

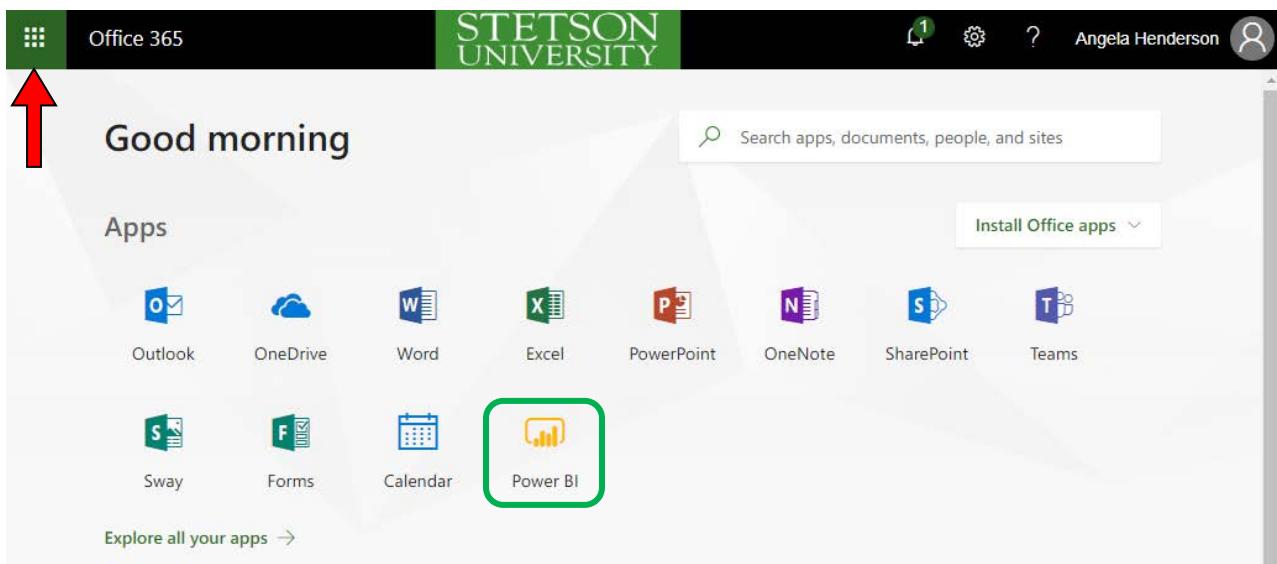
Accessing Stetson's Institutional Research Power BI Reports

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:

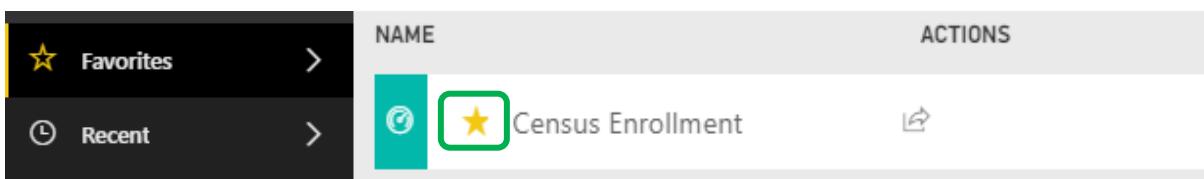
- Log-in to Microsoft Office 365 via the Stetson web email portal: <https://email.stetson.edu>
- If the Power BI icon does not appear on your home screen when you log in, click on the button (waffle icon) to the left of the Office 365 header to view all programs.



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.



The screenshot shows the Power BI desktop application. On the left, there's a sidebar with navigation options like Favorites, Recent, Apps, and Shared with me (which is highlighted with a green box). Below this is a section labeled "Available dashboards". The main area displays a list of dashboards with columns for Name, Actions, and Owner. All the dashboards listed are owned by "Angela Henderson" and have a yellow star icon next to their names. A green bracket on the right side groups the first seven items in the list.

NAME	ACTIONS	OWNER
★ Census Enrollment		Angela Henderson
★ Credit Hours by Home Dept		Angela Henderson
★ Enrollment & Retention Trends		Angela Henderson
★ Major Tracking		Angela Henderson
★ NSSE Survey Results		Angela Henderson
★ Program Data Report		Angela Henderson
★ Retention & Graduation		Angela Henderson

- 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.

The screenshot shows the Power BI desktop application with the "Census Enrollment" dashboard open. The sidebar on the left shows "My Workspace > Census Enrollment". The main area has a header with various icons. A green box highlights the "Dashboard view" button. Another green bracket on the left side groups the first three items in the list below.

Overview of dashboard

- 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.

Census Snapshot
INSTITUTIONAL RESEARCH & EFFECTIVENESS

This report provides a summary of enrollment as of the institution's official census dates.

The graphs below show aggregate data. To see specific data, click on one of the graphs to open the Report View. This view will allow you to select data based on the parameters indicated above. To export aggregate data, click on the series of dots at the top right corner of the graph or table and select the export data icon.

Enrollment by Term and Level

Level: Undergraduate (teal), Graduate (black)

Term	Undergraduate	Graduate
Fall 2005	415	
Spring 2006	370	
Fall 2006	398	
Spring 2007	409	
Fall 2007	383	
Spring 2008	387	
Fall 2008	370	
Spring 2009	430	
Fall 2009	479	
Spring 2010	514	
Fall 2010	483	
Spring 2011	450	
Fall 2011	424	
Spring 2012	371	
Fall 2012	353	
Spring 2013	316	
Fall 2013	327	
Spring 2014	344	
Fall 2014	338	
Spring 2015	330	
Fall 2015	304	
Spring 2016	364	
Fall 2016	353	
Spring 2017	322	
Fall 2017	318	
Spring 2018		

Enrollment by Class Level
FALL 2017

Class Level	Count
Freshman	807
Sophomore	771
Junior	720
Senior	754
Exchange Student	29
Graduate	322

Enrollment by State
FALL 2017

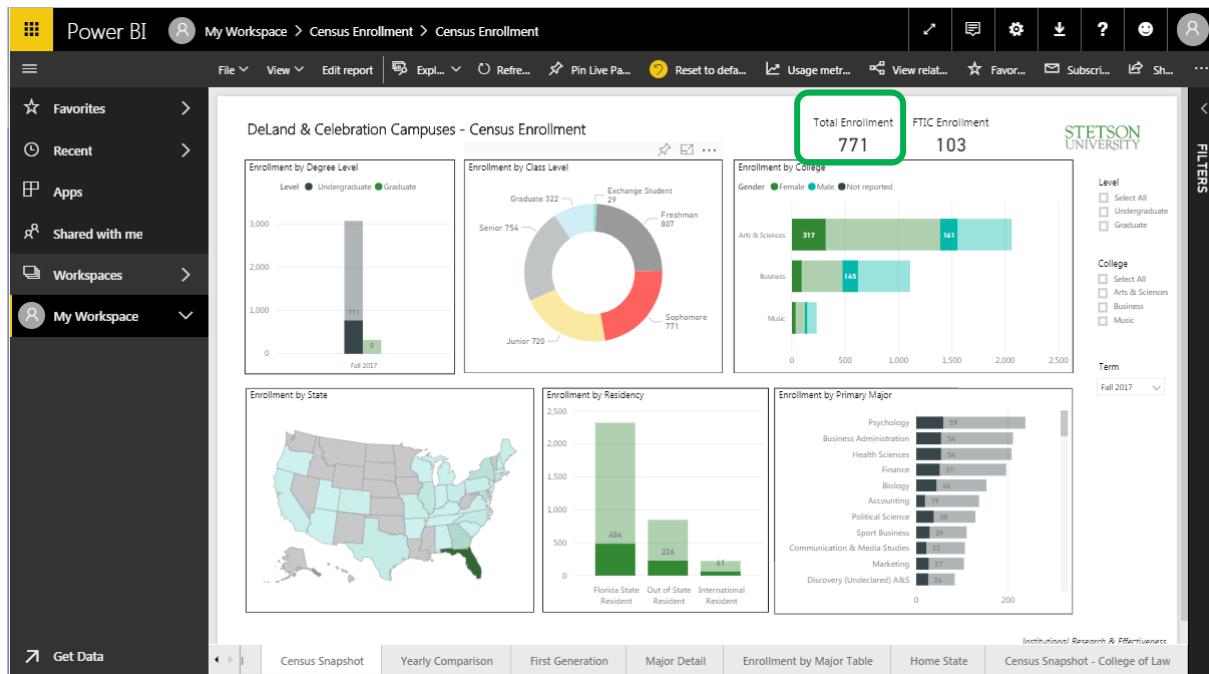
4. Reports in Power BI:

- 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.



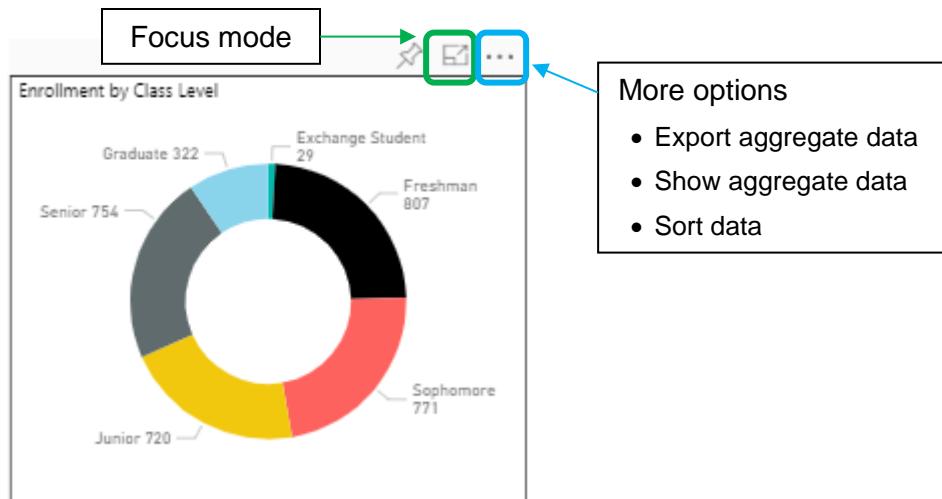
5. Interacting with Visuals in Power BI:

- 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.



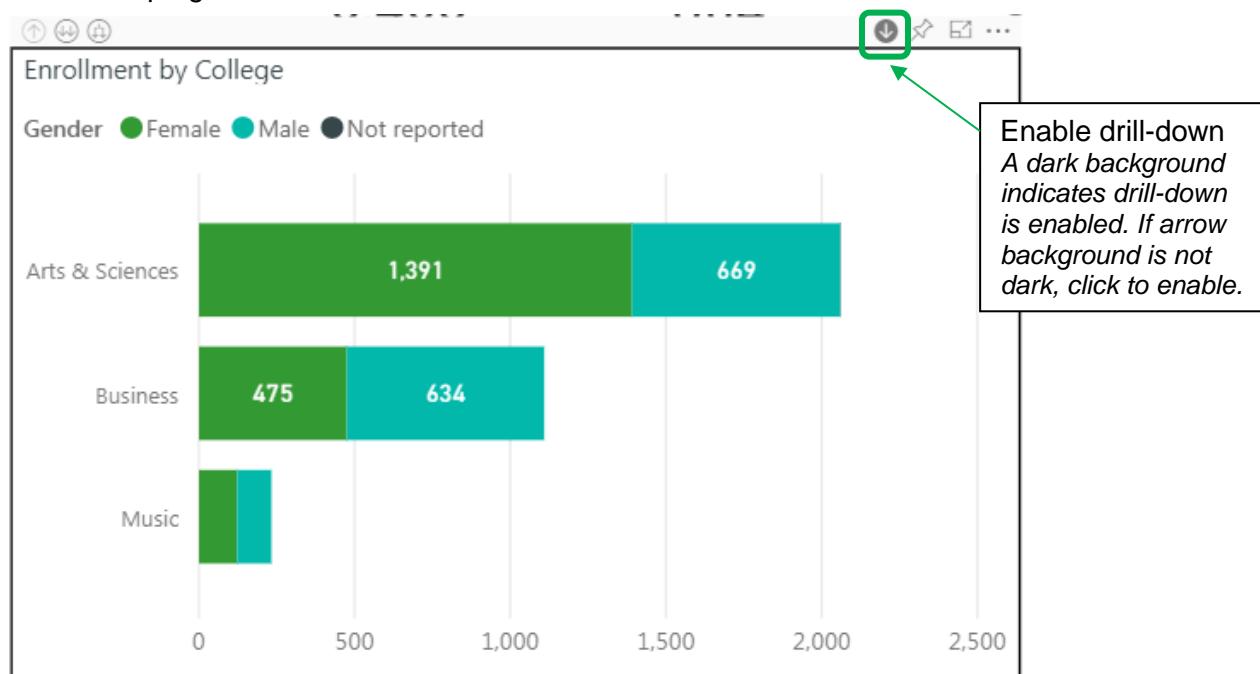
Options within Visuals

- 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.

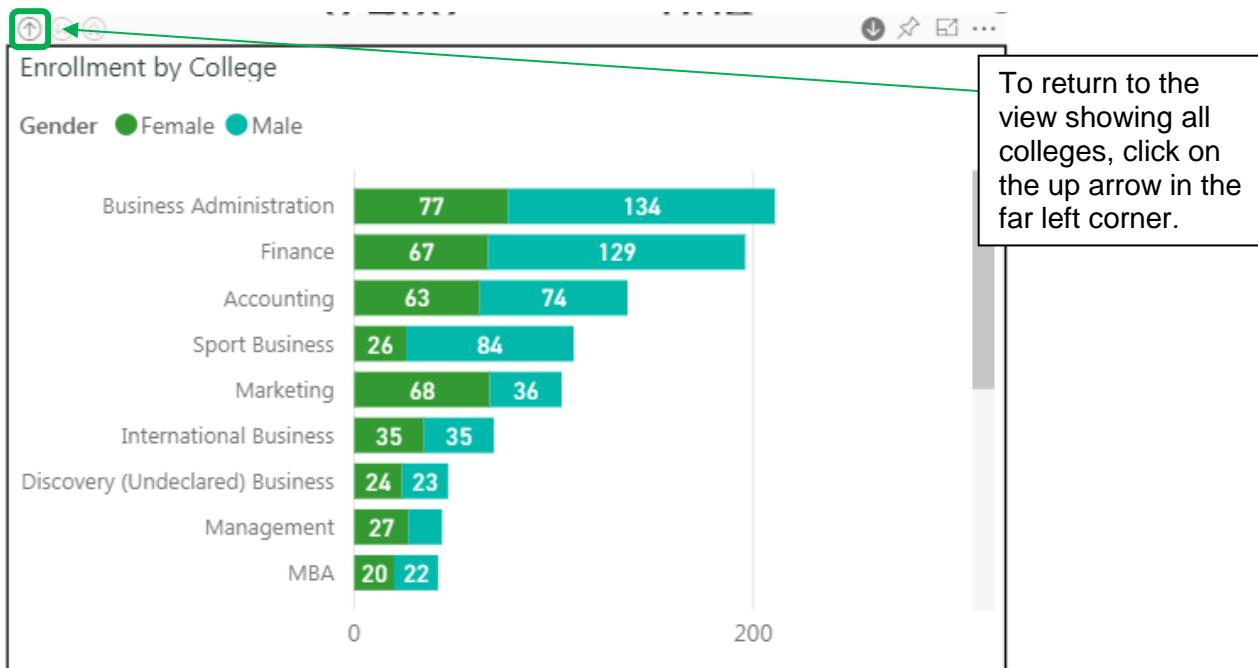


Navigating Visuals with Drill-Down Capability

- 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!](#)