

Using Power BI Reports

Bellarmino University's Office of Institutional Research and Effectiveness produces some reports using Microsoft Power BI. You can interact with a Power BI report to explore data and gain insights. Here are some basic instructions on how to use the tools' features.

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Navigating Between Reports

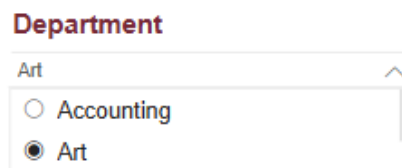
Some Power BI dashboards may contain multiple report pages. Each page will present different visualizations and data.

- Look for a list of report pages on the left side of the dashboard. In some designs, pages may appear as “tabs” located at the bottom or top of the report viewer.
 - Click on a page name or tab to switch to that specific report page.
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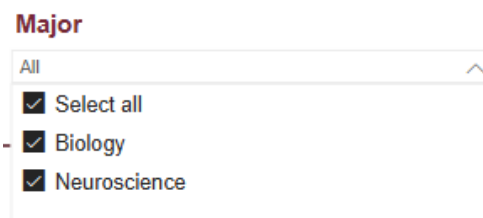
Using Slicers

Slicers allow you to narrow down the data displayed in the report to focus on specific information.

- Slicers appear as interactive lists, dropdowns, or buttons directly on the report page.
- To use a slicer, click on the values you want to include or exclude.
- If a slicer has round “radio buttons” (see example, below) only one selection is permitted at a time.



- If a slicer has square “check boxes” (see example, below) you may select a single value or a combination of multiple values. Click “Select all” to quickly deselect or reselect the entire list of values.



- If unexpected behavior occurs in a report, check all your selections carefully. Incompatible selections may affect the display.
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Resetting to Default Selections

If you've applied many slicers or made selections and want to return to the report's original state, you can reset it.

- Look for a "Reset" icon or button. It may look like a circular arrow.
 - Clicking this icon will clear all your applied slicer selections, returning the report to its initial default view.
 - If you experience unusual report behavior, resetting your slicers is a quick way to clear any incompatible selections and start over.
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Hovering and Tooltips

Many visualizations in Power BI reports provide additional details when you hover your mouse pointer over data points.

- Move your mouse cursor over a bar in a bar chart, a segment of a pie chart, a specific line on a graph, or even a cell in a table.
 - A tooltip (a small pop-up box) may appear, displaying more specific information about that data point, such as exact values, percentages, or categories.
 - Tooltips are also a quick way to view values when a chart segment is very small and the label is not visible.
 - Many reports contain buttons for “additional information” and hovering or clicking that button will display that information.
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Interactivity Between Charts and Tables

One of the most powerful features of Power BI reports is their interactivity. When you select a data point in one visualization, it often filters or highlights related data in other visuals on the same page.

- Click on a bar in a bar chart, slice in a pie chart, specific row in a table, or point on a line graph.
- Observe how other charts and tables on the page dynamically update to reflect your selection. This allows you to quickly see how your selected data point relates to other aspects of the dataset.

- To clear a selection and return to the original view, simply click outside the selected area in the visual, or click the same data point again.
 - If a chart has a legend (e.g., different colored bars representing categories), clicking on an item in the legend might filter or highlight only that specific category across the report. Clicking it again will usually deselect it.
 - In some visualizations (especially those published on the university's public website), there may be very limited interactivity to help protect students' privacy.
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Using Full-Screen Mode

Full-screen mode provides a larger view of the report, removing browser clutter when a report is embedded on a webpage.

- Look for a full-screen icon (often a diagonal arrow or four outward-pointing arrows).
 - Click this icon to enter full-screen mode.
 - To exit full-screen mode, press the Esc key on your keyboard or click the full-screen icon again.
 - When in full-screen mode navigation to individual pages will be available at the bottom of the screen. Click the arrow next to the current page name to see the list of all pages.
 - Some functions, such as sharing or resetting to default selections, may be unavailable in full-screen mode.
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Printing and Sharing Reports

Depending on how the report is shared with you, you might have options to print or share. Keep in mind that Power BI is a tool intended to provide interactive and dynamic explorations of data, and many reports are not well-suited to printing.

- **Printing:**
 - Look for a print icon (often a printer symbol) within the Power BI report viewer or a "... (more options) menu.

- If no specific print button is available, you can usually use your web browser's print function (e.g., Ctrl+P or Cmd+P). Keep in mind that browser printing might not always perfectly format the report, especially if it's very interactive or long.
 - **Sharing:**
 - Some reports may offer a "Share" icon (often an arrow pointing upwards or a three-dot connection symbol) within the report viewer.
 - Clicking this might provide options to:
 1. Copy a direct link to the report, which you can then paste into an email or message.
 2. (Less common) Embed codes for websites or social media sharing options.
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Additional Tips and Tricks for Users

Here are some additional tips to enhance your experience with Power BI reports:

- **Explore Everything:** Don't be afraid to click around! Many elements in a Power BI report are interactive, even if they don't immediately look like buttons. Hovering your mouse is always a good first step.
- **Undo with Browser Back:** If you make a selection or apply a slicer and want to go back to the previous state quickly, your web browser's back button can often act as an "undo" for your navigation within the report pages.
- **Contextual Menus:** Sometimes, right-clicking on a visual or data point can reveal a contextual menu with additional options like "Show as a table" or "Export data." These options can be useful for more in-depth analysis.
- **Data Export (if available):** For specific visuals like tables or charts, you might be able to export the underlying data. Look for a "..." (more options) icon usually in the top right corner of the visual, and then select "Export data" or "Export to CSV." This allows you to analyze the data further in a spreadsheet program.