



UNIVERSITY SYSTEM OF GEORGIA

Power BI-ing the Enrollment Monitoring Report

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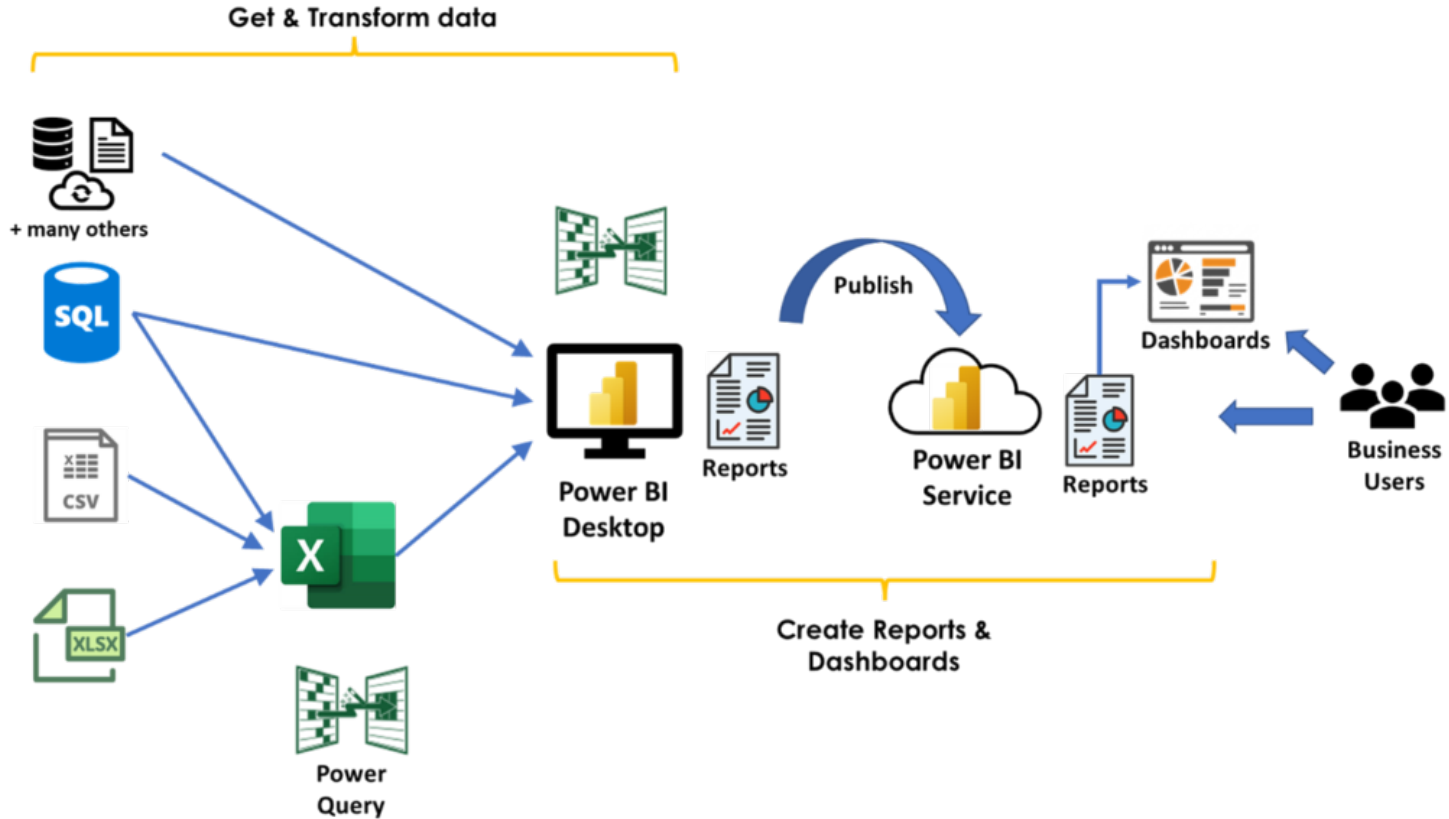
April 14, 2023

Agenda

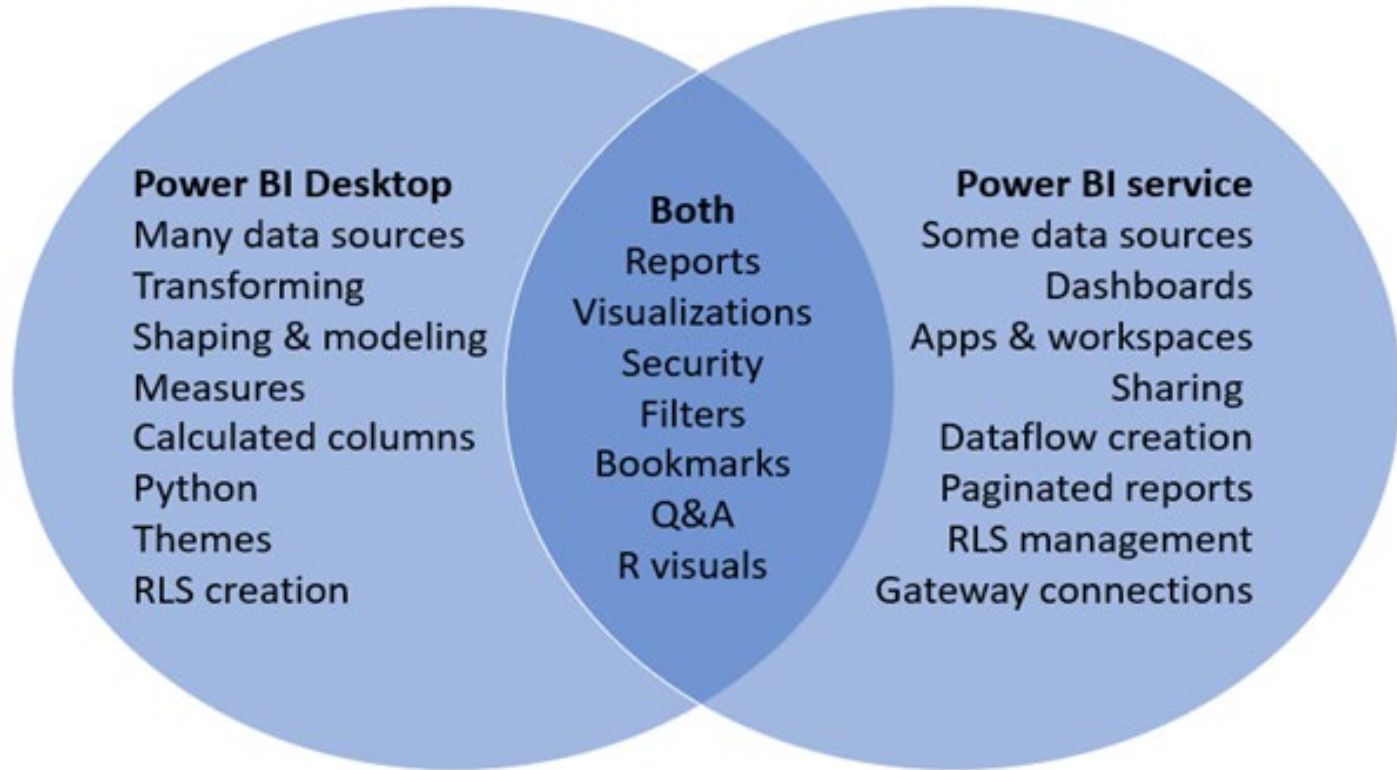
- Power BI Overview
- Power BI-ing the EMR
- Demo
- Other Considerations and Resources



Power BI Overview



PowerBI Desktop vs Service



Enrollment Monitoring Report

Enrollment Monitoring Report										Institution Name
Institution Name:										2/11/2023
Collection Cycle Date (use drop down):										
Applicant/Student Type	Students from Georgia		Students not from Georgia		Total Students				Comments	
	Current YTD Fall 2023	Previous YTD Fall 2022	Current YTD Fall 2023	Previous YTD Fall 2022	Current YTD Fall 2023	Previous YTD Fall 2022	Difference	% Difference		
Section 1: First-time Freshmen										
Applicants (Total)							0	#DIV/0!		
- Partial Applications							0	#DIV/0!		
- Completed Applications							0	#DIV/0!		
Accepted							0	#DIV/0!		
Enrolled							0	#DIV/0!		
Financial Aid Awarded	NR	NR	NR	NR			0	#DIV/0!		
Paid in Full or Balance < Institutional Threshold	NR	NR	NR	NR			0	#DIV/0!		
Section 2: New Undergraduate Transfers and Other New Undergraduates										
Applicants (Total)	NR	NR	NR	NR			0	#DIV/0!		
- Partial Applications	NR	NR	NR	NR			0	#DIV/0!		
- Completed Applications	NR	NR	NR	NR			0	#DIV/0!		
Accepted	NR	NR	NR	NR			0	#DIV/0!		
Enrolled	NR	NR	NR	NR			0	#DIV/0!		
Financial Aid Awarded	NR	NR	NR	NR			0	#DIV/0!		
Paid in Full or Balance < Institutional Threshold	NR	NR	NR	NR			0	#DIV/0!		
Section 3: New Dual Enrollment										
Applicants	NR	NR	NR	NR			0	#DIV/0!		
Accepted	NR	NR	NR	NR			0	#DIV/0!		
Enrolled	NR	NR	NR	NR			0	#DIV/0!		
Section 4: All Continuing Undergraduate Students										
Enrolled	NR	NR	NR	NR			0	#DIV/0!		
Financial Aid Awarded	NR	NR	NR	NR			0	#DIV/0!		
Paid in Full or Balance < Institutional Threshold	NR	NR	NR	NR			0	#DIV/0!		
Section 5: Housing										
Total Number of Institutional Beds	NR	NR	NR	NR			0	#DIV/0!		
Number of Institutional Beds with Housing Deposit/Occupied	NR	NR	NR	NR			0	#DIV/0!		

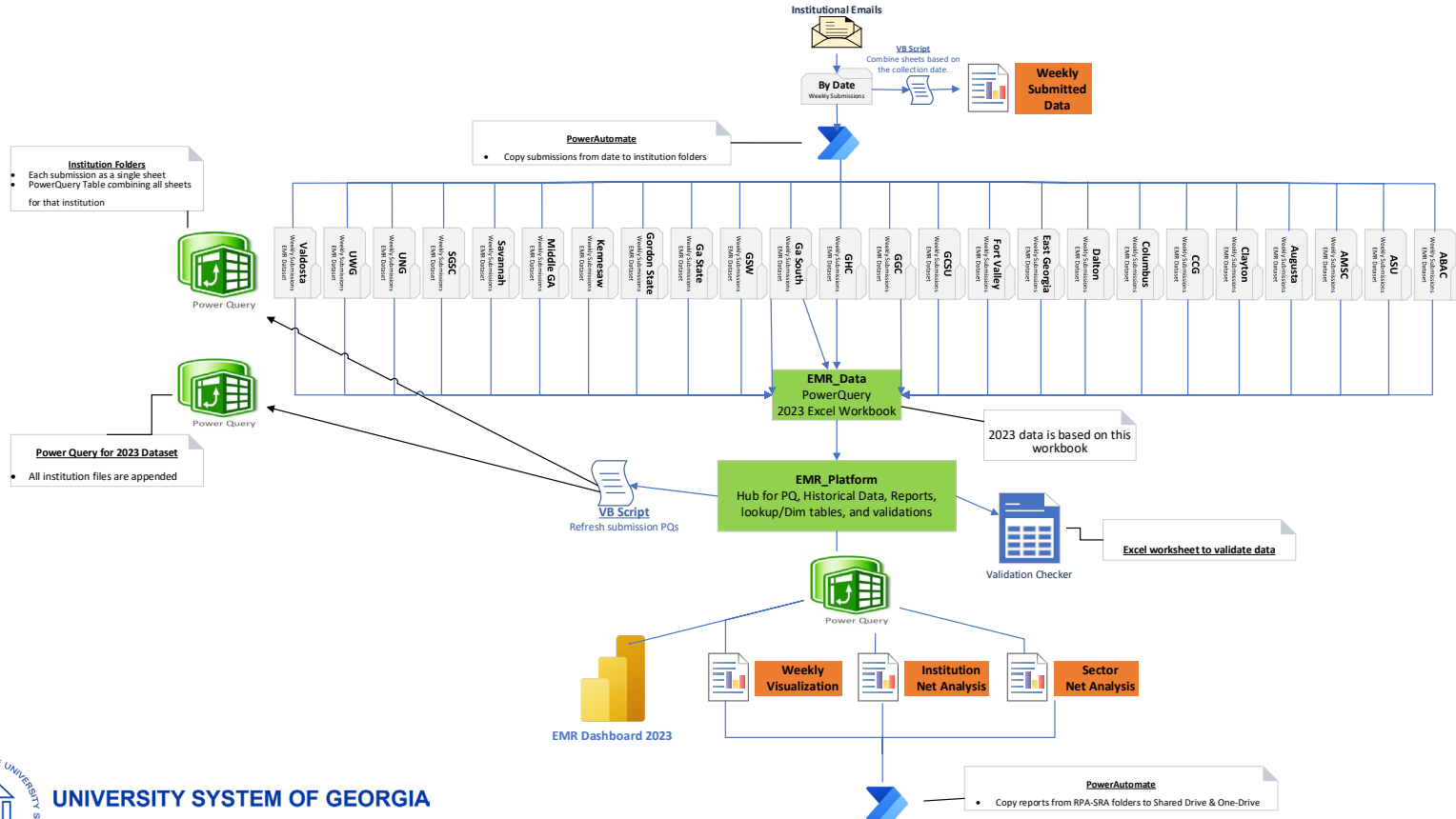
Note:

NR = Not Required

State of origin information is only required for beginning freshmen: Applications, acceptances, and enrolled.

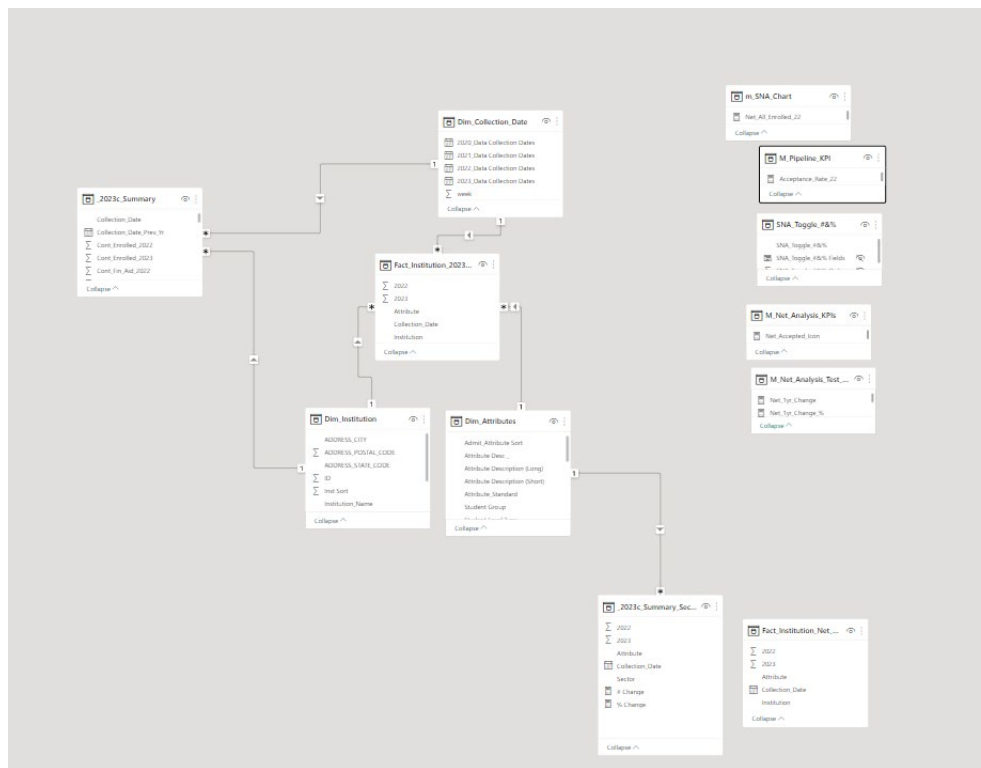


Enrollment Monitoring Report



Enrollment Monitoring Report

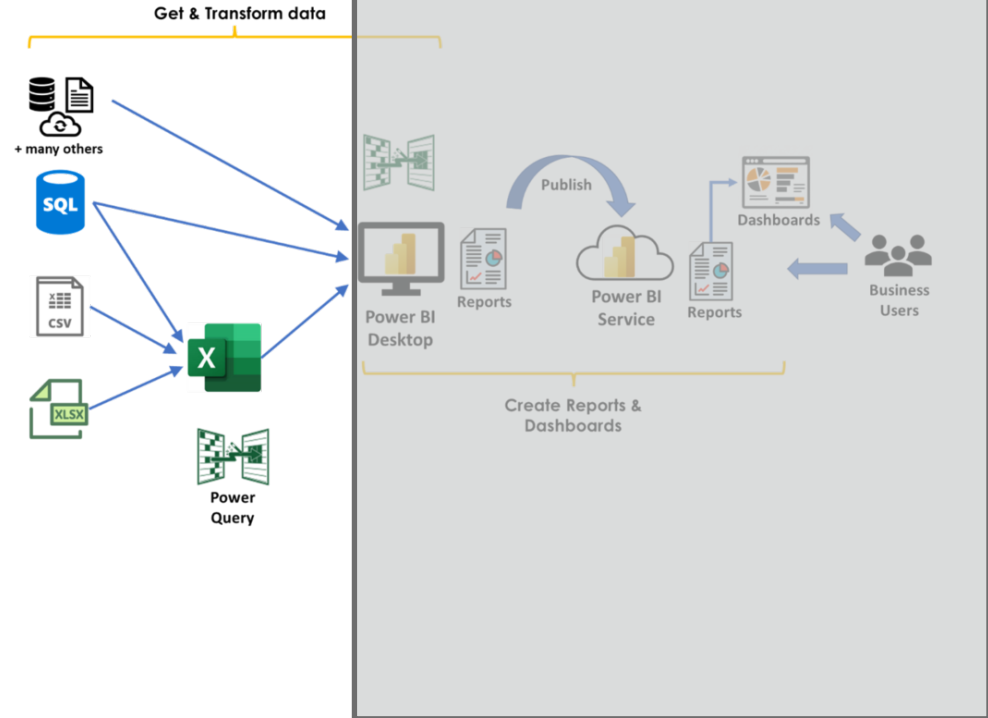
“Schema”



EMR: Get & Transform Data

Excel (VBA & PQ)

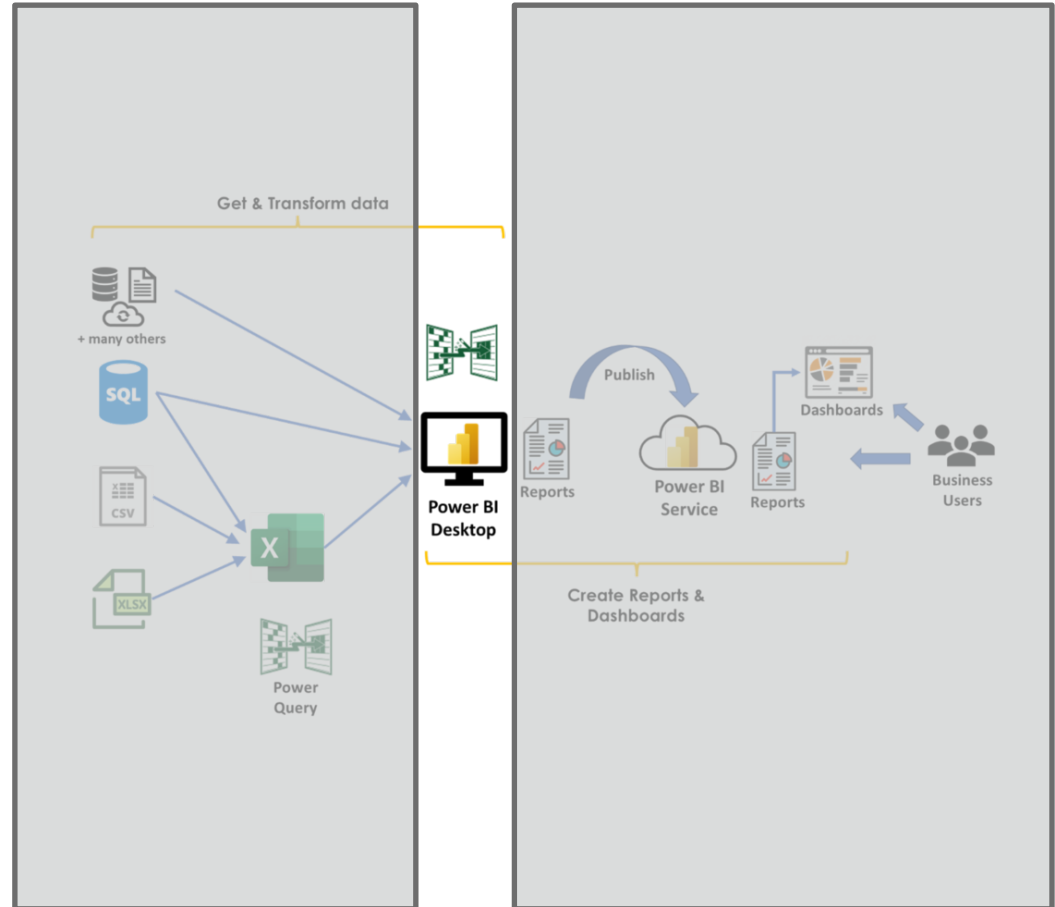
- Collect excel sheets from each institution each week
- VBA to combine sheets into one file and extract data into homegrown validation tool (PQ)
- Validate data against historical reporting & request info/corrections from each institution
- Add weekly data to dataset used for PowerBI



EMR: Get & Transform Data

PowerBI: PowerQuery

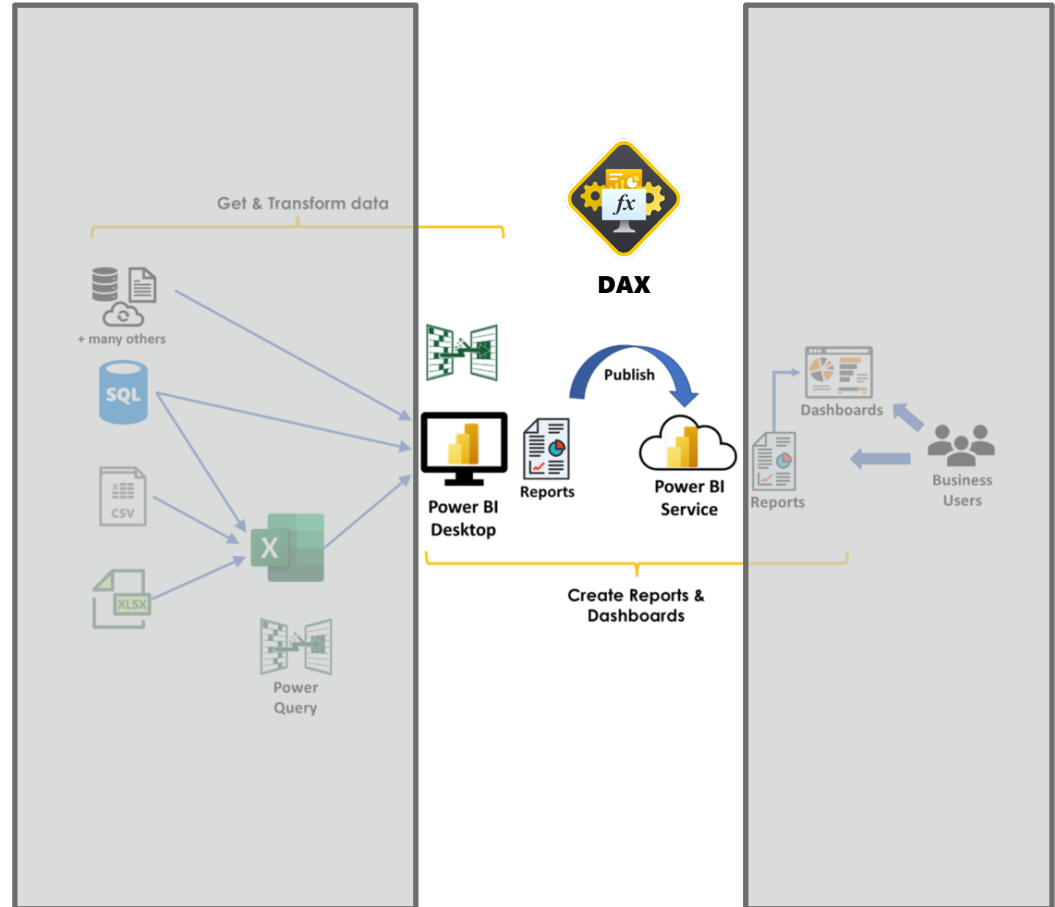
- Import tables into PBI Desktop
- Use PQ (“M”) to clean and transform data
 - Queries -> Transform Data
 - Add categorical columns (e.g., sector sort)
 - Join/link tables together (model)
- Final dataset for measures/analysis



EMR: Creating Measures & Reports

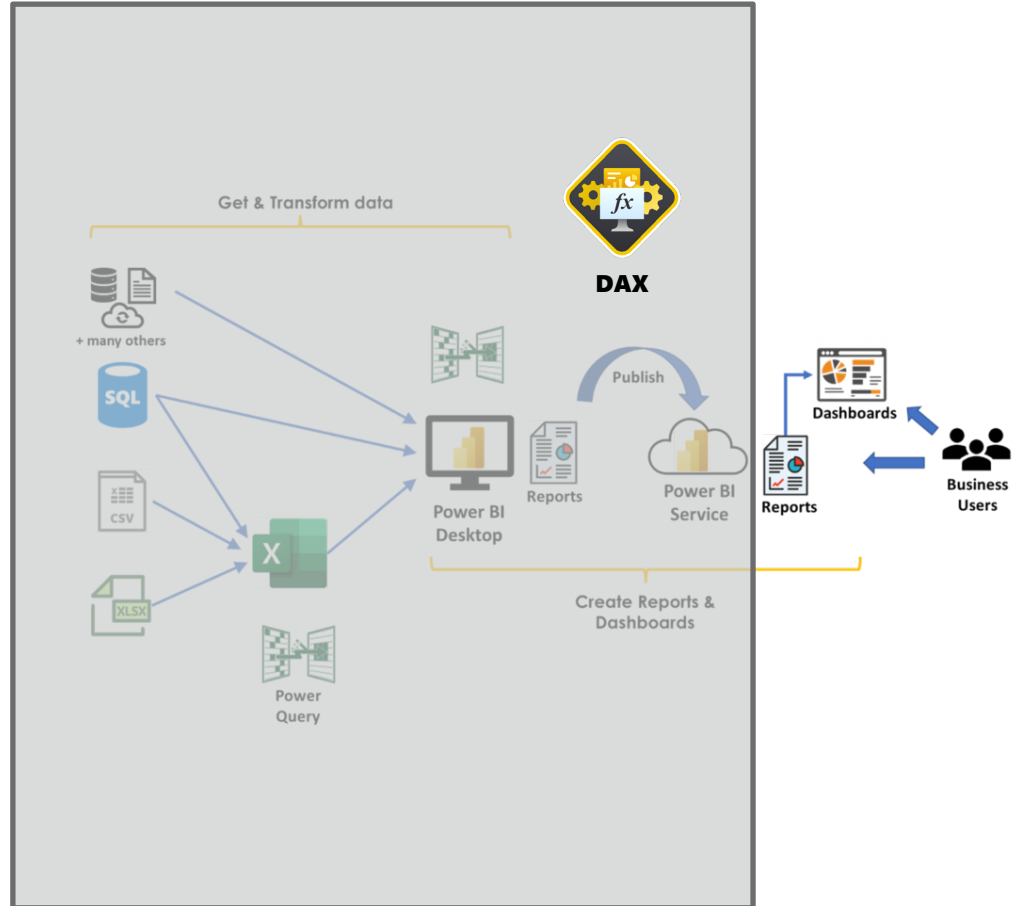
PowerBI: Dax & measures

- Use DAX to create measures
 - Measures = aggregated calculations
 - Measures are perfect for KPIs
- Design report in PowerBI Desktop
- Publish report to PowerBi Service: “Workspaces”



EMR: Sharing Power BI Dashboard

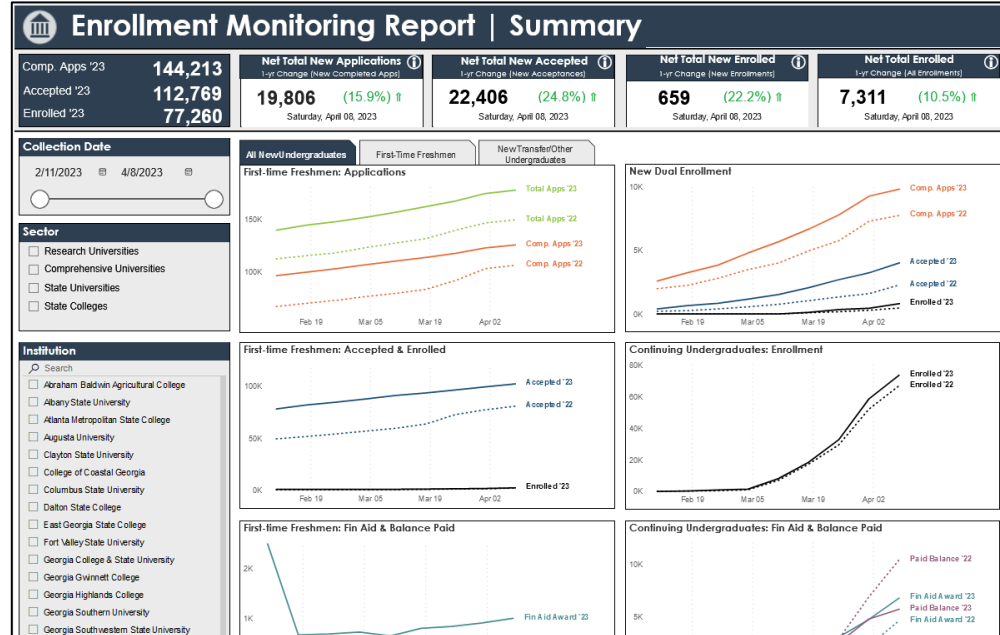
PowerBI: Dashboard & Publishing



Enrollment Monitoring Report

Data Wrangling Process

1. Collect/Validate submissions
2. Combine all submissions
3. Generate Reports
 - Weekly Visualization
 - Net Analysis Reports
4. Dashboard



Demo



Other considerations: Preview Features

Options [Close]

GLOBAL

- Data Load
- Power Query Editor
- DirectQuery
- R scripting
- Python scripting
- Security
- Privacy
- Regional Settings
- Updates
- Usage Data
- Diagnostics
- Preview features**
- Auto recovery
- Report settings

CURRENT FILE

- Data Load
- Regional Settings
- Privacy
- Auto recovery

Shape map visual [Learn more](#)

Spanish language support for Q&A [Learn more](#)

Q&A for live connected Analysis Services databases [Learn more](#)

Azure map visual [Learn more](#)

DirectQuery for PBI datasets and AS [Learn more](#) | [Share feedback](#)

Connect to external datasets shared with me [Learn more](#) | [Share feedback](#)

Modern visual tooltips [Learn more](#) | [Share feedback](#)

Power BI Desktop infrastructure update [Learn more](#)

Web page connector infrastructure update [Learn more](#)

Sparklines [Learn more](#)

Metrics visual [Learn more](#)

Quick measure suggestions [Learn more](#) | [Share feedback](#)

Field parameters [Learn more](#)

Horizontal fusion [Learn more](#)

Optimize ribbon [Learn more](#)

Relationship editing in properties pane [Learn more](#)

Enhanced row-level security editor [Learn more](#)

On-object interaction [Learn more](#) | [Share feedback](#)

Enable setting sensitivity label on exported PDF [Learn more](#)

OK Cancel

Other considerations: PowerBI updates monthly

- <https://community.powerbi.com/>
- Recent conversation (AMA) with a lead Power Bi developer about the big changes on the horizon:
<https://www.youtube.com/watch?v=m4uLv9wWq7Y>



Tips and Tricks in Power BI

- Using Power Point for Power BI Design
 - Canvas
 - Icons (insert > illustration > icons)
- “Measure” tables
- Tool Tips
- Parameters
- Bookmarks and buttons
 - Navigation Panes & Specific Charts



Matching: Dashboard to User Needs

- Wireframe! Wireframe! Wireframe!
 - Visio or PowerPoint
- Transitioning Static Reports to Dynamic Reports
- Creating dashboards from recurring questions
 - Enrollment Pipeline
 - 1-week change?

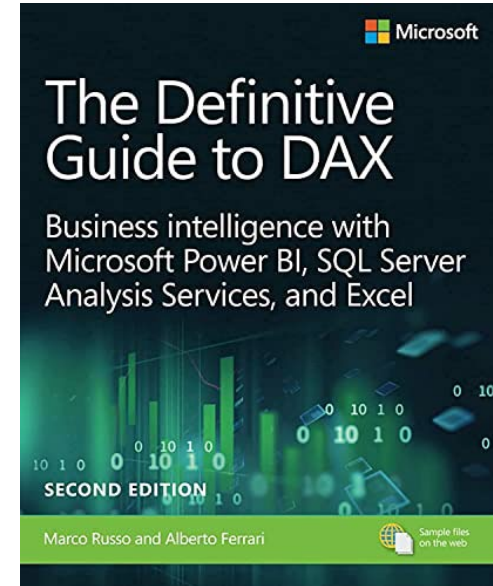


Resources

Youtube

- <https://www.youtube.com/@HowtoPowerBI>
- <https://www.youtube.com/@skillwavetraining>
- <https://www.youtube.com/@CurbalEN>

- <https://learn.microsoft.com/en-us/dax/>



<https://www.sqlbi.com/books/the-definitive-guide-to-dax-2nd-edition/> =

Questions?

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