

PowerBI Quick Start Guide – September 2021

Overview

What is PowerBI? PowerBI is Queen Mary's reporting tool it is the place where you can go to to get information that comes from our corporate systems and some external data sources e.g. league tables or HESA.

What can I expect as a PowerBI user? All the content available to you in PowerBI has been through a rigorous development process. The dashboards should have the same look and feel as each other so that once you know what to expect you should be able to pick up how new dashboards work without someone having to show you. If that is not the case please get in touch with one of key contacts¹ and we will look to find a way of improving your experience.

We have some data quality issues and best efforts are made to resolve these before the data makes it into the PowerBI dashboards. We don't always pick everything up though so if something doesn't look right please get in touch and we will look into it.

PowerBI looks different to what appears in this quick guide. Microsoft issue updates to PowerBI on a fairly regular basis and without giving you proper notice. The look and feel of powerBI and the dashboards within it therefore sometimes change.

Access to PowerBI Apps. There are three levels of access within powerBI



Bronze, Silver and Gold

- Bronze Dashboards contain publicly available information (such as league tables and student numbers), all staff can view Bronze dashboards.
- Silver Dashboards contain potentially sensitive information (such as admissions figures and student outcomes). Some roles e.g. Head of School will have automatically have access to all Silver dashboards. Other staff with legitimate reason for this level of access and sign-off from a School Manager, Head of School or PS Director can request this from the Strategic Planning office (planning@qmul.ac.uk).
- Gold Dashboards are built for specific users. They may contain highly sensitive or personal information (such as salary information) This level of access is given to individuals on a dashboard by dashboard basis.

¹ As of September 2021 key contacts are Catherine Murray (Catherine.murray@qmul.ac.uk), Sharon Pay (s.pay@qmul.ac.uk) and Sam Astley (s.astley@qmul.ac.uk).

There are also some beta testing apps in PowerBI which have gold level access. The colours are reversed on their app icons to give you a visual clue that the content is not finalised and signed off.



What does the crown mean? Dashboards that have a crown in the top left hand corner have been through beta testing and have been signed off for publication. This means that an agreed set of dashboard design principles have been followed and that the data has been through beta testing and is as good as it can be. This is an example of what a 'crowned' dashboard header looks like:



When dashboards are in development the developer will put a different logo in the top left hand side of the dashboard. Here are some examples of non-crowned dashboard headers:



If you find yourself looking at a non-crowned dashboard it is probably in beta testing and is probably OK to use the data in it but be aware that it hasn't been signed off for publication.

Logging in to PowerBI

You can find a link to log in to PowerBI on the connected intranet site:

The screenshot shows a web browser window with several tabs open. The main content area displays a grid of application tiles. One specific tile, 'Power BI', is highlighted with a thick orange border. Other visible tiles include 'MyHR', 'Agresso', 'MySIS', 'Remote email access', 'QMplus', 'MySafety', 'Worktribe', and 'i-GRasp'. The browser's address bar shows the URL 'connected.qmul.ac.uk'.

This button takes you through to a sharepoint site:

<https://qmulpod.sharepoint.com/sites/powerbi/SitePages/Home.aspx>

The sharepoint site has information about PowerBI on it and a button that you can click on to go through to PowerBI.

Welcome to Power BI

Get Started

In using this service, you **MUST**:

- Comply with QMUL's [Data Protection Policy](#)
- Comply with the Data Protection Act 2018 and the General Data Protection Regulation.
- Read the [guidance for SITS users](#) at as it applies equally in this context.

I Agree (continue to Power BI)

What Is Power BI?

Microsoft Power BI is Queen Mary's reporting tool, providing instant, dependable self-service information and enabling staff to support our students and strategy.

Dashboards are designed and built by the data experts with input from the subject matter experts, replacing time-consuming manual processes with automation. The service is governed by data and IT leads to ensure relevance, consistency and quality.

You can also download the PowerBI app for apple and android to use on devices.

Use your QM credentials to log in to PowerBI

Navigating around PowerBI

The PowerBI landing page looks like this (you may not be able to see any apps when you first log in as you need to either use them or flag them as favourites for them to appear on the landing page).

Good morning, Catherine

Find and share actionable insights to make data-driven decisions

+ New report

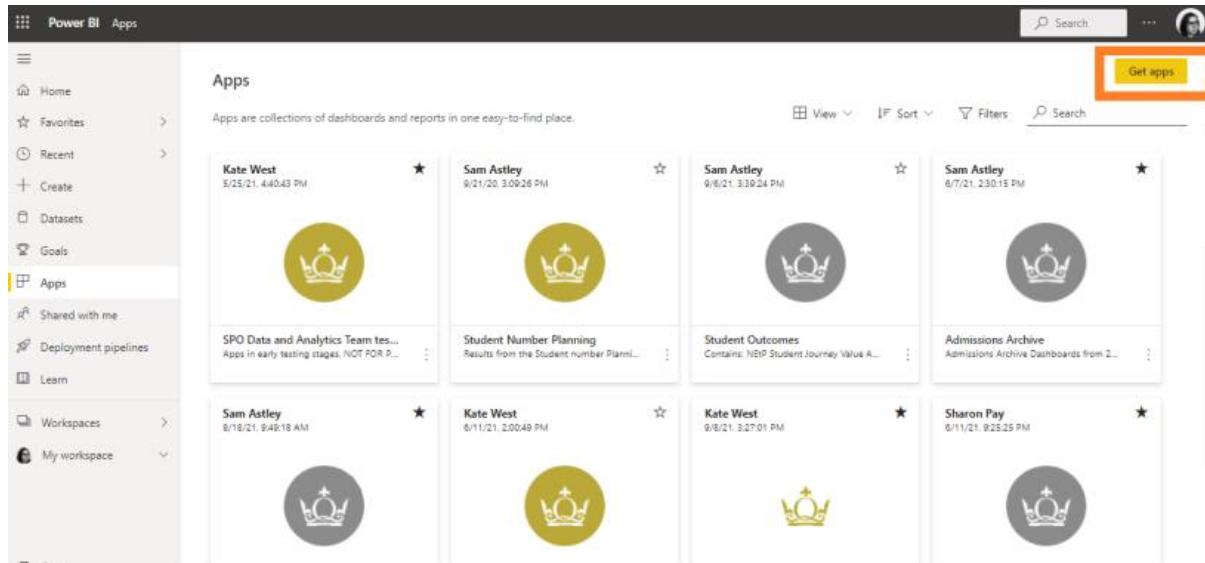
Favorites + frequent

Admissions Admissions Archive Admissions Insights Admissions Supplementary

See all

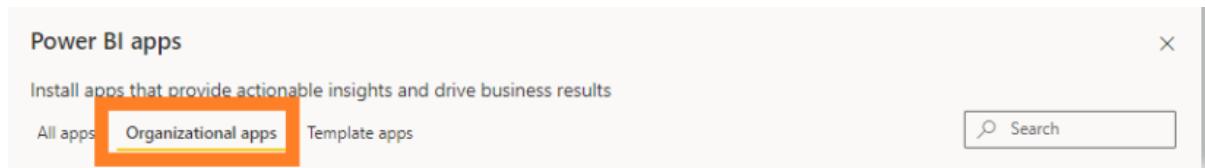
When you first log in select 'apps' from the menu at the left hand side of the screen

Some bronze apps will just appear on this screen but for other apps you have to click on the 'get apps' button on the top right of the screen



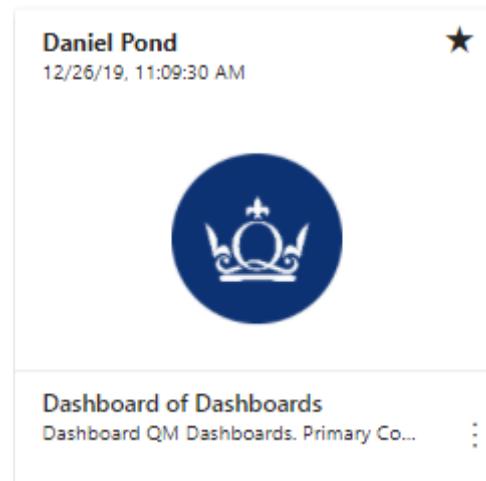
The screenshot shows the Power BI Apps interface. On the left is a navigation sidebar with options like Home, Favorites, Recent, Create, Datasets, Goals, Apps (which is selected and highlighted in yellow), Shared with me, Deployment pipelines, Learn, Workspaces, and My workspace. The main area is titled 'Apps' with a sub-instruction: 'Apps are collections of dashboards and reports in one easy-to-find place.' Below this is a grid of ten app cards. Each card has a star icon in the top right corner. The cards are arranged in two rows of five. The first row includes cards for 'Kate West' (3/25/21, 4:40:43 PM), 'Sam Astley' (9/21/20, 3:09:26 PM), 'Sam Astley' (9/6/21, 3:39:24 PM), 'Sam Astley' (8/7/21, 2:30:15 PM), and 'SPO Data and Analytics Team test...' (Apps in early testing stages, NOT FOR P...). The second row includes cards for 'Student Number Planning' (Results from the Student number Planni...), 'Student Outcomes' (Contains: NEIP Student Journey Value A...), 'Admissions Archive' (Admissions Archive Dashboards from Z...), 'Sam Astley' (8/18/21, 8:42:18 AM), 'Kate West' (6/11/21, 2:00:49 PM), 'Kate West' (9/8/21, 3:27:01 PM), and 'Sharon Pay' (6/11/21, 8:25:25 PM). A yellow box highlights the 'Get apps' button in the top right corner of the header.

In the get apps area select 'organisational apps' and then pick the apps you want to look at.



The screenshot shows a modal window titled 'Power BI apps'. It contains the text 'Install apps that provide actionable insights and drive business results'. Below this are three tabs: 'All apps' (disabled), 'Organizational apps' (highlighted with a yellow box), and 'Template apps'. To the right of the tabs is a search bar with a magnifying glass icon and the word 'Search'. A close button 'X' is in the top right corner of the modal.

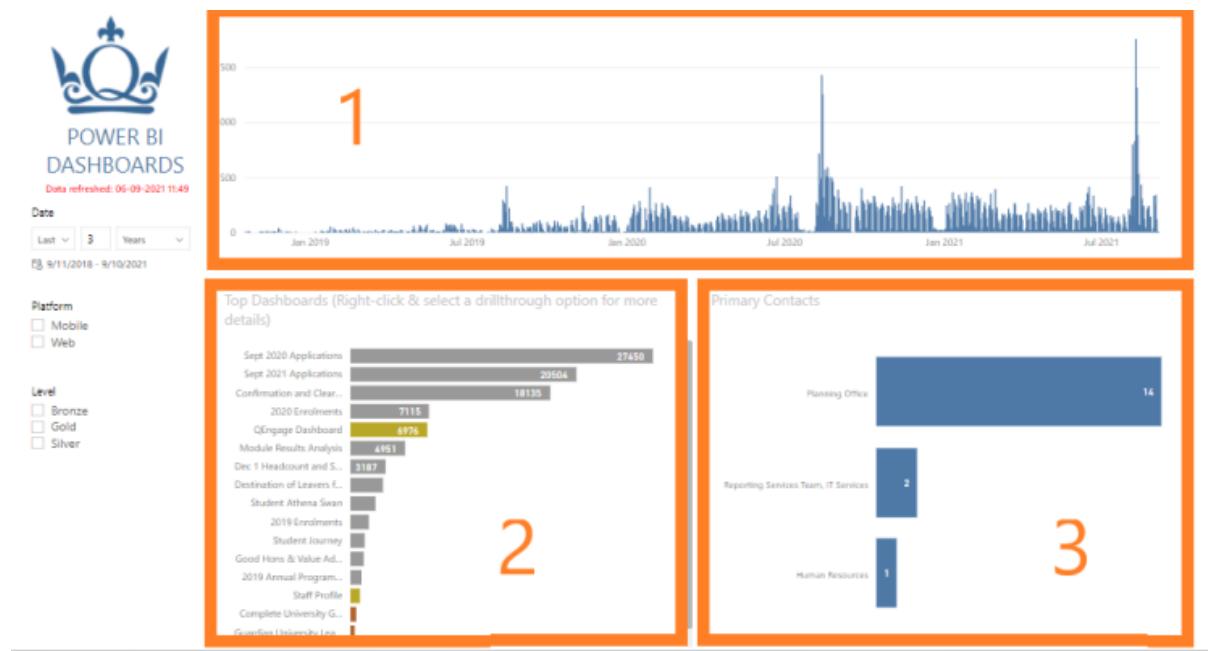
All powerBI users should automatically have access to the 'dashboard of dashboards'



The screenshot shows a single dashboard card. At the top is the name 'Daniel Pond' and the date '12/26/19, 11:09:30 AM'. To the right is a large blue circular icon containing a white crown symbol. Below this is the title 'Dashboard of Dashboards' and the subtitle 'Dashboard QM Dashboards. Primary Co...'. A vertical ellipsis '...' is at the bottom right of the card.

This dashboard gives the usage stats of PowerBI over time. It shows you:

- how many dashboards have been accessed (pane 1)
- what the most popular dashboards are (pane 2) what level of access is required to see the dashboard (note that the top 4 dashboards are silver access and the 5th most popular one is gold, the two at the bottom of the screen are a bit difficult to see but they are bronze ones),
- which team developed the dashboard (pane 3)

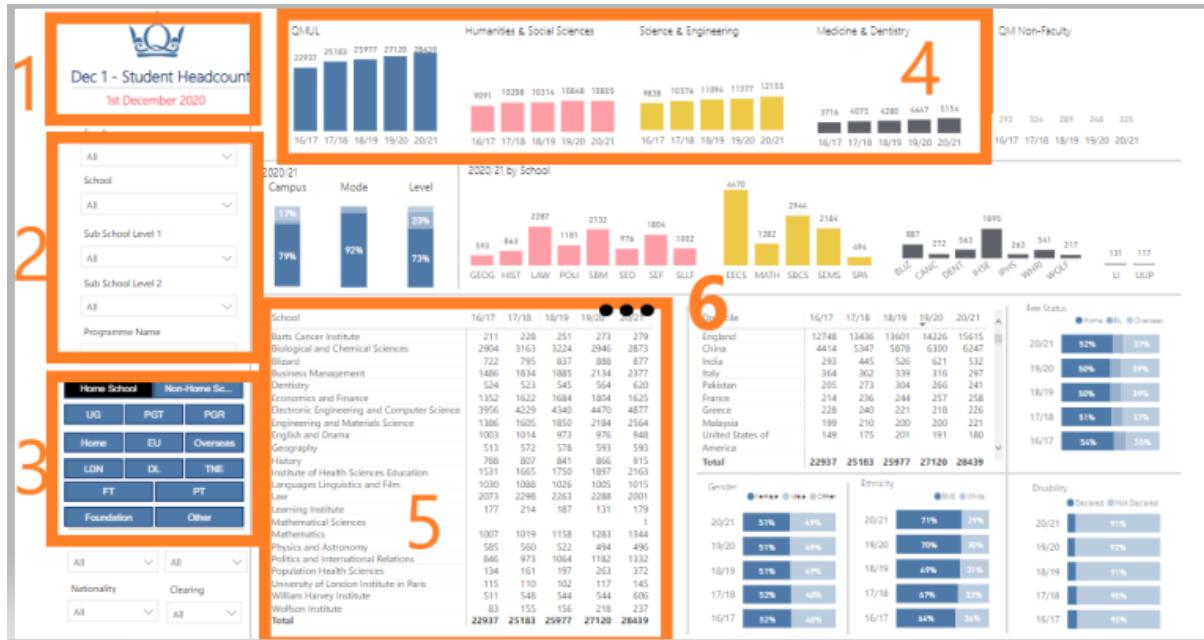


The dashboard is interactive so if you click on a bar relating to a specific dashboard the other visualisations will rerender to show you the pattern of usage over time and which team built it.

The chart showing the most popular dashboards is designed to enable you to quickly see if you are missing out on something that is popular with other users.

Design Principles

The following screen shot is of the Dec 1 student headcount dashboard which is a bronze dashboard that all members of staff at QM have access to.



- Section 1 of the dashboard contains the crown which shows that the design principles have been followed and that the data in the dashboard has been through beta testing. The text in red beneath the crown shows you when the data in the dashboard were last refreshed. Some data in powerbi is updated daily, other data (such as the info in this dashboard) are updated on an annual basis.
- Section 2 of the dashboard contains the filters that you can use to tailor the dashboard to show the information you are interested in.
- Section 3 contains the 'block filters'. These are the most commonly applied filters in the student and staff related dashboards. They are shown in the block format so that if you need to screen shot the dashboard it is east to see which filters are applied. Note that the home school filter is set as default. This means that the student numbers appear in the home school for the programme they are studying. If someone from a school wants to see the student numbers for the students on joint programmes where the home school is a different school select the 'non-home school' filter and these numbers will appear.
- Section 4 gives the student numbers at university and faculty level. The colour scheme is consistent across all dashboards with blue showing QM totals, pink showing HSS, mustard representing S&E and grey for SMD. Note also that the dashboards are set up to show the highest level information at the top and as you look lower down the screen you get the data at a lower level of granularity.
- Section 5 gives the student numbers at school level.
- If you hover your curser in the top left hand corner of section 5 a set of additional functionality becomes available. The two most popular features are the double downwards pointing arrows –

this allows you to drill down to subschool 1 and subschool 2² and programme level in student dashboards.

If you click on the triple dots on the right hand side you get the option to export the data. You can either download a summarised version of the data or the underlying data into excel.

The screenshot shows a table of data with a context menu open over it. The menu includes options like Add a comment, Chat in Teams, Export data (highlighted with a yellow box), Show as a table, Spotlight, Sort descending, and Sort ascending. The table has columns for various years and subjects.

16/17	17/18	18/19	19/20	20/21	
211	228	251	273	279	
2904	3163	3228	2946	2873	
722	795	837	877		
1486	1834	1885	2134	2177	
524	523	545	564		
1352	1622	1684	1804		
1950	4229	4346	4470		
1386	1605	1850	2164	2564	
1003	1014	973	938	940	
213	572	578	583	593	
768	807	841	866	915	
1531	1665	1750	1897	2163	
1030	1068	1026	1005	1015	
2073	2298	2303	2288	2005	
177	214	187	131	579	
7007	10196	1158	1263	1344	