

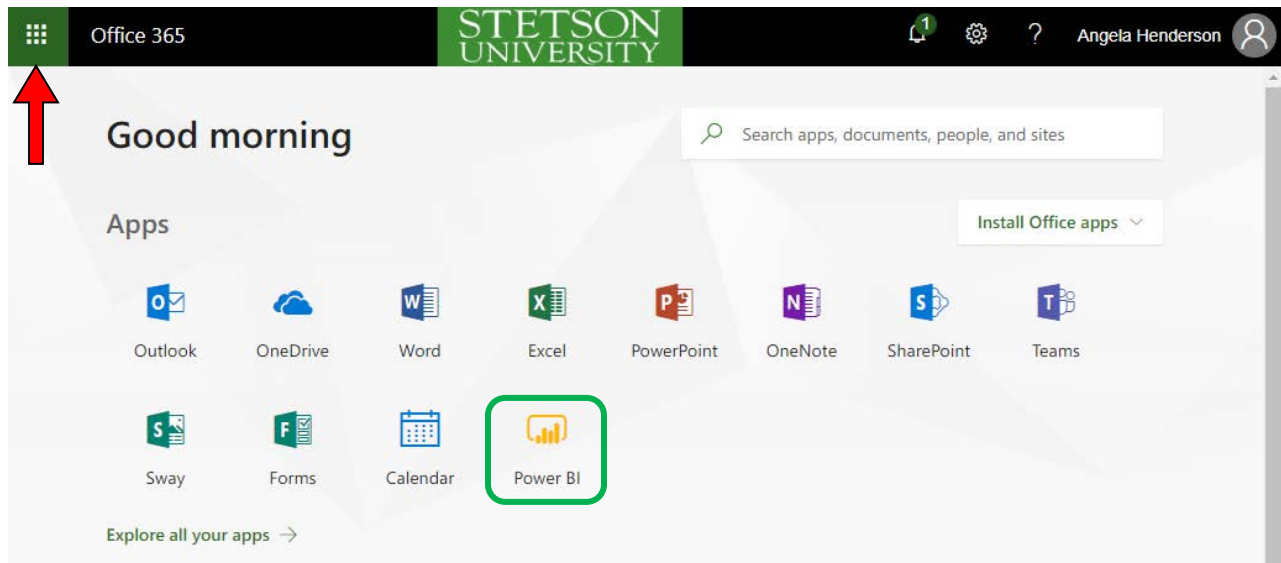
## Accessing Stetson’s Institutional Research Power BI Reports

### 1. Request Power BI License

- If you are a new user, you must request a Power BI license. Contact Institutional Research to request a license.

### 2. Log in to Office 365:

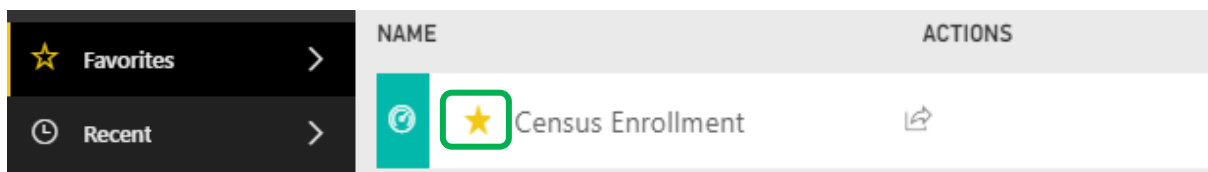
- Log-in to Microsoft Office 365 via the Stetson web email portal: <https://email.stetson.edu>
- If the Power BI icon does not appear on your home screen when you log in, click on the button (waffle icon) to the left of the Office 365 header to view all programs.

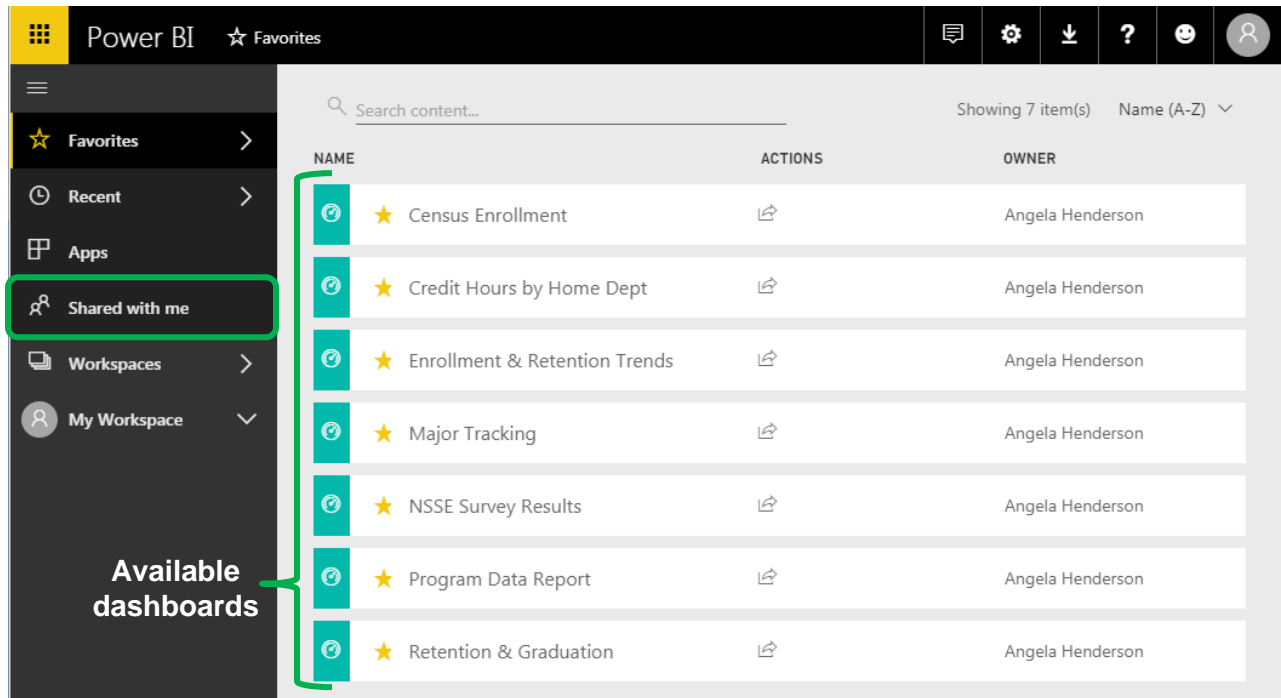


**NOTE:** If you do not see the Power BI tile, contact Institutional Research to make sure you have been assigned a license.

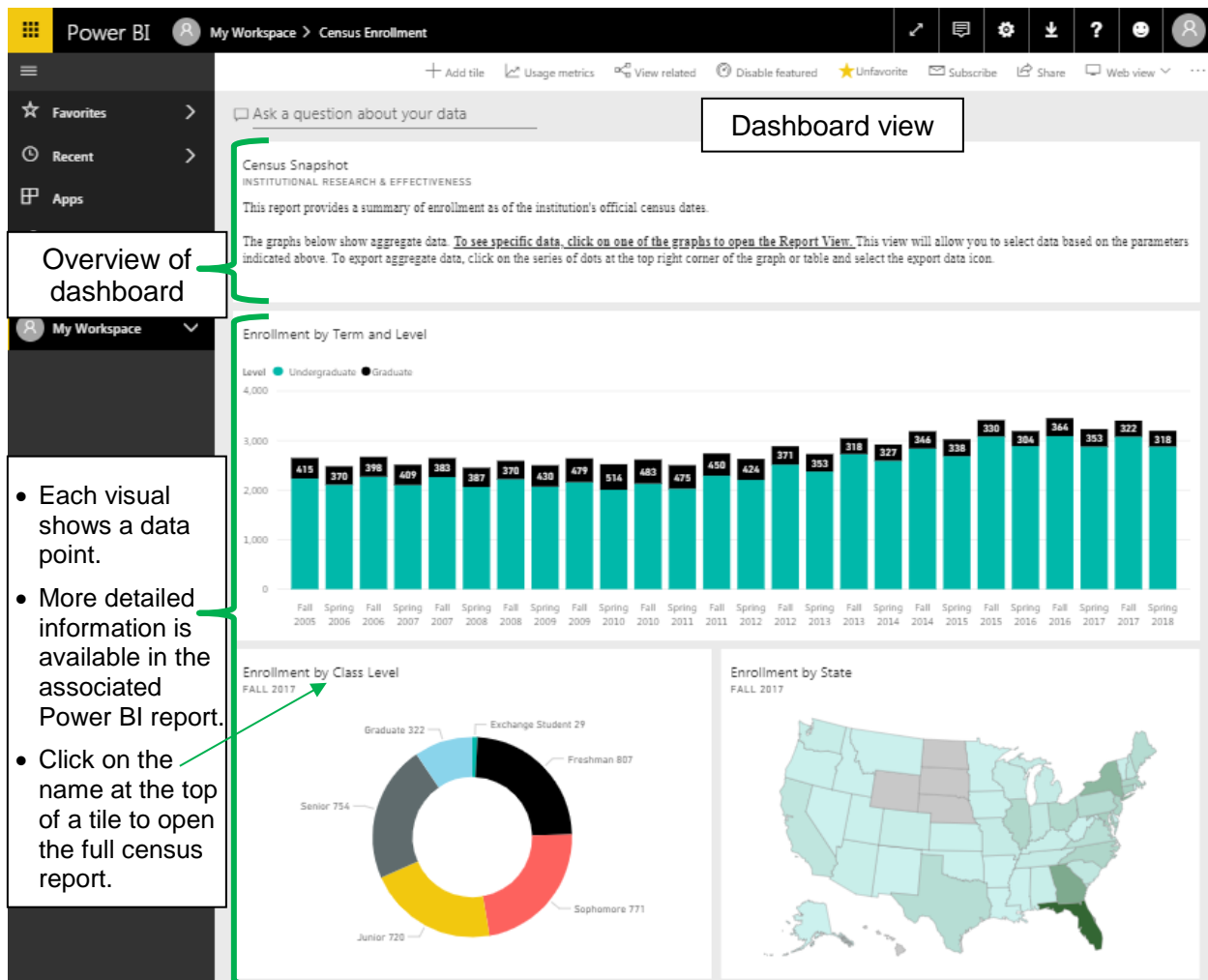
### 3. Dashboards in Power BI:

- Dashboards are the initial data view that users see within Power BI and contain summary information from more detailed Power BI reports.
- Once in Power BI, click on “Shared with me” in the left menu panel to view dashboards that are available to you. Available dashboards will appear as a list.
- To view a dashboard, select an item from the list and click on the name of the dashboard.
- You can add frequently used dashboards to your “Favorites” tab by clicking on the star to the left of the dashboard name. Favorite dashboards can be accessed from the “Favorites” option on the menu panel.





- Once a dashboard has been selected, it will appear in the center of the Power BI window.
- Clicking on the first dashboard in the list above opens the census dashboard, as shown below.



- Each visual shows a data point.
- More detailed information is available in the associated Power BI report.
- Click on the name at the top of a tile to open the full census report.

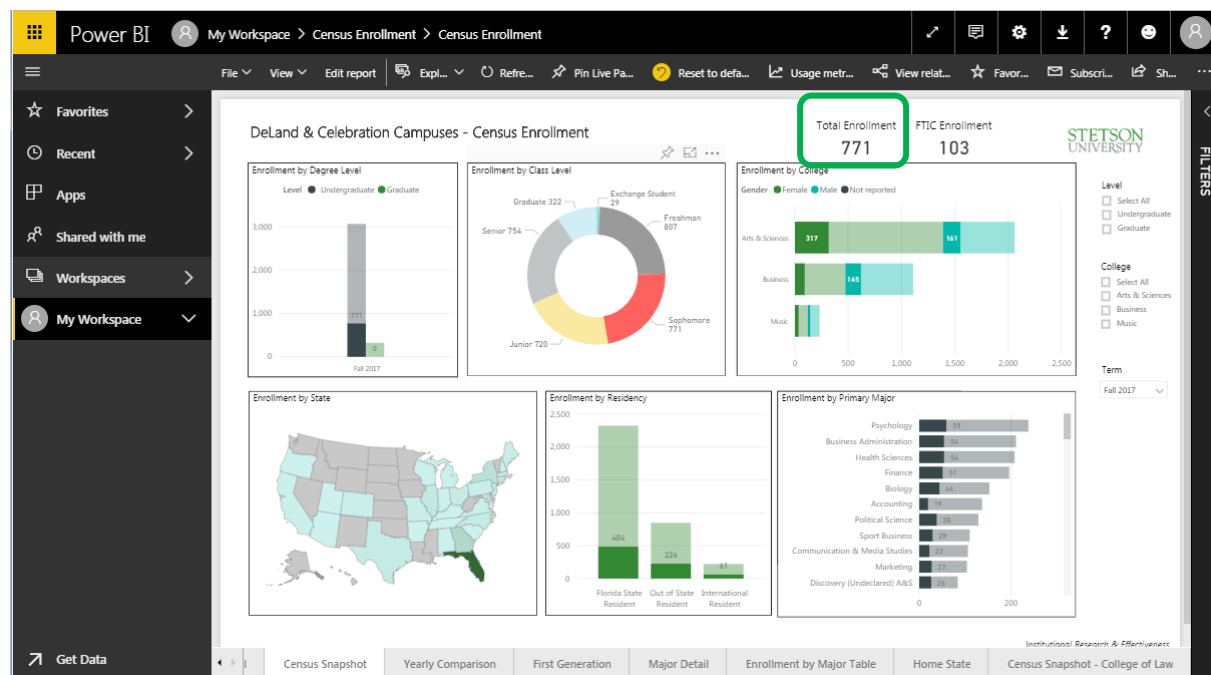
4. Reports in Power BI:

- Reports are the foundation of dashboards and contain much more detailed information and more options for interacting with the data.
- Clicking on the “Enrollment by Class Level” visual in the screenshot above opens the detailed census report, as shown below.



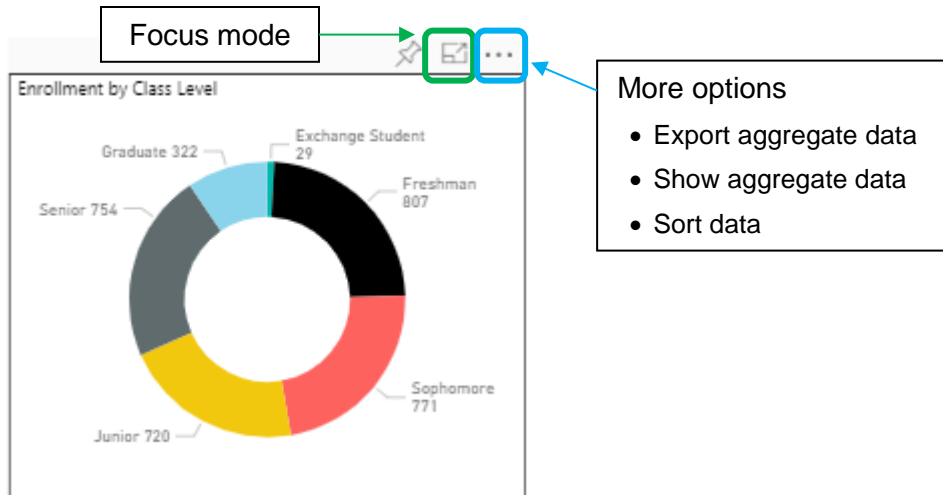
5. Interacting with Visuals in Power BI:

- Users can select items for inclusion from the filters on the side of reports or by clicking on the visuals themselves.
- For example, clicking on the red area of the donut graph “Enrollment by Class Level” automatically filters the other visuals on the page to show only data for the 771 Fall 2017 sophomores (shown below). To reset the filter, simply click on the red area again.



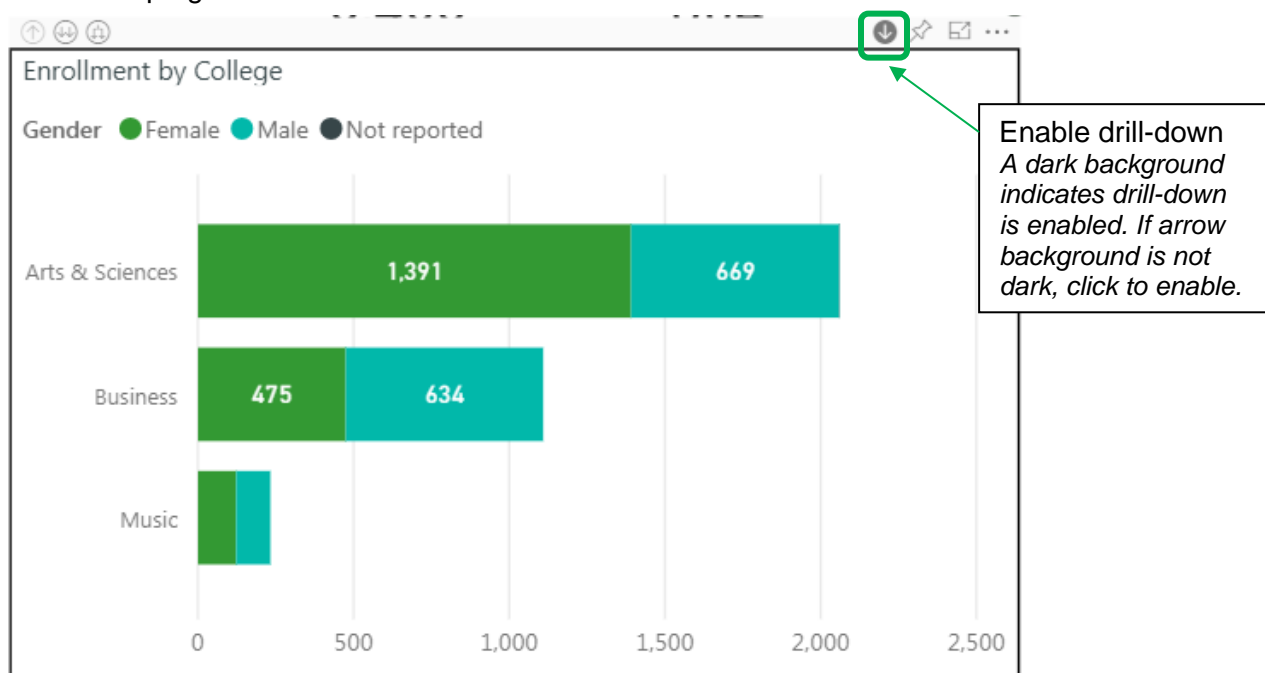
### Options within Visuals

- Each visual offers the option to view it larger in “focus mode” - click on a visual and then on the “focus mode” icon that appears in the bar above the visual. This enlarges the selected visual to full screen size.
- The three dots at the right of the bar allow users to view or export summarized data to Excel or to sort the existing view differently.

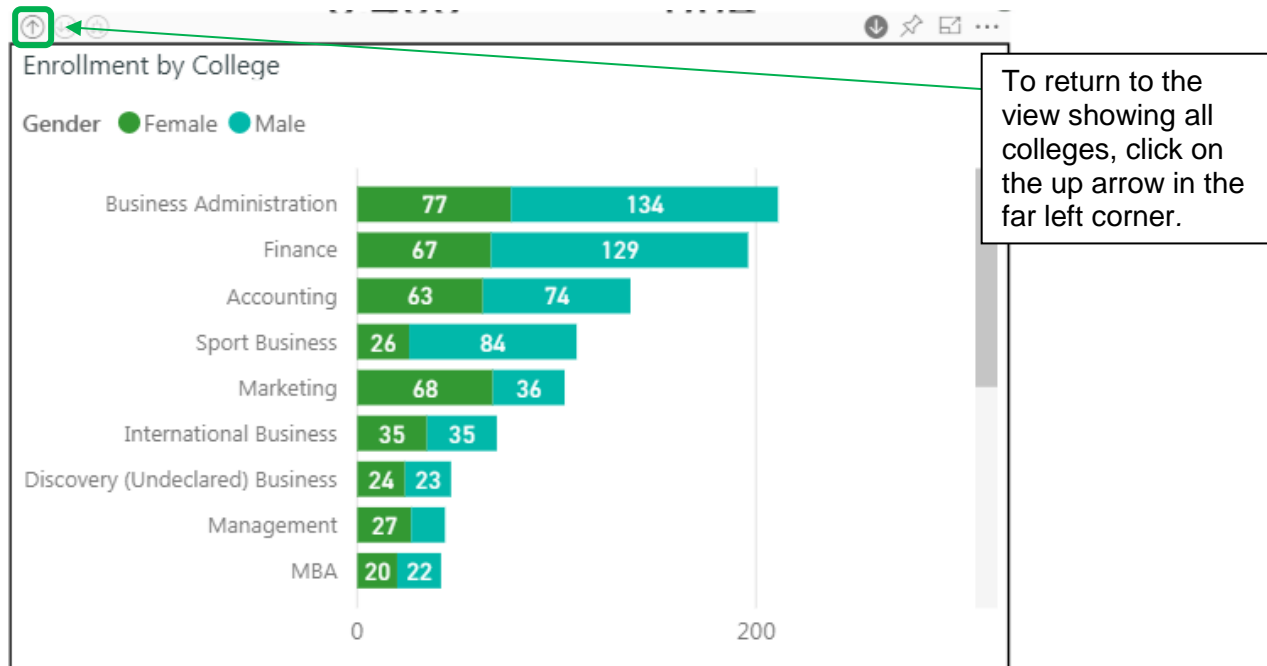


### Navigating Visuals with Drill-Down Capability

- Some visuals contain drill-down capabilities, which allow users to explore a hierarchy of data. For example, the visual initially shows college level enrollment, but drilling down into a single college shows enrollment by major.
- Visuals with drill-down capability have additional icons in the bar above the visual, as shown in the example below.
- To use drill-downs, you **must** enable the functionality within the visual by clicking on the arrow in the top right corner of the visual.



- Once enabled, click on a data bar for a college to view enrollment data for only majors within the selected college. For example, clicking on Business after drill-down is enabled generates the view shown below.



## 6. Additional Guidance

- If you have questions about navigating Stetson's IR Power BI dashboards or reports, contact IR for assistance.

- Links to Microsoft Power BI guidance:

- [Get Started with Power BI](#)
- [Power BI Guided Learning](#)

- Interested in developing your own Power BI dashboards?

Power BI Desktop is a free application you can install on your local computer that lets you connect to, transform, and visualize your data. With Power BI Desktop, you can connect to multiple different sources of data, and combine them (often called modeling) into a data model that lets you build visuals, and collections of visuals you can share as reports, with other people inside your organization. Most users who work on Business Intelligence projects use Power BI Desktop to create reports, and then use the Power BI service to share their reports with others. Download Power BI Desktop free [here!](#)