V͢S Checklist:
Creating a Power BI Dashboard from a SharePoint List

Use this step-by-step guide to ensure the quality and functionality of your report, from data connection to final publication.

Phase 1: Preparation & Connection

This stage lays the foundation for your report. Proper preparation ensures you are working with the correct data and have all the necessary permissions.

- [ ] **Define the Objective:** Clearly formulate the key questions the dashboard should answer.
- [ ] **Find the SharePoint Site URL:** Copy the root URL of the site, not the URL of the specific list (e.g., `https://yourcompany.sharepoint.com/sites/YourSite`).
- [ ] **Verify Permissions:** Ensure your Microsoft 365 account has at least read permissions for the required SharePoint lists.
- [ ] **Launch Power BI Desktop:** Open the application and click "Get Data."
- [ ] **Select the Data Source:** In the list of sources, find and select "SharePoint Online List."
- [ ] **Connect to the Site:** Paste the site URL and authenticate using your Microsoft account.
- [ ] **Choose Your Lists:** In the Navigator window, check the boxes next to all the lists you will need for the report.
- [ ] **Proceed to Transformation:** Click "Transform Data" to open the Power Query Editor for data cleaning and preparation.

> **Pro-Tip:** Always click "Transform Data" instead of "Load." Loading raw data directly into the model almost always leads to performance issues and inaccuracies down the line.

Phase 2: Data Transformation in Power Query

The quality of your visuals depends directly on the quality of your data. This stage is the most critical for ensuring the accuracy and efficiency of your report.

- [ ] **Remove Unnecessary Columns:** Right-click the headers of columns that will not be used in visualizations and select "Remove Columns."

- [ ] **Rename Columns:** Double-click on the headers and give them clear, understandable names (e.g., rename "Title" to "Project Name").
- [ ] **Check Data Types:** Review the data type icons (ABC, 123, Date) in the column headers. Ensure that numbers are numbers, dates are dates, and text is text.
- [ ] **Handle Errors:** Check columns for errors or null values and decide how to handle them (e.g., replace with 0, remove rows).
- [ ] **Expand Composite Columns:** If there are columns with "Record" or "List," click the expand icon (two arrows) in the header to extract the necessary values (e.g., the user's name from the "Created By" field).
- [ ] **Close & Apply:** Once the data is clean, click "Close & Apply" in the top-left corner to load the prepared data into the Power BI model.

> **Pro-Tip:** Every step you take in Power Query is recorded in the "Applied Steps" pane on the right. You can click on any step to see what the data looked like at that moment or delete a step to undo a change.

Phase 3: Dashboard Design & Visualization

In this stage, you transform raw data into an interactive and understandable story.

- [ ] **Define Key Metrics (KPIs):** Select 3-5 main indicators that will be displayed most prominently (e.g., total tasks, percentage of completed projects).
- [ ] **Create the Layout:** Place the most important KPIs (using the "Card" visual) in the top-left corner of the dashboard.
- [ ] **Choose the Right Visuals:**
    - [ ] **Bar/Column Chart** for comparing categories.
    - [ ] **Line Chart** for tracking trends over time.
    - [ ] **Table/Matrix** for displaying detailed information.
    - [ ] **Slicer** for filtering data by date, project, or status.
- [ ] **Adjust Formatting:** Add titles to all visuals, and configure colors and font sizes for readability.
- [ ] **Check Interactivity:** Ensure that clicking on one element (e.g., a bar in a chart) correctly filters the other visuals on the page.

Phase 4: Publishing, Refresh & Security

Your dashboard is ready. Now you need to make it available to your team and set up automatic updates.

- [ ] **Publish the Report:** In Power BI Desktop, click "Publish" and select a Workspace in the Power BI Service.
- [ ] **Configure Data Refresh:**
    - [ ] Go to the Power BI Service and find your dataset.

- ○ [   ] Go to "Settings" -> "Data source credentials" and enter your credentials for SharePoint.
  - ○ [   ] Enable "Scheduled refresh" and set the frequency and time for updates (up to 8 times a day for a Pro license).
- ● [   ] **Set Up Security (If Needed):** If different users need to see only their own data, configure Row-Level Security (RLS) in Power BI Desktop and assign roles in the Power BI Service.
- ● [   ] **Check Refresh History:** After the first scheduled refresh, check the "Refresh history" to ensure it was successful.

Pro-Tip: If a scheduled refresh fails, the most common reason is an expired password for the credentials you entered in "Data source credentials." Always check this first.