applications and organizations.' Below this text are two green buttons: 'JOIN THE COMMUNITY' and 'LEARN MORE'.