



# **Introduction to InformSU Reporting on Power BI**

Version 1.0  
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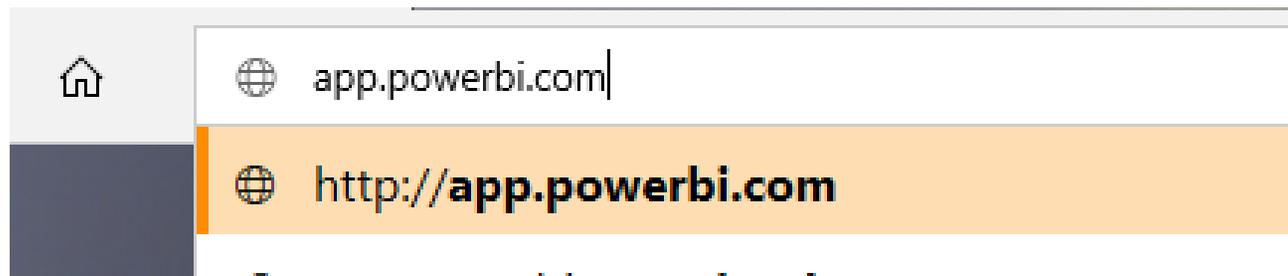
## What is Power BI?

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. Typing the above URL into your preferred browser (you can then bookmark the site for future quick access).



2. Using the link from the MySU page. **(this link will be available in Summer 2019)**

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PROCURESU

NEW STUDENT CHECKLIST

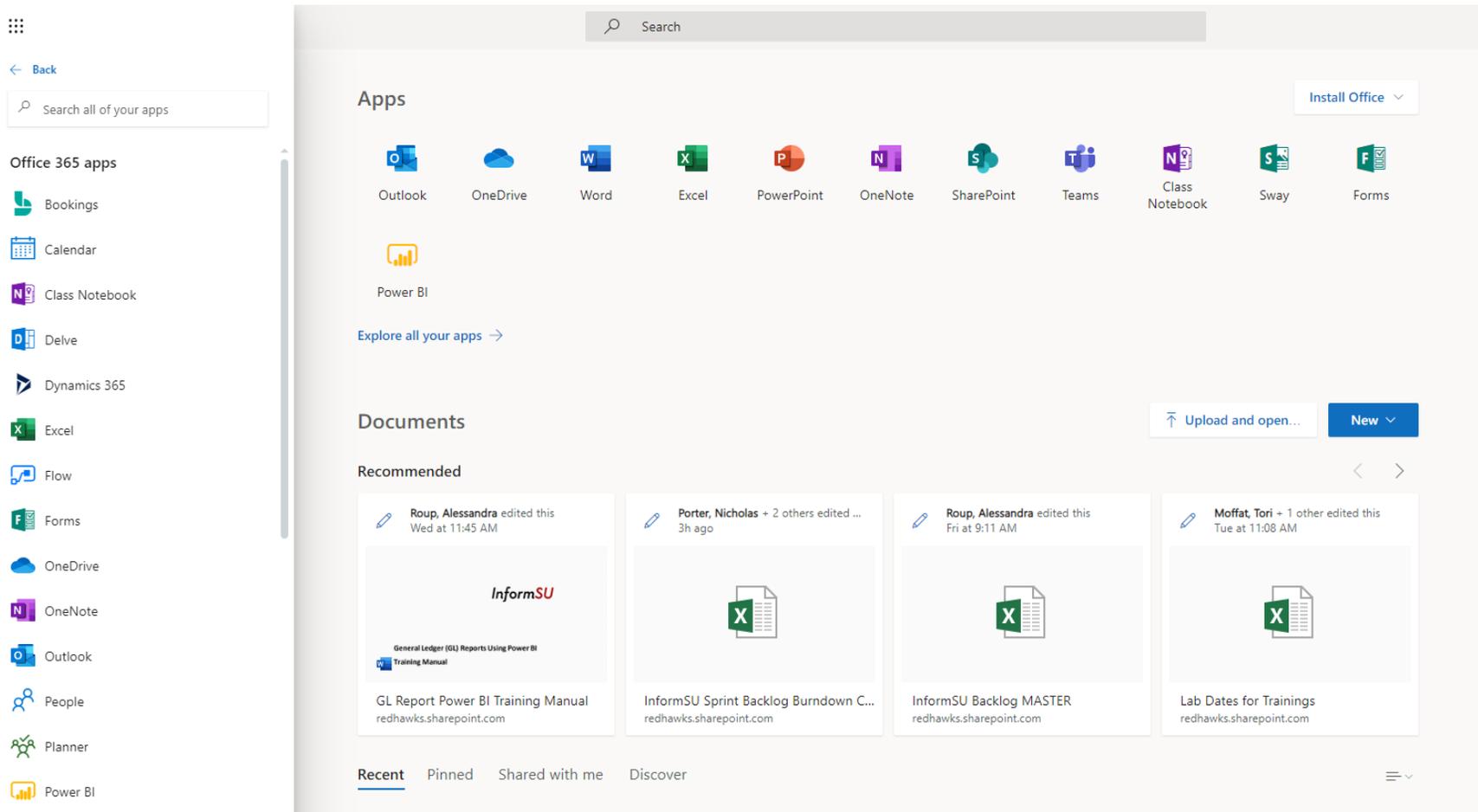
AXIOM

AUTHORIZED USER LOGIN – STUDENT  
ACCOUNT CENTER

REDHAWK SERVICE CENTER

THIRD-PARTY PROXY ACCESS – SELF SERVICE  
LOGIN

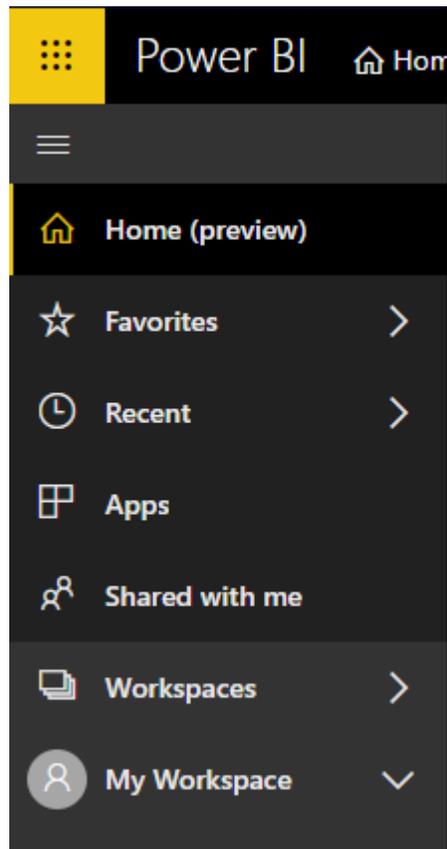
### 3. Using the Office 365 (office.com) waffle.



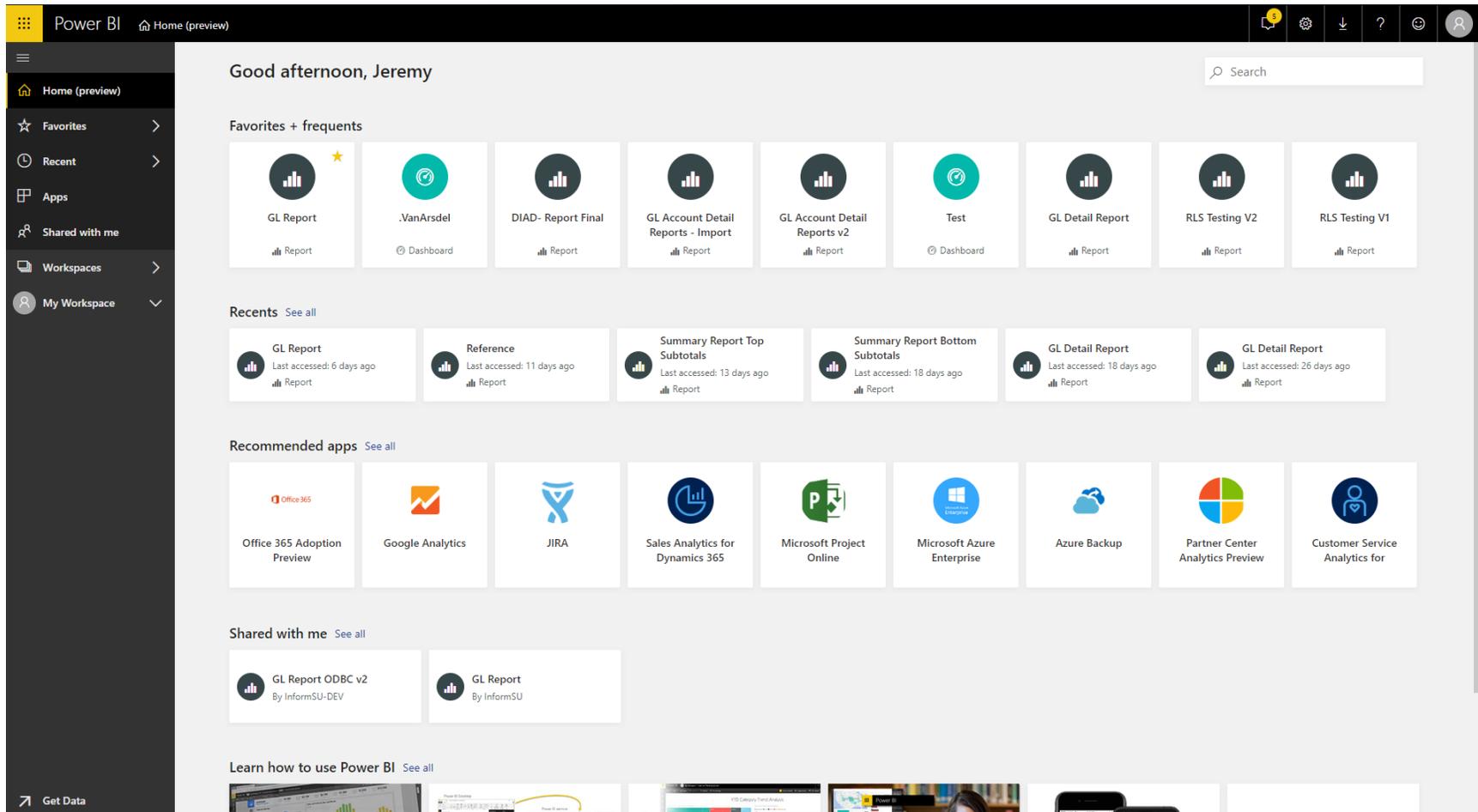
If you are asked for your credentials, you will use your regular SU username and password. These should be the same credentials you use for all other Office 365 applications.

## Navigating around the Power BI service

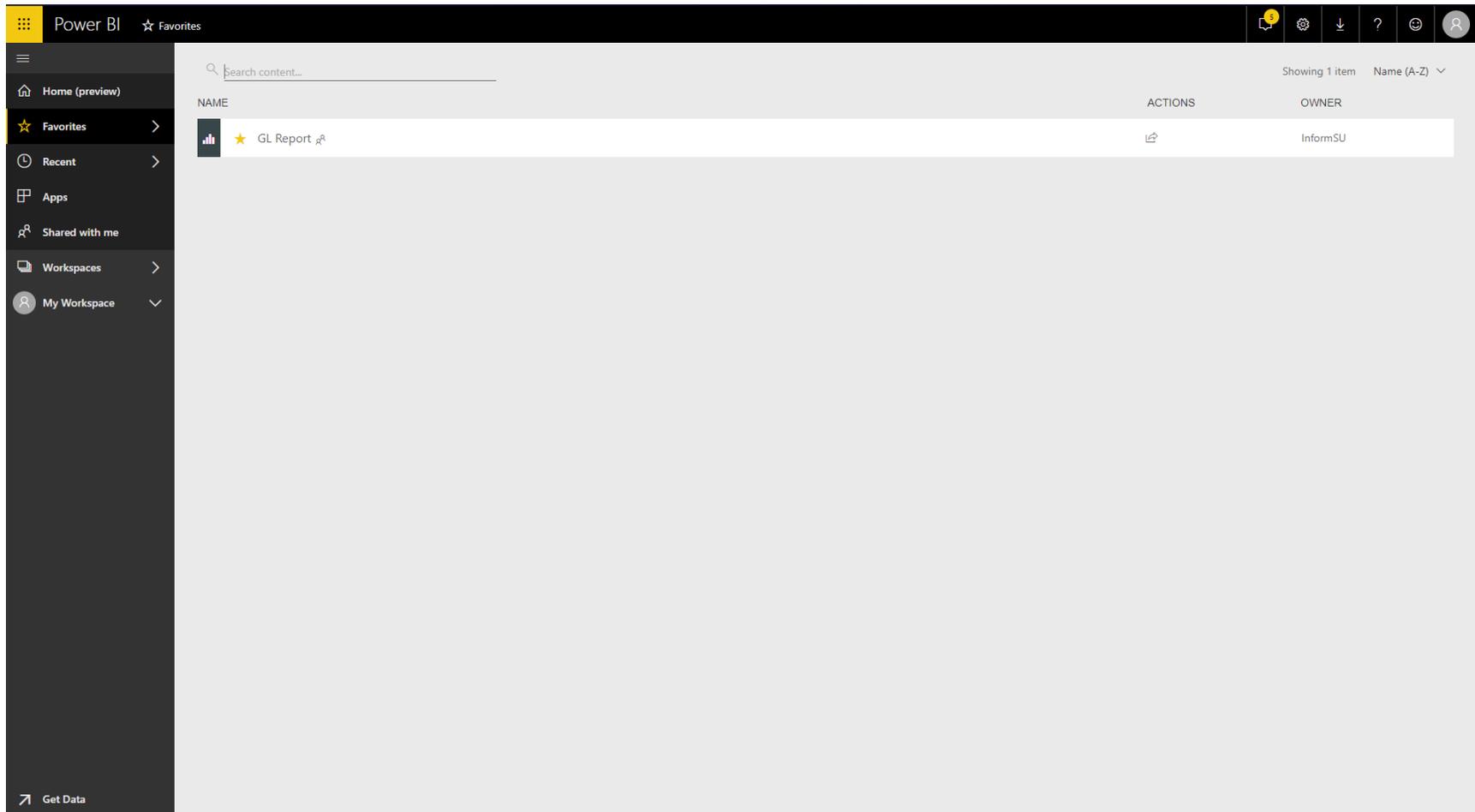
One of the first things you will notice when connecting to the Power BI service is the main navigation pane running along the left side of the page. These selections will be the primary way you navigate around the service. Not all the selections will be utilized, we will focus on those that will be of importance, but we do want to quickly introduce everything that is included in the navigation pane.



**Home (preview)** – This is the landing page where you will see a summary of items from the other navigation pane selections.



**Favorites** – You will have the ability to favorite reports, dashboards, and other Power BI objects. Once you have favorited something you will go to this selection to access those items.

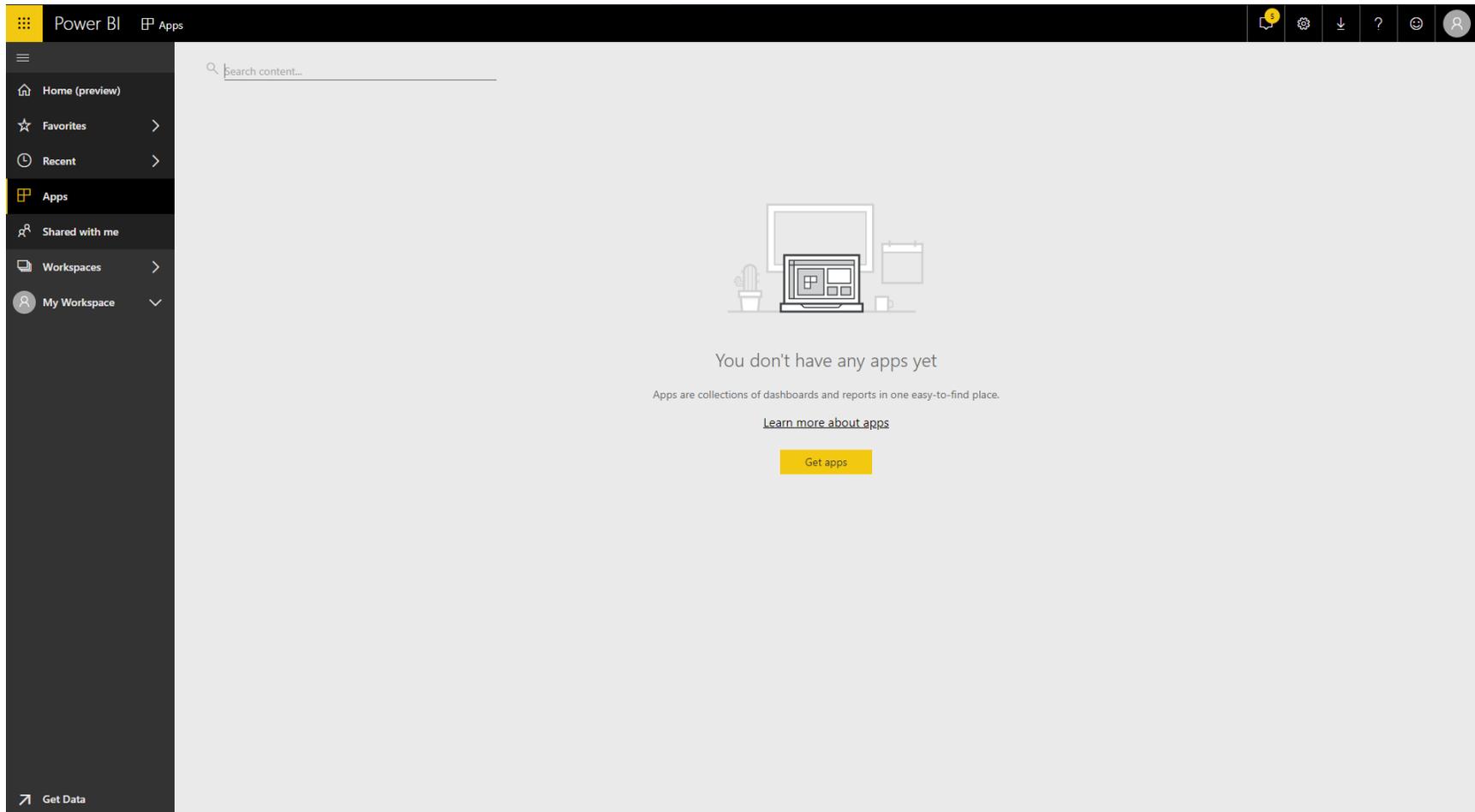


**Recent** – Here you will find Power BI objects you have most recently accessed. Much like the recent history in your web browser, you can quickly find items you have recently used.

The screenshot shows the Power BI interface with the 'Recent' tab selected in the left-hand navigation pane. The main area displays a list of 20 items, each with a bar chart icon, a star icon, a name, action icons, a last access date, and a location. The items are sorted by most recent access.

NAME	ACTIONS	LAST ACCESS	LOCATION
★ GL Report		6 days ago	Shared with me
★ Reference		11 days ago	My Workspace
★ Summary Report Top Subtotals		13 days ago	My Workspace
★ Summary Report Bottom Subtotals		18 days ago	My Workspace
★ GL Detail Report		18 days ago	My Workspace
★ GL Detail Report		26 days ago	InformSU-DEV
★ Summary Report with Drill Downs		26 days ago	My Workspace
★ Summary, Actual, and Budget		a month ago	InformSU-DEV
★ InformSU-DEV		a month ago	Apps
★ GL Account Detail Reports - Import		a month ago	InformSU-DEV
★ RLS Testing V2		a month ago	InformSU
★ RLS Testing V1		a month ago	InformSU
★ RLS Testing V3		a month ago	InformSU
★ GL Account Detail Reports - Import		a month ago	InformSU
★ Test		a month ago	InformSU

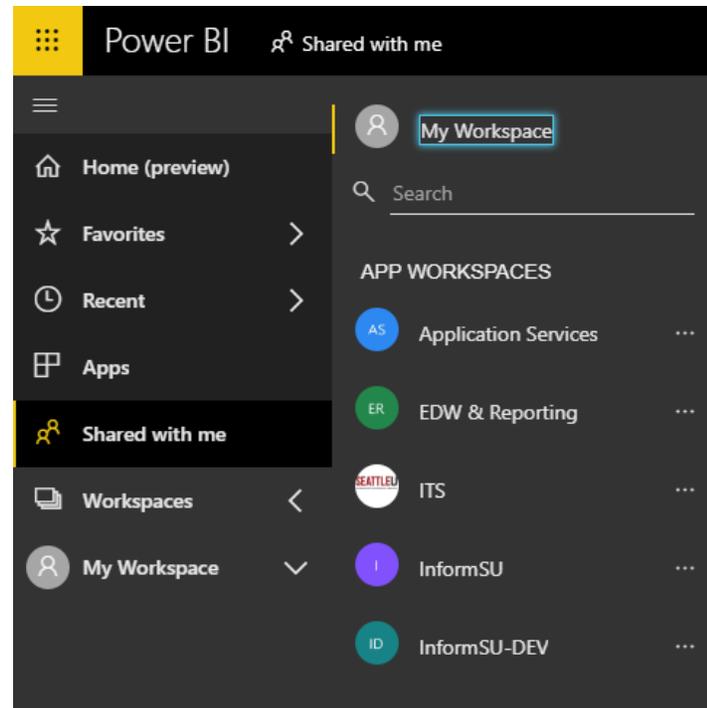
**Apps** – Apps are collections of reports and/or dashboards that can be made available to users. SU is not using this functionality at this time.



**Shared with me** – This is the location where you will find all reports and/or dashboards which you have been granted access to. Report sharing and security will be addressed later in these training materials.

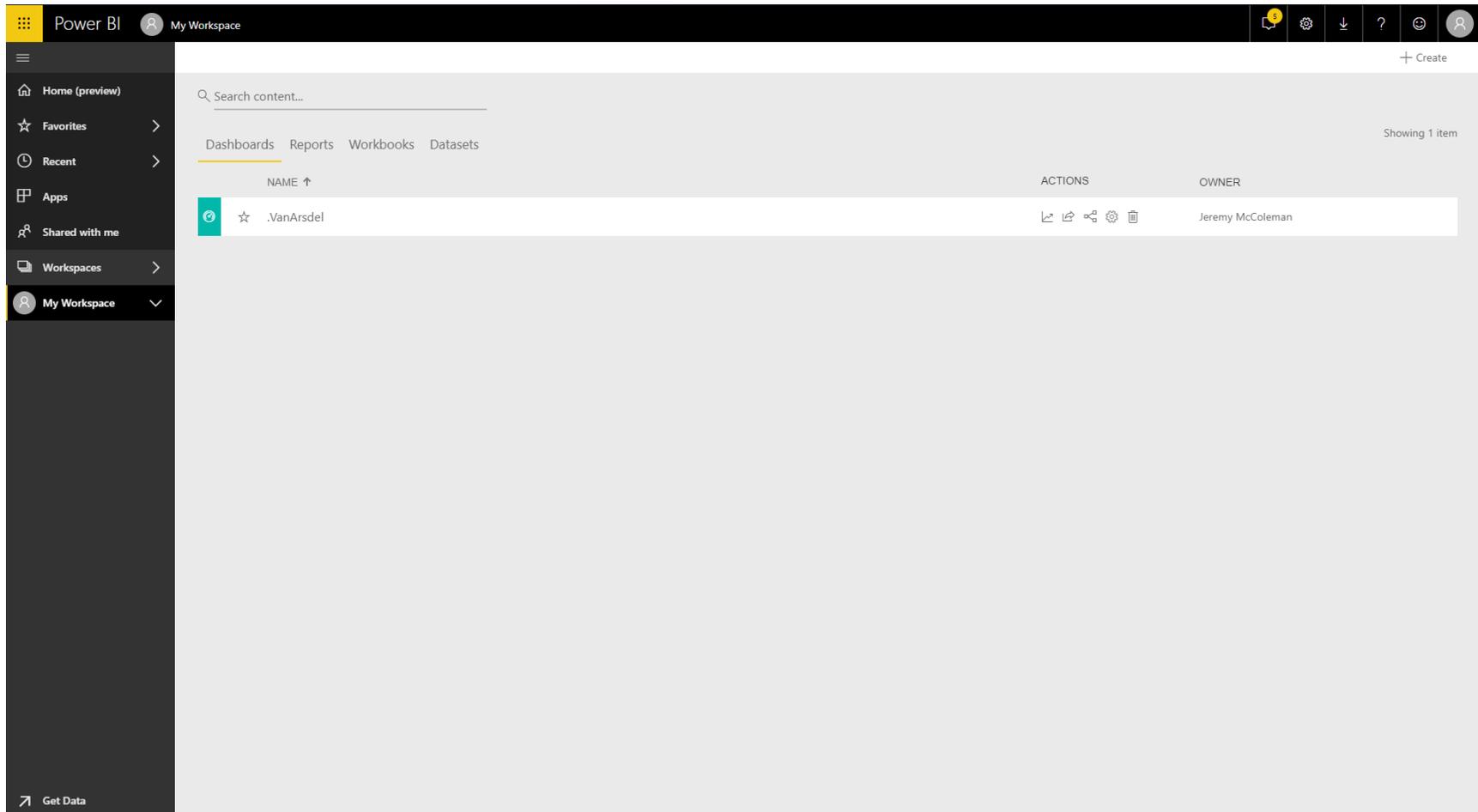
OWNER	NAME	ACTIONS	SHARED DATE	OWNER
All shared	☆ GL Report ODBC v2	📄 📌 🗑️	5 days ago	InformSU-DEV
InformSU	★ GL Report	📄 📌 🗑️	6 days ago	InformSU

**Workspaces** – These are locations where user groups can share reports and dashboards with other members of their group. You may see that you are already part of group Workspaces, this is due to the fact that any groups that are created in other Office 365 applications automatically have a corresponding Workspace created.

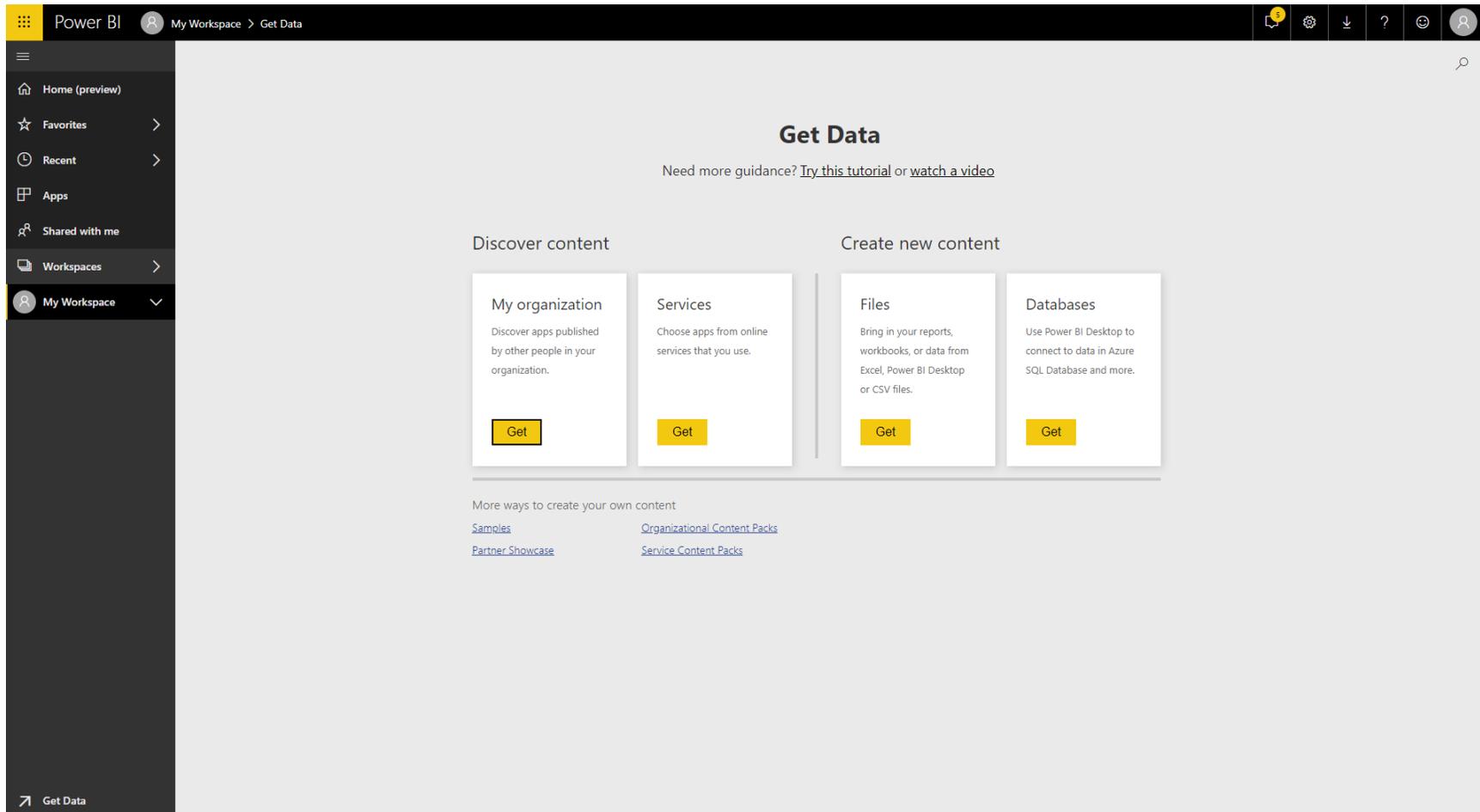


For official reporting purposes, there is an InformSU workspace which will be the repository for all reports and dashboards. Only report developers will have access to the InformSU workspace, and it is from that location that all reports and dashboards will be shared. In later sections of this manual we will cover how you can identify when an item has been shared from the InformSU workspace.

**My Workspace** – This is your own personal workspace for designing content within Power BI. For users who are interested in learning more about this, other trainings will be available.



**Get Data** – This is a quick link to ways to pull data into the Power BI service. For general users, this functionality will not be utilized. For other users, additional trainings will be available.

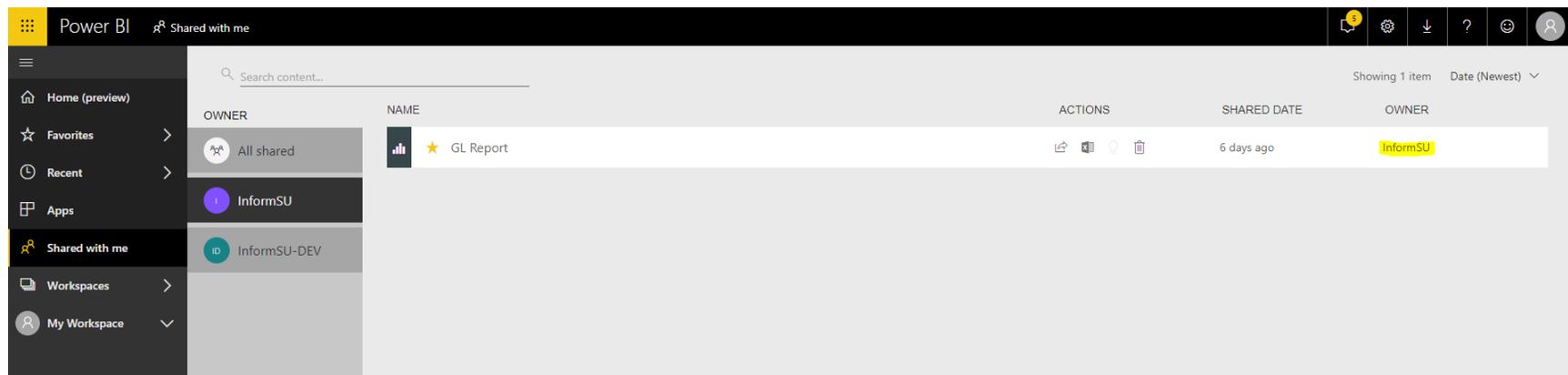


## Accessing reports

As mentioned previously, all reports that you have been approved to have access to will be found in the “Shared with me” selection of the 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 to 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 (Family Educational Rights and Privacy Act) 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.

For data security within reports, row and column-level security will be applied where appropriate. Meaning users will only have access to data sets and data points they have been approved to view.

## 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. Our new cloud-based EDW allows greater flexibility in development of data marts and enhanced reporting performance.