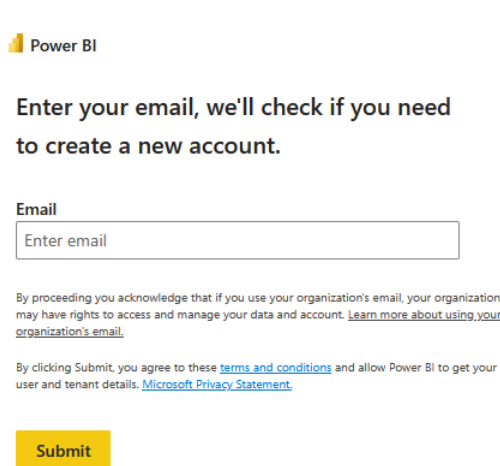


New to PowerBI? Start here!

ACCESSING POWER BI

Users can access Power BI through a direct browser link (app.powerbi.com). Users may be prompted to enter their University credentials when accessing Power BI:



Power BI

Enter your email, we'll check if you need to create a new account.

Email

By proceeding you acknowledge that if you use your organization's email, your organization may have rights to access and manage your data and account. [Learn more about using your organization's email.](#)

By clicking Submit, you agree to these [terms and conditions](#) and allow Power BI to get your user and tenant details. [Microsoft Privacy Statement.](#)

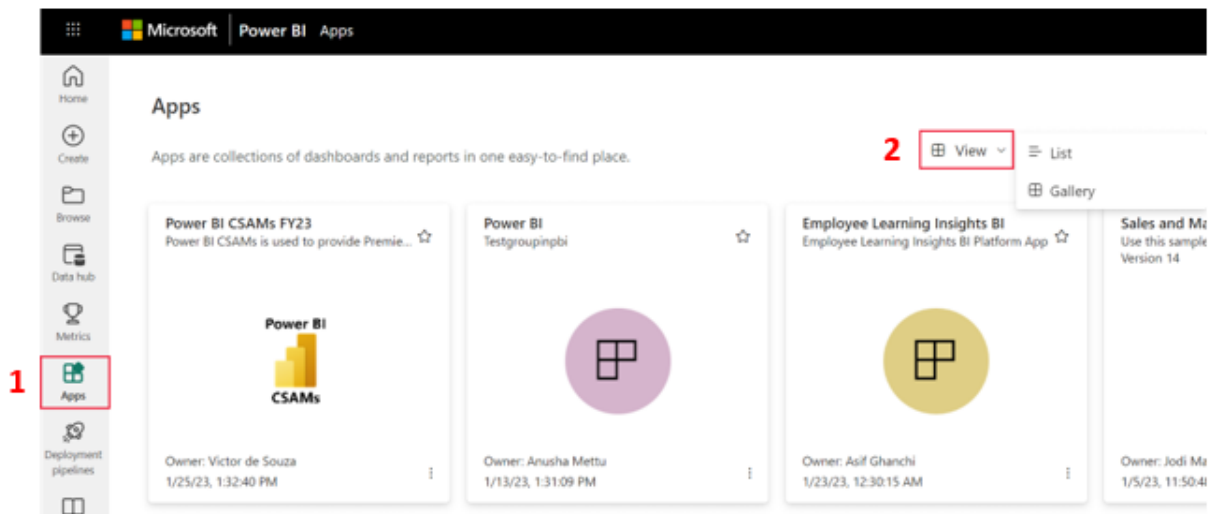
Submit



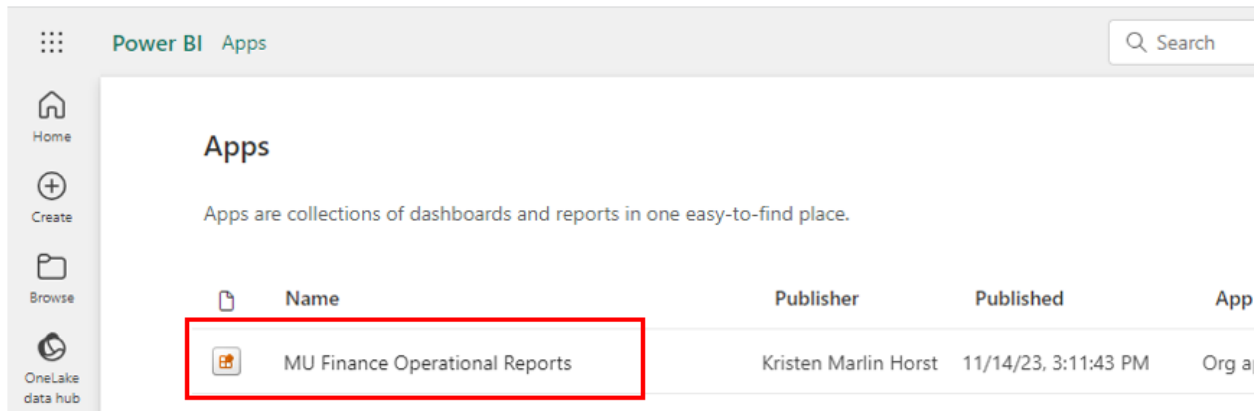
I have PowerBI – now what?

ACCESSING REPORTS

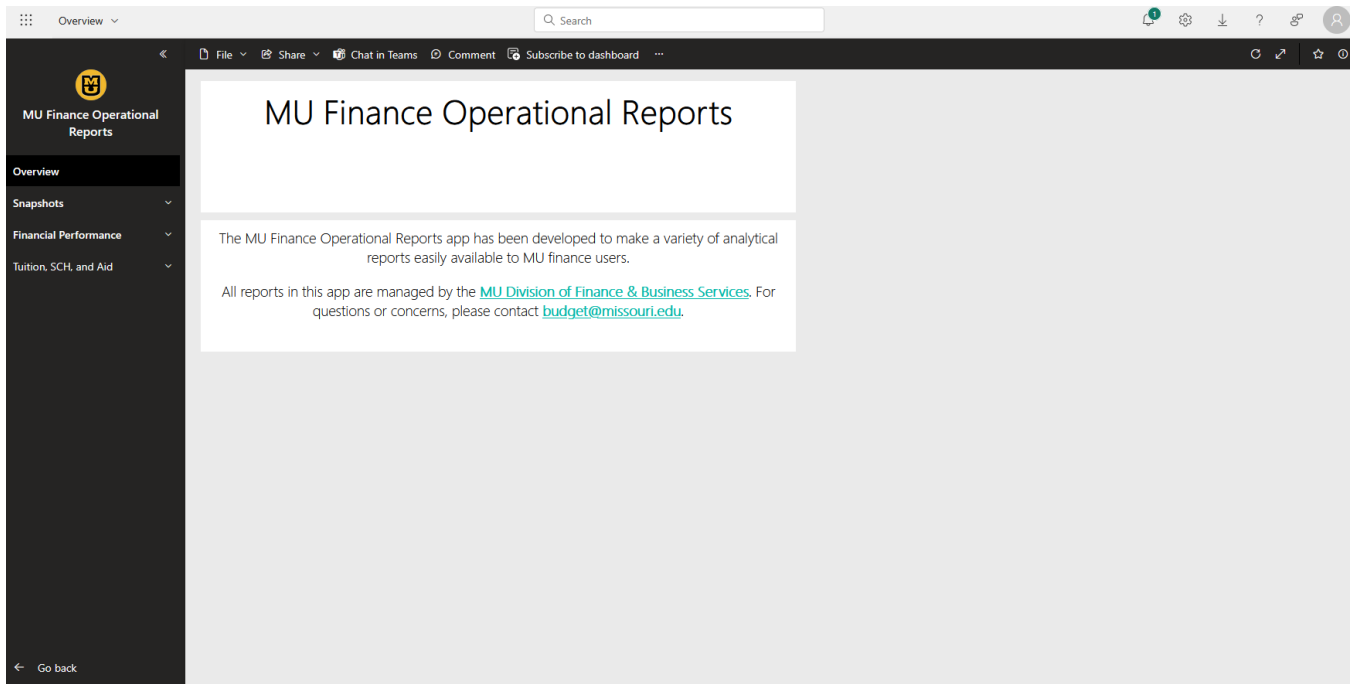
After logging into Power BI, users will see the Power BI Home screen. Select **Apps** from the navigation pane on the left (see box 1). The first example below shows the App page view set to **Gallery**. You can select **View** and then choose **List** to see your apps as a list instead of tiles (see box 2).



Next, select the **MU Finance Operational Reports** app tile (or from the list) to open existing reports in Power BI.



Users should now see a screen similar to the image below. The left side of the screen shows various report categories. Selecting the arrow next to each category will open the menu of reports available for each category.

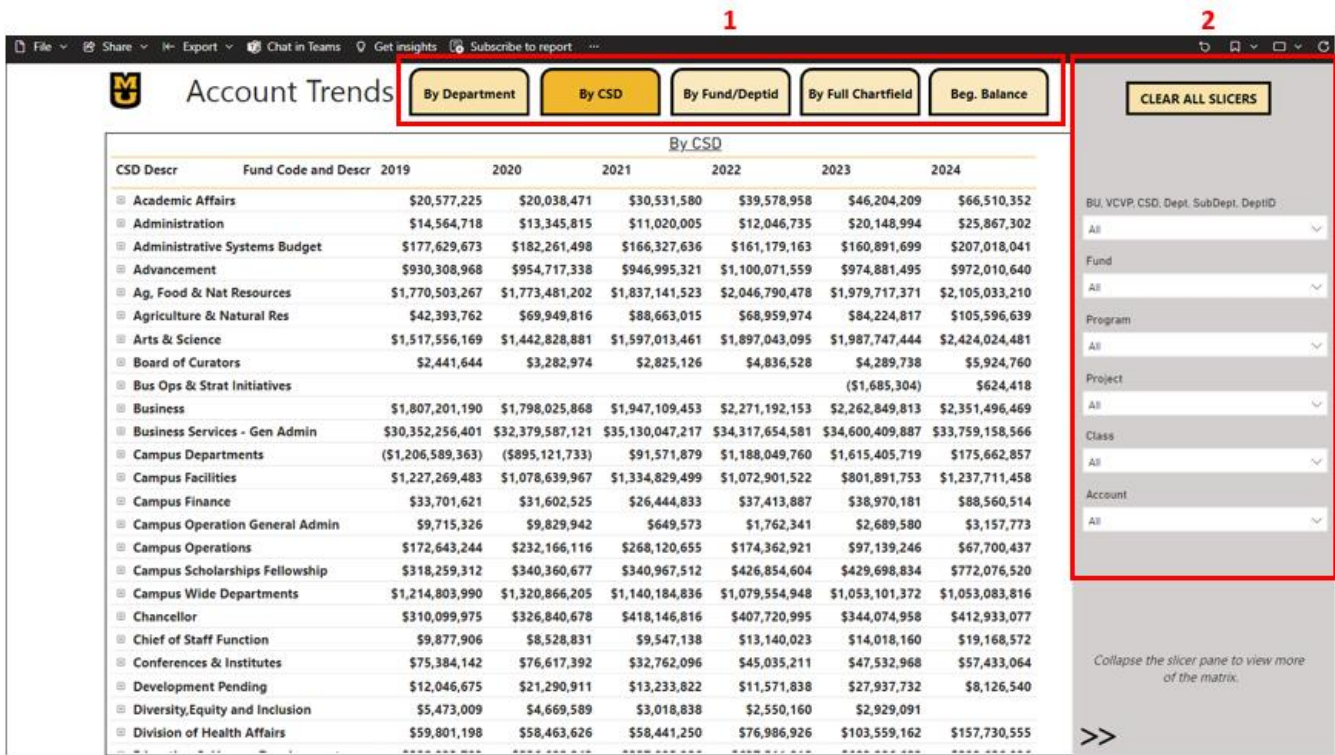


RUNNING REPORTS

Select a report category from the navigation panel on the left side of the screen to open the reports available in that category.



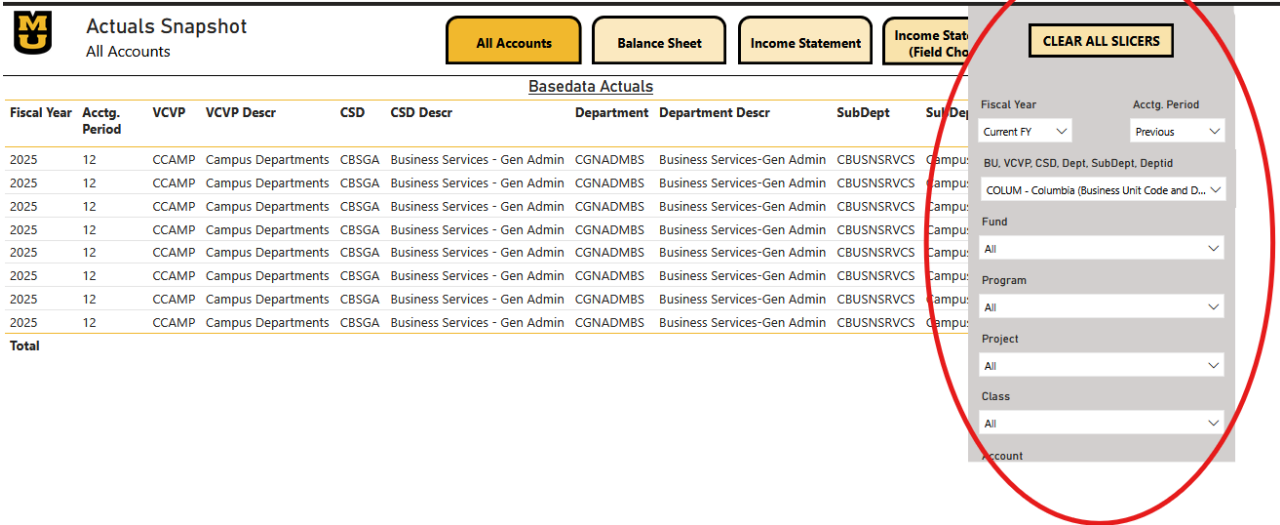
Users can change their report point-of-view (POV) by selecting a report tab across the top of the screen (see box 1) and/or by editing the slicers on the right side of the screen (see box 2).



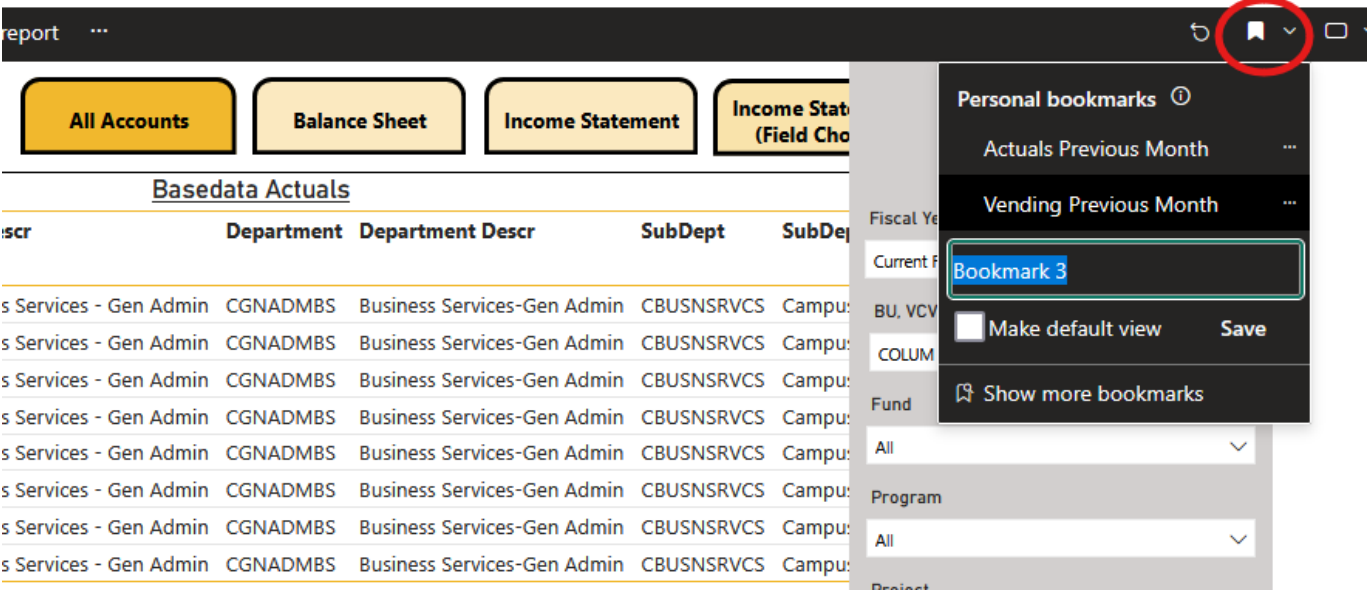
BOOKMARKING REPORTS

A new shortcut in PowerBI utilizes a bookmarking feature that provides quicker access to prior month data. The bookmark will save your search criteria so that whenever you reopen it, your search will yield the same type of information. This is available for all reports.

Let's say, for example, you want to set up a bookmark for a [Snapshot \(Actuals\)](#) that returns the most recently completed month in the current fiscal year for C3222016. You would begin by opening the Actuals Snapshot report as normal and set the search parameters in the slicer panel:



Once the slicers are set, select the bookmark symbol above the slicer panel. Here you can name and save the bookmark, and even make that bookmark a default view when you open the report. You now can switch between pre-set searches without having to reenter the slicer information.



An important note about bookmarks: bookmarks only exist per report. So, all bookmarks you create in Snapshot (Actuals) will not appear in Ending Balances. You will need to make separate bookmarks for each report.

CUSTOMIZING REPORT FIELD CHOICES

For certain reports, you are now able to customize which sections of a chartfield string you wish to include. The reports included in this update are [Snapshot \(Actuals\)](#), [Account and Beg. Balances](#), [Ending Balance and Deficit](#), and [Pay by Month Actuals](#). To access these new features, first open the report you are customizing and select the tab with the label “(Field Choice)” in its title.



Actuals Snapshot
All Accounts

- All Accounts
- Balance Sheet
- Income Statement
- Income Statement (Field Choice)

Basedata Actuals

Fiscal Year	Acctg. Period	VCVP	VCVP Descr	CSD	CSD Descr	Department	Department Descr	SubDept	SubDept Descr	Fund - Level 2	Fund - L
2024	12	CADM	Campus Operations	CADMN	Campus Operations	CVCADMIN	Operations Administration	C0860002	V C ADMINISTRATIVE SERVICES	UNIVERSITY	CURREN
2024	12	CADM	Campus Operations	CADMN	Campus Operations	CVCADMIN	Operations Administration	C0860037	FINANCE & OPERATIONS RESERVE	UNIVERSITY	PLANT F
2024	12	CADM	Campus Operations	CADMN	Campus Operations	CVCADMIN	Operations Administration	C0860037	FINANCE & OPERATIONS RESERVE	UNIVERSITY	PLANT F
2024	12	CADM	Campus Operations	CADMN	Campus Operations	CVCADMIN	Operations Administration	C1110001	FINANCE & OPERATIONS SERVICES	UNIVERSITY	CURREN
2024	12	CADM	Campus Operations	CADMN	Campus Operations	CVCADMIN	Operations Administration	C1110001	FINANCE & OPERATIONS SERVICES	UNIVERSITY	CURREN
2024	12	CADM	Campus Operations	CADMN	Campus Operations	CVCADMIN	Operations Administration	C1110001	FINANCE & OPERATIONS SERVICES	UNIVERSITY	CURREN

- All Accounts
- Balance Sheet
- Income Statement
- Income Statement (Field Choice)

000.

Field Choice

- Select all
- Fiscal Year
- Acctg. Period
- VCVP
- VCVP Descr
- CSD
- CSD Descr
- Department
- Department Descr
- SubDept
- SubDept Descr
- Fund - Level 2
- Fund - Level 3

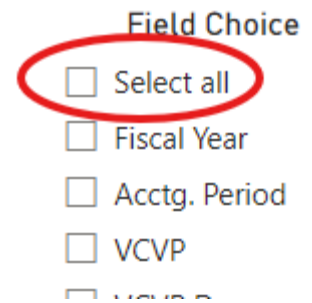
Department Descr	SubDept	SubDept Descr	Fund
Operations Administration	C0860037	FINANCE & OPERATIONS RESERVE	U
Operations Administration	C1110001	FINANCE & OPERATIONS SERVICES	U
Operations Administration	C1110001	FINANCE & OPERATIONS SERVICES	U
Operations Administration	C1110001	FINANCE & OPERATIONS SERVICES	U
Operations Administration	C1110001	FINANCE & OPERATIONS SERVICES	U
Operations Administration	C1110001	FINANCE & OPERATIONS SERVICES	U
Operations Administration	C1110001	FINANCE & OPERATIONS SERVICES	U
Operations Administration	C1110001	FINANCE & OPERATIONS SERVICES	U
Operations Administration	C1110001	FINANCE & OPERATIONS SERVICES	U
Operations Administration	C1110001	FINANCE & OPERATIONS SERVICES	U

Once opened, you will see a column with field choices appear on the right of your screen defaulted to include every option:

If you wish to remove any option from the report, simply uncheck the box next to the item. When you uncheck the box, balances shown will automatically readjust to whichever category you are using.

- Field Choice
- Select all
 - Fiscal Year
 - Acctg. Period
 - VCVP
 - VCVP Descr
 - CSD
 - CSD Descr
 - Department
 - Department Descr
 - SubDept
 - SubDept Descr

However, anytime you add a selection, it is added at the end of the report. So, if you remove "VCVP Descr" and then readd it, it will reappear after "PCS Description", not after "VCVP". You can fix this by unchecking the "Select all" box and selecting the boxes in the exact order you want them.



As you can see, when selecting categories for the report, they become organized by the order in which they are selected, *not* necessarily how they appear in the field choice selection column:

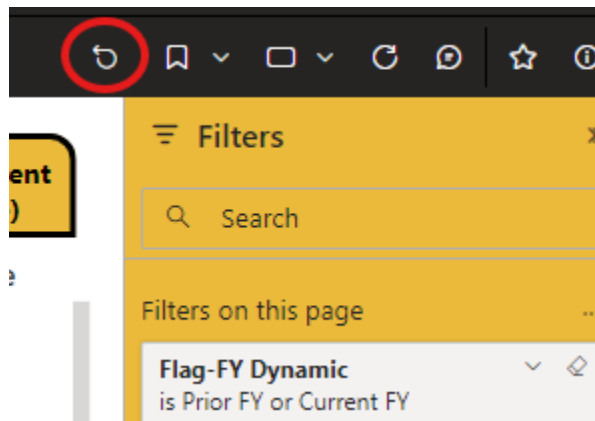
Income Statement

Fiscal Year	VCVP	Fund	Department	CSD
2024	CADM	0000	CDIRCFAC	CCFAC
2024	CADM	0000	CENERMGT	CCFAC
2024	CADM	0000	CENVHLTH	CRISK
2024	CADM	0000	CFACOPER	CCFAC
2024	CADM	0000	CLANDSCP	CCFAC
2024	CADM	0000	COPGENADM	COPGA
2024	CADM	0000	CPOLICE	CRISK
2024	CADM	0000	CSPCLANNING	CFCLPL
2024	CADM	0000	CSUSTAIN	CCFAC
2024	CADM	0000	CVCADMIN	CADMN
2024	CADM	0090	CDIRCFAC	CCFAC
2024	CADM	0090	CENERMGT	CCFAC
2024	CADM	0090	CPLANDES	CFCLPL
2024	CADM	0315	CFACOPER	CCFAC
2024	CADM	0350	CFACOPER	CCFAC
2024	CADM	0365	CFACOPER	CCFAC

Field Choice

- Select all
- Fiscal Year
- Acctg. Period
- VCVP
- VCVP Descr
- CSD
- CSD Descr
- Department
- Department Descr
- SubDept
- SubDept Descr
- Fund - Level 2
- Fund - Level 3
- Fund - Level 4
- Fund - Level 5
- Fund - Level 6
- Fund - Level 7
- Fund

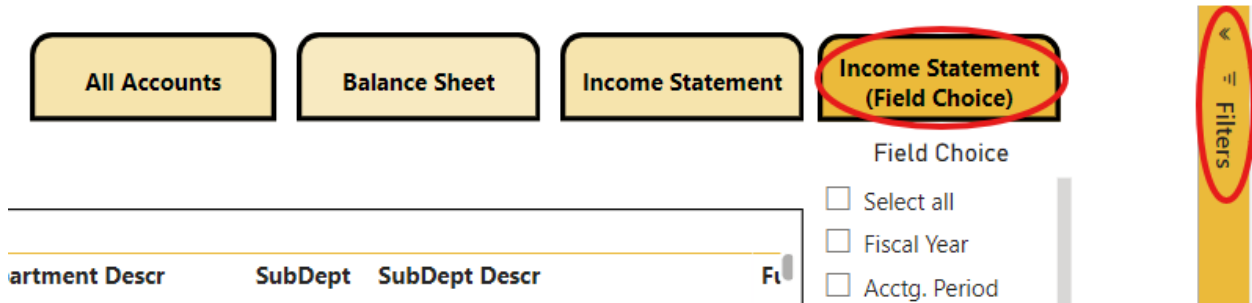
To reset the field choices, simply click the 'Reset Filters' button:



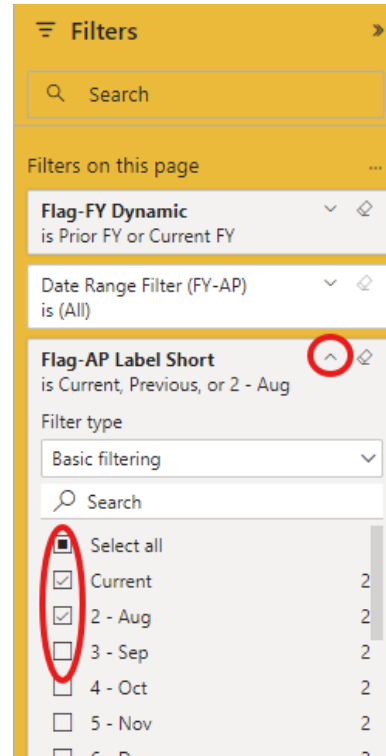
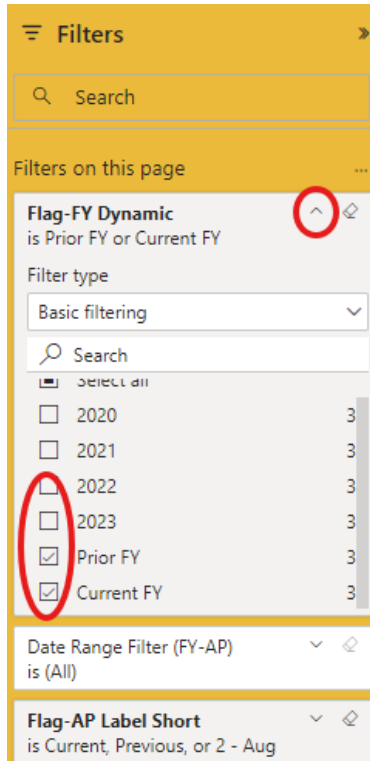
CUSTOMIZING DATE RANGES

Several reports will now allow you to choose a specific date range outside a single fiscal year (e.g. March 2023 – February 2024). This feature can be found in the following reports: [Snapshot \(Actuals\)](#) and [Pay by Month \(Actuals\)](#).

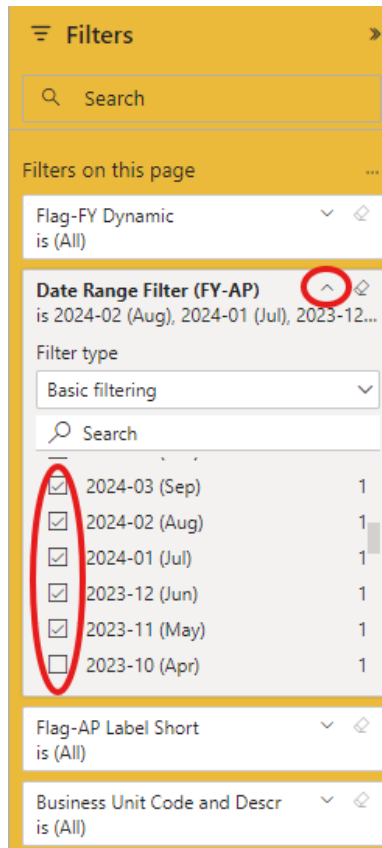
To use this feature in one of these reports, start by selecting the tab that says “(Field Choice + Filter).” Then open the filter pane on the right side of the page:



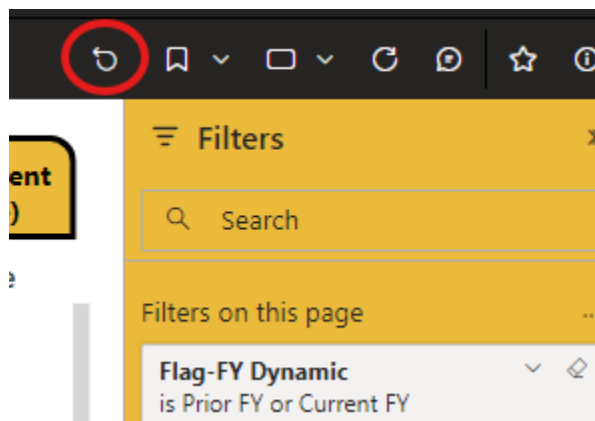
You will first need to select the years and months you wish to review using the “Flag-FY Dynamic” and “Flag-AP Label Short” filters:



Once the full date range has been selected, you can choose the specific months you wish to review in the “Date Range Filter (FY-AP).”



To reset the filters, simply click the ‘Reset Filters’ button:



PERSONALIZE REPORTS

Users can make further edits to the **SAL Variances-MTD and YTD** report using the **Personalize** feature in PowerBI. This functionality is similar to the customizing features mentioned above, however, it allows users to include an additional layer of detail that are not included in the Field Choice option. Specifically, users can add a wide range of data including all fund levels and account hierarchy to the report.

To utilize this feature, open the SAL Variance report under the **Compensation** tab. Once the report opens, minimize your slicers by selecting the double carrots at the bottom of the slicer panel.

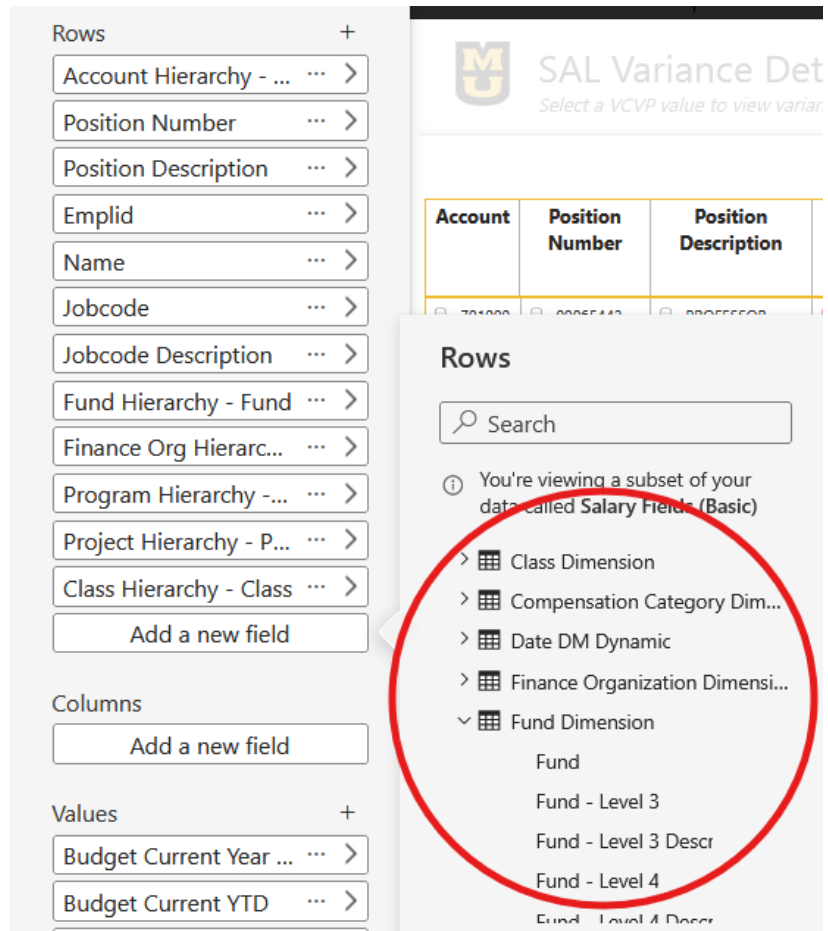
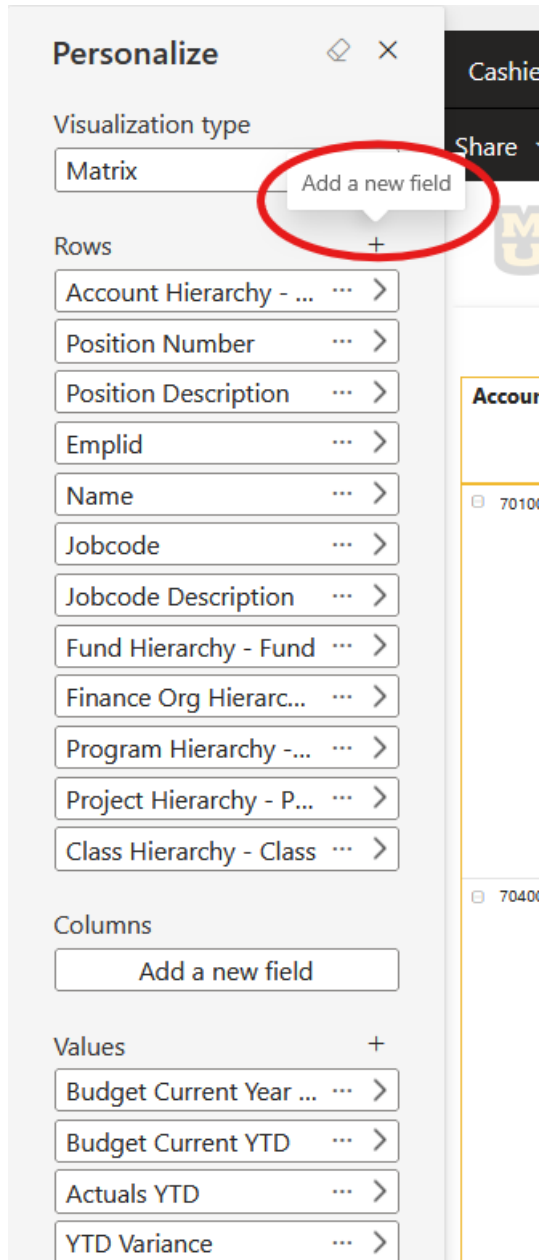
The screenshot shows a PowerBI report titled "SAL Variance Detail - MTD & YTD". The report is displayed in a table format. The table has the following columns: Account, Budget Current Year Total, Budget Current YTD, Actuals YTD, and YTD Variance. The data is filtered for FY2025, Acctg. Period 12. The slicer panel on the right is minimized, showing a "CLEAR ALL SLICERS" button and a "Collapse the slicer pane to view more of the matrix." button. The "Personalize this visual" icon is highlighted with a red circle.

Account	Budget Current Year Total	Budget Current YTD	Actuals YTD	YTD Variance
704000	\$766,375	\$766,375	\$231,033	\$535,342
701000	\$591,625	\$591,625	\$146,597	\$445,028
701500	\$271,784	\$271,784	\$82,981	\$188,803
705000	\$228,392	\$228,392	\$80,184	\$148,207
710025	\$173,903	\$173,903	\$49,736	\$124,167
710010	\$110,342	\$110,342	\$24,697	\$85,645
702500	\$94,000	\$94,000		\$94,000
710050	\$84,858	\$84,858	\$27,613	\$57,245
707100	\$47,767	\$47,767	\$27,906	\$19,861
705500	\$30,934	\$30,934	\$8,950	\$21,984
710027	\$9,269	\$9,269	\$2,727	\$6,542
703800			\$500	(\$500)
708000			\$69,064	(\$69,064)
708050			\$216	(\$216)
Total	\$2,409,251	\$2,409,251	\$752,405	\$1,656,846

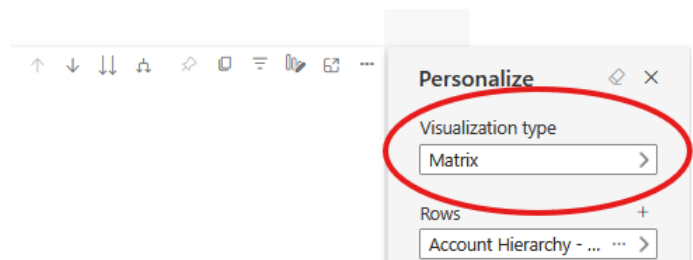
Once the slicer has been minimized select the **Personalize** icon. That button looks like a column chart with a pencil.

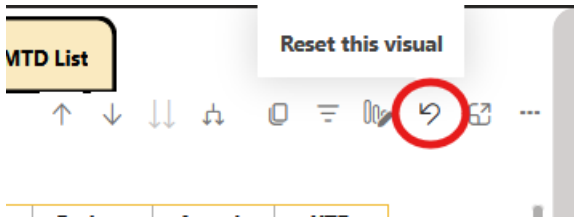
The close-up shows the report controls for the "Total & YTD Variance Detail" table. The controls include buttons for "YTD Matrix", "YTD List", "MTD Matrix", and "MTD List". Below these buttons are navigation icons (up, down, double down, refresh). The "Personalize this visual" icon, which is a column chart with a pencil, is circled in red.

A new tab will appear, where you can personalize the report. Select **Add a new field** and choose the level of data that will be included in the report. Once added, you can drag the field and slot it in the exact order you wish.



If the report you are personalizing uses the "Matrix" Visualization, do not adjust the visualization type as it may cause the report formatting to error out.





However, if you need to reset the field choices or visualization type to the default view, simply click the 'Reset Filters' button:

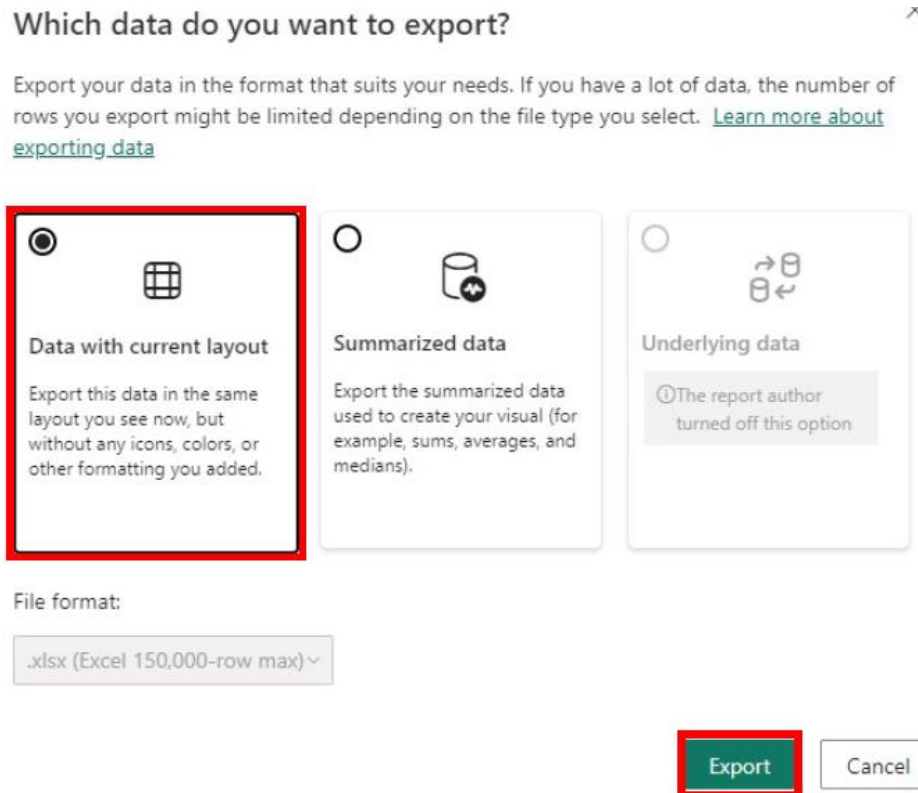
EXPORTING DATA

Report data can be exported into Excel for further analysis by selecting the ellipsis to open **More Options** in the upper right corner of the data set (the slicer panel will first need to be minimized using the arrows located at the bottom of the slicer panel). *DO NOT use the "Export" link located at the top of the report.*

The screenshot shows a report titled 'Account Trends' with a navigation bar at the top containing buttons for 'By Department', 'By CSD', 'By Fund/Deptid', 'By Full Chartfield', and 'Beg. Balance'. The main data area is a table with columns for 'CSD Descr', 'Fund Code and Descr', and years 2019 through 2024. The table lists various departments and their corresponding financial values. On the right side, there is a vertical 'View Slicers' panel with a double left arrow icon at the bottom. In the top right corner of the data table area, there is a 'More options' button (represented by an ellipsis) which is circled in red.

CSD Descr	Fund Code and Descr	2019	2020	2021	2022	2023	2024
Academic Affairs		\$20,577,225	\$20,038,471	\$30,531,580	\$39,578,958	\$46,204,209	\$66,510,352
Administration		\$14,564,718	\$13,345,815	\$11,020,005	\$12,046,735	\$20,148,994	\$25,867,302
Administrative Systems Budget		\$177,629,673	\$182,261,498	\$166,327,636	\$161,179,163	\$160,891,699	\$207,018,041
Advancement		\$930,308,968	\$954,717,338	\$946,995,321	\$1,100,071,559	\$974,881,495	\$972,010,640
Ag. Food & Nat Resources		\$1,770,503,267	\$1,773,481,202	\$1,837,141,523	\$2,046,790,478	\$1,979,717,371	\$2,105,033,210
Agriculture & Natural Res		\$42,393,762	\$69,949,816	\$88,663,015	\$68,959,974	\$84,224,817	\$105,596,639
Arts & Science		\$1,517,556,169	\$1,442,828,881	\$1,597,013,461	\$1,897,043,095	\$1,987,747,444	\$2,424,024,481
Board of Curators		\$2,441,644	\$3,282,974	\$2,825,126	\$4,836,528	\$4,289,738	\$5,924,760
Bus Ops & Strat Initiatives						(\$1,685,304)	\$624,418
Business		\$1,807,201,190	\$1,798,025,868	\$1,947,109,453	\$2,271,192,153	\$2,262,849,813	\$2,351,496,469
Business Services - Gen Admin		\$30,352,256,401	\$32,379,587,121	\$35,130,047,217	\$34,317,654,581	\$34,600,409,887	\$33,759,158,566
Campus Departments		(\$1,206,589,363)	(\$895,121,733)	\$91,571,879	\$1,188,049,760	\$1,615,405,719	\$175,662,857
Campus Facilities		\$1,227,269,483	\$1,078,639,967	\$1,334,829,499	\$1,072,901,522	\$801,891,753	\$1,237,711,458
Campus Finance		\$33,701,621	\$31,602,525	\$26,444,833	\$37,413,887	\$38,970,181	\$88,560,514
Campus Operation General Admin		\$9,715,326	\$9,829,942	\$649,573	\$1,762,341	\$2,689,580	\$3,157,773
Campus Operations		\$172,643,244	\$232,166,116	\$268,120,655	\$174,362,921	\$97,139,246	\$67,700,437
Campus Scholarships Fellowship		\$318,259,312	\$340,360,677	\$340,967,512	\$426,854,604	\$429,698,834	\$772,076,520
Campus Wide Departments		\$1,214,803,990	\$1,320,866,205	\$1,140,184,836	\$1,079,554,948	\$1,053,101,372	\$1,053,083,816
Chancellor		\$310,099,975	\$326,840,678	\$418,146,816	\$407,720,995	\$344,074,958	\$412,933,077
Chief of Staff Function		\$9,877,906	\$8,528,831	\$9,547,138	\$13,140,023	\$14,018,160	\$19,168,572
Conferences & Institutes		\$75,384,142	\$76,617,392	\$32,762,096	\$45,035,211	\$47,532,968	\$57,433,064
Development Pending		\$12,046,675	\$21,290,911	\$13,233,822	\$11,571,838	\$27,937,732	\$8,126,540
Diversity,Equity and Inclusion		\$5,473,009	\$4,669,589	\$3,018,838	\$2,550,160	\$2,929,091	
Division of Health Affairs		\$59,801,198	\$58,463,626	\$58,441,250	\$76,986,926	\$103,559,162	\$157,730,555

When asked which data to export, you will need to select **Data with Current Layout**, and then select **Export**.



Exported data is limited to 150,000 rows. Power BI will not alert users that their data has been truncated, but users can verify whether their exported data is complete by going to the bottom of the Excel file created during the export process. To avoid exceeding the maximum number of rows, users can further limit their data by editing their slicer selections.

	A	B	C	D	E	F	G	H	I	J	K	L
149995	2023	1	COLUM	CPVST	Exec Vice	CVTMD	Veterinar	CDNVTME	Dean of V	C2999069	Dean of V	UNIVERSI
149996	2023	1	COLUM	CPVST	Exec Vice	CVTMD	Veterinar	CDNVTME	Dean of V	C2999069	Dean of V	UNIVERSI
149997	2023	1	COLUM	CPVST	Exec Vice	CVTMD	Veterinar	CDNVTME	Dean of V	C2999069	Dean of V	UNIVERSI
149998	2023	1	COLUM	CPVST	Exec Vice	CVTMD	Veterinar	CDNVTME	Dean of V	C2999069	Dean of V	UNIVERSI
149999	2023	1	COLUM	CPVST	Exec Vice	CVTMD	Veterinar	CDNVTME	Dean of V	C2999069	Dean of V	UNIVERSI
150000	2023	1	COLUM	CPVST	Exec Vice	CVTMD	Veterinar	CDNVTME	Dean of V	C2999069	Dean of V	UNIVERSI
150001	Total											
150002												
150003	Applied filters:Fiscal Year is 2023Business Unit Code and Descr is COLUM - ColumbiaAccounting Period is 0, 1, 10, 11, 12, 2, 3, 4											
150004	Exported data exceeded the allowed volume. Some data may have been omitted.											
150005												