Graduate Student Funding

- Reporting – How to Access the GSF Workspace for reports and to 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 like this. You are now in Power BI Service.
Reporting – Selecting the GSF Workspace

- This page shows 'Favorites and Frequent' tiles in the center. Your page may look different depending upon the reports and screens to which you have access.
- Workspaces are places to collaborate with colleagues on specific content. They contain reports, dashboards, and datasets.
- To access the GSF Production Workspace, click on 'Workspaces' on the left navigation bar.

For help, contact the Finance Support Center at 432-5394 or sharedservices@yale.edu.
You will then see a list of workspaces to which you have access.

Click on the 'Graduate Student Funding (GSF)' workspace.

If you only have access to one workspace, it may open automatically.
Reporting – Access Report in Workspace

- Click on the 'GSF Detailed Data' report name.
- If you only have access to one workspace and that is the only report to which you have access, it may open automatically.

For help contact the Finance Support Center at 432-5394 or sharedservices@yale.edu.
• The ‘GSF Detailed Data’ report will then open.
• 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 both features:

<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>
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Payroll Costing – Costing Allocation Information

- 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
  2. Click 'Export data'

1. Hover over ellipsis
2. Click 'Export data'
The data will then be exported, and you will be notified when complete.

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.
Reporting – Analyze in Excel

• Click on 'Analyze in Excel'

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. It will then open in your browser.
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

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End of Slides