Perkins V Power BI Reports: Refresher and Q&A

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Agenda

We will review:
• Requesting access to the Perkins V Reporting app
• Logging in to Power BI from Office 365
• Finding the Perkins V Reporting app
• Reports available in the app
• Time for Q & A
Power BI – Getting Access to the Perkins V Reporting app

- To request access to the Perkins V Reporting Power BI app, please send an email to Jeralyn Jargo (Jeralyn.Jargo@minnstate.edu) or Katie Vaccari (Katie.Vaccari@minnstate.edu).

- If you are not a Consortium Leader, please indicate the business reason for this access.

- Access was given to consortia leaders and other limited staff, as requested. There is an expectation that consortium leaders will share the data as needed/appropriate.
Log in to Office 365
Log in to Office 365

• Log into Office 365

Microsoft

cn8374da@minnstate.edu

Stay signed in?

Do this to reduce the number of times you are asked to sign in.

☐ Don’t show this again

No Yes

Trouble logging in? Contact your campus IT help desk.
Accessing Power BI

- Find and open the Power BI app. There are three options to do this:
  - In the upper left, click the icon that resembles 9 dots (the App Launcher”
  - The Power BI icon on your navigation pane (you may have to scroll down).
  - The “All Apps” button at the bottom left corner.
Power BI – Finding the App

- On Power BI home page, click on the **Perkins V Reporting** app if available, otherwise click “Apps” on the left navigation pane.
Power BI – Finding the App

- Click the **Get apps** button in the upper right.
- On the pop up, click **Organizational Apps**, find **Perkins V Reporting**, click **Get it now**
Power BI – Add to Favorites

- Find the **Perkins V Reporting** app under the **Apps** tab in the left navigation pane
- Hover over the app and click the ★ to add to your favorites to easily find and access again

![Image showing how to add to favorites]
Perkins V Reporting App

- App will open to a “Data Privacy and Definitions” page.

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Data Privacy and Definitions

Data Privacy Statement

Notice: Users must exercise caution in distributing information generated in this tool. Reports that present information for any group that includes fewer than 10 students may constitute private data. These data should not be released in any reports that will be available to the public and should only be disclosed to institution or system employees with a business need for that level of detailed information. If you have questions or concerns about the functionality of this report, please submit a service request to the [Minnesota State Service Portal](https://minnstate.edu/system/cta/school_resources/documents/Perkins-V-Report-Structure-and-Definitions.pdf).

Reporting Structure and Data Definitions

Please see the document at the link below for information on Perkins V postsecondary data reporting structure and definitions that will be useful to you in understanding the data provided in the reports.


Please note that the following reports includes data for reporting years that are in progress (the current and future reporting years) and may appear very different from previous reporting years due to the fact that the data are still being collected for these reporting years. Data for current and future reporting years will change monthly and should be considered preliminary until frozen. Data for current reporting years freeze on September 1 (e.g., Reporting Year 2021 data freeze on September 1, 2021). Once past a reporting year freeze date, data will remain unchanged.
Perkins V Reporting App

- Under the Data Definitions, you will find 14 paginated report options.
- Finally, you will find 4 Power BI reports at the bottom left navigation.
Perkins V Reporting App – Paginated Reports

- The paginated reports provide summary data based on the selections you make at the top of each report. Once you choose your report, reporting level (population) and timeframe, click “View Reports”.

Make your slicer selections at the top of the page.

Click “View Report” in upper right.
Perkins V Reporting App – Power BI Reports

- The Power BI reports are more dynamic and allow you to look at multiple years of data, cross up to four populations, and filter the data to further explore enrollment and performance data.
Perkins V Reporting App – Power BI Reports

• When you select a Power BI report, you will first be brought to a Welcome page with information about that report.

• To use the report, decide the population you wish to look at and your timeframe of interest, then choose the appropriate report.
Perkins V Reporting App – Power BI Reports

- Once you choose your report, make slicer selections at the top. You can also further filter data using filter pane on the right.
Perkins V Reporting App – Power BI Reports

• To export the data to .csv or .xlsx, use the ellipses on the far right. You need to have the “Power Consumer” feature enabled to export to Excel; if you don’t have this, you will need to contact your IT service desk and ask for the “[College]-PBI-PowerConsumer” feature.
Tips/Tricks/Troubleshooting

• Be patient. Let the data load on the page first before making changes or selections
• In the Power BI reports, let all of the selections load before making new selections in the slicers (at the top)
  • Make selections in order of 1, 2, 3, 4
• Drill up
  • Up arrow in the table navigation options or right click -> Drill Up
• Refresh or reset to default (see Troubleshooting: Reset/Refresh)
• Trouble clicking the table navigation buttons on the top right of the table, click in one of the cells of the table (see Troubleshooting: Drill Up Arrow)
Troubleshooting: Drill Up Arrow

If the drill up arrow is not showing in the table navigation options:

1. Click in this white space.

2. Click back to the table area, then the full table navigation options should be available. If the drill options are not back, try clicking in one of the cells in the table and repeat steps 1 and 2.
Troubleshooting: Reset/Refresh

- Sometimes Power BI will hang up if too many selections are made too quickly before loading completely. Try to **reset to default** and start again, letting each selection load between drop downs.
- If the data doesn't seem updated, there are may be cache issues. It may be helpful to **refresh** your visual.
Power BI and Perkins V Resources

• Minnesota State Service Portal: [https://servicedesk.minnstate.edu/TDClient/30/Portal/Home/](https://servicedesk.minnstate.edu/TDClient/30/Portal/Home/)
• Power BI Resources on the IT Connect site: [https://mnschu.sharepoint.com/sites/its/SitePages/topic.aspx?topicID=174&state=resources](https://mnschu.sharepoint.com/sites/its/SitePages/topic.aspx?topicID=174&state=resources) (in particular, the “Power BI All Access Training – Getting Started” recorded training session)
• Perkins V Accountability Resources: [https://minnstate.edu/system/cte/consortium_resources/index.html](https://minnstate.edu/system/cte/consortium_resources/index.html) (scroll down to Accountability Resources)
THANK YOU!

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