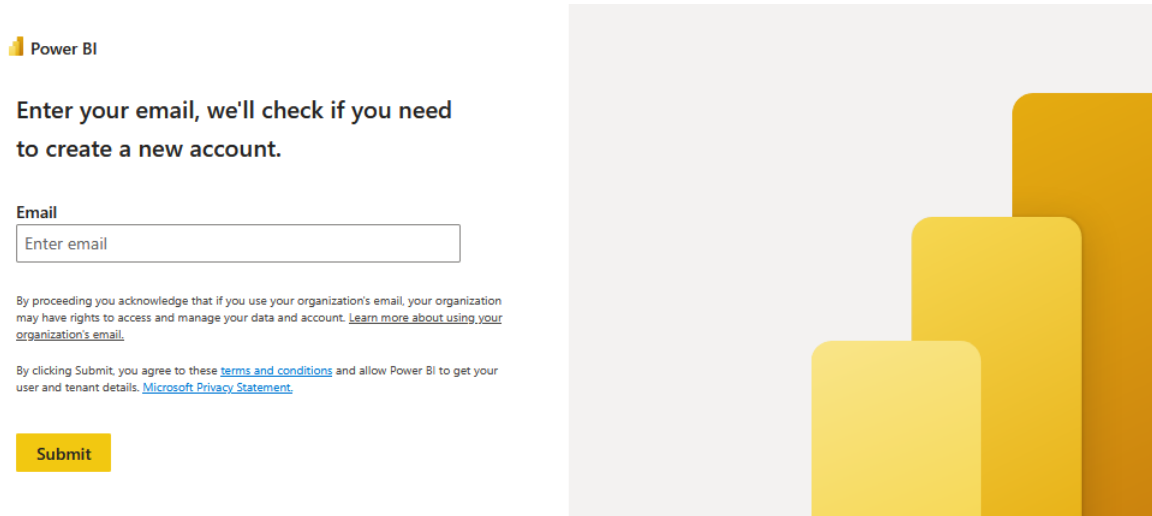# New to PowerBI? Start here!

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:


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).
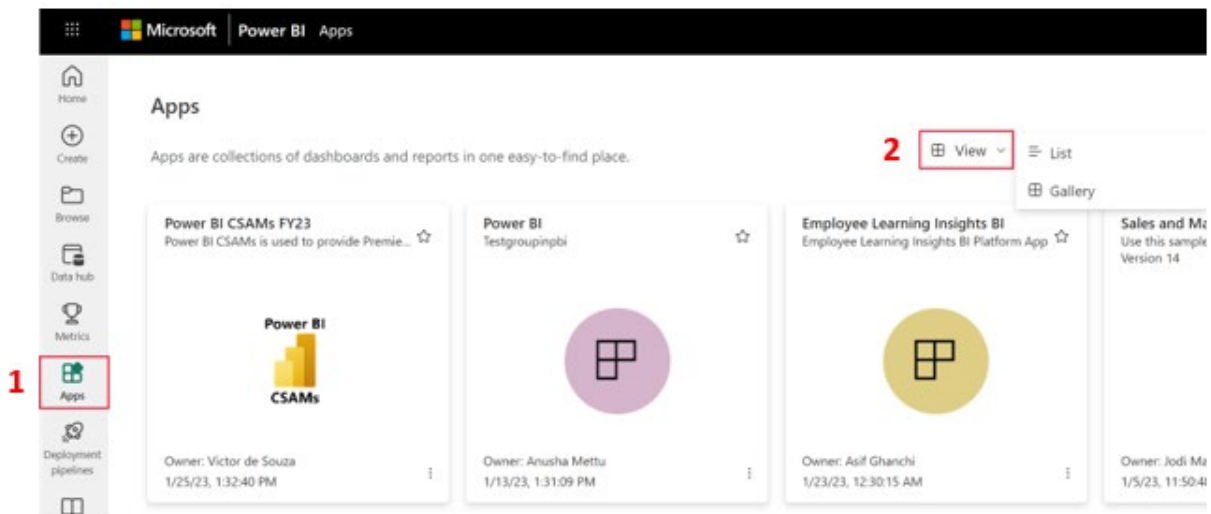
Next, select the **MU Finance Operational Reports** app tile (or from the list) to open existing reports in Power BI.
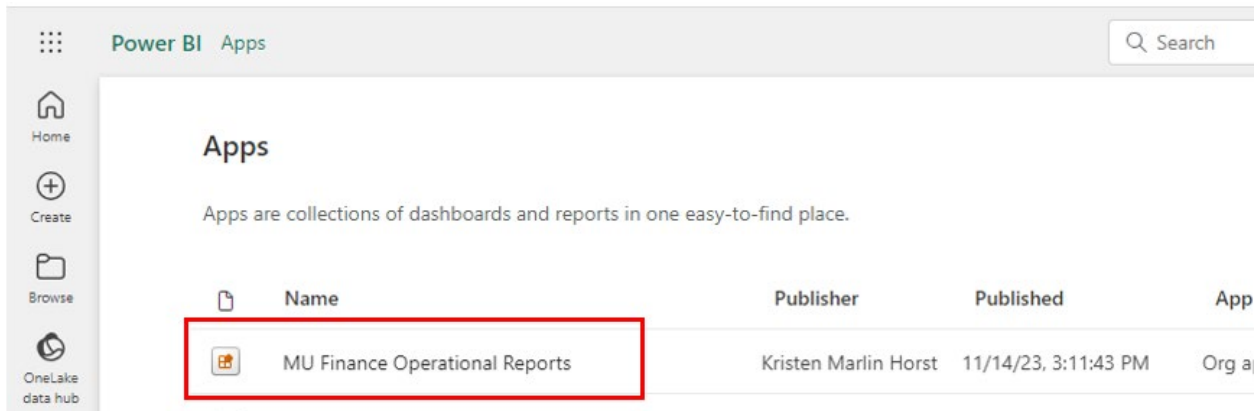
Users should now see a screen similar to the image below. The left side of the screen shows various report categories. Selecting the arrow next to each category will open the menu of reports available for each category.
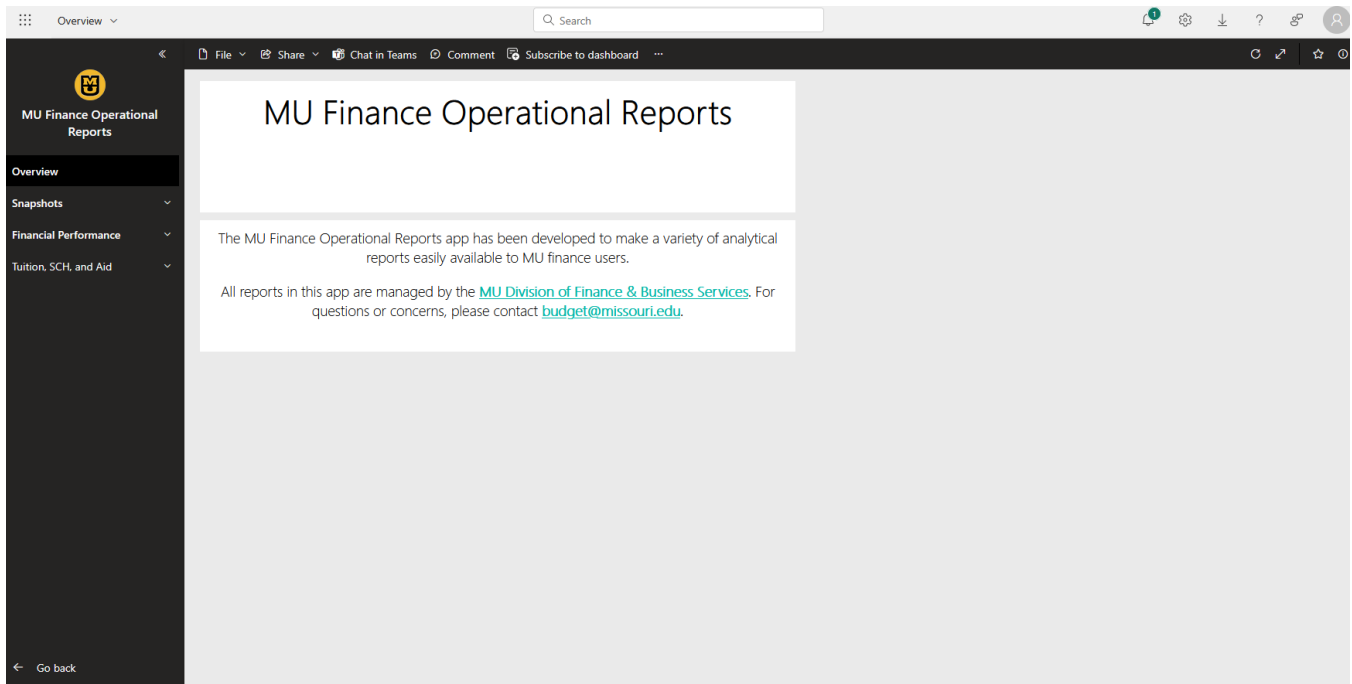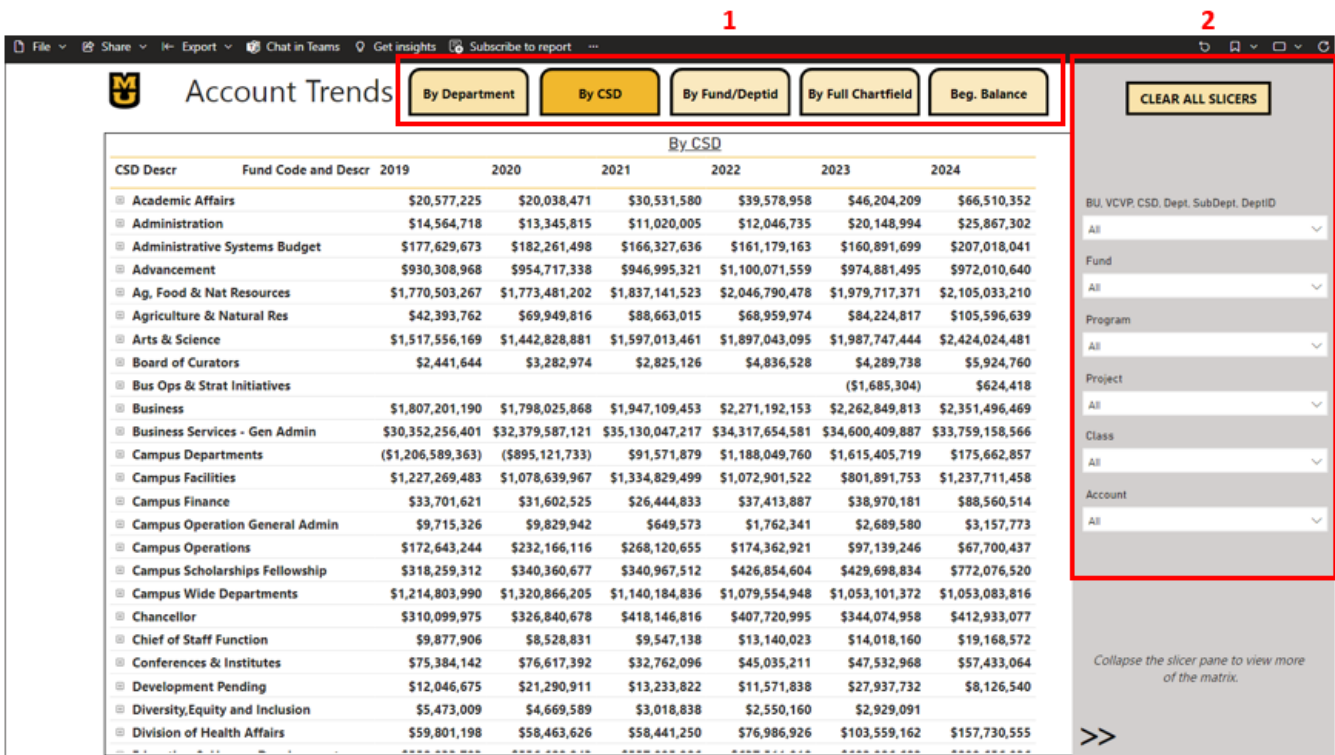
RUNNING REPORTS

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.

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.
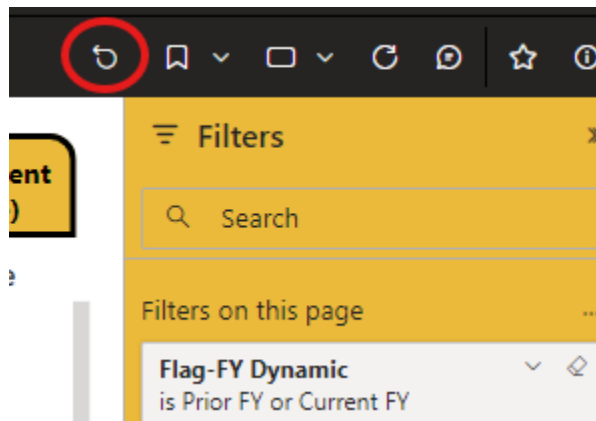
However, anytime you add a selection, it is added at the end of the report. So, if you remove "VCVP Descr" and then readd it, it will reappear after "PCS Description", not after "VCVP". You can fix this by unchecking the "Select all" box and selecting the boxes in the exact order you want them.
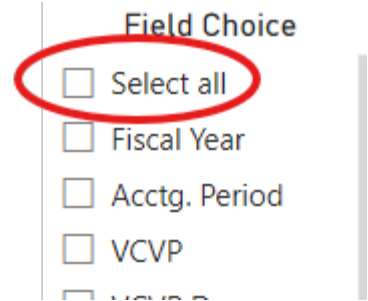
As you can see, when selecting categories for the report, they become organized by the order in which they are selected, *not* necessarily how they appear in the field choice selection column:


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:
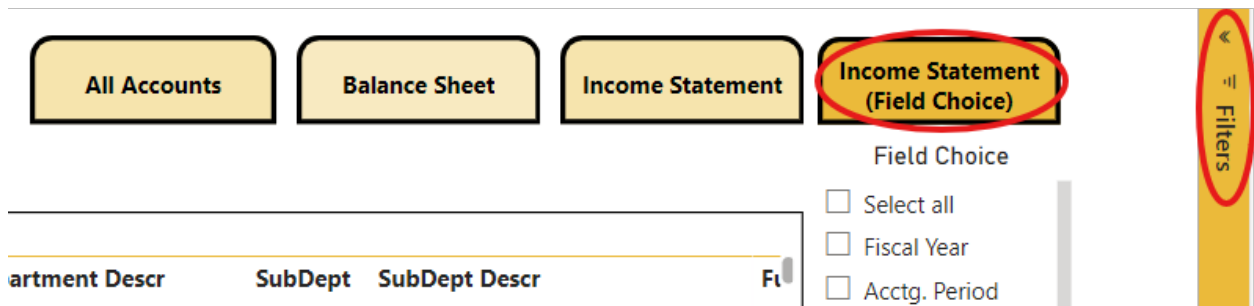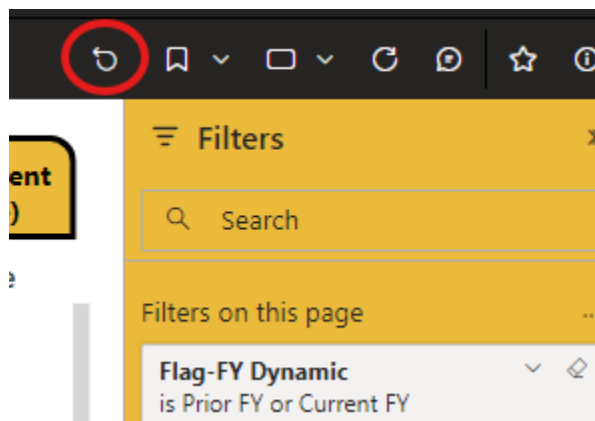

You will first need to select the years and months you wish to review using the "Flag-FY Dynamic" and "Flag-AP Label Short" filters:
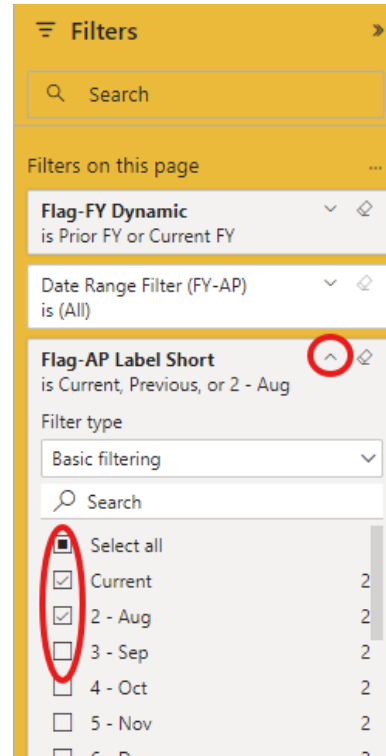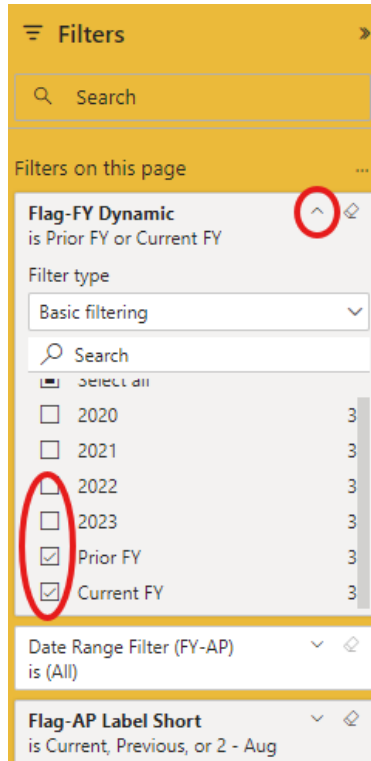
Once the full date range has been selected, you can choose the specific months you wish to review in the "Date Range Filter (FY-AP)."
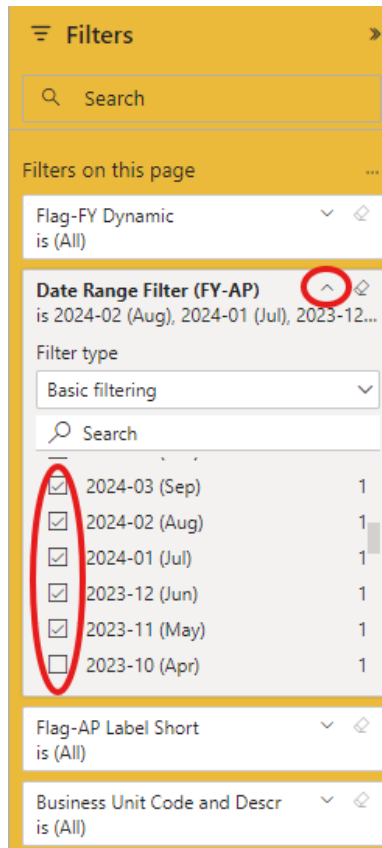
To reset the filters, simply click the 'Reset Filters' button.:

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.*

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	UNIVERSIT
149996	2023	1	COLUM	CPVST	Exec Vice	CVTMD	Veterinar	CDNVTME	Dean of V	C2999069	Dean of V	UNIVERSIT
149997	2023	1	COLUM	CPVST	Exec Vice	CVTMD	Veterinar	CDNVTME	Dean of V	C2999069	Dean of V	UNIVERSIT
149998	2023	1	COLUM	CPVST	Exec Vice	CVTMD	Veterinar	CDNVTME	Dean of V	C2999069	Dean of V	UNIVERSIT
149999	2023	1	COLUM	CPVST	Exec Vice	CVTMD	Veterinar	CDNVTME	Dean of V	C2999069	Dean of V	UNIVERSIT
150000	2023	1	COLUM	CPVST	Exec Vice	CVTMD	Veterinar	CDNVTME	Dean of V	C2999069	Dean of V	UNIVERSIT
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.											