## St Mary's University

# Power BI Basics User Guide

Version: 1.0

Author: Max Applegarth

Max.Applegarth@simpson-associates.co.uk

## Contents

Intro	duction	3
1.	Logging into the Power BI Service	4
2.	Report Access Types	5
3.	Power BI Report App	7
4.	Report Functionality	9
5.	Report Page	10
6.	Report Visualisation	14
7.	Report Interaction	16

## 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.

Enter your email, we'll check if you need		
to create a new account.		
Email		
Enter email		
By proceeding you acknowledge that if you use your organization's email, your organizatio may have rights to access and manage your data and account. <u>Learn more about usibg you</u> organization's email		
By clicking Submit, you agree to these <u>terms and conditions</u> and allow Power BI to get you user and tenant details. <u>Microsoft Privacy Statement</u>		
Submit		

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.

wer Bl Home								Mit State
								5 ( dage left
ne	Good morning, Ma	¢					+ 1	New report
*	Find and share actionable insig		ons					
>								
	Recommended							< >
e.	You frequently open this	You frequently open this	You frequently op	oen this	<sup>(2)</sup> Getting started with Power BI	Explore this a	ata story	Explore this da
							1000	The later spece
						100	IS ST	- De
with me				alt	Image: A state of the state		ETC.	
nt pipelines	-				0 P			
	Student Numbers	Retention Report	applications	1.1	Explore basic Power & concepts	Explore the 100 mos	useful product	Cancer statistics in th
hspace ~	Recent Favorites My apps							See all
	D Name		Туре	Opened	Location	Endorsement	Sensitivity	
	P Applications and Student	Numbers	App	an your ago	Augus			
	alt Student Numbers		Report	2 days ages	Report Development			
	all applications		Teport	2 days ago	Report Development			
	ab applications excel tables		Report	2 days ago	Report Development			
	Award Report		Report	2 days sign	Report Development			
	at NSS		Report	2 days ago	Asport Development			
	at Retention Report		Report	2 days 200	Report Development			
	Student Demographics		hport	K days ago	Report Onvelopment			
	My workspace		Workspann	17 days opt	Woltopeon			

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/

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.

=							
<b> Home</b>							
☆ Favorites >	A						
C Recent >	Арр	35					
+ Create	Apps	are collections of dashboards and reports in one easy	-to-find place.				
Datasets							
0 00000		Name	Publisher	Published	App type	Version	Endorsement 1
					Арр type	Version	Endorsement 1
	D **	Name Applications and Student Numbers	Publisher Andrew Whateley	Published 2/15/22, 12:03:35 PM	App type Org app	Version	Endorsement ↑
😨 Goals	Ď <b>∛</b>						
<ul><li>✿ Goals</li><li>⊕ Apps</li></ul>	□ *						

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.

				Get apps
III ve			0.6	
🗄 View 🗸	↓≓ Sort ∨	Y Filters	♀ Search	

#### A list of available apps will appear

Power Bl	× +							× -	×
	erbi.com/groups/m						@ ☆	۰ 🕫	) E
谢 St Mary's University 🍟	it Marys Self Help	🛄 Chatbot 🛛 🛄 Zoom St I	Mary's 🔹 Panopto 🔹 My Folder : Panopto 🧯	Skype For Business 📙 Contensis Previews	i 🛄 Digital Accessibility 🛄 SEAtS 📃	SRS 🚯 Techsop.IT 🔇 Kicksta	rt Job Ads		»
<b>Power BI</b> My works						♀ Search Ω			۲
=									
命 Home	Power B	II apps				×			
☆ Favorites	> Install app	s that provide actiona	ble insights and drive business results						
() Recent	> All apps	Organizational apps	Template apps			,			
+ Create				8 0	80				
Datasets									
😨 Goals		The second se							
₽ Apps		15							
x <sup>9</sup> Shared with me		Applications Andrew Whateley	Power BI Training AW Andrew Whateley	Analyze Popular St Microsoft	COVID-19 US Track Microsoft				
🔊 Deployment pipelines		Get it now	Get it now	****	<b>★★★</b> ★☆(?)				
🛄 Learn		_							
Workspaces	>			<b>~~</b>	V 0				
	~	<b>H</b>	APPS	- <b>S</b>	Microsoft 365				
		ogle Analytics R avens Consulting Inc	Template Apps Expl DataChant	Github Repository <sub>Microsoft</sub>	Microsoft 365 Usag Microsoft Corporation				
		*****(38)	★★★★★(I)	<b>★★★★</b> ★(26)	★★★★ (131)				
			n		<b>∞</b> ∩				
✓ Get data									

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

## **Power BI apps**

Install apps that provide actionable insights and drive business results



#### 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:

	Power BI Apps	
≡		
ណ៍	Home	Apps
☆	Favorites >	Apps are collections of dashboards and reports in one easy-to-find place.
Ŀ	Recent >	Report Development ☆ Applications and Student Numbers ☆ Applications ☆
+	Create	This report uses data warehouse informati An overview of current applications and e This report will be live on Monday 28th M
0	Datasets	
₽	Goals	
₽	Apps	
RR	Shared with me	
<b>\$</b> 2	Deployment pipelines	Owner: Llewellyn Bound . Owner: Andrew Whateley . Owner: Andrew Whateley .
	Learn	3/28/22, 11:47:27 AM <sup>:</sup> 2/15/22, 12:03:35 PM <sup>:</sup> 3/28/22, 8:48:48 AM

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:

Power BI Applications and				Student Numbers   Data updated							an and a second		⊕ ± ?	
-	D File ∨ → Export ∨ 4	B Chat in Teams ♀ Get insights  Subscribe …										ult 🔲 Bookmarks 🗸 🗔 V	riew ∨ O 🖵 ▼ Filters	1
plications and Student Numbers	Summary	Faculty Multiple selections	v ↓		Returning Students	All	Description	~	Fee		$\sim$	Location of study St Marys	0.1.1	
numbers	1		_			-							Fiters on all pa	
nt Numbers A		lent Headcount by Programme					Vear	of Program	ma			Clear User Selection	8 (AI)	
ulty	and Year						real o						Academic Ye is 2021/22	
ations ^				Headcount by Level of st	udy	0	1	2	3	4	Total		Level of stud is not Other of	y Ir Sh
nmary		I students with a current enrolment		Foundation Degree			123	104			227		Status Code in (AI)	
fergraduate Summary		s not include students who have on leave of absence, or have		Undergraduate	1	139	1,090	950	802		2,981		Faculty Grou is not (Slank)	•
nes	completed.			PGCE			423				423			
mational	Undergraduate	includes foundation year students.		Postgraduate Taught			829	229	142		1,200			
		,		Postgraduate Research			70	70	6	4	150			
	This report exc	ludes exchange students by default.		Total	1	39	2,535	1,353	950	4	4,981			
							Year	of Program	me					
				Headcount by Facult	/	0	1	2	3	4	Total			
				Institute of Business, Law and So	tiety	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 Perform	ance Sciences	62	992	588	479		2,121			
				Total		139	2,535	1,353	950	4	4,981			
												St Mary's University Twickenham		

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 Applications - 2022/23 Last updated: Monday 14th February, 2022 Applications St Mary's University Texcher free Level of Study Apps Apps Last Apps = Number of applications YVY = Vear on Vear comparison Ins = Insurance offer Pending – App 2111 to be processed by SMU Offer = SMU have offered the student a place No RepV = Offer made, on repV yet Firm = Student has made us 1st choice Con Firms = An unconditional firm accept Undergraduate 4,820 *i* In this report 5233 🔻 -413 -8% Postgraduate Taught 873 696 🔺 +177 +25% This Page: An overview of curr firmly asserted by applicants PGCE 734 1045 🔻 -311 -30% 164 🔺 +51 Foundation Degree 215 +31% Page 2: A more detailed breakdo Research 21 0 🔺 +21 0% Page 3: Find the numbers for individual courses, depts or faculties Total 6,663 -475 7138 🔻 -7% Offers made by SMU Offers firmly accepted Level of Study Con Firms Level of Study Offers Offers Last Year YoY % Pending Uncon Total Firms Firms Total Firms Last Year Ins Undergraduate 3,469 3,405 🔺 64 2% 1,135 Postgraduate Taught 188 97 285 200 🔺 +85 +43% 0 244 
 550
 363
 ▲
 187
 52%

 258
 394
 ▼
 -136
 -35%
 Postgraduate Taught 177 Undergraduate PGCE 67 135 202 199 +2% 2,876 58 PGCE 200 180 🔻 -24 -13% 35 92 64 156 0 127 87 **▲** 40 0 **▲** 7 Foundation Degree6713Research145 9 🔺 +4 Foundation Degree 46% 71 +44% 4 99 13 Research Research 0 🔺 +5 7 0% 0% 0 2 4,411 4,249 🛦 162 Total 4% 1,596 Total 354 307 661 588 🔺 +73 +12% 62 3,256

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

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

App	lications - 202	22/23 Clear Filt	Faculty ers All	$\sim$	Level of Study All	Domicile Grouping, I	Domiciles		\	~
<u> </u>	nternational	Domicile Groups	Apps Apps YoY	Offers Total Firms		Click on a course below and s countries. Click again to clear.	ee how it is	doing acro	ss all	ł
via faculty	ers at the top of the page to sort or department, or click on a course to drill down into the	United Kingdom International TBC <b>Total for all countries</b>	5,380 -749 1,246 +238 37 +30 6,663 -47	674 23 14 1	8 +66 3 +13	Course search All				~
Applic	YoY	Click on a country there. Click again t	below and see which o clear.	courses are popul	ar 🖊	Title MSc International Business	Apps	Apps YoY +49	Fir	rms 32
1,246	+24/0	Country search			×	Management MA Human Trafficking, Migration and Organised Crime	54	+29		22
Offers 674	s made by SMU YoY ▲ 144 27%	All	Apps Apps YoY	Offers Total Firms	Firms	BA (Hons) Business Management MSC Sports Management LLB (Hons) Law	35 35 34	-11 +17 +12	25 25 21	6 12 1
Offers 238	s firmly accepted	India Nigeria Ireland	216 +83 160 +117 92 -20	149 64 54 37 42 11	+16 +26 -3	BSc (Hons) Physiotherapy MA Bioethics and Medical Law (full-time) MA Diplomacy and International	33 28 28	+6 +24		0 11 13
238 Insuranc 2	Conditional Unconditional 85 153	United States of America Ghana Pakistan	86 -23 62 +48 41 +5	46 10 26 16 13 9	-5 +13 +3	Relations MSc International Finance and Accounting	28	+18	17	11
Penc 35		Hong Kong Italy Turkey Kenya	25 -4 25 -10 25 +14 21 +9	18 2 16 0 15 3 13 7	+2 0 +2 +1 ~	MA Education, International Development and Social Justice BSc (Hons) Psychology MSc Physiotherapy Pre-registration PGCE Primary with QTS	27 24 24 24	+5 -17 -26 -2	22 15 11 10	18 4 4 6

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:



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.

	ONS					
		+	Add new subscr	iption		
^ Interna	ational			⊳ Rur	now 🧲	) On
Subscribe						
🚳 Max /	oplegarth	× Enter	email addresses			
Subject						
Subject						
Include an	optional m	essage				
Report page	e					
Internatio	inal					
Frequency						
Daily						
Sun	Mon	U Tu	e 🛛 🔤 Wed	🖂 Thu	🗸 Fri	$\checkmark$
Scheduled I	ime					
11 ¥	00 ¥	AM Y	(UTC) Dublin,	Edinburgh, Lisb	on, L ¥	
Start date			End date			
2/28/2022			M/d/yyyy	(100) (100)		
Also include						
	report in Pe		t in Power Bl			
Clink to Preview		naer bi				
	ornage	ant or				
Emails will b AM.	se sent daily	at 11:00 AM	A GMT Standard	Time starting 2/	28/2022, 12	00:00

#### **Reset to Default:**



#### **Bookmarks:**

Reset to default 🛛 Bookmarks	$\sim$
Personal bookmarks ①	
Max Bookmark	
☐ Add a personal bookmark	
ြာ Show more bookmarks	

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.

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:

8ookmarks 🗸 🗖 View 🗸
✓ Full screen
🗔 Fit to page
E Fit to width
In Actual size
High-contrast colors >

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.

re enly visible to you

#### **Full Screen View:**

Summary	Faculty Multiple selections	Level of study	New/Returning Students	Mode All	Description	~	Fee		~	Location of study St Marys
, in the second se	multiple selections			All		~	All		~	St Marys
urrent Stud	lent Headcount by Programme	▽ 🗠 …								Clear User Selection
and Year					Year	of Programr	me			
		Heado	ount by Level of study	0	1	2	3	4	Total	
	students with a current enrolment	Foundation De	gree		123	104			227	
	not include students who have on leave of absence, or have	Undergraduate	1	139	1,090	950	802		2,981	
completed.	of fleave of absence, of flave	PGCE			423				423	
Undergraduate	includes foundation year students.	Postgraduate 1	aught		829	229	142		1,200	
	· · · · ·	Postgraduate F	lesearch		70	70	6	4	150	
This report excl	udes exchange students by default.	Total	1	139	2,535	1,353	950	4	4,981	
					Year	of Programr	ne			
		He	adcount by Faculty	0	1	2	3	4	Total	
		Institute of Bus	iness, Law and Society	56	507	284	241		1,088	
							470	4	1,458	
		Institute of Edu	cation	15	901	368	170	4	1,450	
			cation ology and Liberal Arts	15 6	901 125	368 106	54	4	291	
			ology and Liberal Arts					4		
		Institute of The Joint across fac	ology and Liberal Arts		125	106	54	4	291	
		Institute of The Joint across fac	ology and Liberal Arts rulties ealth and Performance Sciences	6	125 10	106 7	54 6	4	291 23	
		Institute of The Joint across fac Sport, Allied H	ology and Liberal Arts rulties ealth and Performance Sciences	6	125 10 992	106 7 588	54 6 479		291 23 2,121	St Mary's University Tecksmitan

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:** 

Page 12 of 17



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.

	Power Bl	Favorites	
≡			
ŵ	Home		
☆	Favorites	:	>
Ŀ	Recent	2	>

#### 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:

Faculty	
Multiple	e selections
, р ķe	arch
	Select all
$\sim$	Exchange/Study Abroad
$\sim$ $\checkmark$	Institute of Business, Law and Society
$\sim$ $\checkmark$	Institute of Education
$\sim$ $\checkmark$	Institute of Theology and Liberal Arts
$\sim$ $\checkmark$	Joint across faculties
$\sim$ $\checkmark$	Sport, Allied Health and Performance Sciences

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 "CRTL" 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

		× 6 7 2				
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



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 Filter Focus Mode

**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
💬 Add a comment	the visual you are on.
🛱 Chat in Teams	<b>Chat in Teams:</b> This gives you the ability to chat about the visual in Teams.
🗋 Export data	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
😡 Show as a table	breakdown of the data in the graph in a table from.
⊐¶ Spotlight	<b>Spotlight:</b> This simply highlights the visual selected on the page, making it more prominent.
Get insights	<b>Get Insights:</b> This enables you get insights on the data you are looking at in the visual. Typically, not used within reports themselves as you
$\downarrow_{A}^{Z}$ Sort descending	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	Sort ascending: Sorts the data in lowest to highest order
Sort by	Sort by: Shows you the fields that you can sort the visual by
Fee status Headcount 2	Sort axis The Sort option within a Graph gives a slightly different option you need to go into the <b>Sort Axis</b> 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.

		Year	of Program	me		1078-
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 laught		829	229	142		1,200
Postgraduate Research		70	70	6	4	150
Total	139	2,535	1,353	950	4	4,981
		Year	of Program	me		
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.

		Yea	r of Program	ime		RDRB
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
		Yea	r of Program	nme		
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.