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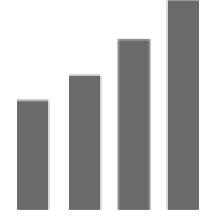Exporting Data

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Welcome to OCAS' Domestic Insights Power BI Reports

These customizable reports, which provide insights about college applications and enrolments, can be filtered by application cycle, program information, or demographic information to help you find the data you need.

This guide contains tips to help you use these reports in Power BI, as well as how to get them delivered to your inbox. A screen reader version of this guide is available **here**.

If you have questions or ideas for the reports, please let us know at **data@ocas.ca**.

Slicers

A slicer is an **on-canvas visual** that lets anyone viewing a report segment the data by a particular value, such as a program, geographical location or college.

A slicer selection will reflect changes to every visual on the report canvas that contains data in some shape or form.

Slicers and filters can always be reset by selecting the button at the top right of the report page.

Interactive Slicer Example

Unique Applicants by Applicant Type

First Generation

All

- The main **benefit** of a slicer is the ability to slice and dice different combinations of data field values to rapidly modify the visual contents of a report.

- The main **drawback** of a slicer is that it consumes valuable report canvas space and can cause clutter and affect readability if too many are displayed together at one time.
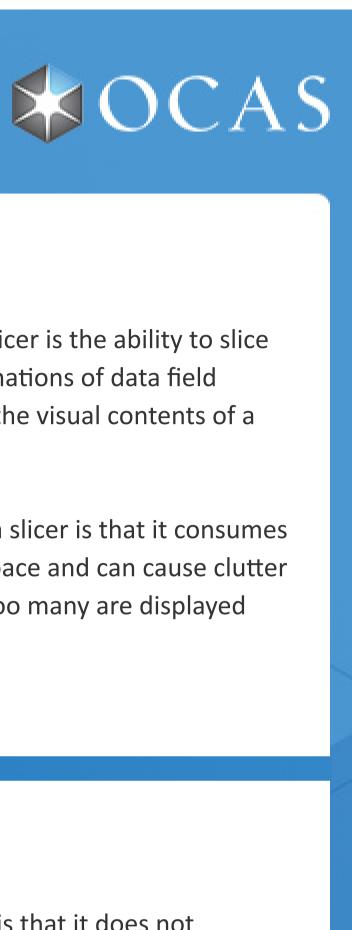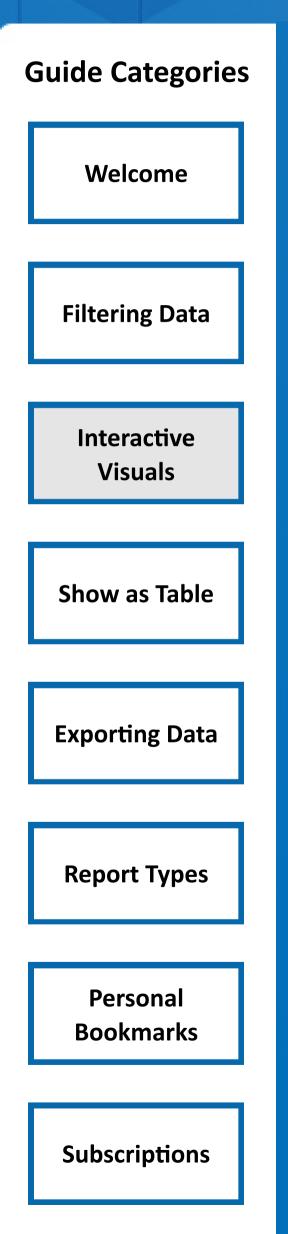
Filters

A filter is an **off-canvas option** that provides similar functionality to that of a slicer, but is contained within a separate pane to the right of the report canvas. There are 3 main types of filters:

(1) Report level filters: Selections will reflect changes on every visual on every report page.

(2) Page level filters: Selections will reflect changes only on the current report page.

(3) Visual level filters: Selections will only reflect changes on the currently selected visual.

Most Power BI reports will have the filter pane disabled and exclusively use slicers for filtering functions. However, some Power BI Reports may use a combination of filters and slicers.

- The main **benefit** of a filter is that it does not consume valuable canvas space and contains all filterable fields in a concise, off-screen list.

- The main **drawback** of a filter is that it requires an extra click to view the filters list and it is not initially clear what options are available for filtering. Counts associated with filtering options in the filter bar are not meaningful from the user standpoint and should be ignored.

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Interactive Visuals

Almost all Power BI visuals have a level of interactivity that can allow you to easily drill down on a specific element in your report. A single click of a bar, line, pie or table value in a visual is all it takes to reveal a new piece of insight.

By clicking a bar in a bar chart or selecting the name of a college from a table, you are temporarily slicing the the data in the report to reveal details behind your selection. To unselect the changes made, simply click again on the visual element that was selected initially. It is also possible to select multiple elements at the same time by clicking multiple items while simultaneously holding down the **CTRL** keyboard key.

How a visual reacts to a visual interaction is dependent on if the interaction is set to **Cross-Highlighting**, **Cross-Filtering** or **No Interaction**.
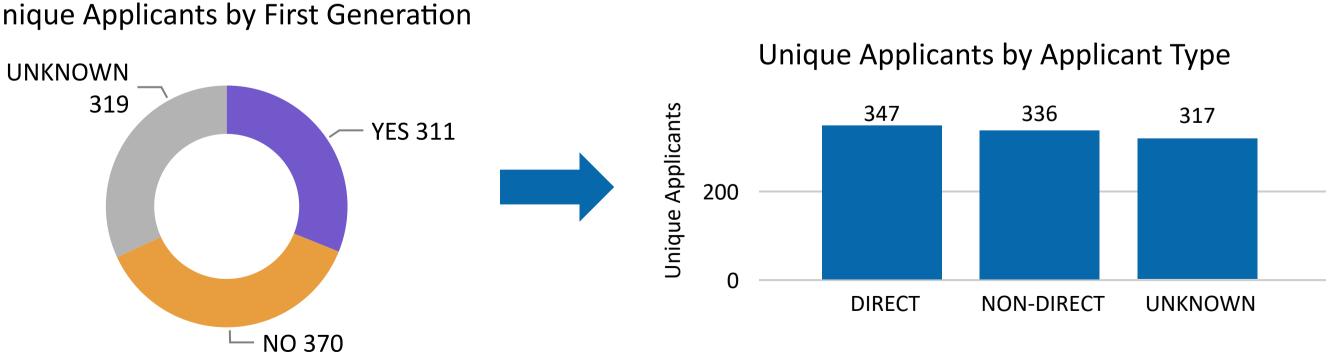
Cross-Highlighting: Selecting a value in one visual highlights related data in visuals such as column and bar charts. Unrelated data is dimmed instead of being removed.
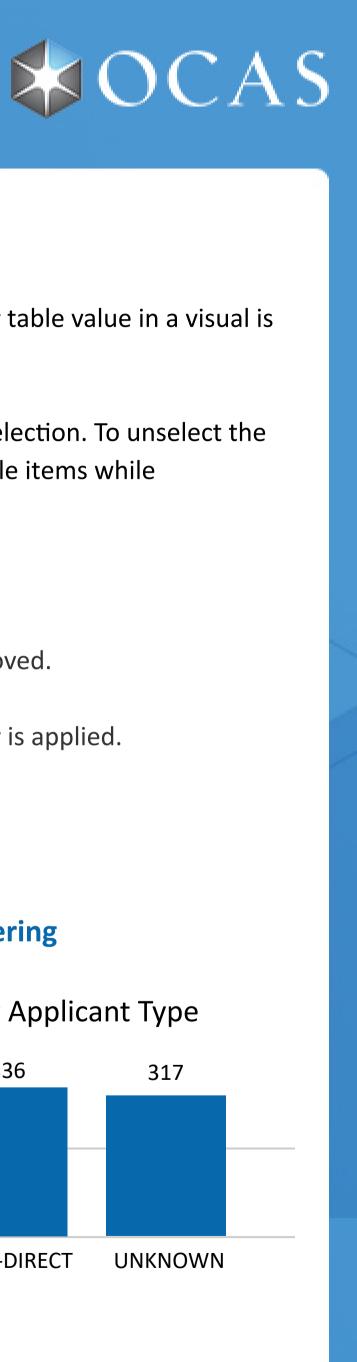
Cross-Filtering: Selecting a value in one visual filters visuals in visuals such as line charts, scatter charts and maps. Unrelated data is removed, just like when a filter is applied.
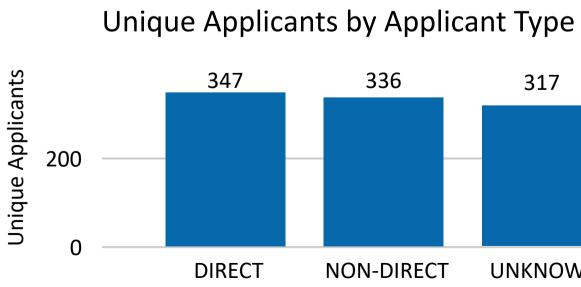
No Interaction: Selecting a value in one visual has no effect on another visual.

Unique Applicants by First Generation

UNKNOWN 319

YES 311

NO 370

Cross-Highlighting

Unique Applicants by Applicant Type

	347	336	317
200			
0	DIRECT	NON-DIRECT	UNKNOWN

Cross-Filtering

Unique Applicants by Applicant Type

	347	336	317
200			
0	DIRECT	NON-DIRECT	UNKNOWN

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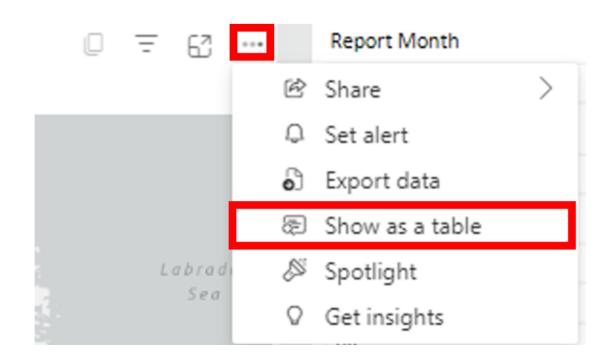- Personal Bookmarks
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View Visualization Data

If you would like to see the data behind a visualization, you can display the data directly within Power BI.

This feature is most useful when looking at visualizations displaying numerical data in a non-numerical way. A few good examples of visuals to view data from are maps and line charts, as well as other visuals that mainly display general trends or high level comparisons.
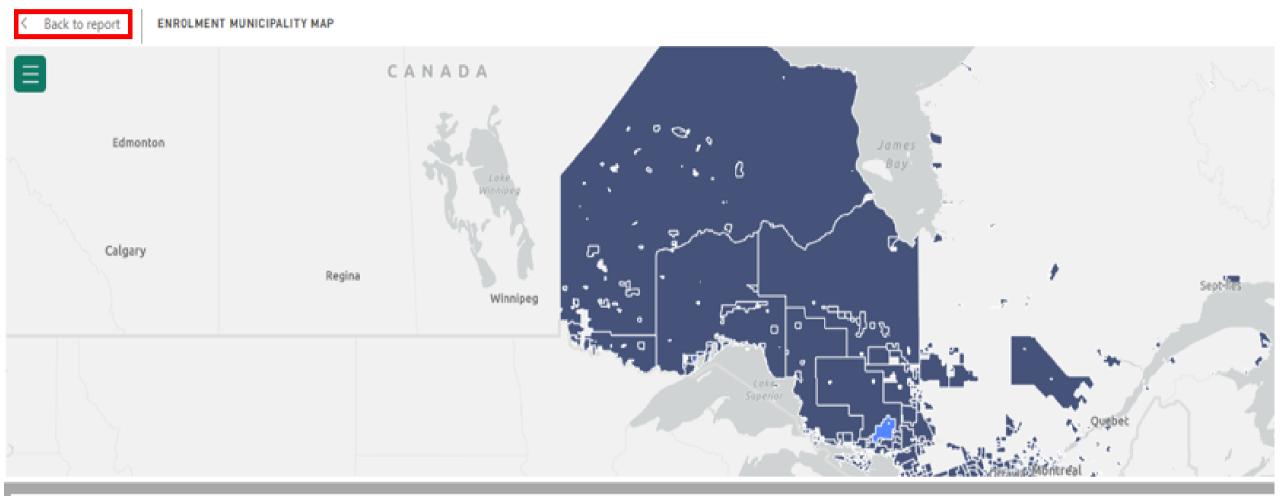
You can view the data by selecting the "**...**" that appear in the top right hand corner of every graphical visual upon hovering over it with your cursor.

Next, simply click **Show as a table** to have the visual and data displayed adjacent to one another in the window.
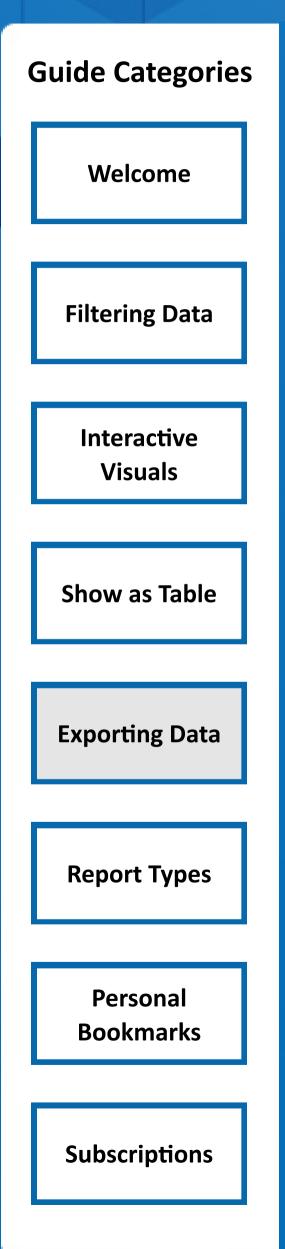
To return back the report, simply click the **Back to report** option in the top left hand corner of the screen.
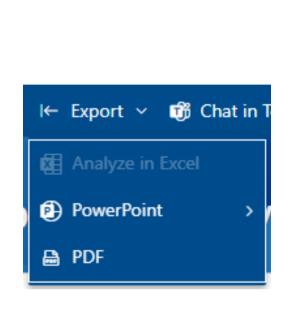
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Export Reports to PDF or PowerPoint

Power BI allows you to export reports to a **PDF** or **PowerPoint**. This feature enables offline demos or presentations of Power BI content to those who do not have access to the published reports.

To export, navigate to the **Export** button in the top left hand side above the report canvas and select the desired type of export.
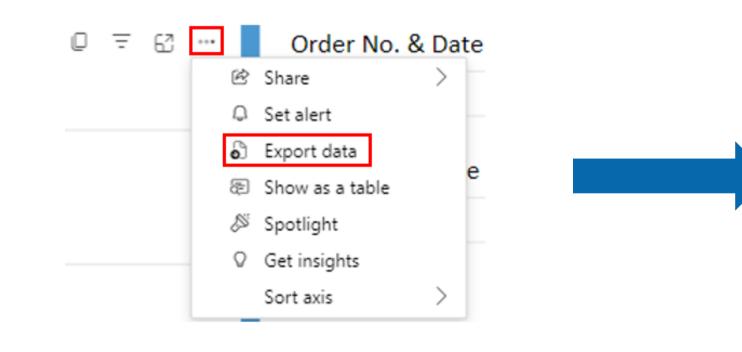
Selecting either export option will open an pop up window. Exporting with **Current Values** will export the report with any currently selected filters applied. Exporting with **Default Values** will export the report in its default state and any selected filters will not be reflected in the export.

Selecting the **Only export current page** option will limit the export to the report page currently being viewed.

When the export has been completed, a PowerPoint or PDF file will show up in your **downloads** folder.

When exporting to PowerPoint, selecting **Embed live data** option will open a window that provides a link that can be used to embed the live and interactive report within PowerPoint.

If you want to embed the live report into a new PowerPoint file, simply select **Open in PowerPoint** and a new PowerPoint file will open containing the embedded report.
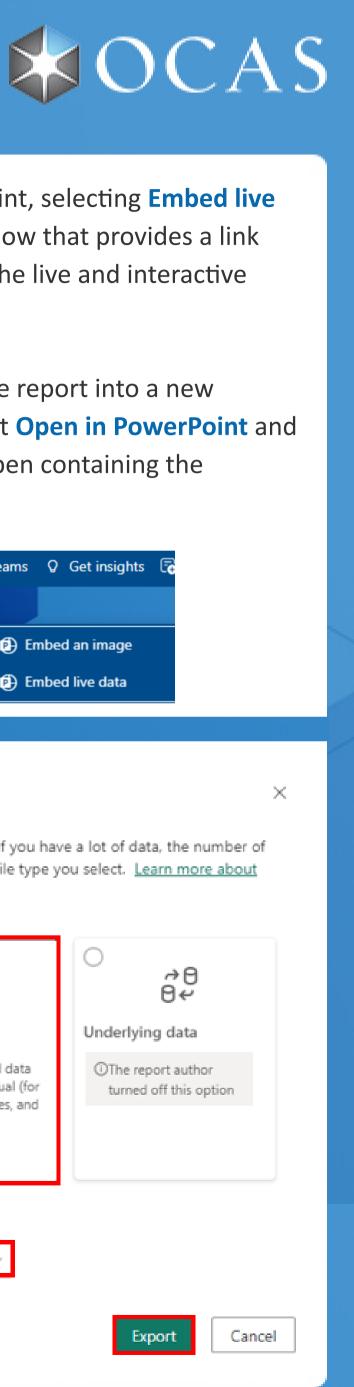
Export Data to Excel

To export the data to a format that can be used in another tool, navigate to the top right of the visual or table and click the "**...**" and select the **Export data** option.

A pop up will appear with the option to export the data. Choose the **Summarized data** option and select the file format (.CSV or .XLSX) in the bottom left of the pop up window.

Once selected, select the **Export** button in the bottom right to trigger the export.

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Report Naming Conventions

In order to improve readability and organization of report names, we have come up with a naming convention for published reports in our **OCAS Domestic** app. We have condensed the reports into 5 main categories which are described below:

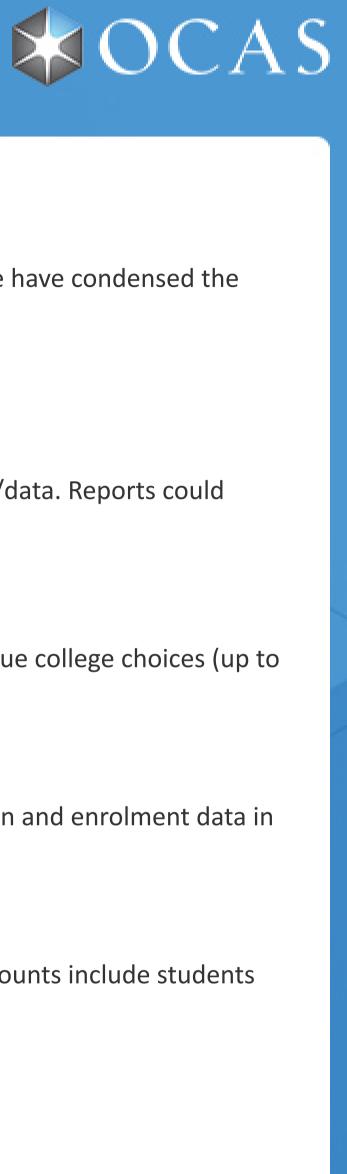**HELP###** (**Help**) These reports include help and reference report guides to assist the user in successfully using Power BI and understanding reports/data. Reports could contain user guides, data definitions, reference materials, etc.

APPL### (**Application**) These reports contain data related to college applications. Common counts in these reports include distinct applicants, unique college choices (up to 3 per application), program choices (up to 5 per application) and confirmations.

COMP### (**Comprehensive**) These reports contain data from multiple systems. For example, report COMP001 contains KPI data as well as application and enrolment data in the same place.

RETN### (**Retention**) These reports contain enrolment data presented in the form of student retention across enrolment periods. Some common counts include students retained in same program, students transferred to a different program and students transferred to a new college.

OTHR### (**Other**) These reports contain data not covered by the other categories but are still relevant to the colleges.

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Personal Bookmarks

As a report consumer, you have the ability to create your own set of bookmarks for each report by capturing various states of a report page (that includes any selected filters, slicers and state of visuals), give them custom names and later return to each state with a single click.

This feature is extremely useful for saving report states and not having to re-select multiple slicers or filters every time you return to a report.
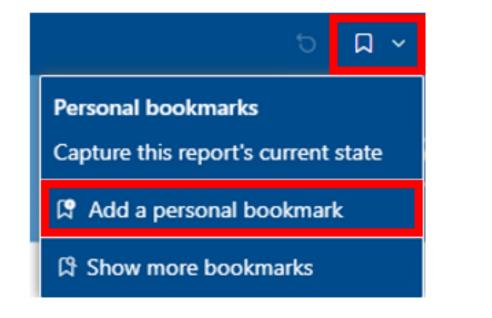
To get started in creating a personal bookmark, go to any Power BI report and notice the bookmarks dropdown in the top right banner just above the report page.

First, make a few slicer selections on the report page to get it to a state that you would like saved.

Next, select the bookmarks dropdown and then click **Add a personal bookmark** to create a new personal bookmark. Any existing personal bookmarks will already be displayed in this dropdown window.

In the provided textbox, enter a custom name for the bookmark you are creating. By checking the **Make default view** box during the creating of a new bookmark, the newly created bookmark will be the default view whenever you leave and return to this report. Confirm your custom bookmark by clicking **Save**.

Any existing personal bookmarks can be renamed, updated or set as the default view at any time by clicking on the "**...**" and clicking on the appropriate option.

Subscriptions

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Power BI allows you to schedule a report for email delivery. This saves you the time of logging into Power BI and delivers the information you want to your inbox when you need it.

To set up a subscription, navigate to the **Subscribe to report** button in the top center of the screen to open the subscriptions panel and click the **Create a subscription** button.

From the subscription panel, configure your subscription details which includes entering a subscription name, adding attachments, setting a delivery frequency and defining the email subject/content.

By default, the subscription will include any report filters that are currently applied. To subscribe to the default report, uncheck the **Include my changes** option.

To make the subscription active, toggle to the **ON** position beside the report name and click save at the bottom of the edit screen. Clicking the **New subscription** button at the bottom of the screen will allow you to set up another report to be delivered to you with different information.

Subscriptions

Keep track of your data by subscribing to this report.

Manage all ⬀

As a viewer, you can't subscribe others.

∨ College Count Report ✏ 🗑 ⬤

Subscription name *

College Count Report

Attach full report

📄 PDF (.pdf) ⌄

Scheduled date and time

Start date *	End date
11/14/2023 📅	11/14/2024 📅

Repeat *

Daily ⌄

Scheduled time *

| 11 ⌄ | 30 ⌄ | AM ⌄ |

Time zone *

(UTC-05:00) Eastern Time (US and Cana ⌄

Emails will be sent daily at 11:30 AM (UTC-05:00) Eastern Time (US and Canada) starting Tuesday, November 14, 2023.

∨ More options

Email subject

My Daily College Count Report

Message

Include an optional message...

Report page

College Count Report ⌄

Link to report in Power BI

⬤

Report page preview

⬤

My changes

Include any changes to the report, such as applied filters, drilling, spotlights and more. What's included? ⬀

☑ Include my changes

State as of 11/14/2023, 11:44 AM

My Daily College Count Report

MB **Microsoft Power BI**
To: ▮▮▮▮▮▮

📄 APPL001 - College Count Report.p... ⌄
74 KB

■■ Microsoft   Power BI

College Count Report

Go to report >