

Power BI Documentation

Overview

Power BI is a data visualization application used by Information Resource Management (IRM) at University Advancement to convert data into a more visually appealing and interactive format. Power BI uses Advance as its data source. Data is refreshed daily, and visualizations will include Advance data as recent as the previous day.

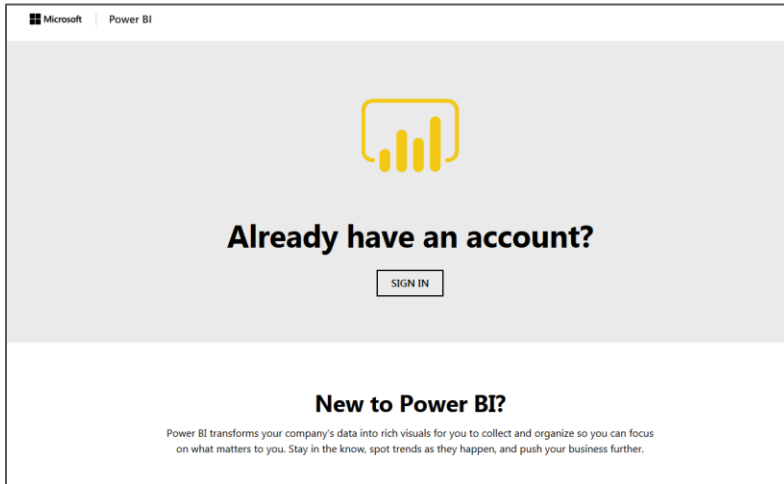
If you have any problem accessing/navigating Power BI, please contact [Brian White](#) for training/support.

If you have any questions related to the information/data provided in the reports or if you think that your department/unit will benefit from custom reports/dashboards specific to your department's needs, please feel free to send your requests/queries to ua-reports@uci.edu.

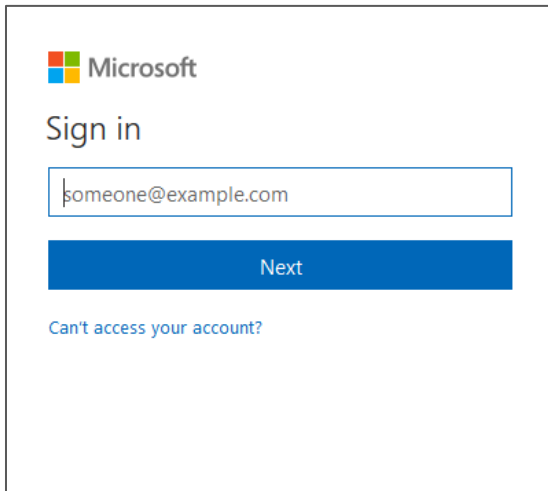
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How to Sign In

1. Visit <http://app.powerbi.com> and click Sign In.

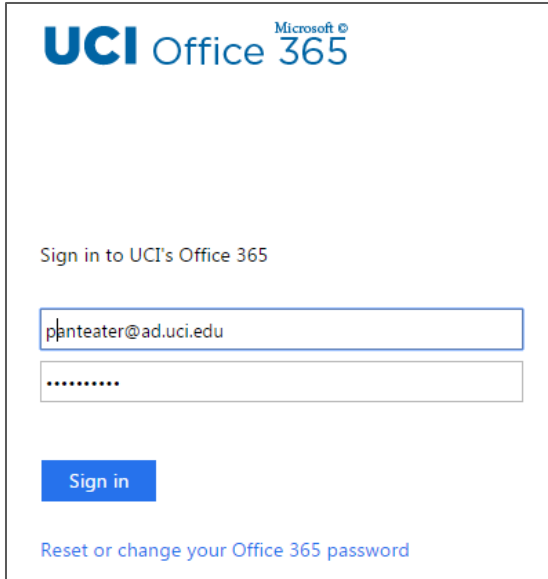


2. Enter the ad version of your UCI email address (UCInetID@ad.uci.edu) and click Next at the Microsoft login screen.



3. At the UCI Office 365 logon screen, enter the ad version of your UCI email address (UCInetID@ad.uci.edu) and computer/exchange password.

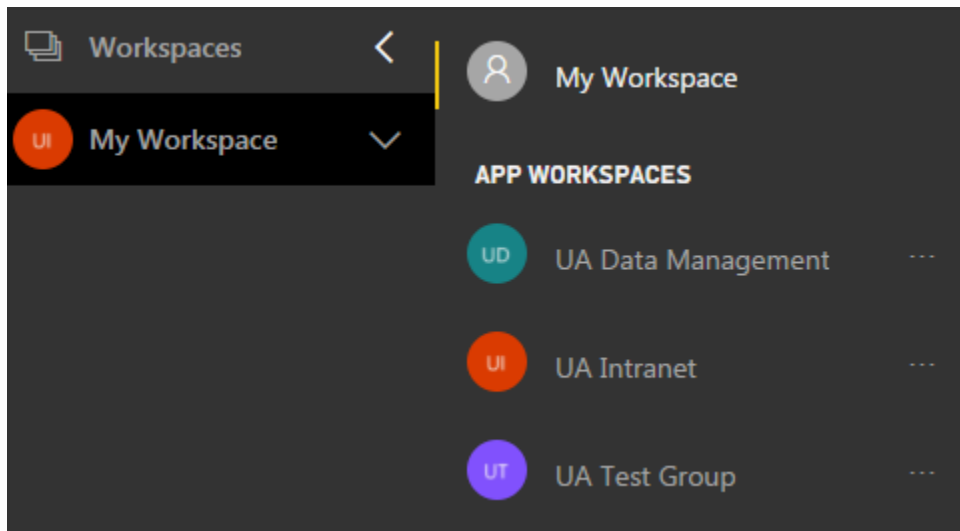
NOTE: @uci.edu will not work. You must use @ad.uci.edu.



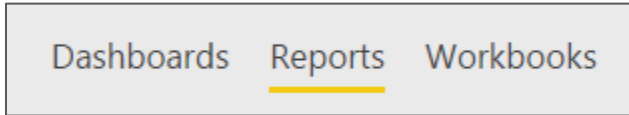
NOTE: You can also access Power BI via the intranet: <http://intra.uadv.uci.edu/index.php>. Select Reporting from the main menu. Clicking on a report type will direct you to Power BI.

Opening and Viewing Reports

1. Using the left navigation bar, click Workspaces and select the desired group. The workspaces that are visible are dependent on your permissions.



2. Select Reports from the horizontal menu in the main window.






3. Click on the name of the report set you want to open.

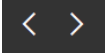
At the bottom of the screen are tabs that represent report pages.



You can view each report page by clicking the tab. For reports that hold several pages, you can scroll through the report pages using the arrow keys to the left.

To maximize screen space, click the hamburger icon  at the top of the left navigation pane. This will minimize the pane. Click again to maximize.

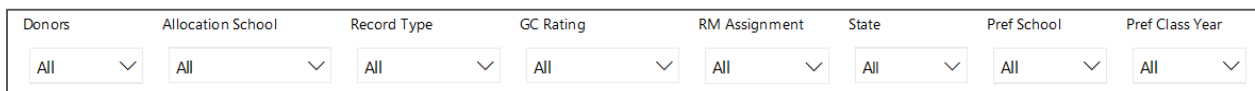
To view reports full screen, use the double ended arrow icon  on the top menu bar. To exit full screen mode, click the double arrows  on the floating toolbar on the bottom right of the screen.

The left and right arrows  on the floating tool bar can be used to navigate through each report page.

Filtering Reports


Filter Using Dropdown Fields/Checkboxes

Data can be filtered using the dropdown filters found at the top or right of the report. Available filters are dependent on the report.



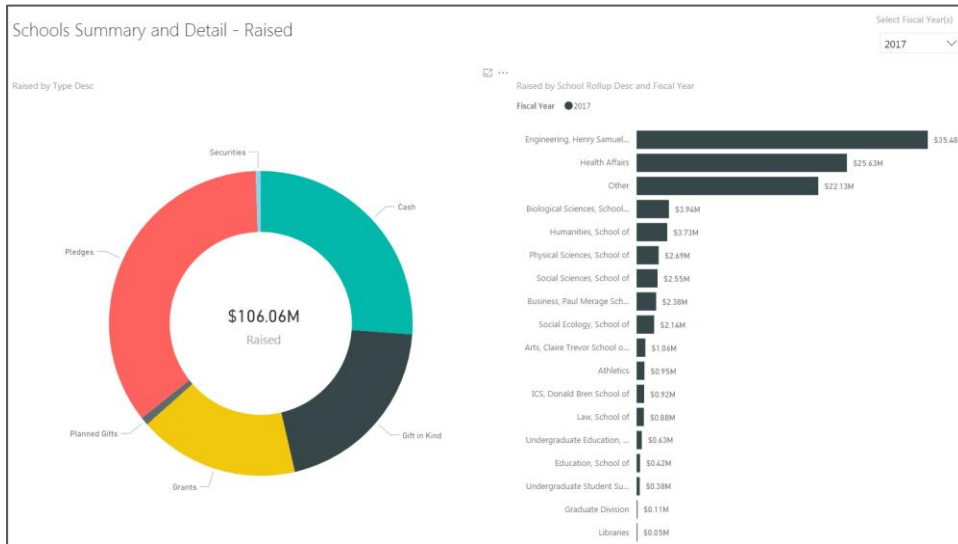
Multiple filters can be applied at once. Within each filter, more than one value can be selected by using Ctrl-click. Click the down arrow to open the filter dropdown and the up arrow to minimize the dropdown once selections have been made.

As filters are applied, the data on the chart/graph will update as well.

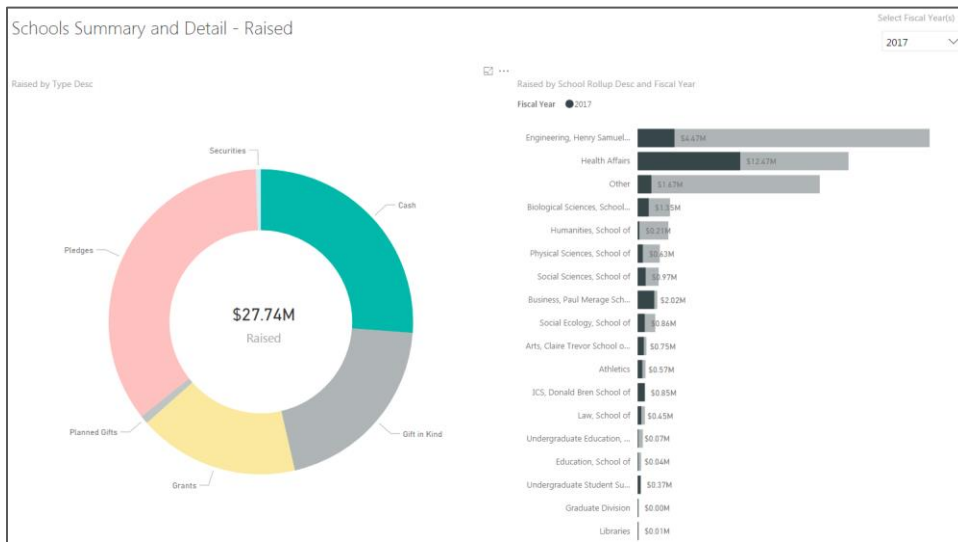
To clear a filter, click on the eraser icon  to the right of the filter.

Filter Using Charts and Graphs

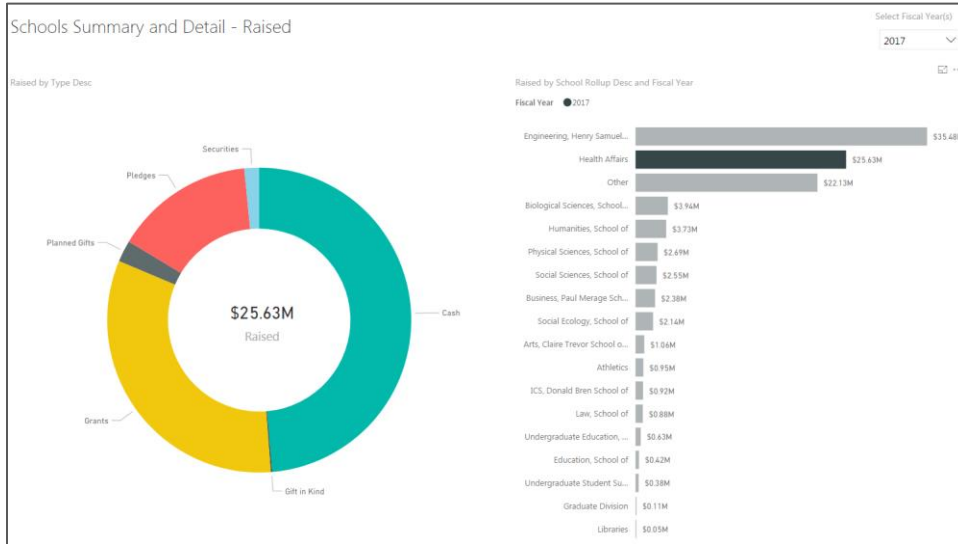
On reports with multiple visuals, the data on each visual is linked to each other. Clicking a data point on one chart will update the data on the other chart(s) and vice versa.



For example, clicking Cash on the doughnut chart will update the bar chart to only show Cash gifts.



Clicking Health Affairs on the bar chart will update the doughnut chart to only show Health Affairs gifts.



You can multi-select data points using Ctrl-click. To reset the charts, click on the white space.

Filter Using Drilldowns

When a chart or graph has a hierarchy of data, you can drill down to reveal additional details. For example, in an Amount Raised by School visualization, a hierarchy might include amount raised by all schools at the top level, amount raised by school at the second level and amount raised by unit/department at a third level.

Not all visualizations have a hierarchy. Charts and graphs with a hierarchy can be identified by drill controls in the top left and right corners.



There are two different ways to drill down (and up) in your visualization. Using the drill icons or using the Explore dropdown in the top menu bar.

Drilldown Using Drill Icons

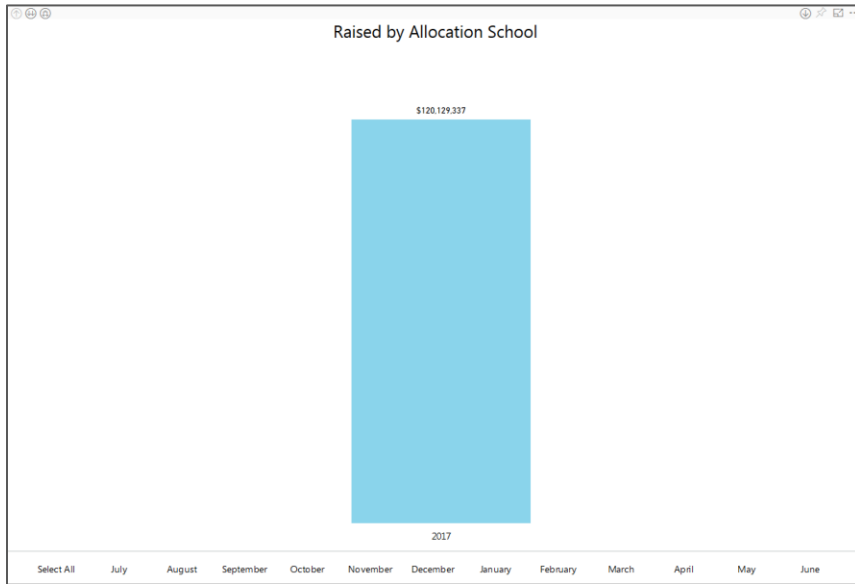
- To enable drill down, select the arrow icon in the top right corner of the visualization.



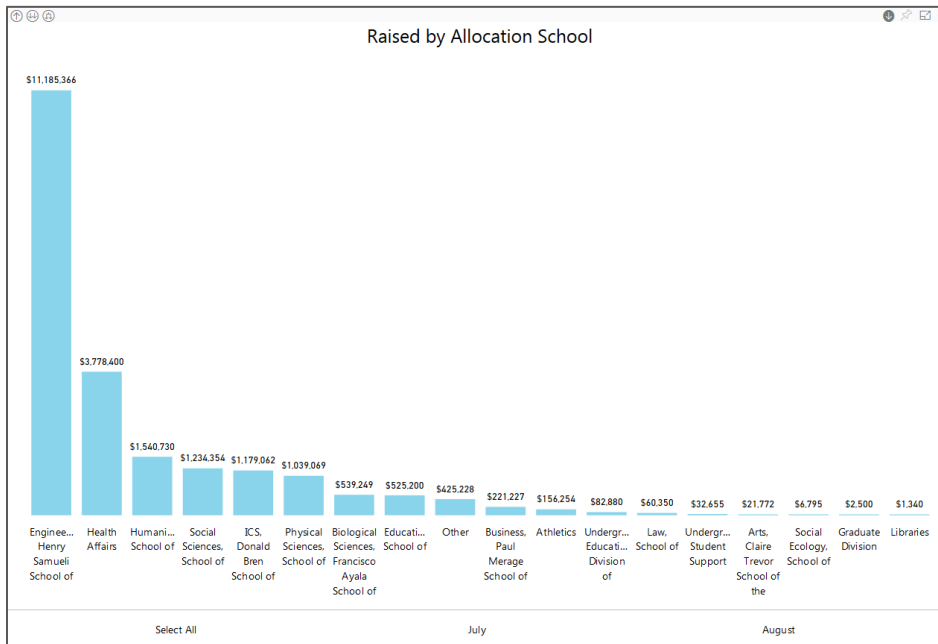
The arrow icon will turn dark, indicating drill down is enabled.



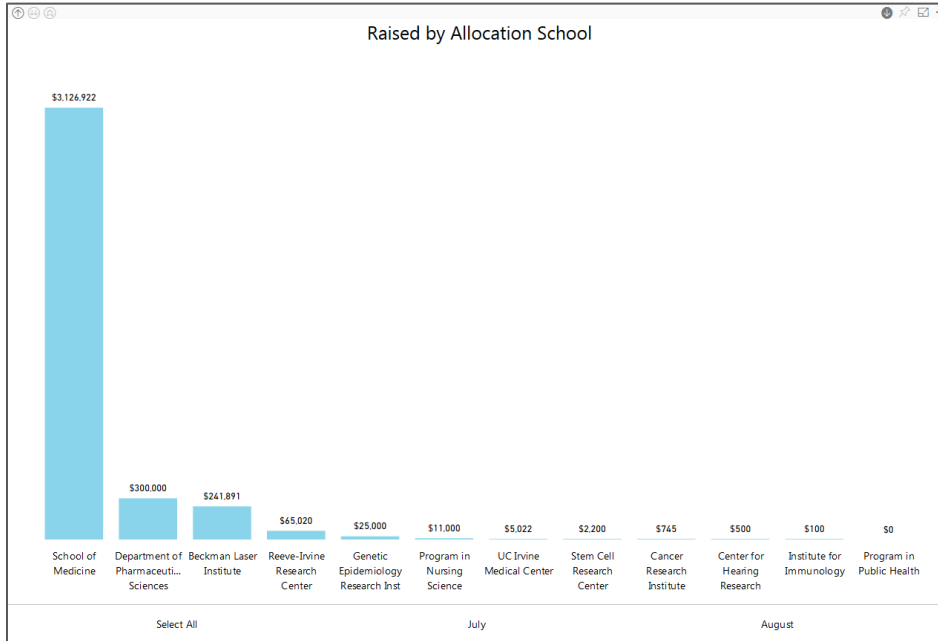
- To drill down one level at a time, click one of the bars/elements of the chart. For example, clicking Total Raised would display amount raised by each school.



After



Clicking on a school would display the amount raised by each unit/department within the school.



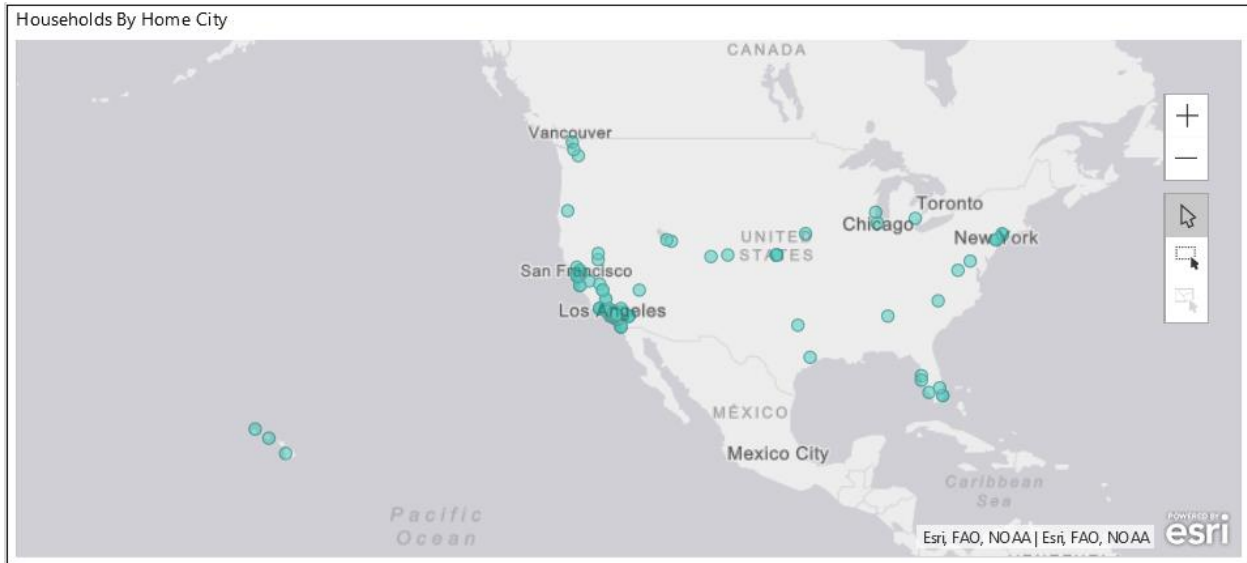
- To drill back up, select the Drill Up icon  in the top left corner of the visualization.



Drilldown Using Explore Dropdown

- To enable drill down, select the visualization to make it active and Select Explore>Drill Down from the top menu bar.
- Once enabled, drill down one level at a time by selecting one of the bars/elements of the chart.
- To drill down all levels at once, select Explore>Show Next Level.
- To drill back up, select Explore>Drill Up.

Filter Using Maps


Reports with a map provide an interactive, geographic representation of records that match selected filters.



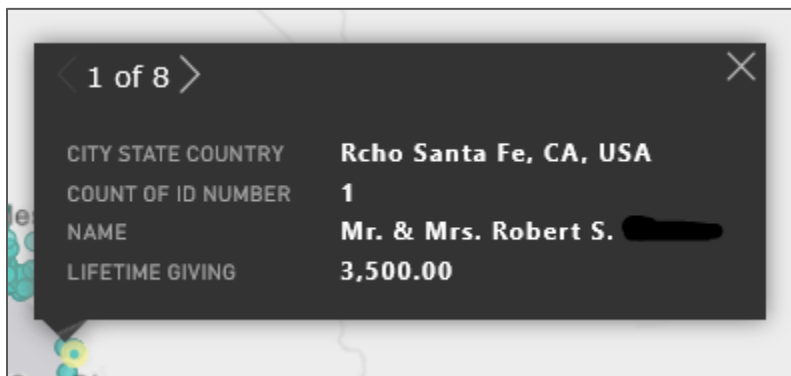
Use the plus icon  to zoom in and the minus icon  to zoom out. To move the map, click and drag.

Below the zoom buttons are selection mode buttons.

 Select individual locations. Ctrl-click to select more than one location.

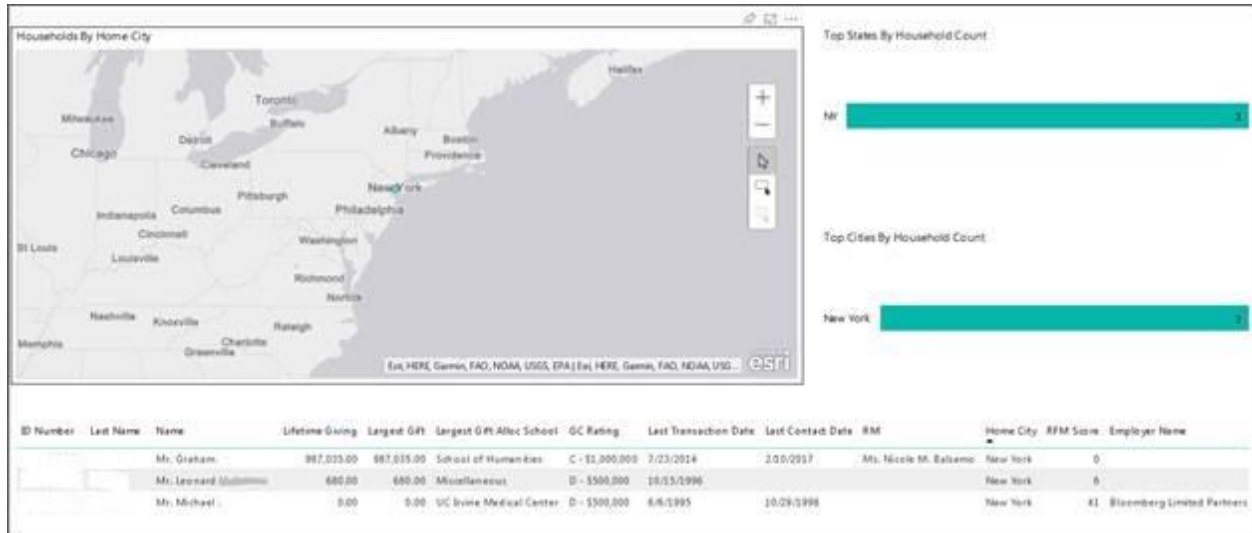
 Draws a rectangle on the map and selects the contained data points.

Placing your cursor over a location will open a pop-up window that shows the detail of each record at the location.



In the example above, there are 8 records in Rancho Santa Fe, CA. The arrow can be used to scroll through the records.

Clicking a location on the map will update the data on any charts/graphs as well. Some reports may also include a list of Advance records that match the selected filters. For example, clicking New York City on the map will cause (a) the Top States chart and Top Cities chart to show New York and (b) the records list to show the associated individuals in New York.



To reset the map, click on any open space on the map.

Self-Service Reporting

Self-service reports give users the ability to quickly view how much has been raised by fund and appeal.

Amount Raised by Fund

UA Reports → Self-Service Report List → Self-Service By Fund

1. Enter the fund number or fund name in the Fund textbox.

Fund

0000 - Convergent Sciences Building

00000 - Geneva Metzler Matlock Endowed Research Fund

00000 - Institute for Memory Impairments & Neurological

08438 - Owen Thomas Memorial Scholarship Fund

The field allows partial matches so it is not necessary to know the exact name of the fund. Typing in “engineering” will display all funds with “engineering” anywhere in the fund name.

- Click to select the fund. If you would like to view more than one fund at once, repeat step 1.

Fund

 Clear All

X 2185 - Sam ueli Sc...
X 2336 - Sam ueli Sc...

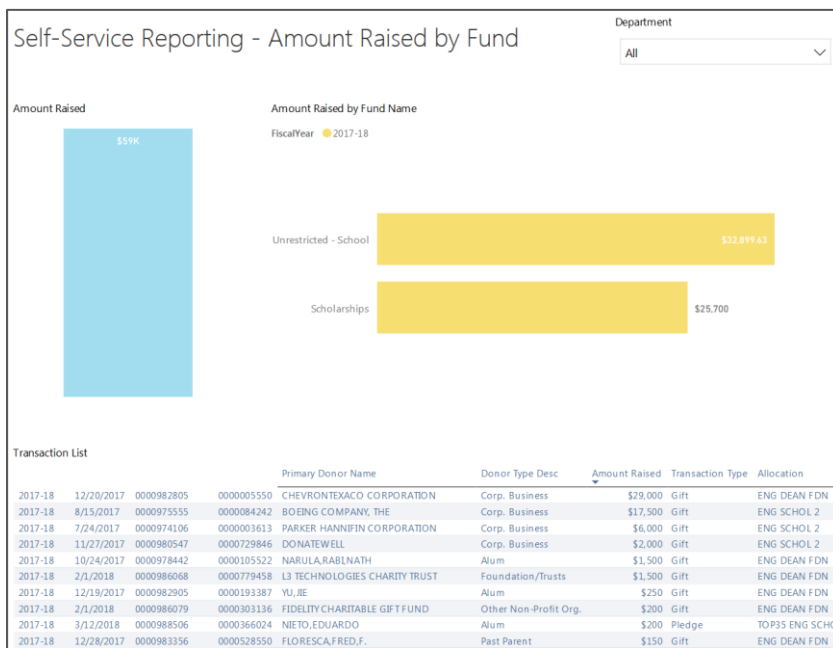
2253 - Engineering Fellowship

2316 - Engineering Student Council

2385 - Biomedical Engineering Research

- Apply additional filters such as Fiscal Year as needed.

The results will include amount raised, amount raised by fund type (research, fellowship, scholarship, etc.) and a list of the individual transactions.



- To export the transactions to Excel, mouse over the transaction list and click the ellipsis on the top right of the list.
- Select Export data and then choose Underlying data.

Amount Raised by Appeal

UA Reports → Self-Service Report List → Self-Service By Appeal

1. Enter the appeal code or appeal name in the Appeal textbox.

Appeal

2017 CYE / Catalog of Giving Opportunities
 2017 Fall – Dr. Federoff Personal Letter
 2017 Fall Appeal – With Cancer Feature/Impact Report
 2017 Holiday Cards

The field allows partial matches so it is not necessary to know the exact name of the appeal. Typing in “cancer” will display all funds with “cancer” anywhere in the appeal name.

2. Click to select the appeal. If you would like to view more than one appeal at once, repeat step 1.

Appeal

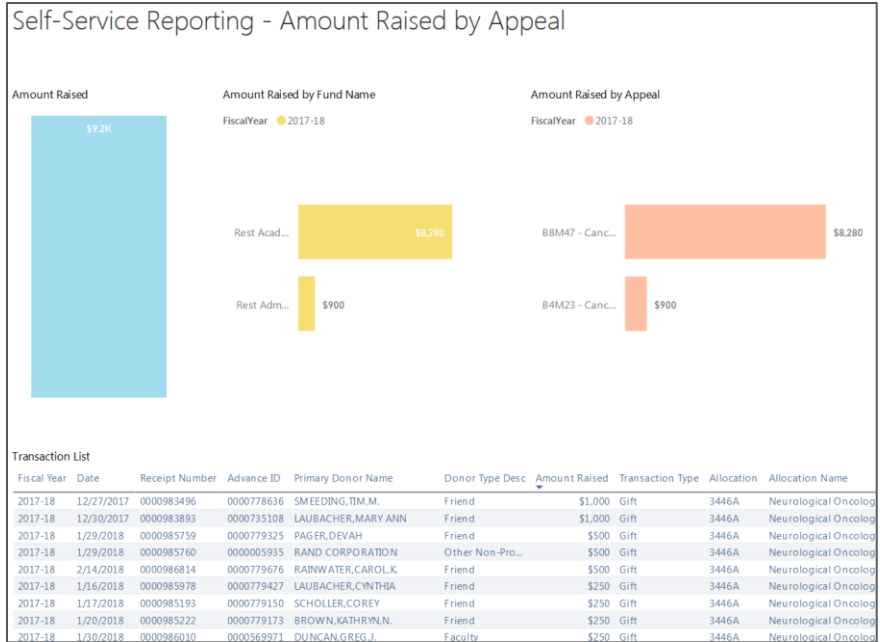
 Clear All

X B8M47 - Cancer P...
X B4M23 - Cancer C...

2017 Fall Appeal – With Cancer Feature/Impact Report
 B7M06 - Fall 2016 Cancer Center Director’s Circle Mailer
 B8102 - MobileCause – Anti Cancer Challenge

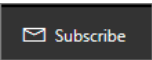
3. Apply additional filters such as Fiscal Year as needed.

The results will include amount raised, amount raised by fund type (research, fellowship, scholarship, etc.) and a list of the individual transactions.



- To export the transactions to Excel, mouse over the transaction list and click the ellipsis on the top right of the list.
- Select Export data and then choose Underlying data.

Subscribe to a Report Page

- From the top menu bar, click  Subscribe.
- You can subscribe to one report page at a time. Select the particular report page from the dropdown.

NOTE: Depending on the report you may have the option to set a frequency of daily or weekly. If the option is not available, you will be sent an email whenever the data is updated, but no more than once per day.

CUSTOMER PROFITABILITY SAMPLE

Subscribe to emails

+ Add another subscription

Page 1 🔔 🗑️

Report page

Page 1 ▼

You will be sent an email whenever the data is updated, but no more than once per day.

[Manage all subscriptions](#)

Save and close
Cancel

- Continue to add report pages as needed by clicking Add another subscription.
- Use the yellow slider to turn the subscription for each page on and off. Setting the slider to Off will not delete the subscription. To delete the subscription, select the trashcan icon.

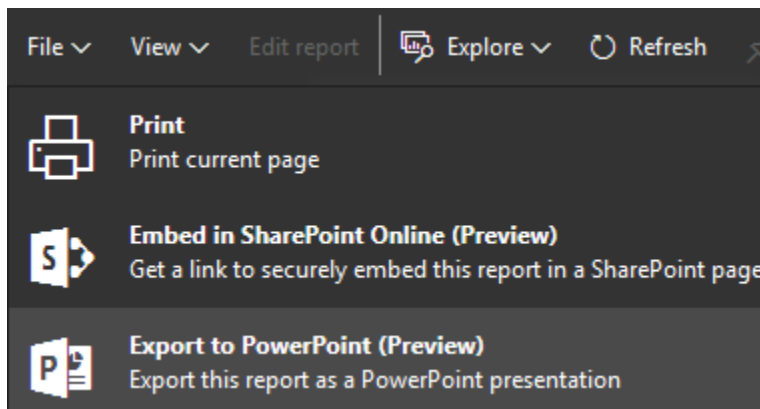


- Click Save and close to save the subscription.

To manage subscriptions, click Manage all subscriptions from the Subscribe to emails dialog.


Export a Report to PowerPoint

- From the main menu, click File – Export to PowerPoint.



NOTE: When exporting to PowerPoint, the entire report is exported and filters are removed. If data is cut off on the Power BI window, it will be cut off on the PowerPoint slide as well.

How to Sign Out

Sign out by clicking the profile icon  on the top right navigation bar and selecting Sign Out.