



October, 2024

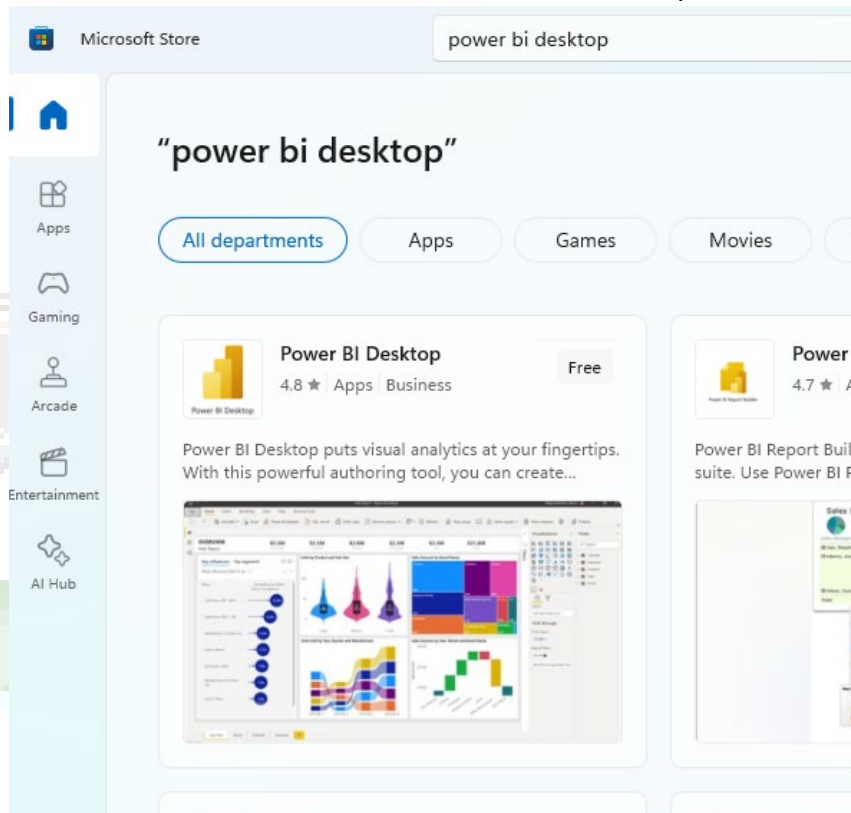


# Workflow Dashboard Configuration

MWEngineeringChange 5.0 includes a “Workflow Dashboard”. The Workflow Dashboard is a Power BI file displaying several visual reports related to workflow processes, such as a report displaying information about how long items are taking to get through workflow. Using this Workflow Dashboard does require some configuration. Each step is detailed below:

1. Install Power BI

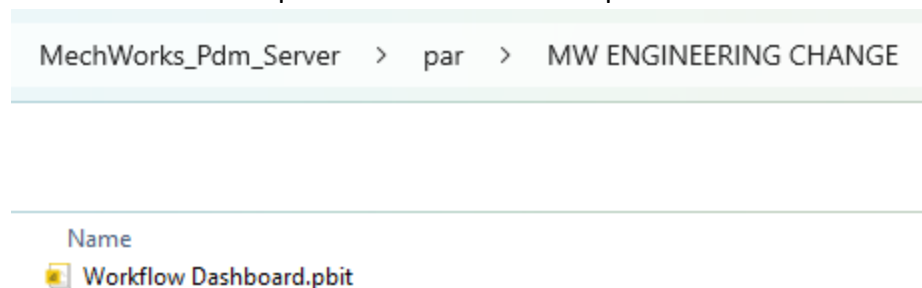
- a. Open the Microsoft APP Store and search for “Power BI Desktop”:



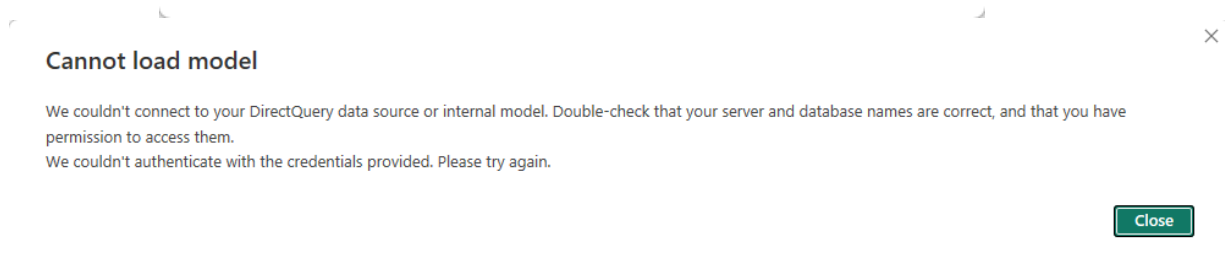
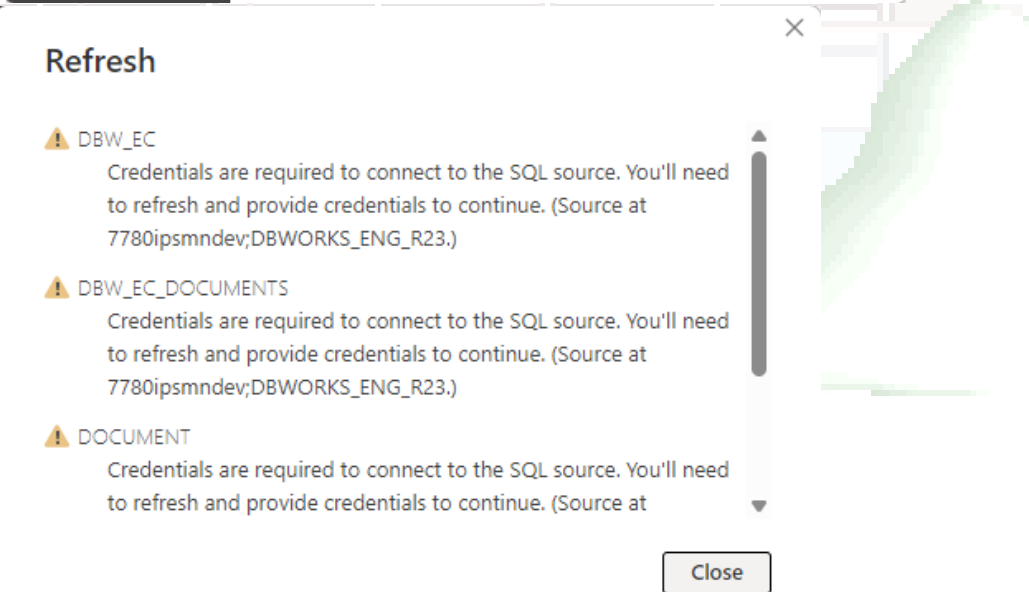
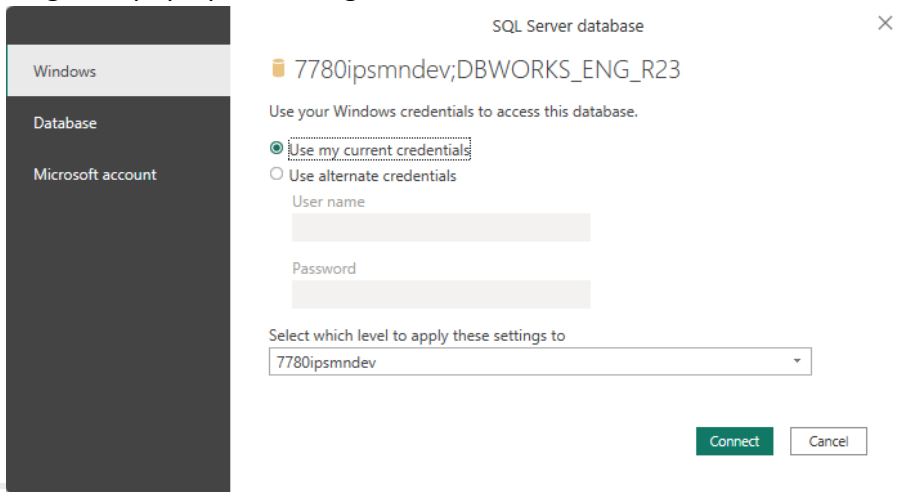
- b. Download and install the Power BI Desktop app

2. Open the installed template file

- a. Locate the “Workflow Dashboard.pbix” template file in the ...PAR\MW ENGINEERING CHANGE folder and double click it to open it in Power BI Desktop:

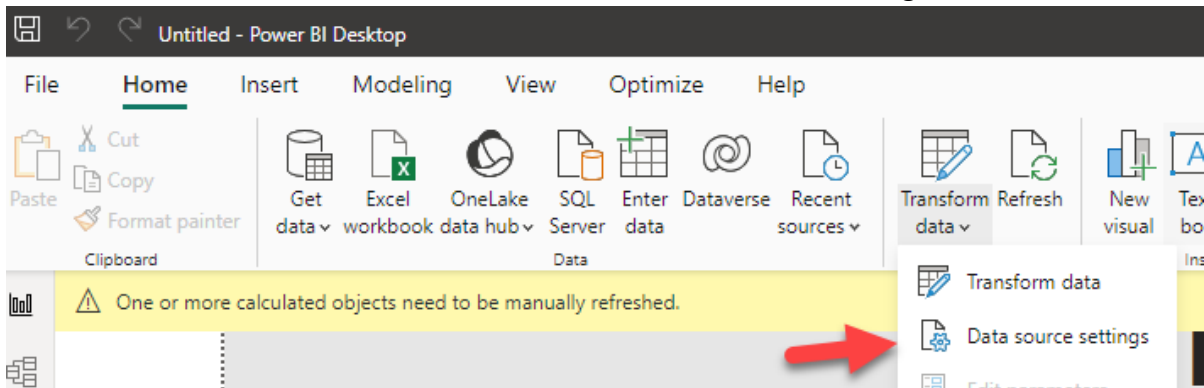


3. Select “Cancel” or “Close” on any popup dialogs that are displayed
  - a. Several dialogs will pop up indicating that the file cannot find a data source:

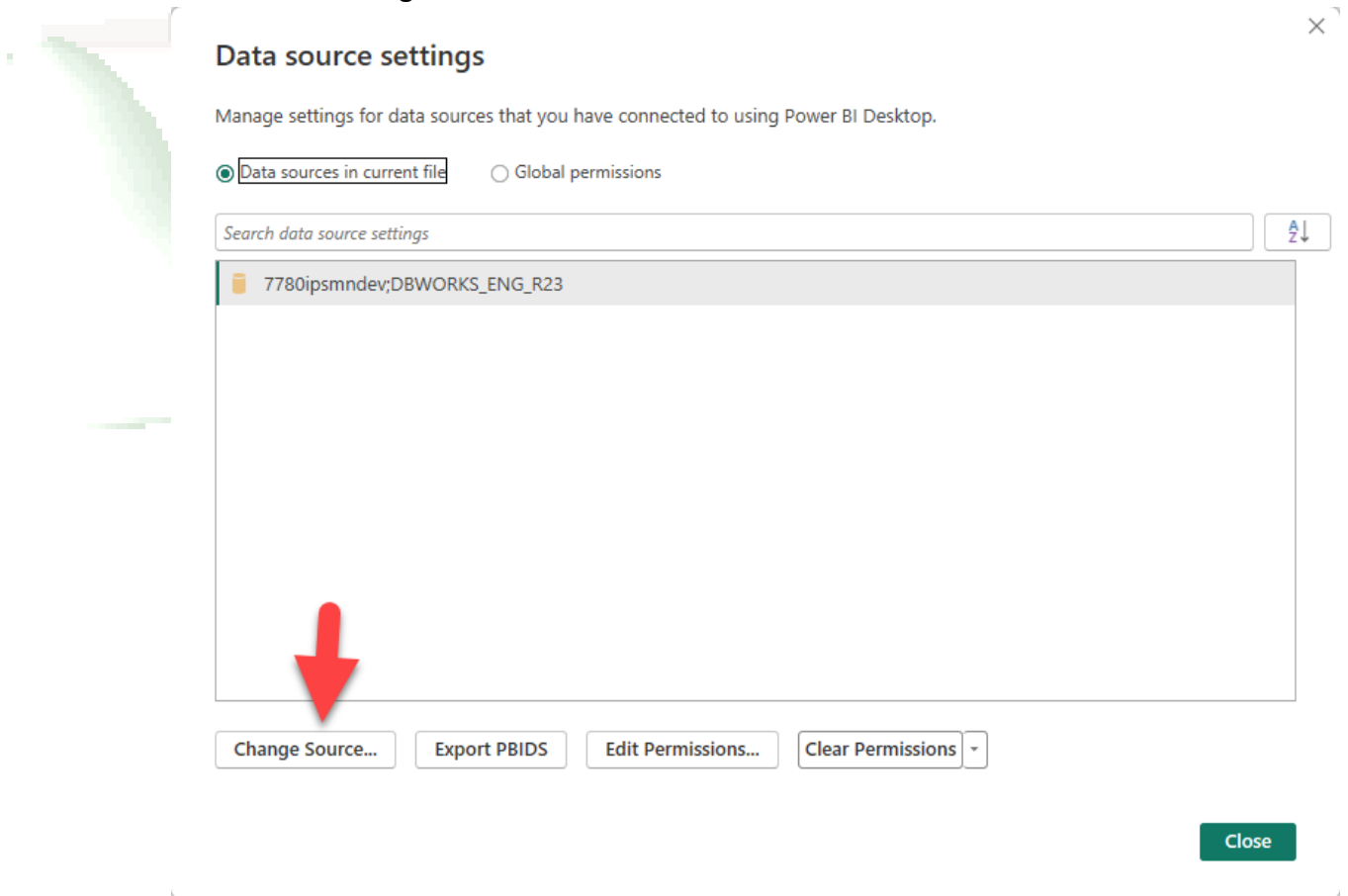


- b. Some dialogs may be displayed several times. Select “Cancel” or “Close” on every dialog.

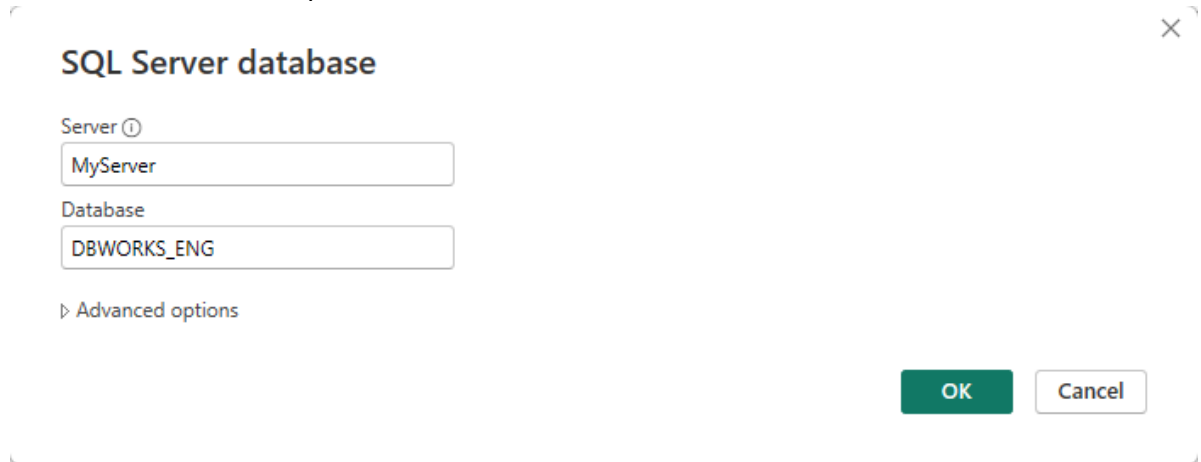
- 4. Change the “data source” to the production database
  - a. In the Home ribbon, select “Transform Data” -> “Data source settings”:



- b. Select the “Change Source” button:



- c. Set the source to the production SQL Server and MechWorks PDM database then select OK:



**SQL Server database** ✕

Server ⓘ  
MyServer

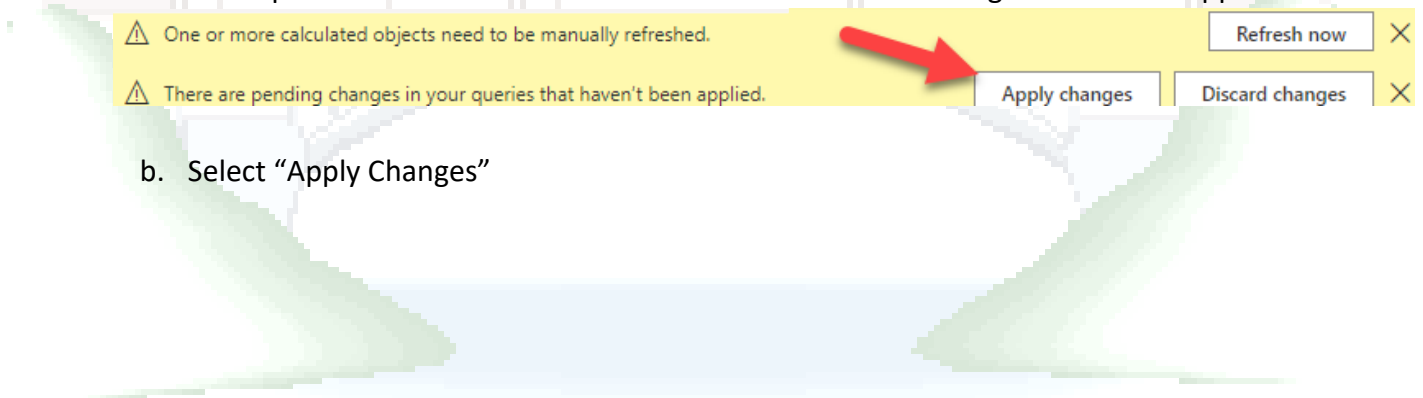
Database  
DBWORKS\_ENG

▸ Advanced options

**OK** Cancel

5. Apply changes

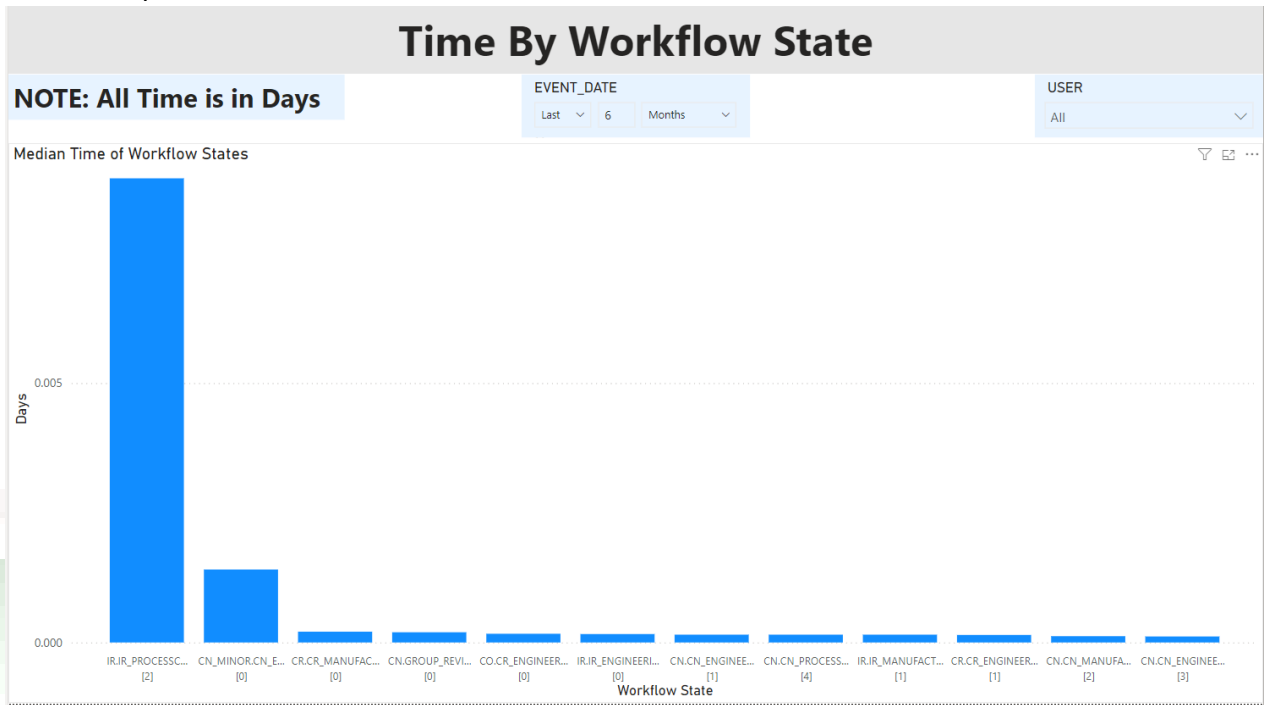
- a. The top of the file will now indicate that the data source change needs to be applied:



- b. Select "Apply Changes"

6. Reports Visible

a. The reports should now show data:



7. Save the file
  - a. Select “File” -> “Save As” and save the file as “Workflow Dashboard.pbix” in the ...PAR\MW ENGINEERING CHANGE folder:

MechWorks\_Pdm\_Server > par > MW ENGINEERING CHANGE

Name

 Workflow Dashboard.pbix

- b. The “Dashboard” shortcut will now open this file directly:

