

St Mary's University

Power BI Basics User Guide

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Introduction

The purpose of this User Guide is to give a step by step walk through of how colleagues within St Mary's University can view the reports they have been given access to and the different options that are available to them on the report screens.

This user guide will also explain how the different visuals within the reports interact with each other, as well as the specific options that are available on the visuals.

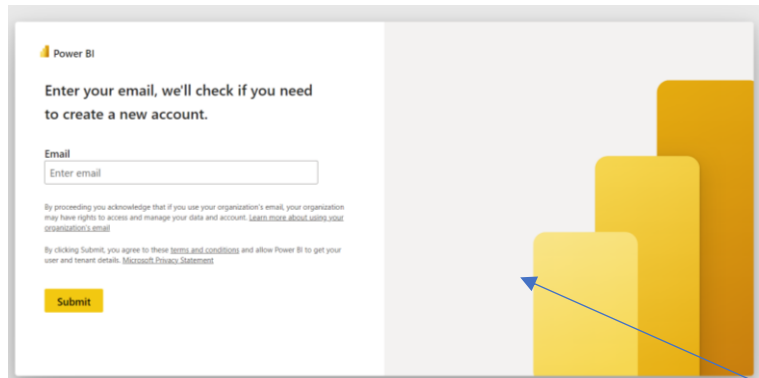
All the Reports and Visuals within Power BI have the same abilities, so the same properties and functionality shown in this document can be applied to all the reports.

1. Logging into the Power BI Service

In order to access the reports that you have been granted access to, you need to open a Web Browser (it is recommended to use compatible browsers, such as Chrome, Edge and Firefox) and enter the following web address:-

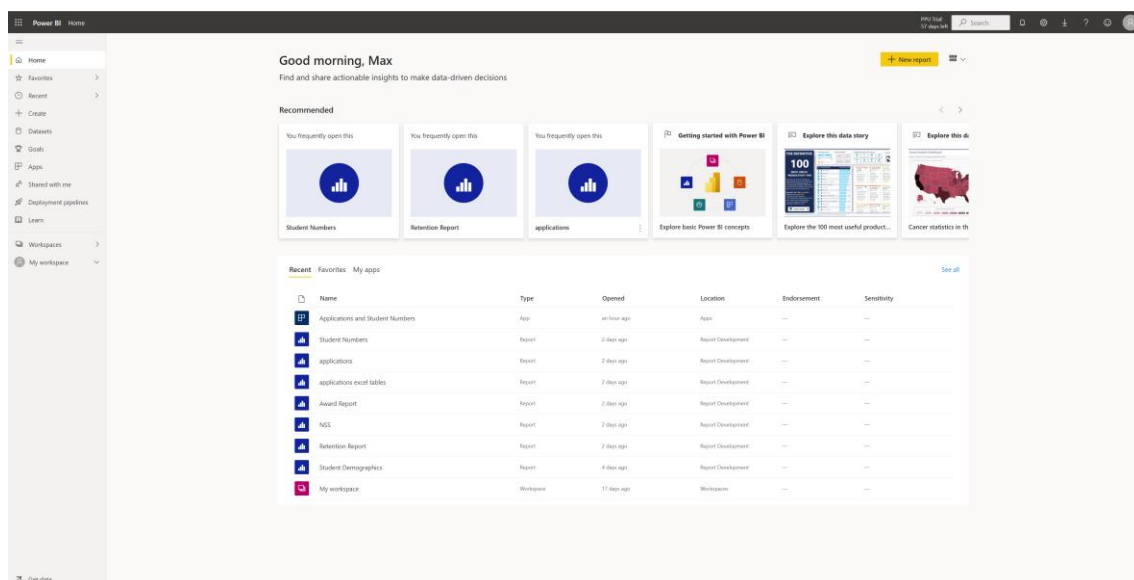
www.app.powerbi.com

This will load up the following screen.



You will need to enter your St Mary's University logonID (e.g. 12345@stmarys.ac.uk) here in order to gain access to the site where our reports reside, and click Submit.

On Submit you will be given a screen like the screenshot below.



This is where you will be able to view all the reports that you have been granted access to.

2. Report Access Types

There are several ways that you may be able to view these reports. Usually, this will be through an App link - this is where selected reports have been chosen for you and have been published, and a web link has been sent to you this will normally appear in your Emails.

There are two other ways that you can get access to the reports, which is through the **Apps** Icon on the homepage, and through the **Workspaces**.

1. Apps weblink

An app may be shared with you via an email containing a weblink which will be sent from the Power BI Service and to your email.

The link in the email will look like this:

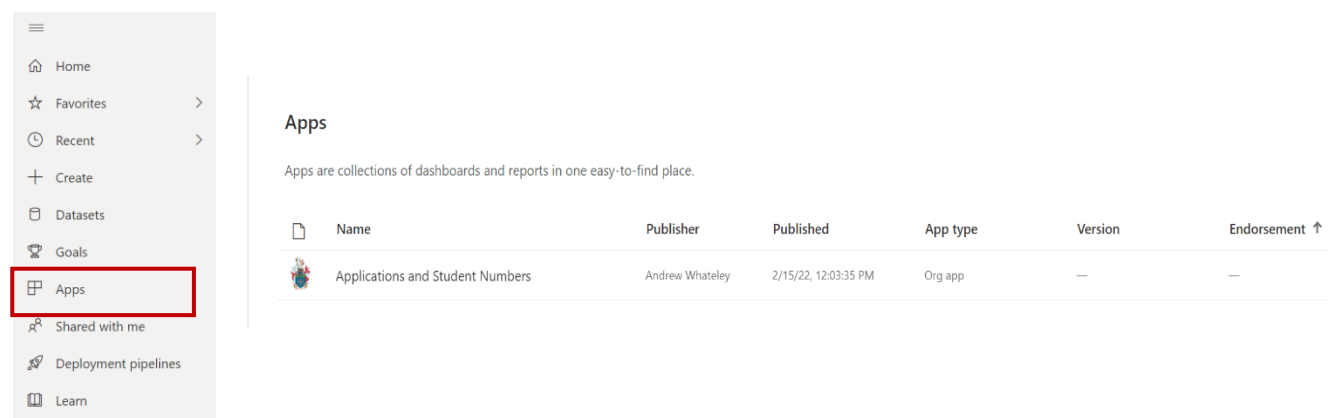
<https://app.powerbi.com/groups/me/apps/2c3f28e6-0986-402d-8ae3-22ec3cb38136/ReportSection>

Clicking the link within the email will take you directly to the app.

Within the app will be one or more reports.

2. Apps Icon - RECOMMENDED

Once you've logged into PowerBI, from the left-hand pane of the PowerBI homepage, select the Apps Icon.



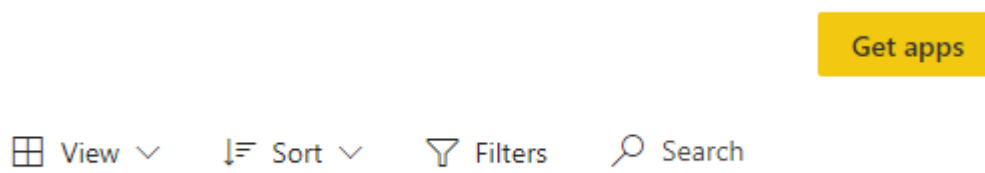
The screenshot shows the Power BI interface. On the left, the navigation pane lists various options, with 'Apps' highlighted by a red rectangle. The main area is titled 'Apps' and contains a table of available applications.

Name	Publisher	Published	App type	Version	Endorsement
Applications and Student Numbers	Andrew Whateley	2/15/22, 12:03:35 PM	Org app	—	—

Clicking on this icon shows the list of Apps that you have permission to view.

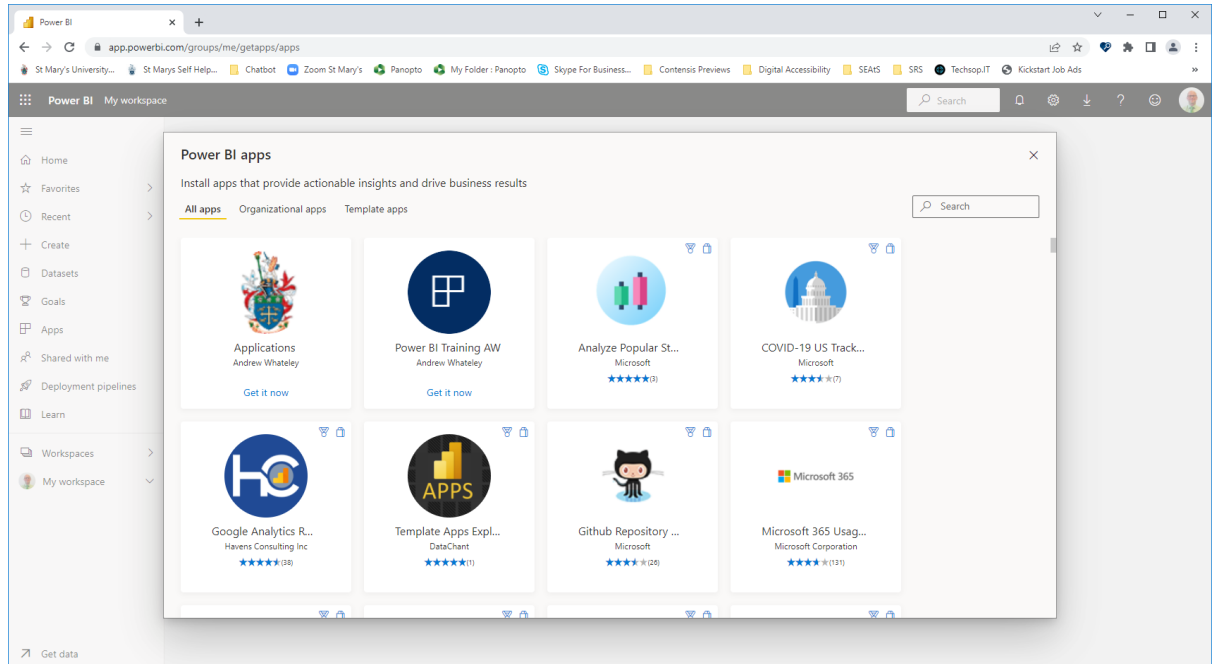
Get an App

If the App you are looking for doesn't appear in your list, click the Get apps button at the top right of the page.

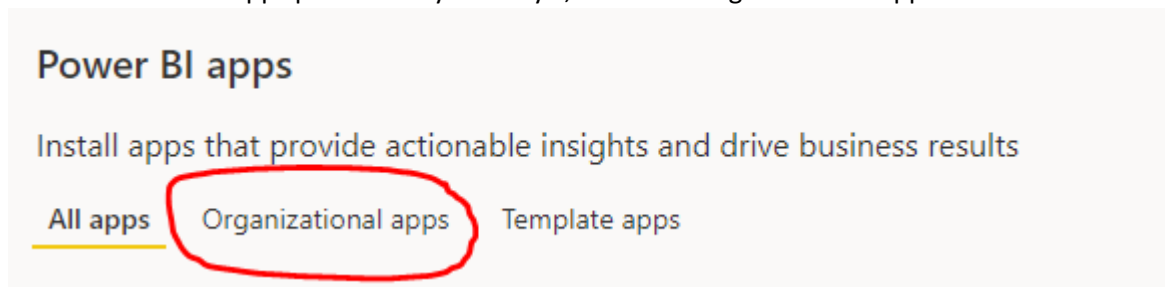


The screenshot shows the bottom of the Power BI Apps page. A yellow 'Get apps' button is located at the top right. Below it, there are navigation controls: 'View', 'Sort', 'Filters', and a search bar.

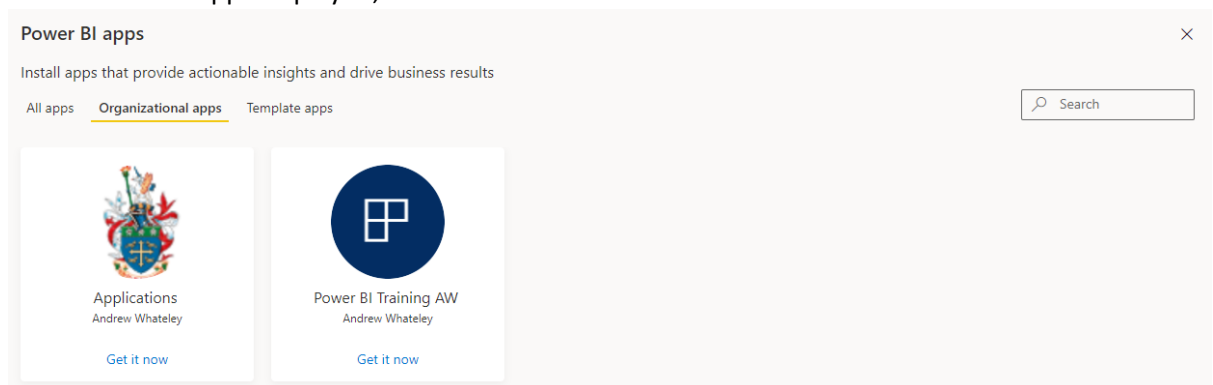
A list of available apps will appear



To see a list of the apps published by St Mary's, Click the "Organizational apps" tab



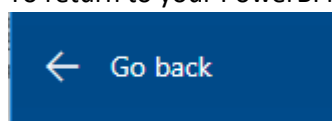
From the list of apps displayed,



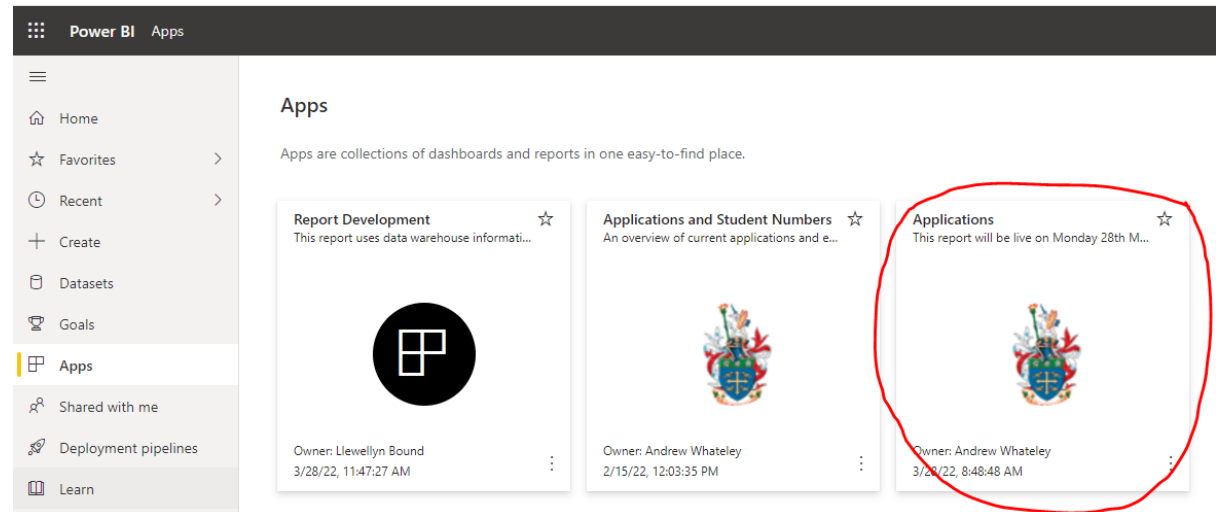
click on the relevant app.

The app will be displayed, and will also be added to your list of apps.

To return to your PowerBI home page, click Go back (bottom left of the window)



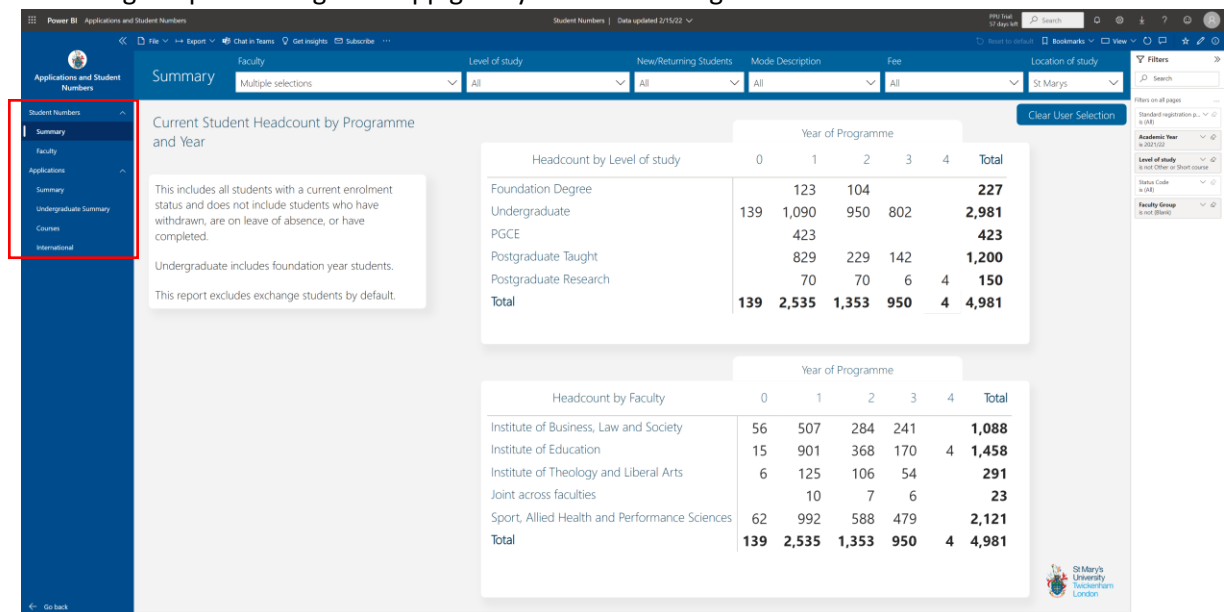
The app you selected will now appear in your list of apps:



Click on the app to view the report(s) within it.

3. Power BI Reports in Apps

Accessing a report through the App gives you the following screen:



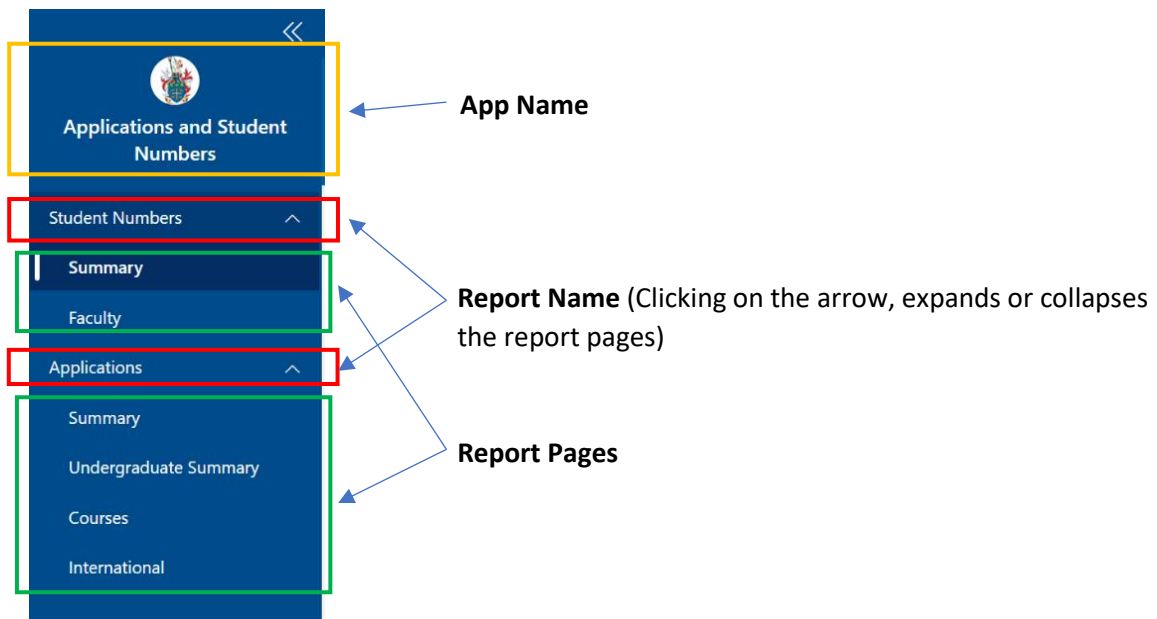
The Name of the App and the Reports available within it will, of course, differ from App to App. However, all Apps follow the same format and give you the same functionality.

On the left-hand side of the page, you will see the Name of the App.

Underneath the Name of the App will be the Report Name(s).

Below each Report Name are shown the pages within the report.

If you have been granted access to multiple reports in the same App, the Report Name will have an Arrow on the right-hand side, which you can click to expand/collapse the list of pages within the report.



4. Report Functionality

Where available all the options discussed below are available across all reports such as: Filters (a.k.a. slicers), Export functionality, Bookmarks, and how the visuals on the page interact with each other.

Click on the name of the report that you wish to view. This will load the default page of that report.

E.g. Clicking on the “Applications” Report Name has loaded the “Summary” page of that report.

Applications - 2022/23

Last updated: Monday 14th February, 2022
Comparing data for academic year 2022/2023 to 2021/2022

In this report

This Page: An overview of current applications, offers made and offers firmly accepted by applicants.
Page 2: A more detailed breakdown of the undergraduate numbers.
Page 3: Find the numbers for individual courses, depts or faculties.
Page 4: International numbers with breakdown by country.

Applications

Level of Study	Apps	Apps Last Year	YoY	YoY %
Undergraduate	4,820	5233	-413	-8%
Postgraduate Taught	873	696	+177	+25%
PGCE	734	1045	-311	-30%
Foundation Degree	215	164	+51	+31%
Research	21	0	+21	0%
Total	6,663	7138	-475	-7%

Offers made by SMU

Level of Study	Offers	Offers Last Year	YoY	YoY %	Pending
Undergraduate	3,469	3,405	+64	2%	1,135
Postgraduate Taught	550	363	+187	52%	177
PGCE	258	394	-136	-35%	200
Foundation Degree	127	87	+40	46%	71
Research	7	0	+7	0%	13
Total	4,411	4,249	+162	4%	1,596

Offers firmly accepted

Level of Study	Con Firms	Uncon Firms	Total Firms	Total Firms Last Year	YoY	YoY %	Ins	No Reply
Postgraduate Taught	188	97	285	200	+85	+43%	0	244
Undergraduate	67	135	202	199	+3	+2%	58	2,876
PGCE	92	64	156	180	-24	-13%	0	35
Foundation Degree	6	7	13	9	+4	+44%	4	99
Research	1	4	5	0	+5	0%	0	2
Total	354	307	661	588	+73	+12%	62	3,256

To view a different page of a report, simply click on the name of the page.

Applications - 2022/23

International

Use the filters at the top of the page to sort via faculty or department, or click on a country or course to drill down into the detail.

Applications

Level of Study	Apps	Apps Last Year	YoY	YoY %
Undergraduate	1,246	1,022	+224	+22%

Offers made by SMU

Level of Study	Offers	Offers Last Year	YoY	YoY %
Undergraduate	674	530	+144	27%

Offers firmly accepted

Level of Study	Offers	Offers Last Year	YoY	YoY %
Undergraduate	238	172	+66	+38%

Domicile Groups

Domicile Group	Apps	Apps Last Year	YoY	YoY %
United Kingdom	5,380	5,674	-294	-5%
International	1,246	1,022	+224	+22%
TBC	37	14	+23	+165%
Total for all countries	6,663	6,710	-47	-0.7%

Country search

Domiciles

Domicile	Apps	Apps Last Year	YoY	YoY %
India	216	128	+88	+69%
Nigeria	160	117	+43	+37%
Ireland	92	117	-25	-21%
United States of America	86	117	-31	-26%
Ghana	62	48	+14	+29%
Pakistan	41	13	+28	+215%
Hong Kong	25	4	+21	+525%
Italy	25	10	+15	+150%
Turkey	25	14	+11	+79%
Kenya	21	9	+12	+133%

Course search

Title	Apps	Apps Last Year	YoY	YoY %
MSc International Business Management	99	50	+49	+98%
MA Human Trafficking, Migration and Organised Crime	54	25	+29	+116%
BA (Hons) Business Management	35	46	-11	-24%
MSc Sports Management	35	17	+18	+106%
LLB (Hons) Law	34	12	+22	+183%
BSc (Hons) Physiotherapy	33	6	+27	+450%
MA Bioethics and Medical Law (full-time)	28	14	+14	+100%
MA Diplomacy and International Relations	28	5	+23	+460%
MSc International Finance and Accounting	27	18	+9	+50%
MA Education, International Development and Social Justice	27	5	+22	+440%
BSc (Hons) Psychology	24	17	+7	+41%
MSc Physiotherapy Pre-registration	24	26	-2	-8%
PGCE Primary with QTS	24	10	+14	+140%

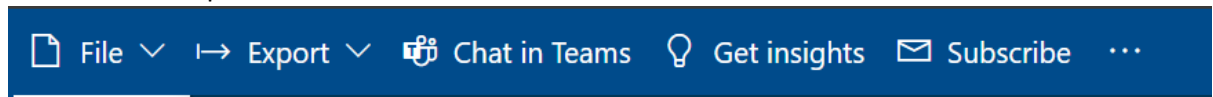
Each page will have different layout and content (visuals).

5. Report Page

Once you have loaded the App or selected the page from the report you wish to view, you will be presented with several different options across the top of the report. These options are the same across all the reports and pages [however some of those depend on the access that has been granted by the University].

The top menu bar will look like this:

Left Hand Side Options:

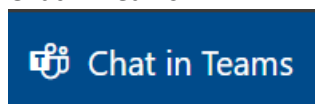


Right Hand Side Options



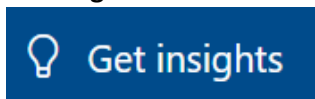
The functions of the relevant menu options are as follow:-

Chat in Teams:



Where available this option gives you the ability to discuss the report within a Teams locations, this is dependent on the permissions granted and there are other ways to comment on the report staying within the PBI Service.

Get Insights:

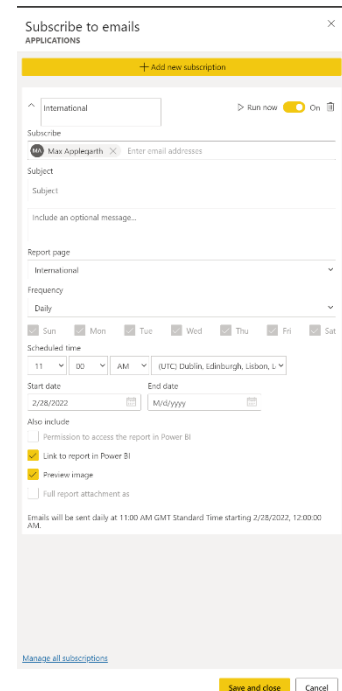


This gives you the ability to get quick insights on the data available in the report. However, this is dependent on how the data has been presented and does not always give results expected.

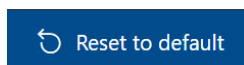
Subscribe:



This option gives you the ability to create a subscription to the App/Report for yourself or anyone else you include on the subscription created. The subscription sends an email with a link to the report as well as visual snapshot of the information in the report at the point the email was sent.

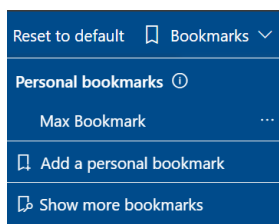
A screenshot of the "Subscribe to emails" dialog box. It has a yellow header bar with a close button. Below the header, there's a section for "International" with a "Run now" toggle. The "Subscribe" section includes fields for "Max Applegraph" (with a close button), "Enter email addresses", "Subject", and "Include an optional message...". The "Report page" section has a dropdown menu set to "International". The "Frequency" section has a dropdown menu set to "Daily". The "Scheduled time" section shows a calendar view with "Sun" selected, and a time picker set to "11:00 AM" in "UTC+1 Dublin, Edinburgh, Lisbon, L". The "Start date" is "2/28/2022" and the "End date" is "M/d/yyyy". The "Also include" section has checkboxes for "Permission to access the report in Power BI" (unchecked), "Link to report in Power BI" (checked), "Preview image" (checked), and "Full report attachment as" (unchecked). At the bottom, it says "Emails will be sent daily at 11:00 AM GMT Standard Time starting 2/28/2022, 12:00:00 AM." and has a "Manage all subscriptions" link. The bottom right has "Save and close" and "Cancel" buttons.

Reset to Default:



This option gives you the ability to restore the report you are looking at back to its original state by removing any filter options that you have applied.

Bookmarks:



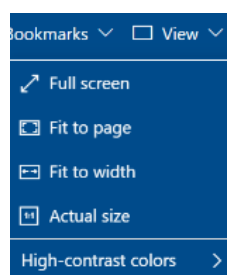
This option gives you the ability to save a version of the report which applies the specific filters that you have applied to the original report.

This enables you to quickly see a version of the report with the filters you want without having to apply them from scratch each time.

To do this, select the filters that you require, then select "Add a personal bookmark".

Your bookmarks are only visible to you.

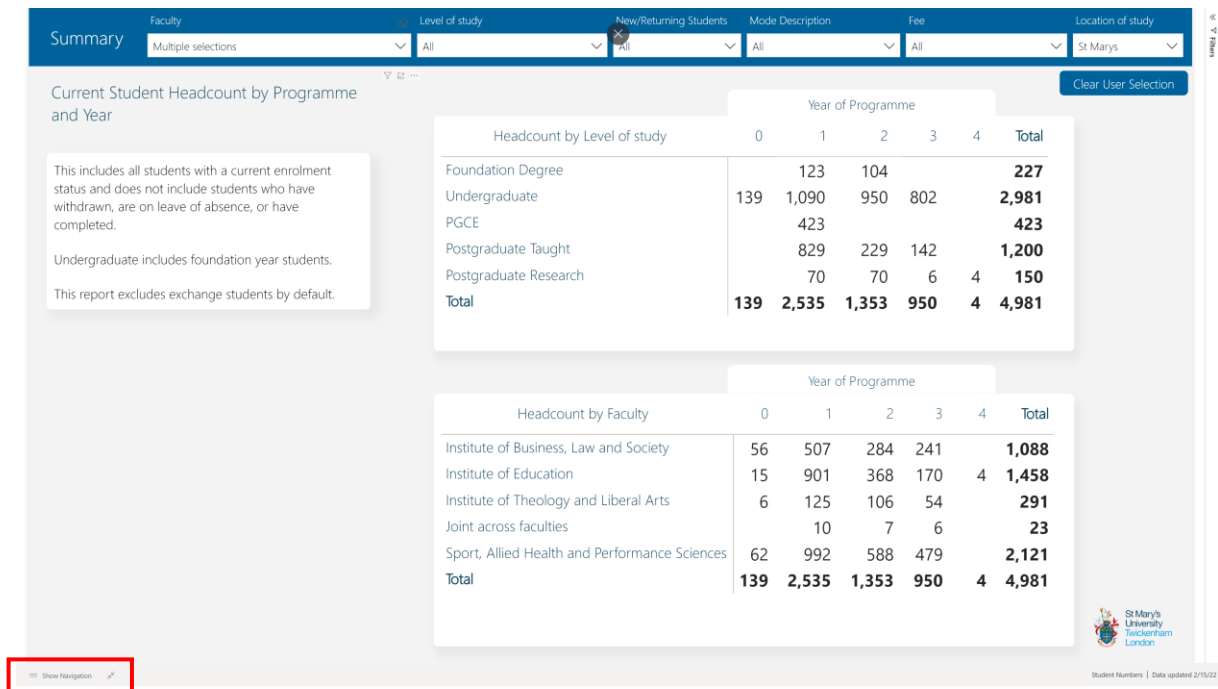
View:



View gives you the ability to view the report in a number of different dimensions.

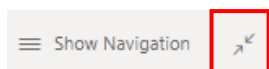
Full Screen is the most popular option here as this shows the report on the full page, hiding away the Web bar and other options to just focus on the report.

Full Screen View:



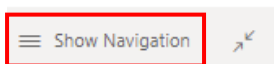
This is how the screen will look on Full Screen view. The Web bar and other options are no longer visible.

To return to the default view, simply press the “Esc” button or click the “Two Arrow” Icon in the bottom left corner.



From this view you can still navigate between the different Reports and Pages in the App.

In order to do this, you simply select the “Show Navigation” option in the bottom left, which opens the Navigation pane.



Refresh Visuals:

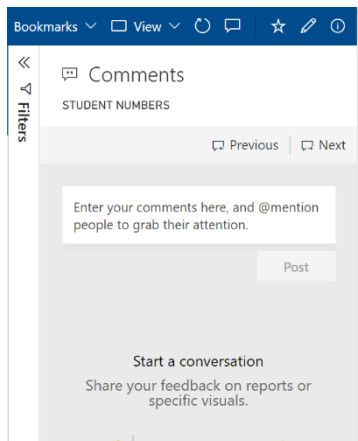


This option enables you to refresh all the visuals with the latest data.

Typically, this shouldn't be necessary as the data in reports should be refreshed on a scheduled basis. However, if you are already viewing the report when the data is refreshed you may need to click this icon to refresh the data.

Comments:



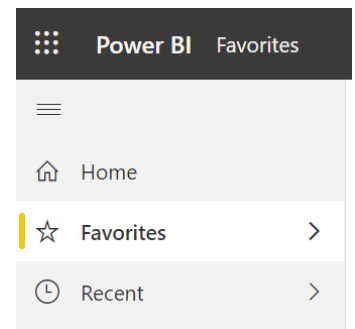


Clicking on the Speech box opens the comments box, which is where you can add comments about the report. Should you wish to notify specific people then simply add their name with @ at the beginning of their name, this will then send them a notification that something has been added on the report.

Favourites:



Selecting this option saves the report on your PowerBI Home page under the Favourites section. This enables you to quickly navigate to the reports that are of specific interest to you.



Information:



The Information icon simply displays some information about the App e.g. the name, Who Created it and a Description.

6. Report Visualisations

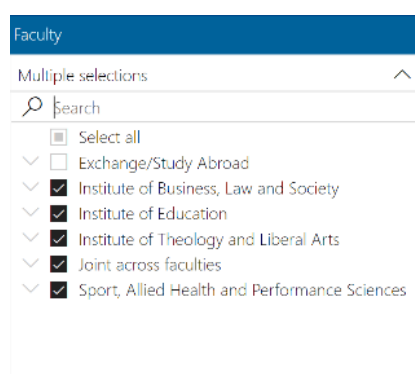
Visualisations are visual representations of the data on report pages e.g. Tables, Graphs, Charts.

A page may contain one of more visualisations.

Not every report/page will contain every type of visualization - it depends on which visualisations have been chosen by the report creator.

Whilst the data displayed in a visualisation may vary from report to report or from page to page, the functionality of visualisations is the same.

Slicer/Filter:



Slicers or Filter as they can be known provide the ability to change what the report is showing depending on the value(s) you select within the filter that you have selected.

To use a filter select the arrow in the top right of the visual, this will then display a list of available options.

Click the option you want.

To select multiple options simply hold the “CTRL” button down on your keyboard when clicking.

Table/Matrix:

Table and Matrix have the same options available to them.

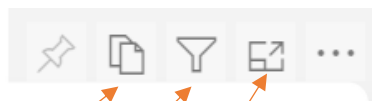
Table / Matrix Headers

Selecting any of the headers gives you the ability to sort in either Ascending or Descending order.

In the following example the headers are: Headcount by level of Study; 0 ; 1; 2; 3; 4 and Total

Year of Programme						
Headcount by Level of study	0	1	2	3	4	Total
Foundation Degree		123	104			227
Undergraduate	139	1,090	950	802		2,981
PGCE		423				423
Postgraduate Taught		829	229	142		1,200
Postgraduate Research		70	70	6	4	150
Total	139	2,535	1,353	950	4	4,981

Table / Matrix icons



Copy Filter Focus Mode

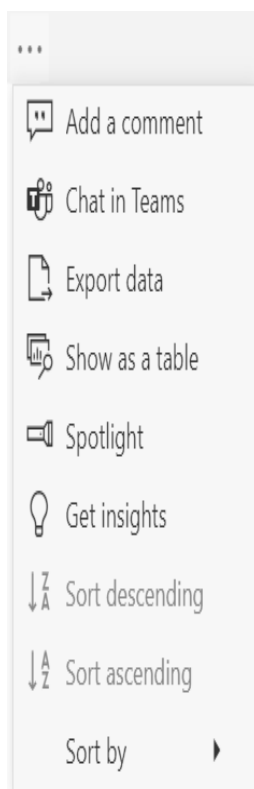
There are other options available on the Table/Matrix, these are shown on the right-hand side on the visuals and have the following capabilities:

Copy: This enables you to copy the visual and the ability to paste into another programme such as Word/PowerPoint or into an Email.

Filter: Hovering over this option shows a list of the filters that have been applied to the data in the visual. This will include any filters applied as default by the report creators plus any Slicers/Filters that you have applied (if any).

Focus Mode: Selecting this option shows the Table/Matrix in a single page without showing any of the other visualisations from the page. This can be useful to highlight the table you want to focus on without being distracted by the information of the other visualisations.

Additional Options: A number of additional options are available by clicking on the “...” (three dots) icon as follows:



Add a Comment: This gives you option to add a comment in the same way as the option for the whole report, however this is specific just to the visual you are on.

Chat in Teams: This gives you the ability to chat about the visual in Teams.

Show as a Table: This shows the data on a separate page in a table. This is useful for visualisations such as Graphs as it enables you to see the breakdown of the data in the graph in a table from.

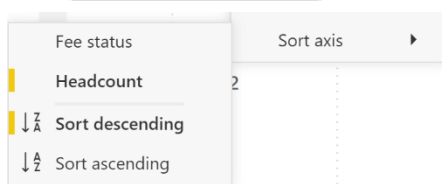
Spotlight: This simply highlights the visual selected on the page, making it more prominent.

Get Insights: This enables you get insights on the data you are looking at in the visual. Typically, not used within reports themselves as you have already filtered the data down to the areas you wish to focus on.

Sort descending: Sorts the data in highest to lowest order

Sort ascending: Sorts the data in lowest to highest order

Sort by: Shows you the fields that you can sort the visual by



The Sort option within a Graph gives a slightly different option you need to go into the **Sort Axis** area which will then give you the fields and direction that you can sort the graph by.

7. Report Interaction

Visualisations in Power BI are not static representations of the data being shown. All the visuals within a report can interact with each other.

Selecting one option on one Table/Graph enables the other visualisation on the page to be filtered by that selection

For example...

All Selected: The top visual has all options select so the bottom table is showing all available options.

The screenshot shows a Power BI report with two tables. The top table is titled 'Headcount by Level of study' and the bottom table is titled 'Headcount by Faculty'. Both tables have a filter 'Year of Programme' set to 'All Selected'.

Headcount by Level of study	0	1	2	3	4	Total
Foundation Degree		123	104			227
Undergraduate	139	1,090	950	802		2,981
PGCE		423				423
Postgraduate taught		829	229	142		1,200
Postgraduate Research		70	70	6	4	150
Total	139	2,535	1,353	950	4	4,981

Headcount by Faculty	0	1	2	3	4	Total
Institute of Business, Law and Society	56	507	284	241		1,088
Institute of Education	15	901	368	170	4	1,458
Institute of Theology and Liberal Arts	6	125	106	54		291
Joint across faculties		10	7	6		23
Sport, Allied Health and Performance Sciences	62	992	588	479		2,121
Total	139	2,535	1,353	950	4	4,981

Foundation Degree Selected: The top visual has “Foundation Degree” selected, which means the bottom table below is now filtered to show figures for “Foundation Degree” only.

		Year of Programme				
Headcount by Level of study		0	1	2	3	4
Foundation Degree			123	104		227
Undergraduate		139	1,090	950	802	2,981
PGCE			423			423
Postgraduate Taught			829	229	142	1,200
Postgraduate Research			70	70	6	150
Total		139	2,535	1,353	950	4,981

		Year of Programme		
Headcount by Faculty		1	2	Total
Institute of Education		71	61	132
Sport, Allied Health and Performance Sciences		52	43	95
Total		123	104	227

To remove that filter selection, simply select the option (e.g. “Foundation Degree”) again.