Power BI-ing the Enrollment Monitoring Report

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RAC-IRP
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 Agenda

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

Get & Transform data

+ many others

SQL

CSV

Power Query

Power BI Desktop

Create Reports & Dashboards

Publish

Dashboards

Business Users

Reports

Power BI Service

Reports

# Enrollment Monitoring Report

**Institution Name:**
Collection Cycle Date (use drop down):

<table>
<thead>
<tr>
<th>Applicant/Student Type</th>
<th>Students from Georgia</th>
<th>Total Students</th>
<th>Students not from Georgia</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Current YTD Fall 2023</td>
<td>Previous YTD Fall 2022</td>
<td>Current YTD Fall 2023</td>
<td>Previous YTD Fall 2022</td>
</tr>
<tr>
<td><strong>Section 1: First-time Freshmen</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Applicants (Total)</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Accepted</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Enrolled</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Financial Aid Awarded</td>
<td>NR</td>
<td>NR</td>
<td>NR</td>
<td>NR</td>
</tr>
<tr>
<td>Paid in Full or Balance &lt; Institutional Threshold</td>
<td>NR</td>
<td>NR</td>
<td>NR</td>
<td>NR</td>
</tr>
<tr>
<td><strong>Section 2: New Undergraduate Transfers and Other New Undergraduates</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Applicants (Total)</td>
<td>NR</td>
<td>NR</td>
<td>NR</td>
<td>NR</td>
</tr>
<tr>
<td>Accepted</td>
<td>NR</td>
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<tr>
<td>Enrolled</td>
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<tr>
<td>Paid in Full or Balance &lt; Institutional Threshold</td>
<td>NR</td>
<td>NR</td>
<td>NR</td>
<td>NR</td>
</tr>
<tr>
<td><strong>Section 3: New Dual Enrollment</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Applicants</td>
<td>NR</td>
<td>NR</td>
<td>NR</td>
<td>NR</td>
</tr>
<tr>
<td>Accepted</td>
<td>NR</td>
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<td>NR</td>
</tr>
<tr>
<td>Enrolled</td>
<td>NR</td>
<td>NR</td>
<td>NR</td>
<td>NR</td>
</tr>
<tr>
<td><strong>Section 4: All Continuing Undergraduate Students</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Enrolled</td>
<td>NR</td>
<td>NR</td>
<td>NR</td>
<td>NR</td>
</tr>
<tr>
<td>Financial Aid Awarded</td>
<td>NR</td>
<td>NR</td>
<td>NR</td>
<td>NR</td>
</tr>
<tr>
<td>Paid in Full or Balance &lt; Institutional Threshold</td>
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<td>NR</td>
<td>NR</td>
<td>NR</td>
</tr>
<tr>
<td><strong>Section 5: Housing</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total Number of institutional Beds</td>
<td>NR</td>
<td>NR</td>
<td>NR</td>
<td>NR</td>
</tr>
<tr>
<td>Number of institutional Beds with Housing Deposit/Occupied</td>
<td>NR</td>
<td>NR</td>
<td>NR</td>
<td>NR</td>
</tr>
</tbody>
</table>

**Note:**
NR = Not Required
State of origin information is only required for beginning freshmen: Applications, acceptances, and enrolled.
Enrollment Monitoring Report

EMR-dashboard 2023
Weekly Visualization
Institution Net Analysis
Sector Net Analysis

EMR_platform
Hub for PQ, Historical Data, Reports, lookup/Dim tables, and validations

EMR_data
PowerQuery 2023 Excel Workbook
WeeklySubmitted Data

Institutional Emails
Weekly Submissions
By Date

By Date

PowerAutomate
• Copy submissions from data to institution folders

Data
Institution Folders
• Each submission as a single sheet
• PowerQuery Table combining all sheets for the institution:

Power Query
• All institution files are appended

Power Query for 2023 Dataset

PowerQuery

VB Script
Refresh submission PQs

Validation Checker
Excel worksheet to validate data

Weekly Visualization
Institution Net Analysis
Sector Net Analysis

PowerAutomate
• Copy reports from RPA-SRA folders to Shared Drive & One Drive
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

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
Other considerations: PowerBI updates monthly

- [https://community.powerbi.com/](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](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/

Questions?

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