Graduate Student Funding

- Reporting – How to access Power BI GSF Reports within the Power BI APP and Export Data
Reporting – Logging In

- Graduate Student Funding Reports will be accessed by using Microsoft Power BI Service
- The link to Power BI Service is [https://app.powerbi.com](https://app.powerbi.com)
- You will be prompted to enter your Yale credentials
- This will bring you to the home page that will look similar to this. You are now in Power BI Service.
This page show 'Favorites and Frequent' tiles in the center. You page may look different depending upon the reports and screens to which you have access.

Apps are a collection of reports and dashboards.

Once on this home page, select 'Apps' on the left navigation bar.
Reporting – Selecting Apps

- This page will display the Apps to which you have access.
- Select the 'Graduate Student Funding (GSF)' App by clicking on the Name.
- If you do not have any apps listed, please contact your administrator to get access.
If you have access to multiple reports, you will then see a list of reports you have access to. Click on the report name you would like to open.

If you only have access to 1 report, that report will launch automatically after clicking on the App name. See next page for an example.

See the yellow arrows below to help you navigate on the page.

To enlarge the report, select the 'focus mode' feature. Hover your cursor over the right-hand corner of the visual. Additional features will appear. Select the small box with the arrow in it.

Click on 'Go back' in the bottom left corner at any point to return to the App menu page.
There are two ways to export data in Power BI:
- Export data
- Analyze in Excel

This table describes the features of both options:

<table>
<thead>
<tr>
<th>Export Data</th>
<th>Analyze in Excel</th>
</tr>
</thead>
<tbody>
<tr>
<td>Connection is offline and static. Export will not refresh.</td>
<td>Connection is a Live Connection. No need to refresh.</td>
</tr>
<tr>
<td>Row limitation of 150K rows if you export to Excel, and 30K rows for CSV files.</td>
<td>No row limitation</td>
</tr>
<tr>
<td>Data exported is only from the specific visual you export from. The fields in that visual (or related fields to that) are exported.</td>
<td>You will have access to all the tables, columns and their calculated fields and measures in Excel. You will also have a lot of fields/data that may not be necessary for what you are trying to accomplish</td>
</tr>
</tbody>
</table>
To export the data to either an Excel spreadsheet or a CSV:
1. Hover your cursor over upper right of the visual and click on it. It will not appear until you hover over it.
2. Click 'Export data'
For help contact the Finance Support Center at 432-5394 or sharedservices@yale.edu.

Reporting – Export data

- You will then be at this pop-up screen.
- 1. Click on the 'Data with current layout' box. It may already be selected as the default.
- 2. Select 'File Format' - choices are .xlsx or a csv file
- 3. Click the yellow Export button
- The data will then be exported, and you will be notified when complete
• To export the data by using the Analyze in Excel option:
  With the report open, click on the Export drop down from the menu along the top
For help contact the Finance Support Center at 432-5394 or sharedservices@yale.edu.
Reporting – Analyze in Excel

- You will get a message saying preparing file.
- You will then get this pop up that the file is ready
- Click on the yellow box to open in Excel for the web
Reporting – Filters

- To apply filters, Click on the double arrows indicated below.
- This will open the Filters pane.
Reporting – Filters

- Select the field you'd like to filter on.
- If the field list is long, enter the field name in the search box. You do not have to have the exact field name. It will provide a list of fields that are close to what you type.
- Filters can be applied to just the page you are on or to all pages
Reporting – Filters

- Click on the down carrot to open the filter on a field.
- If the field list is long, enter the field name in the search box. You do not have to have the exact field name. It will provide a list of fields that are close to what you type.
- Filters can be applied to just the page you are on or to all pages
- Enter the field value and click the box next to it to apply filter
End of Slides