

*Inform***SU**

# **Admissions Report Training Manual**

Version 1.0  
Created: November 15, 2019

# Introduction to Power BI

## What is Power BI?

Power BI is a Microsoft business analytics service designed to analyze business data and share live, interactive insights. SU faculty and staff will be able to quickly and accurately view tailored reports from multiple data sources through a single, user-friendly platform. Users are able to drill down into data as much or as little as they want. Not only will Power BI be able to surface current reporting needs, but it will empower SU to harness the power of their data in new and innovative ways. Through Power BI, SU will be able to transform data into effective decision-making.

## Navigating to the Power BI service

Official InformSU reports will be available to users on the Power BI service ([app.powerbi.com](https://app.powerbi.com)). You can navigate to the service in multiple ways:

1. Type [app.powerbi.com](https://app.powerbi.com) into any browser window. You will be asked to enter your Office 365 credentials the first time you enter.
2. Go to [seattleu.edu/mysu/](https://seattleu.edu/mysu/) and click the InformSU button.
3. From within another Office 365 product, click the App Launcher waffle at the top left of the screen and search for Power BI in the list of apps.

## Accessing reports

All reports that you have been approved to have access to will be found in the “Shared with me” selection of the left-hand navigation pane. In order to make it easier to find reports that are relevant to your needs, individual reports and/or dashboards are being shared rather than entire report folders or groupings. This not only makes for a better user experience, but it also reduces security risks as users will now only have access to the specific data they need rather than general buckets of data.

Requesting access to reports in Power BI is handled the same way as current reporting. Please refer to the InformSU website for further information on requesting access.

Upon viewing the reports that have been shared with you, you will see that each report has an Owner, which is a reference from the Workspace the report has been shared from (if you have had reports shared with you from multiple workspaces, you will find them grouped by Owner

under the All Shared link on the left side). All official reports and dashboards will show the Owner as InformSU.



## Report Security

Once a report has been shared with a user, that user will not be able to then share the report with a different user. While report data can be exported to Excel or to a PDF, please remember that SU’s FERPA and Data Security policies will be enforced in regard to any data shared that has been generated within Power BI. If you have questions as to whether or not you should be sharing report data, please contact your manager or one of the university’s data stewards.

## Data Sources and Data Refreshes

Data for these reports is being sourced from our new Enterprise Data Warehouse (EDW) which resides in an Amazon Web Services cloud environment. Data for the admission report is a composite of Colleague, Slate, and TargetX and there is a nightly process that pulls data into the EDW. Our new cloud-based EDW allows greater flexibility in development of data marts and enhanced reporting performance.

As with the existing SSRS admissions reports, the data that is presented will be “day old” data, meaning it will be representative of any transactions that were processed by the end of the previous day. Specifically, the Colleague to EDW load happens at 12:00 AM, and the reports themselves are refreshed at 6:00 AM.

For up to date information on the status of report data, any issues with degraded service, or planned outages, please subscribe to InformSU notifications on the [IT Service Desk Status Page](#). This is our primary method for communicating reporting issues.

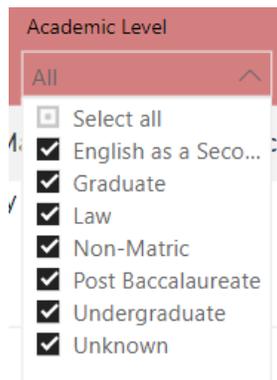
# Navigation of the Admissions Funnel Report

## Selection & Overview



This tab shows high level counts for inquiries, applications, admits, and net deposits and allows users to make slicer selections which will be applied to all future pages of the report.

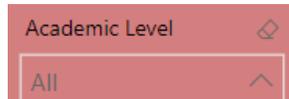
The three slicers on the Selection & Overview page are Academic Level, Admit Group, and Term. In the Term slicer, rather than depict specific terms – e.g., 19FQ – the four upcoming terms are displayed (summer, fall, winter, spring) as the report is designed to show data for upcoming terms only, with comparative YTD and final data for previous years. Users can select multiple options from any of the slicers by checking the box next to the value or they can select all values using the “Select all” option at the top of the list.



The grey text bar below the slicers shows what term values have been selected and is also included on future pages of the report to remind users of the filters being applied to the data on each page.

There are two ways to clear slicer selections:

1. By clicking the eraser icon at the top right of each slicer. This will clear just the selections made in that slicer.



2. By clicking the Reset to default button at the top right of the report window. This will clear selections from all slicers within the report and restore to default settings. This will not clear out any saved bookmarks.



A Date Last Refreshed card is displayed at the top right of the report and indicates the most recent date of the data being presented. This should always show the previous date as data is refreshed once per day. If there has been an issue with the data refresh the Date Last Refreshed will be replaced with a message notifying users that data is not up to date.

Gauges on the left-hand side display year to date (YTD) counts for each of the stages compared to goal and prior year final values. The large text and filled in red section shows the YTD value, a tick mark shows the goal value if one has been set, and the max value of the gauge is a calculation of 110% of the prior year final value.

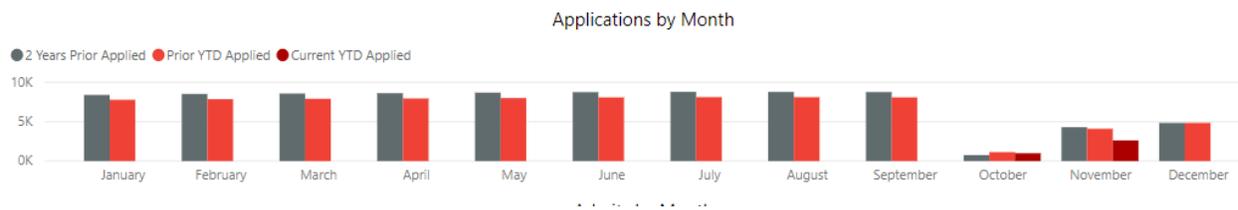


Users can instead view conversion rates by clicking the View Conversion Rates button above the gauge values. All gauges besides the inquiry count will be updated to show the conversion rate from the previous stage.

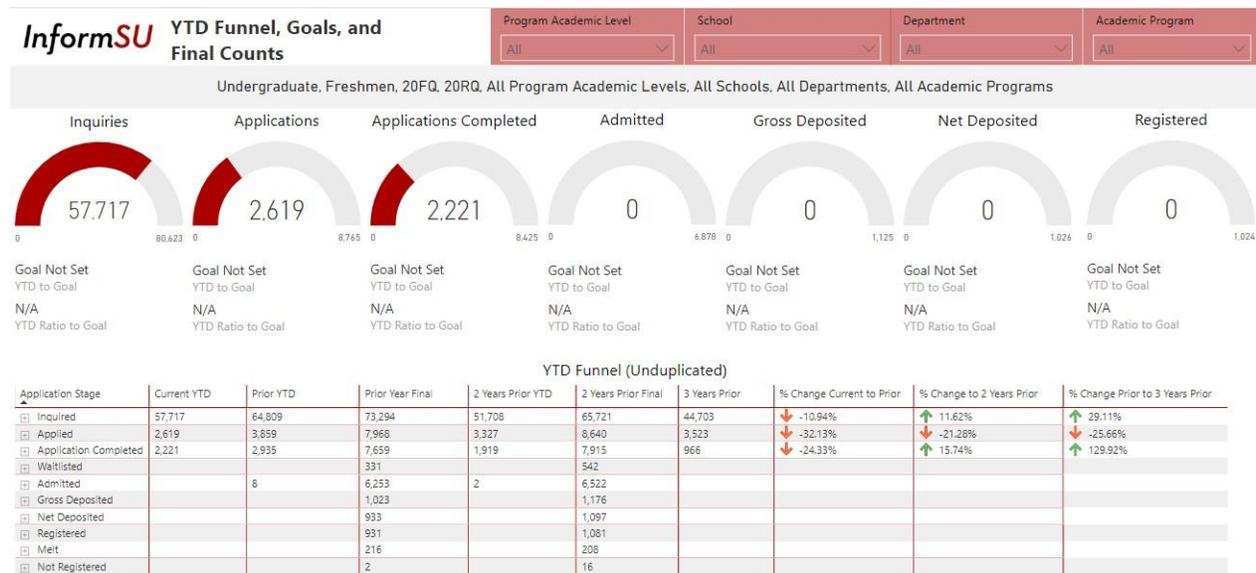


A gauge legend tooltip appears when users hover over a gauge to remind users what values are presented in the gauges.

Monthly bar charts show current YTD aggregate counts compared to prior year values for up to one year before the start of the term. In the below example, the user has selected a fall term meaning that the current YTD count begins in October (a month during which the first EA applications for the following Fall term start coming in). As months pass, the Current YTD count will appear for each month once the month has begun.



## YTD Funnel

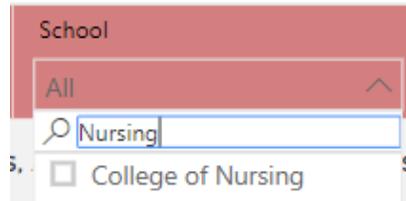


This page displays the full list of application stages and allows the user to view aggregate counts as well as school, department, and academic program level data. Users can also access a detailed list of students for each count displayed in the YTD Funnel (Unduplicated) table.

While slicer selections from the previous report page are still applied, users can further filter visuals by using the four slicers at the top of the page. The Program Academic Level slicer differs from the Academic Level slicer of the Selection & Overview page as the latter refers to the student's academic level based on their inquiry or application while the former is based on the

level of the program the student is inquiring/applying for. The four slicers on this page filter one another so it is best to go from left to right (general to specific) although users can select any of the slicers individually without making a selection in previous slicers.

A search bar has also been included on the School, Department, and Academic Program slicers to allow for easy filtering based on text values (remember to clear/delete the text search here once you find the school/program/other slicer value you're looking for, since whatever you type in will persist, filtering your data by default).



Once a selection has been made it will be included in the grey text bar to indicate that additional filters have been applied.

Gauges on this page follow the same format as the previous page. The goal cards beneath each gauge compare the current YTD value to the goal if one has been set. If no goal has been set, default text will be displayed. Please note: Selections made in the Program Academic Level, School, Department, and Academic Program slicers do not filter goal gauges and cards (right now – this functionality will be added for graduate goals; since undergraduate enrollment goals are set at the level of admit status, and not program/school, these goals will not be populated for undergraduates).

The YTD Funnel (Unduplicated) table replicates the format of the SSRS (legacy) YTD Fall Undergraduate Funnel report and compares three-year YTD counts and final counts for the prior two years. The three right-most columns show the % change comparing the current YTD count with one year prior, two years prior, and three years prior. Icons are included to show the general trajectory of the counts.

YTD Funnel (Unduplicated)									
Application Stage	Current YTD	Prior YTD	Prior Year Final	2 Years Prior YTD	2 Years Prior Final	3 Years Prior	% Change Current to Prior	% Change to 2 Years Prior	% Change Prior to 3 Years Prior
<input type="checkbox"/> Inquired	57,717	64,809	73,294	51,708	65,721	44,703	↓ -10.94%	↑ 11.62%	↑ 29.11%
<input type="checkbox"/> Applied	2,619	3,859	7,968	3,327	8,640	3,523	↓ -32.13%	↓ -21.28%	↓ -25.66%
<input type="checkbox"/> Application Completed	2,221	2,935	7,659	1,919	7,915	966	↓ -24.33%	↑ 15.74%	↑ 129.92%
<input type="checkbox"/> Waitlisted			331		542				
<input type="checkbox"/> Admitted		8	6,253	2	6,522				
<input type="checkbox"/> Gross Deposited			1,023		1,176				
<input type="checkbox"/> Net Deposited			933		1,097				
<input type="checkbox"/> Registered			931		1,081				
<input type="checkbox"/> Melt			216		208				
<input type="checkbox"/> Not Registered			2		16				

Users can expand any level of the table to view counts by school, department, and academic program by clicking on the + icons next to each stage and can collapse the hierarchy by clicking on the – sign which will appear once the level has been expanded. All sections can be expanded or collapsed at once by clicking on the below icons:



A student level drill through is also configured for the Current YTD, Prior YTD, and 2 Years Prior YTD columns. To access, right click on the desired value and select “Drillthrough” in the dropdown. Here is an example from the Current YTD column:

Application Stage	Current YTD	Prior YTD	Prior Year Final	2 Years
Inquired	57,717	64,809	73,294	51,708
Applied	2,619	3,859	7,968	3,327
Application Completed	2,221	2,935	7,659	1,919
Waitlisted			331	
Admitted				
Gross Deposited				
Net Deposited			933	

Show data

Drillthrough ▶

Copy ▶

Current YTD Student List

A new report page will open to show a listing of the students who make up the selected count. To return to the previous page use the back arrow at the top right of the page.



## YTD Funnel Population Detail

**InformSU** Undergraduate, Freshmen, 20FQ, 20RQ, All Program Academic Levels, All Schools, All Departments, All Academic Programs, All Demographic Selections, All Test Scores & GPAs, All Financial Aid Selections, All Geography Selections, All Grad Score Selections

YTD Funnel Population Detail (Unduplicated)

Application Stage	Current YTD	Total Population	% of Population	Prior Year	% of Population - Prior Year	% Change Current to Prior	2 Years Prior	% of Population - 2 Years Prior	% Change to 2 Years Prior
Applied	2,619	2,619	100.00%	3,859	100.00%	↓ -32.13%	3,327	100.00%	↓ -21.28%
Application Completed	2,221	2,221	100.00%	2,935	100.00%	↓ -24.33%	1,919	100.00%	↑ 15.74%
Admitted				8	100.00%		2	100.00%	

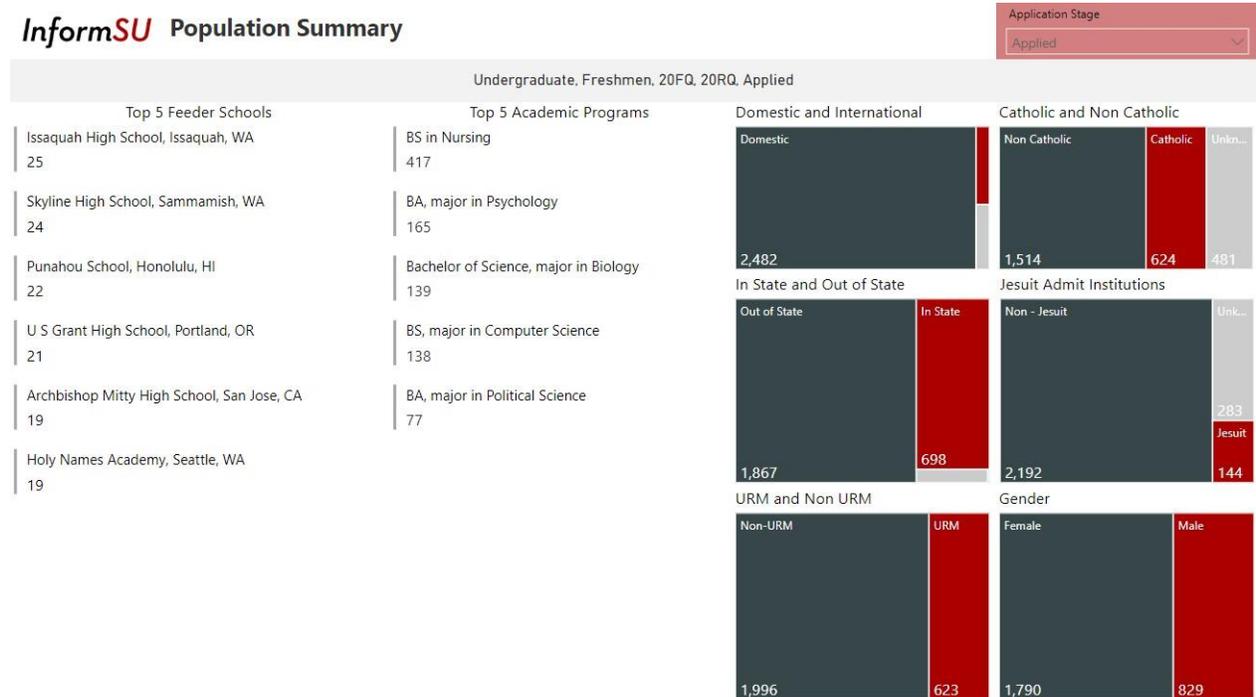
This page allows users to apply additional filters to the YTD funnel to look at specific student subpopulations and their proportion/representation in the overall student population of interest. Slicer selections from the Selection & Overview and YTD Funnel tabs are applied and listed in the grey text bar at the top of the page. Two hidden slicer panels allow users to select demographic, academic performance, financial aid, and geographic values to filter the YTD counts displayed in the table.

To access the hidden slicer panels, click on the Open General/Grad Scores Slicer Panel button and make the desired selections. When selections have been made click the Close Slicer Panel button to view the filtered table.

The Current YTD, Prior Year, and 2 Years Prior columns show counts with all filters applied. The Total Population column is filtered by all slicers except those in the hidden slicer panels. The % of Population, % of Population – Prior Year, and % of Population – 2 Years Prior columns show the filtered value divided by the unfiltered value. The % Change columns compare the filtered

current YTD values with the filtered prior YTD values and icons show whether there has been an increase or decrease.

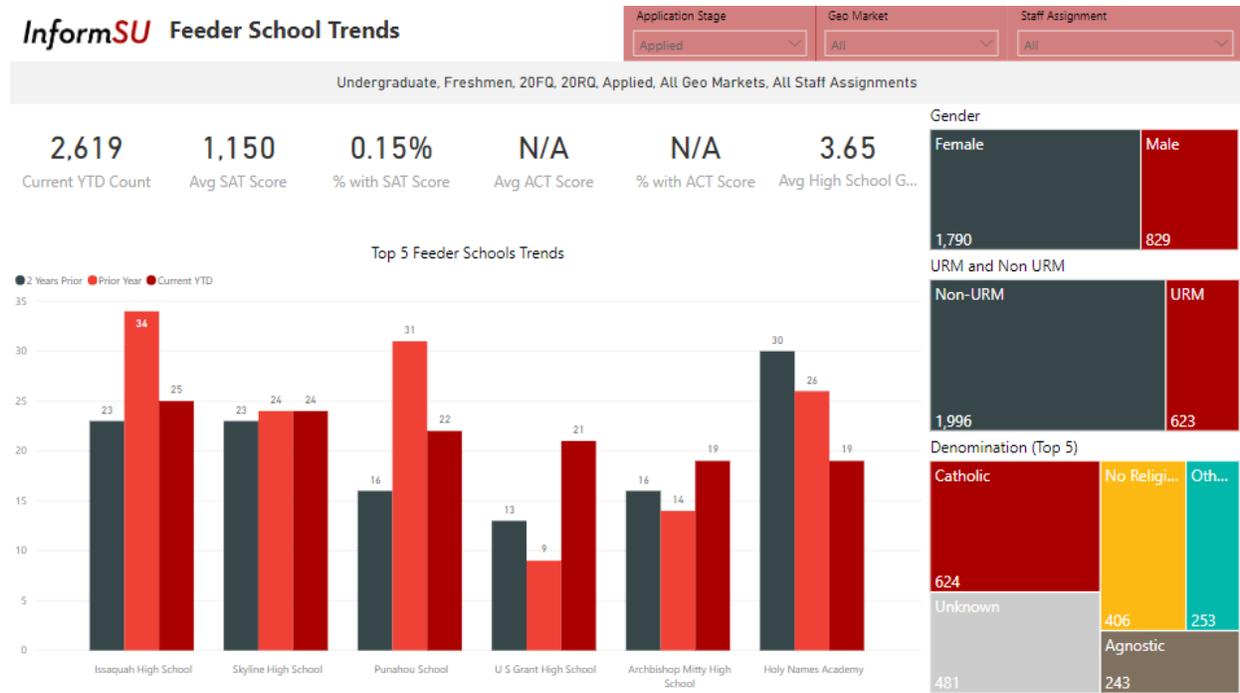
## Population Summary



Only filters selection on the Selection & Overview are applied to this page and are listed in the grey text bar. An additional Application Stage slicer allows users to view data for applicants in a particular stage. This slicer is configured to allow only one selection at a time.

Treemap visuals on the right-hand side of the page show proportions by specific characteristics and allow users to apply additional filters to the Top 5 visuals. By clicking on a value in a treemap, other visuals will be filtered. For example, if a user clicks the Female box values will be updated to show the top 5 feeder schools and academic programs for female applicants. Users can view the full population again by clicking on the highlighted box (in this example, clicking “Female” again).

## Feeder School Trends



This page is an expansion of the Top 5 Feeder Schools which shows a three-year trend of the top 5 schools.

Users can select an Application Stage, Geo Market, or Staff Assignment in the top three slicers. The Application Stage slicer is synced with the one on the previous page meaning that the new selection will be applied to the Population Summary tab. Cards show the Current YTD Count and average SAT and ACT scores along with the % of applicants with an SAT or ACT score and the average High School GPA.

By selecting a value in the right-hand treemaps the bar chart will update to show the proportion of the selected population. This functionality is slightly different than the treemaps on the previous page as those selections filtered the data to show a potentially different top 5 list based on the selection. On this page, the top 5 schools are calculated based on the overall population and making a selection highlights the corresponding proportion but does not recalculate the top 5 schools.

# Grad Summary



This page is specifically geared towards graduate applicants and presents similar visuals as seen on the Feeder School Trends page. Slicers have been updated to show only those relevant to grad programs. The Program Academic Level and Academic Program slicers are the same as those on the YTD Funnel page and values are synced so selections on one page will be applied to the other.

The scores and GPA cards show values relevant to graduate admissions and the Catholic and Non Catholic treemap has been replaced by an SU Alumni treemap to show the proportion of SU Alumni applicants.

## Financial Aid

### **InformSU** Financial Aid

#### Freshmen and Transfer Deposit Tracker

	Admitted	Net Deposited	Registered
Student Count	2,999	39	
Students with Need > 0	1,565	19	0
% of Students with Need > 0	52%	49%	0%
Average Need Amount (Need > 0)	\$42,479	\$34,828	\$0
Students with Need >= 0	2,246	28	0
% of Students with Need >= 0	75%	72%	0%
Average Need Amount (Need >= 0)	\$29,599	\$23,633	\$0
Students with Institutional Grants	2,950	39	0
% of Students with Institutional Grants	98%	100%	0%
Average Institutional Grant	\$23,785	\$21,405	\$0
Students with Athletic Grants	0	0	0
% of Students with Athletic Grants	0%	0%	0%
Average Athletic Grant	\$0	\$0	\$0
Costco Scholarship Total	\$1,460,000	\$0	\$0
Unfunded Discount Rate	49.54%	44.87%	0.00%
NACUBO Discount Rate	49.15%	44.23%	0.00%

This page mirrors the functionality previously served by the deposit tracker (and SSRS report). It depicts the student numbers and award values associated with the three major funnel stages of interest for financial aid planning – admitted, net deposited, and registered, and presents different types of aid, and discount rates for these three stages.