The University of Texas
Rio Grande Valley

DIVISISION OF STRATEGIC ENROLLMENT & STUDENT AFFAIRS
Power BI Enrollment Reports Guide

UNIVERSITY OF TEXAS RIO GRANDE VALLEY

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DIVISION OF STRATEGIC ENROLLMENT & STUDENT AFFAIRS
Power BI Enrollment Reports Guide

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Contact Information

If you are experiencing any issues, notice any errors, or have any questions, please contact Enrollment Systems and Analysis @ enrollmentsystems@utrgv.edu

Enrollment Reports Overview

Several members of the Enrollment Systems and Analysis team and IT have been working on transitioning certain Enrollment Reports to Power BI. One of the main benefits of moving to Power BI includes:

- Better visualization of Enrollment data

The Enrollment Reports that have transitioned to Power BI Reports are the following:

- Enrollment Headcount Report
- Counts By College, Department & Major Report
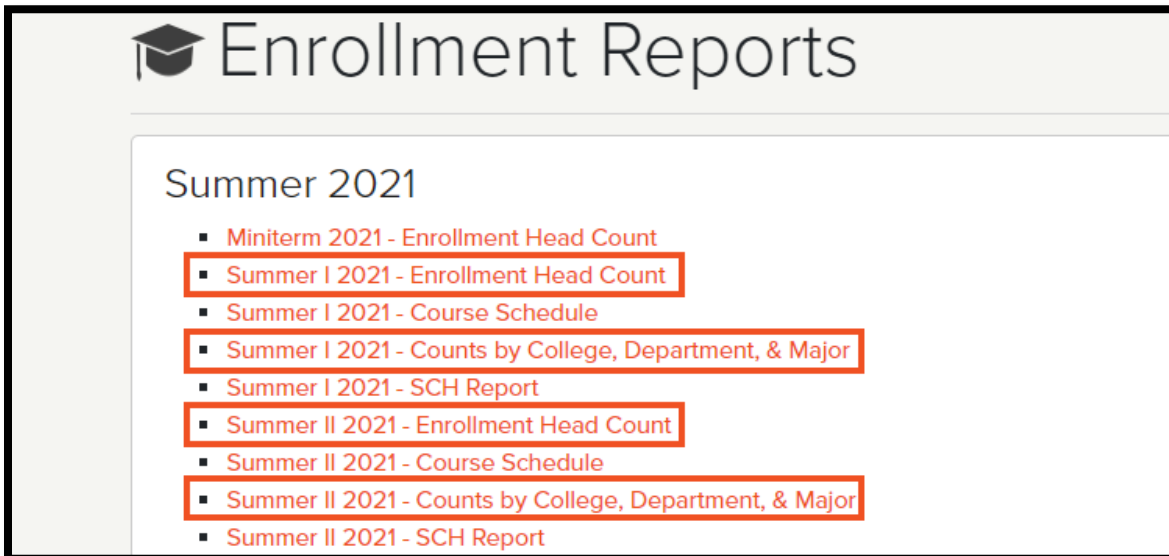
NOTE: Course Schedule, SCH reports are not being transitioned to Power BI at this time and are still in Excel format. They can be found under the Course Schedule & Semester Credit Hours (unofficial) tab.
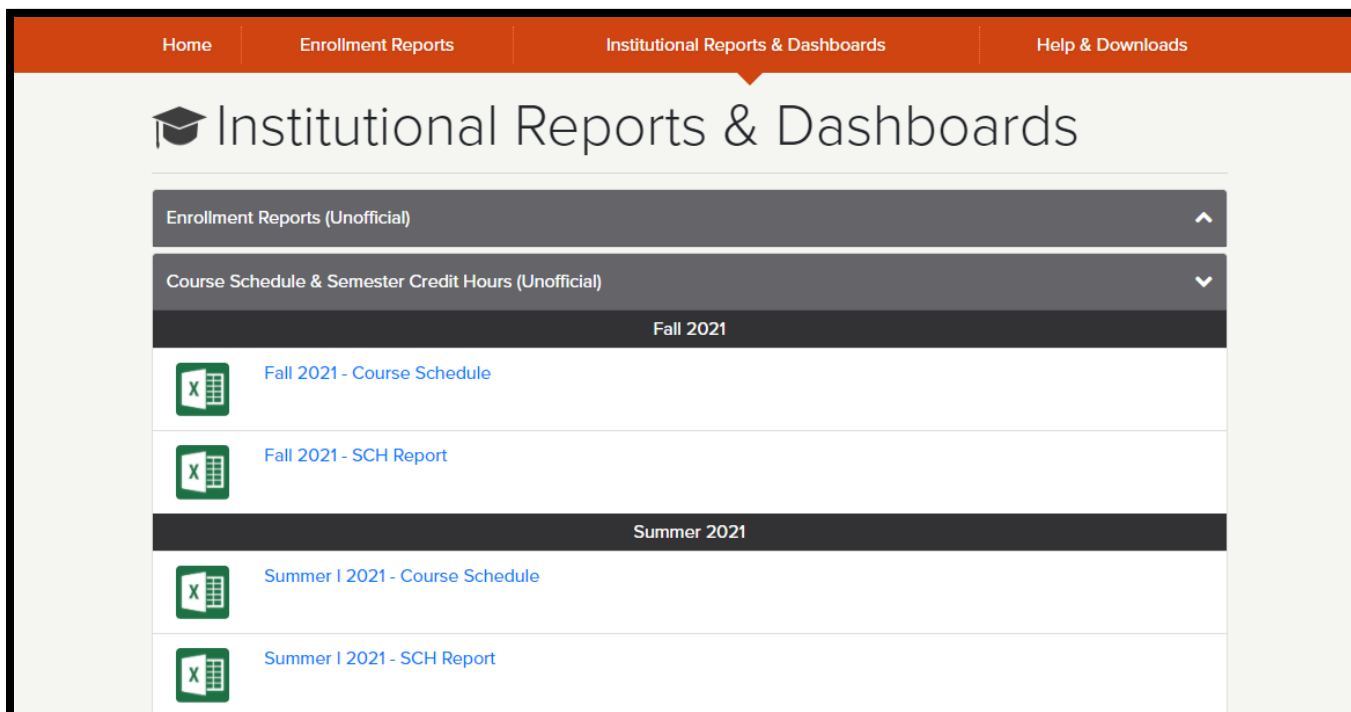
What has changed?

The Enrollment Power BI reports look completely different than what is seen in the distributed Excel Files. For example, the Summer II 2021 headcount report, has the data in tables for all days across 2 years (Summer I 2021 and Summer II 2020).

While the Power BI Enrollment report displays data visually in charts and graphs across three years by Class Day.

Note: Class Day means days prior to first class day or after first class day.

IMPORTANT NOTE: Visually it has changed a lot, but underlying data is still the same.
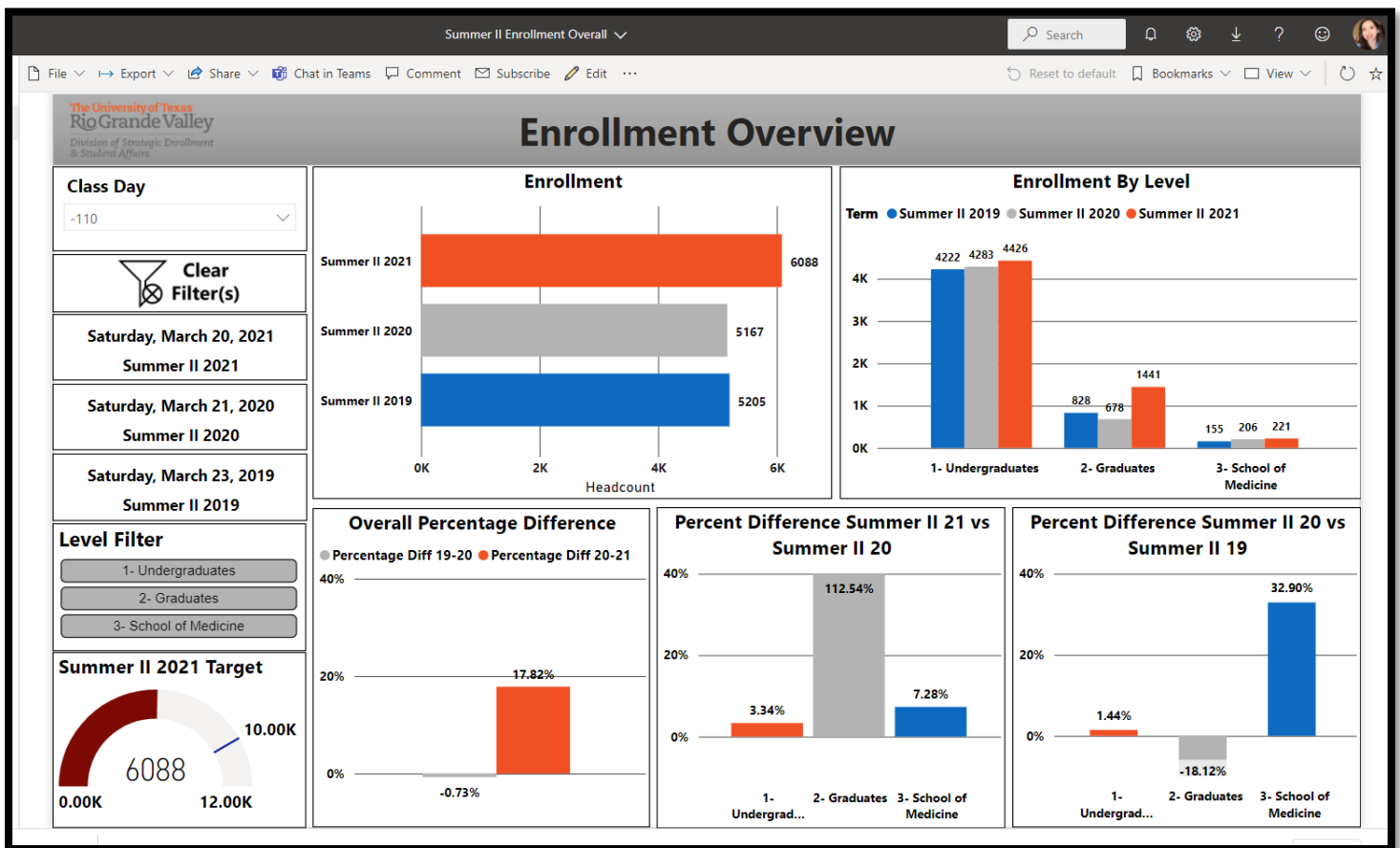
Navigating to Power BI Enrollment Reports

1. Login to the https://my.utrgv.edu/home portal with your UTRGV Credentials.
2. Click on **Institutional Reports & Dashboards**.
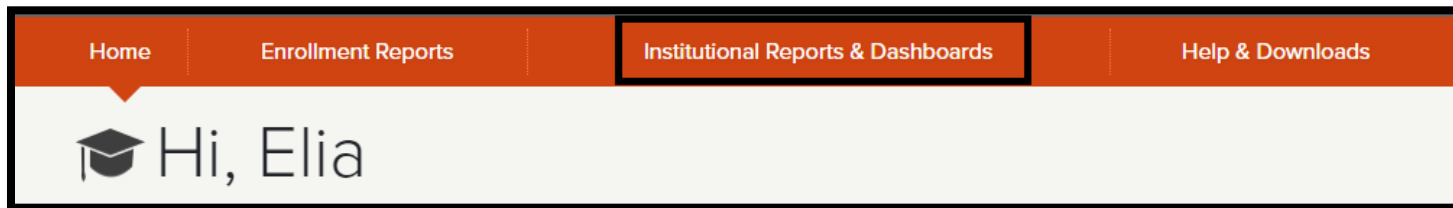
3. Under the **Enrollment Reports (Unofficial)** tab, you will see the Power BI Enrollment Reports that have been created for Spring 2021, Summer I 2021, Summer II 2021, Fall 2021, May Mini 2021.
Click on any one of the links to be taken to the Enrollment Report for that semester.
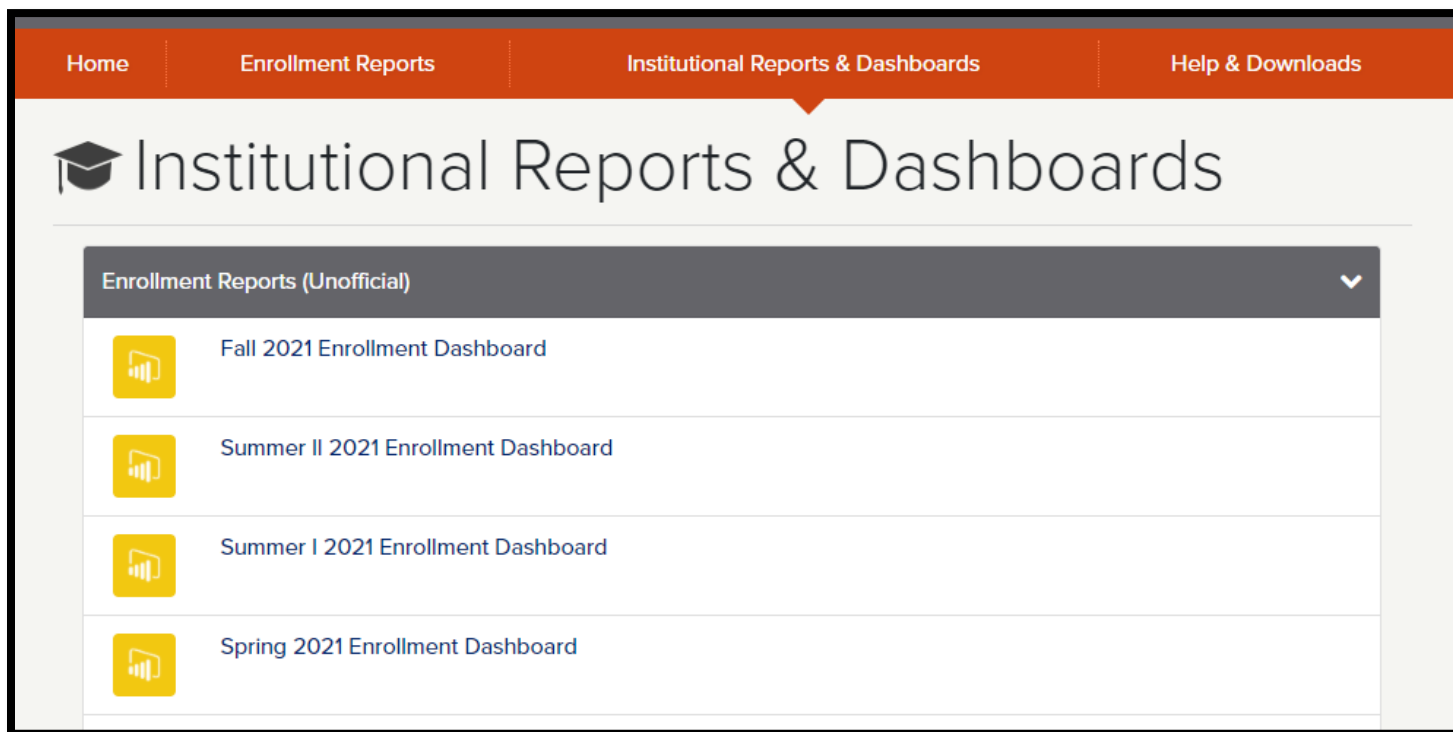
Power BI Enrollment Tabs

There are 5 tabs in the Power BI Enrollment Report. The following sections will explain each different tab.

1. Enrollment Overview
2. By College & Department
3. By Level
4. By Classification
5. Events

Pages
- Enrollment Overview
- By College & Departme...
- By Level
- By Classification
- Events

Enrollment Overview Tab

The **Enrollment Overview** tab replaces the **Enrollment Daily** tab of the **Enrollment Headcount** excel report.
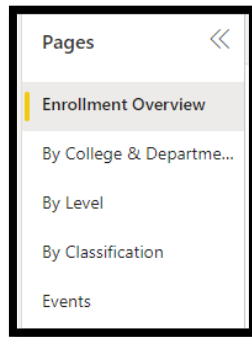
1. **Class Day Slicer**: Select class day to view stats for that day. *Note: Class Day is # of class days prior to first day of class (when registration starts) or after first day of class. See EVENTS tab for Class days and their respective date.*
2. **Clear Filter**: used to clear selected filters. Press CTRL + mouse click to clear filter.
3. **Dates:** Date of Class Day selected for past three years.
4. **Level Filter**: Select Level to filter data.

6. **Enrollment:** Headcounts for last 3 years.
7. **Enrollment By Level**: shows count by level (UG, GR, SOM)
8. **Overall percentage difference**: View % difference between two years: 2020/2021 and 2019/2020.
9. Percentage difference by Level for 2020/2021.
10. Percentage difference by Level for 2019/2020.
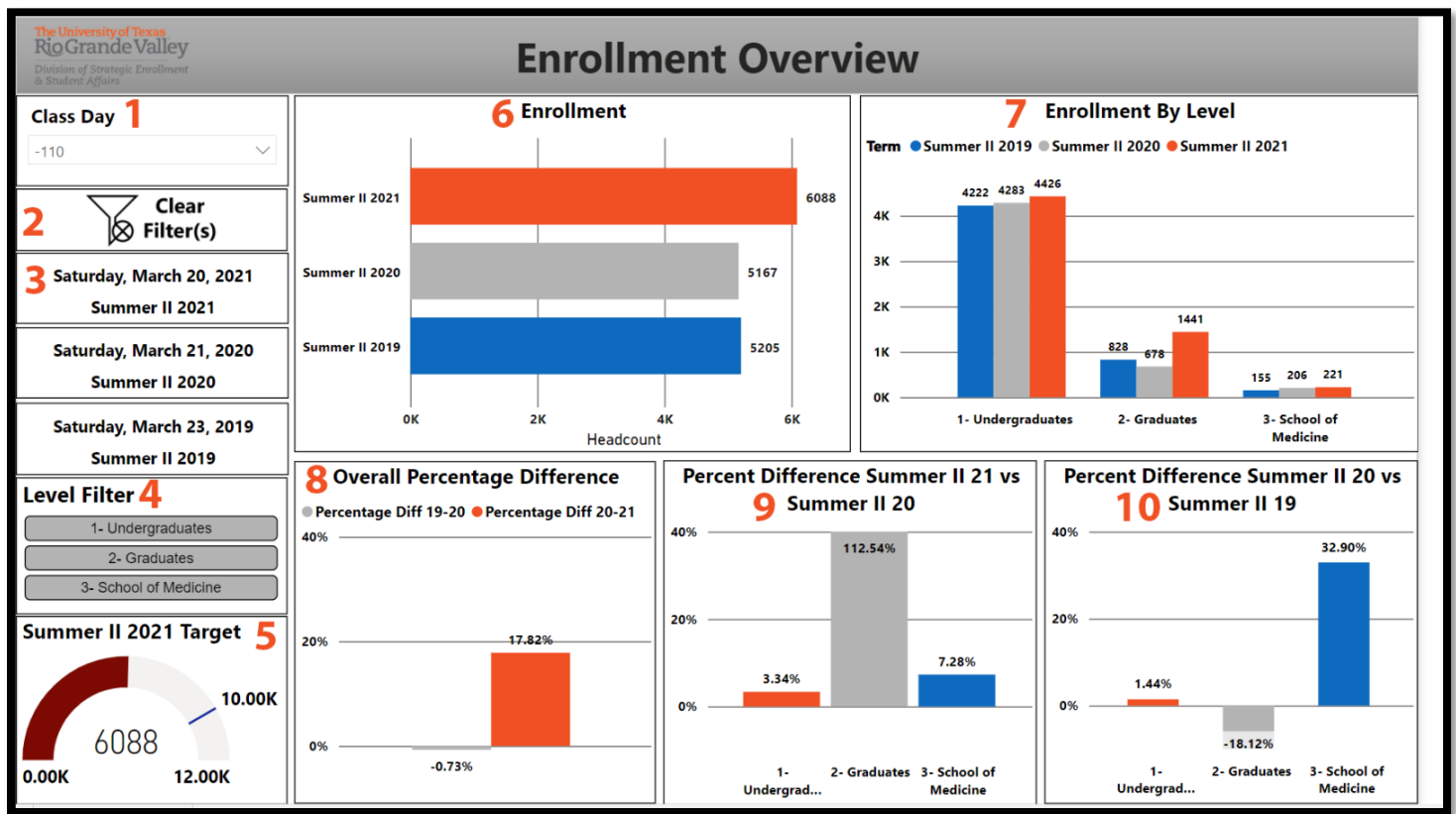
By College & Department

The **By College & Department** tab is a combination report that is sort of a mix of the **Counts by College, Department, Major Report** and **Enrollment by College** tab of the **Enrollment Headcount** excel report.

1. **Class Day Slicer**: Select class day to view stats for that day. *Note: Class Day is # of class days prior to first day of class (when registration starts) or after first day of class. See EVENTS tab for Class days and their respective date.*
2. **Clear Filter**: used to clear selected filters. Press CTRL + mouse click to clear filter.
3. **Dates:** Date of Class Day selected for past three years.
4. **Level Filter**: Select Level to filter data.

5. **College Filter**: Select College to filter data.
6. **Department Filter**: Select Department to filter data.
7. **Enrollment By College**: Default visual shows stats by college. This visual will allow you to drill down two more times, to Department, then to Major(See section on Drilling Down).
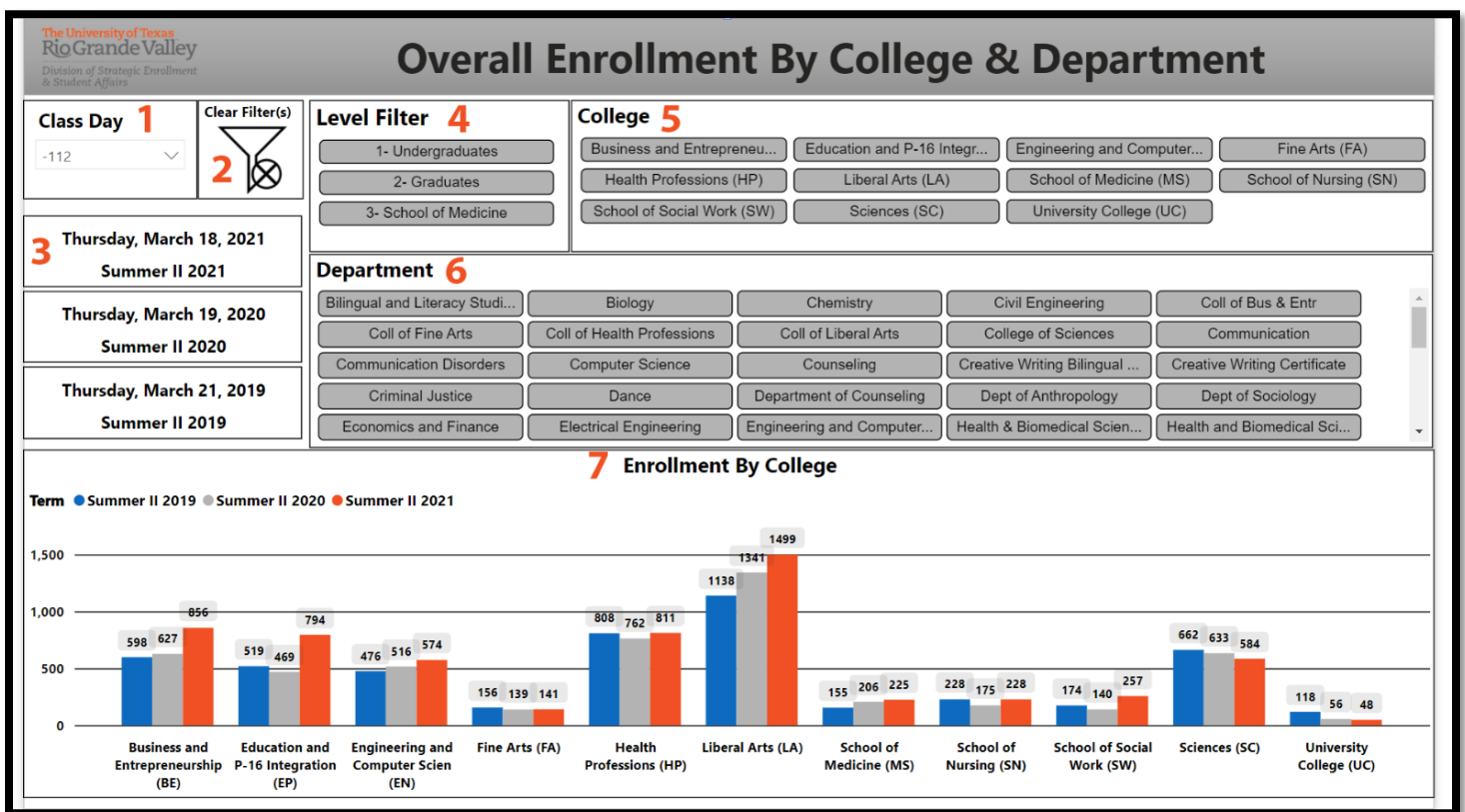
By Level

The **By Level** tab replaces the **Enrollment By Level & Class** tab of the **Enrollment Headcount** excel report.

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1. **Class Day Slicer**: Select class day to view stats for that day. ***Note: Class Day is # of class days prior to first day of class (when registration starts) or after first day of class. See EVENTS tab for Class days and their respective date.***
2. **Clear Filter**: used to clear selected filters. Press CTRL + mouse click to clear filter.
3. **Dates:** Date of Class Day selected for past three years.

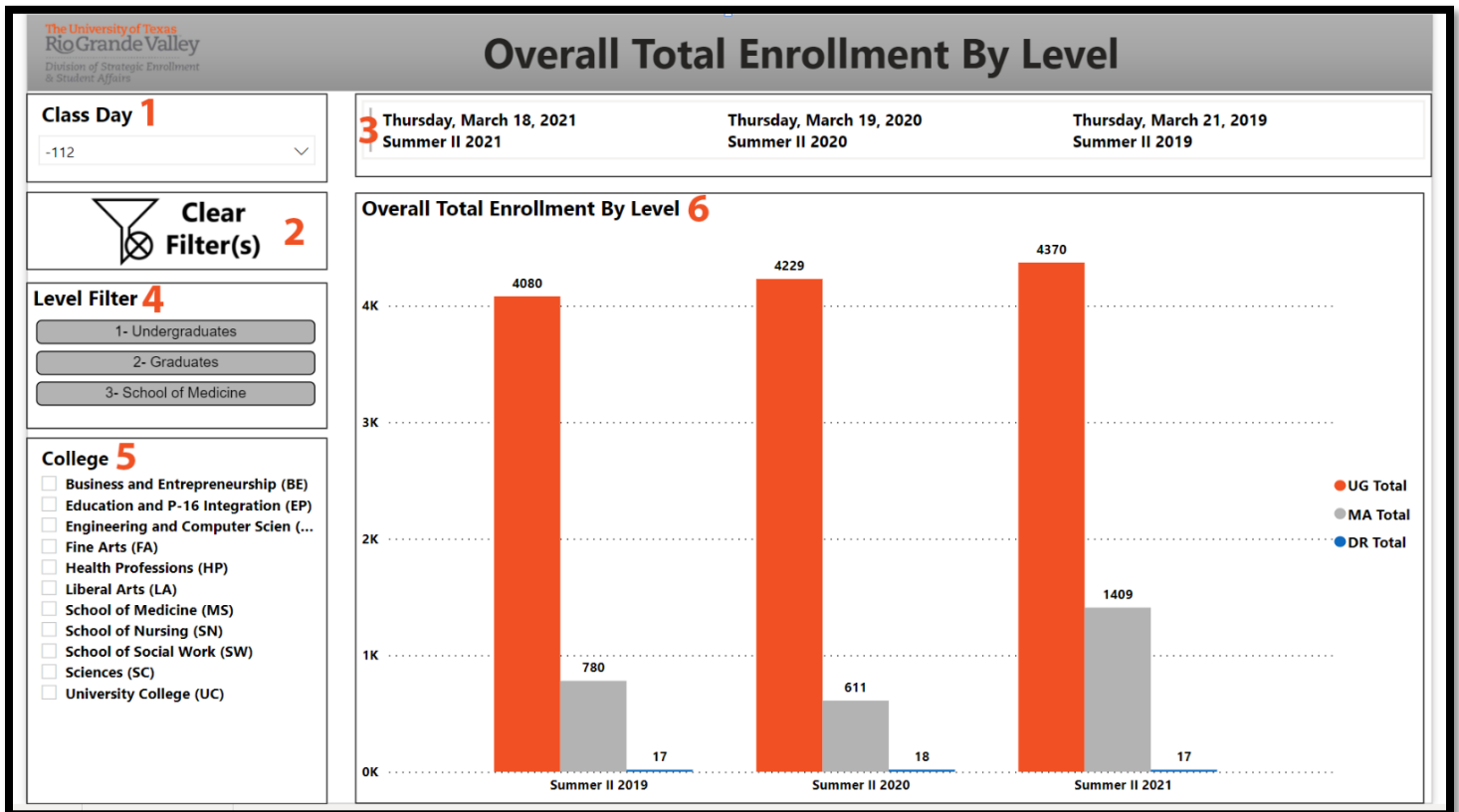4. **Level Filter:** Select Level to filter data.
5. **College Filter:** Select College to filter data.
6. **Overall Total Enrollment By Level:** overall enrollment by level for the past 3 years.

By Classification

The **By Classification** tab is report that replaces the **Enrollment By Level and Class** tab of the **Enrollment Headcount** excel report.

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1. **Class Day Slicer:** Select class day to view stats for that day. *Note: Class Day is # of class days prior to first day of class (when registration starts) or after first day of class. See EVENTS tab for Class days and their respective date.*
2. **Clear Filter:** used to clear selected filters. Press CTRL + mouse click to clear filter.
3. **Dates:** Date of Class Day selected for past three years.
4. **College Filter:** Select College to filter data.

5. Doctoral Bar Graph
6. Graduate Bar Graph showing stats by Graduate Classifications.
7. Undergraduate Bar Graph showing stats by Undergraduate Classifications.


Events

The **Events** shows the Class Day, Class Date and Class event for the past 3 years. This is a good tab, especially when you are having trouble deciding which class day to filter by.

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Division of Strategic Enrollment & Student Affairs

Events

| Class Day	Summer II 2021	2021 Event	Summer II 2020	2020 Event	Summer II 2019	2019 Event
16			Thursday, July 30, 2020		Thursday, August 1, 2019	
15			Wednesday, July 29, 2020		Wednesday, July 31, 2019	
14			Tuesday, July 28, 2020		Tuesday, July 30, 2019	
13			Monday, July 27, 2020		Monday, July 29, 2019	
12	Friday, July 23, 2021	TR Orientation	Friday, July 24, 2020	TR Orientation	Friday, July 26, 2019	Brownsville - Orientation
11	Thursday, July 22, 2021		Thursday, July 23, 2020		Thursday, July 25, 2019	
10	Wednesday, July 21, 2021	EF Orientation	Wednesday, July 22, 2020	EF Orientation	Wednesday, July 24, 2019	Edinburg- TR Orientation
9	Tuesday, July 20, 2021		Tuesday, July 21, 2020		Tuesday, July 23, 2019	
8	Monday, July 19, 2021		Monday, July 20, 2020		Monday, July 22, 2019	
7	Friday, July 16, 2021	EF Orientation	Friday, July 17, 2020	EF Orientation	Friday, July 19, 2019	
6	Thursday, July 15, 2021		Thursday, July 16, 2020		Thursday, July 18, 2019	
5	Wednesday, July 14, 2021	EF Orientation Stats: 235 Dropped students for non-payment 102 Partials ; paid enough for 3SCH or more 22 Saved students by a department 2 Drop and need to be reinstated -> made a payment, enrolled or saved during drop cycle	Wednesday, July 15, 2020	EF Orientation	Wednesday, July 17, 2019	
4	Tuesday, July 13, 2021	Census date Summer 2	Tuesday, July 14, 2020	TR Orientation	Tuesday, July 16, 2019	
3	Monday, July 12, 2021		Monday, July 13, 2020		Monday, July 15, 2019	
2	Friday, July 9, 2021	Last Day to withdraw and receive 50% refund Summer 2 - EF Orientation	Friday, July 10, 2020	EF Orientation	Friday, July 12, 2019	
1	Thursday, July 8, 2021	1st class day Summer 2	Thursday, July 9, 2020		Thursday, July 11, 2019	
-1	Wednesday, July 7, 2021	Last Day to withdraw and receive 100% Refund; Waitlist Ends (Purged after 5PM) - EF Orientation	Wednesday, July 8, 2020	EF Orientation	Wednesday, July 10, 2019	Brownsville - TR Orientation
-2	Tuesday, July 6, 2021	Stats: 353 Dropped students for non-payment 25 Saved student recently registered for the 1st time	Tuesday, July 7, 2020		Tuesday, July 9, 2019	

By College & Department: Drilling Down to Department and Major

As mentioned earlier, in the **By College & Department** page, you have the option of Drilling Down to **Department** then Drilling Down to **Major**. When drilling down to department or major, filter by College first using the **College** filter, before drilling down to Department or Major. There are many departments and majors, and if you do not filter by college or even department, then it will be very cluttered.
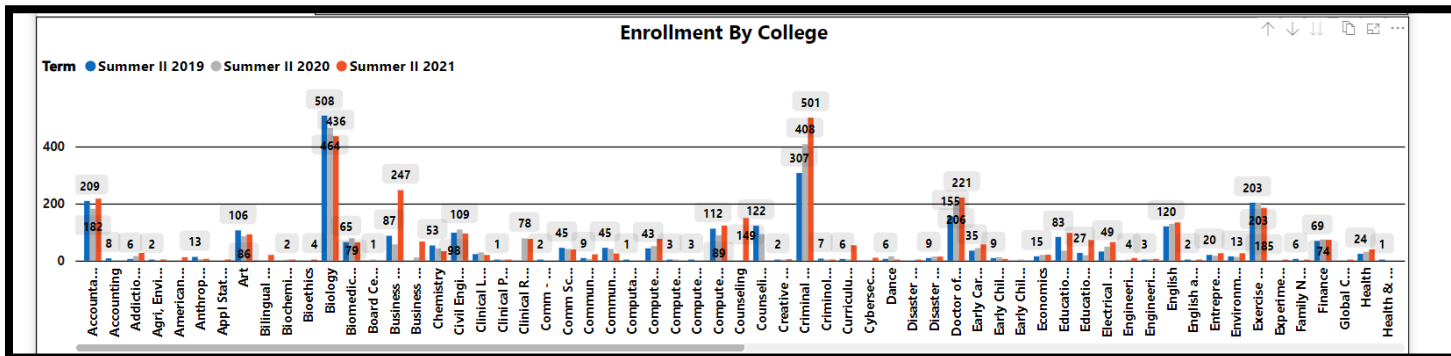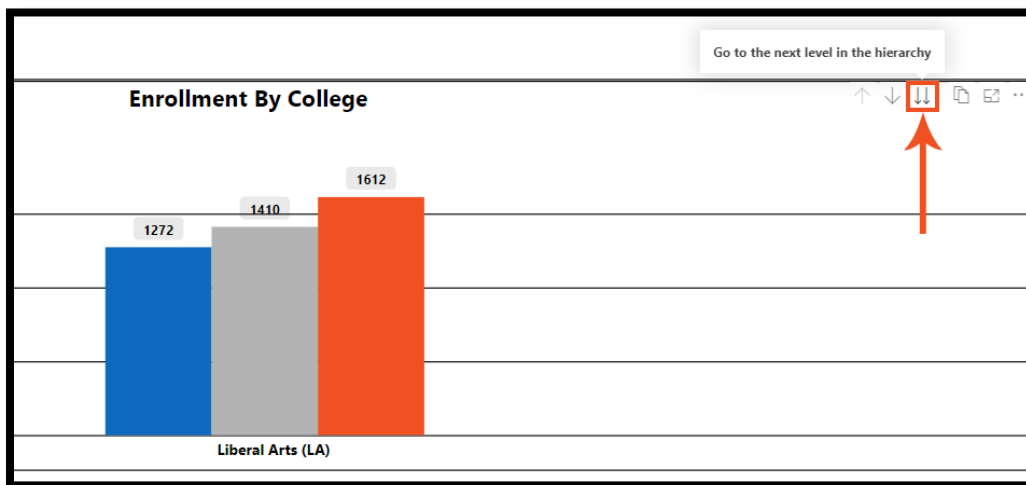

To Drill Down to **Department**:

1. First filter by using the **College** filter (example I am using Liberal Arts):
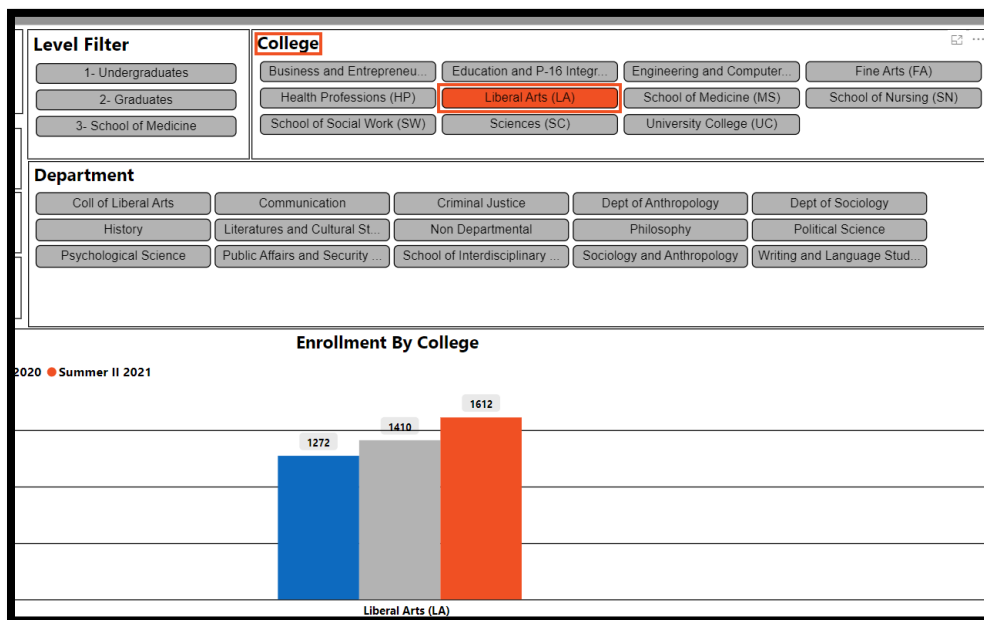
2. Then on the **Enrollment By College** graph, in the top right corner you should see **two down arrows**. Hovering over will say **"Go to the next level in the hierarchy"**.
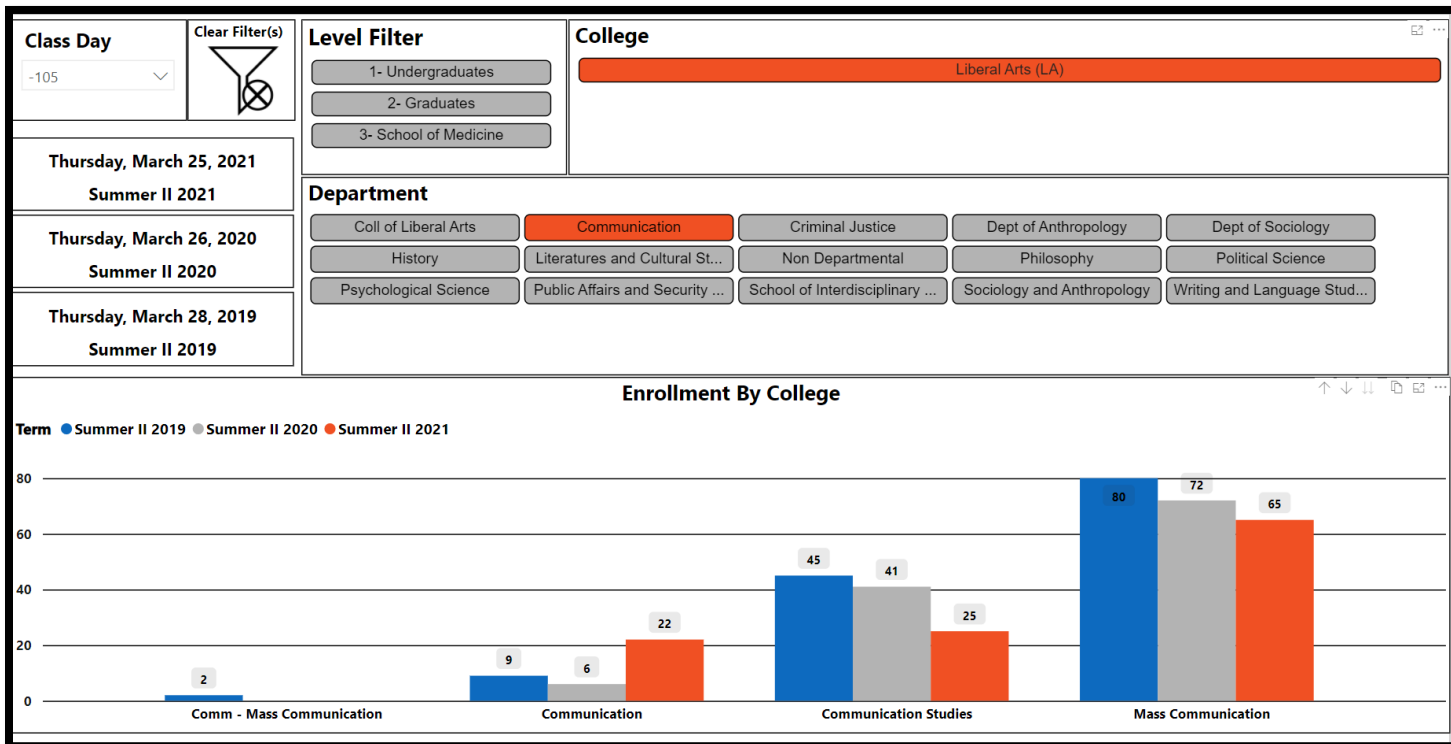
3. Clicking on the two down arrows, you will then be able to see Department stats.
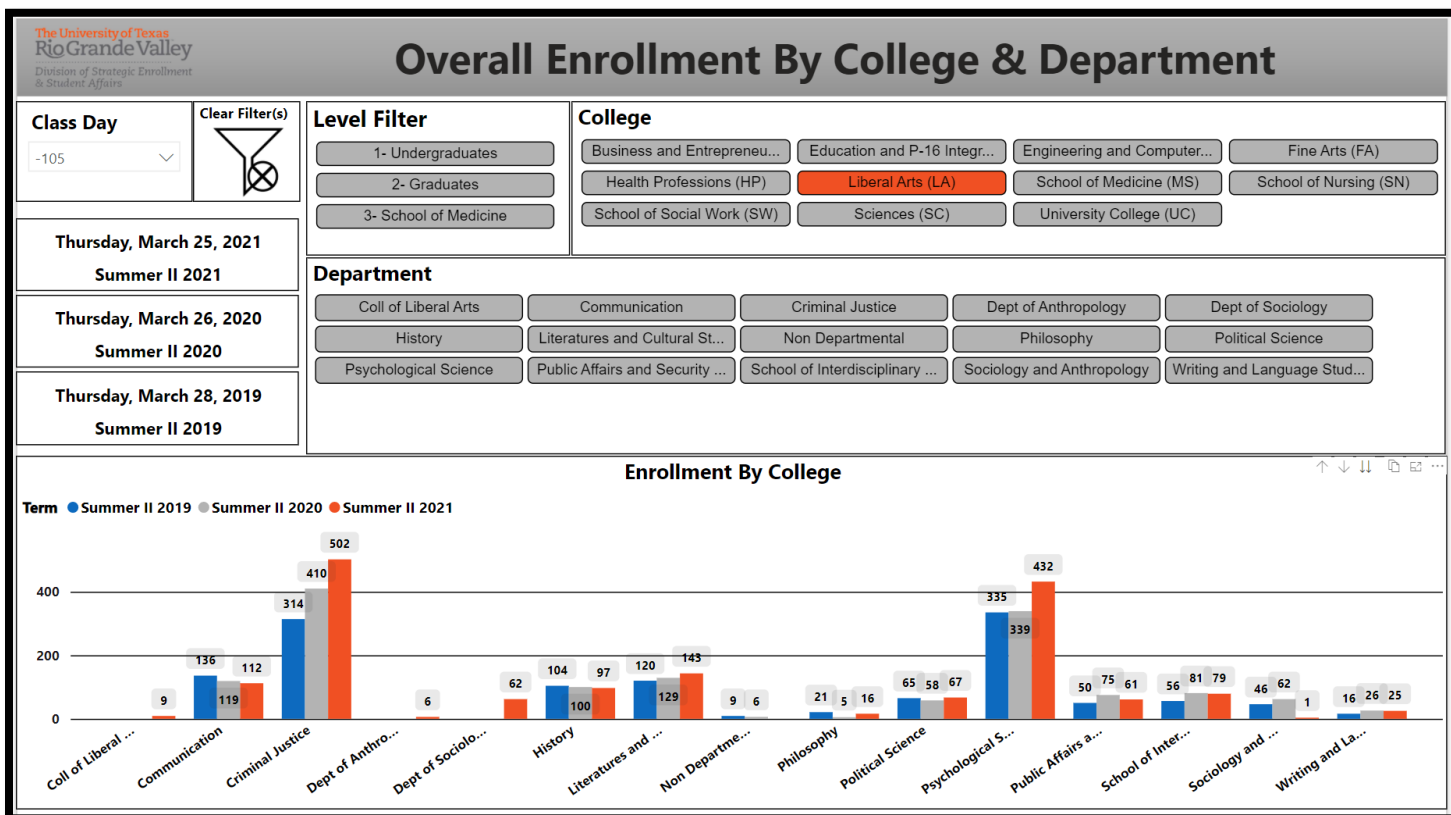
4. To drill down to **Major**, filter by **Department** first (in example, I will filter by Communication). Then click the two down arrows.
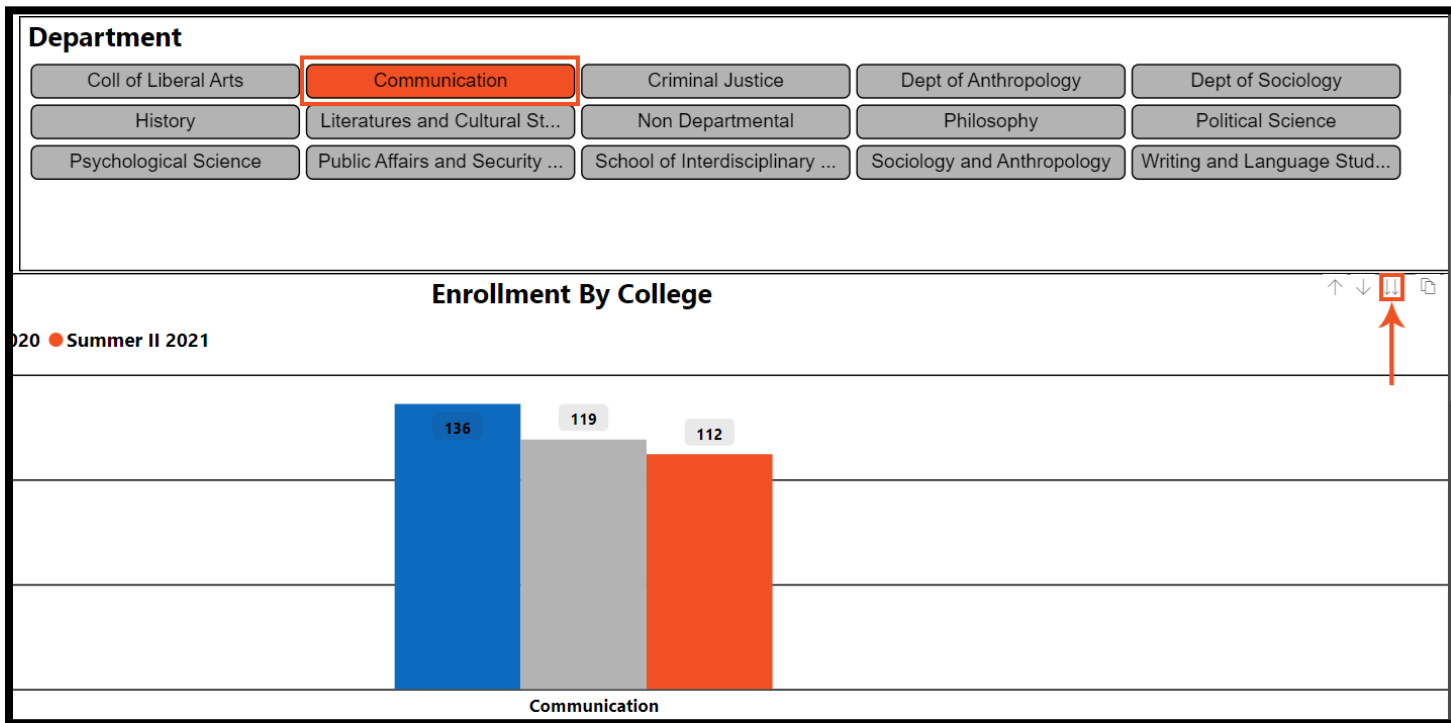
5. To go back up to Department or College, simply click the up arrow once (to go up to Department) or click the up arrow again to drill back up to college. FYI, if you hover over the icon, text will say "**Drill up**".
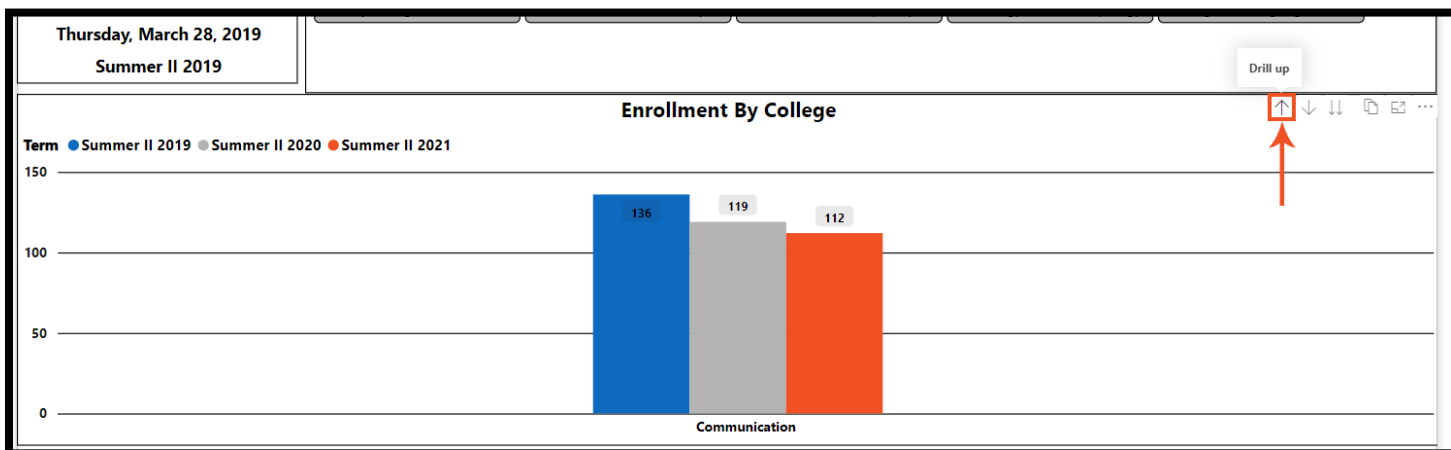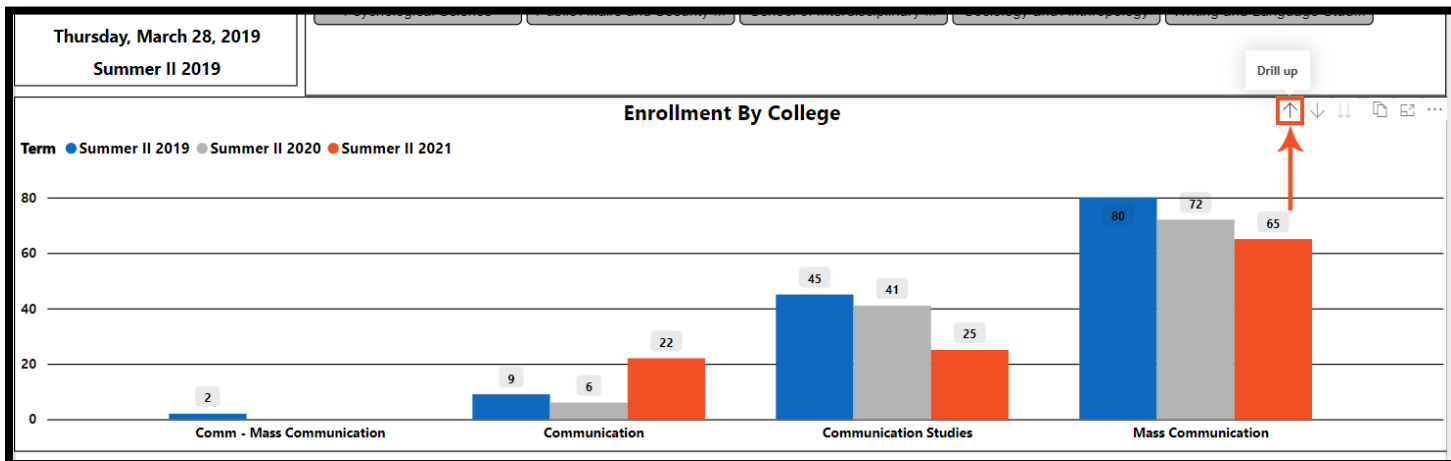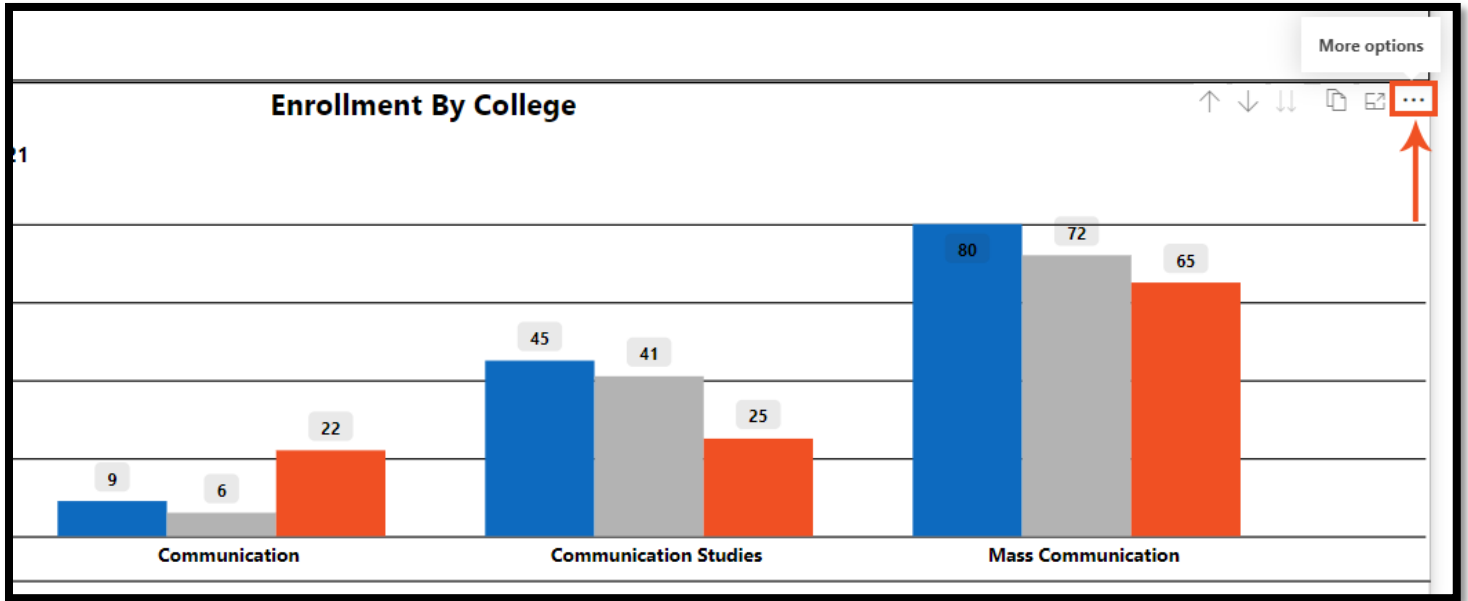

You can also click on **Clear Filter** box to clear all filters and return to the default.

Exporting Data from Chart or Graphs to Excel

You can also export data from charts or graphs to Excel. For this example, I will be leaving the filters (College: Liberal Arts, Department: Communication) on, as well as the drill down to Major in place.
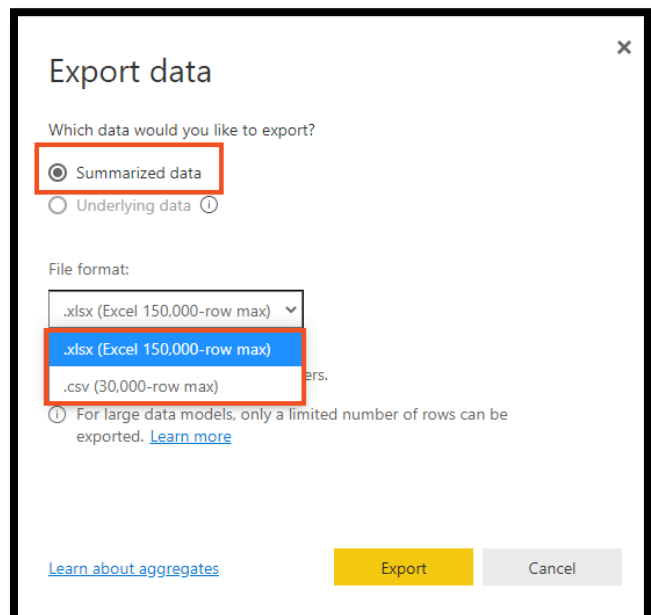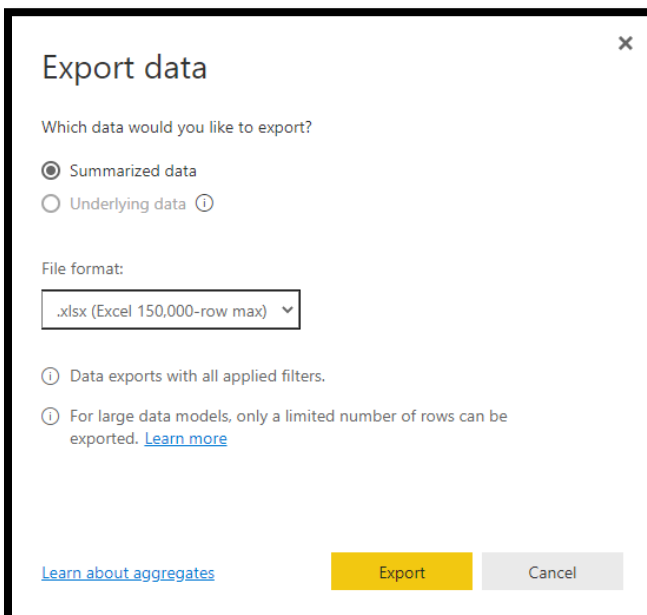
1. Click on the **More Options icon (…)**.


2. Then click on **Export data**.
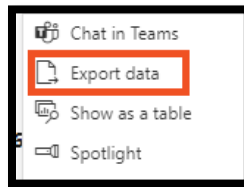
3. **Export data** window will open. You can only export data as **Summarized Data**. Available **File Format** options are .XLSX or .CSV. *It is highly recommended that you export only as XLSX as CSV leaves out filters, such as which Class Day is currently selected.*


4. Choose **.XLSX** and click **Export**.

5. The **Save As** dialog box will open, and you will be asked where you would like to save file. For this example, I will pick my PC's **Downloads** folder. I will also change the file name to one that reflects what I filtered by. *Important NOTE: Please remove .xlsx extension from the File Name when changing the file name, as that can cause issues when trying to open Excel file.*
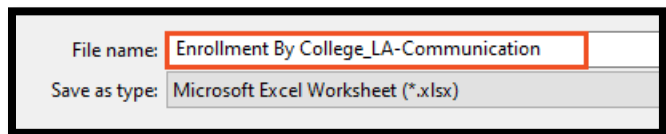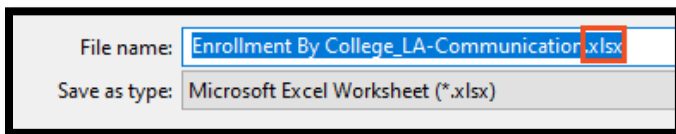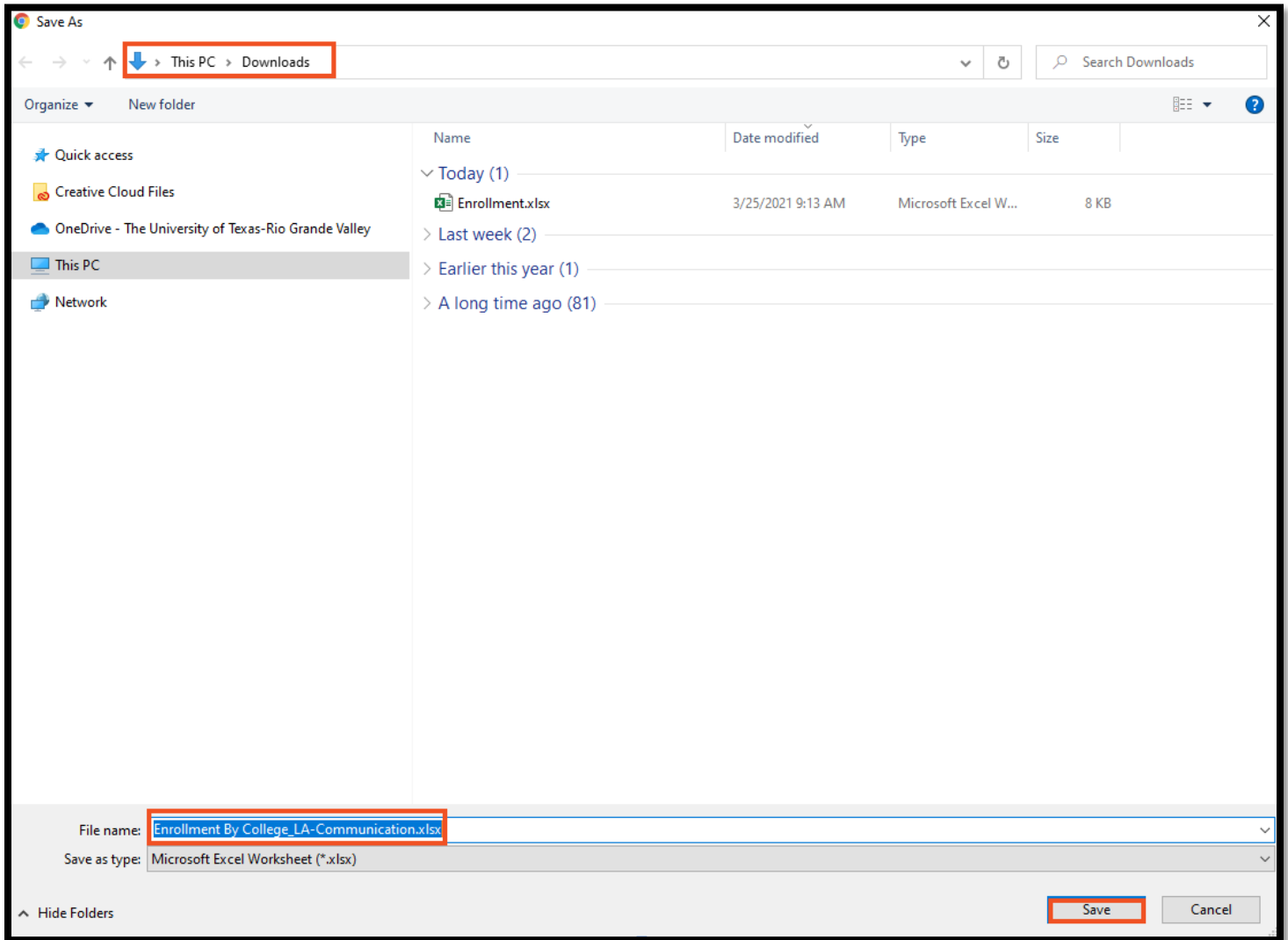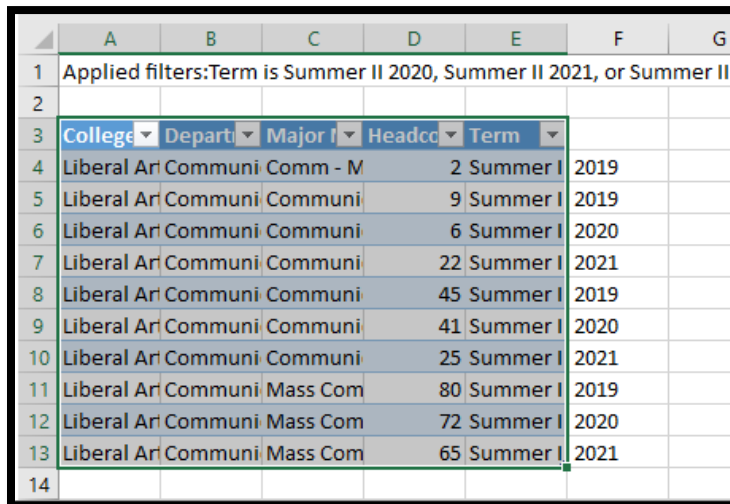

6. After clicking **Save**, your file will be saved and will appear at the bottom left corner of your screen. Clicking on the file will open it up in Excel.
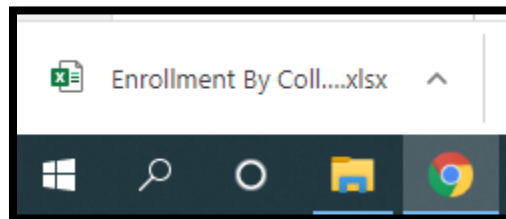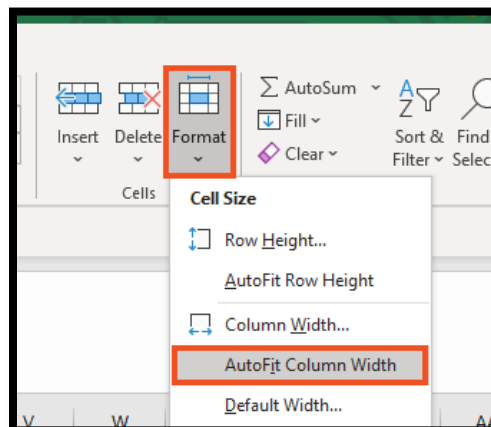
7. When opened in **Excel**, it will be in **Protected View**. Click **Enable Editing** to begin formatting/making changes.
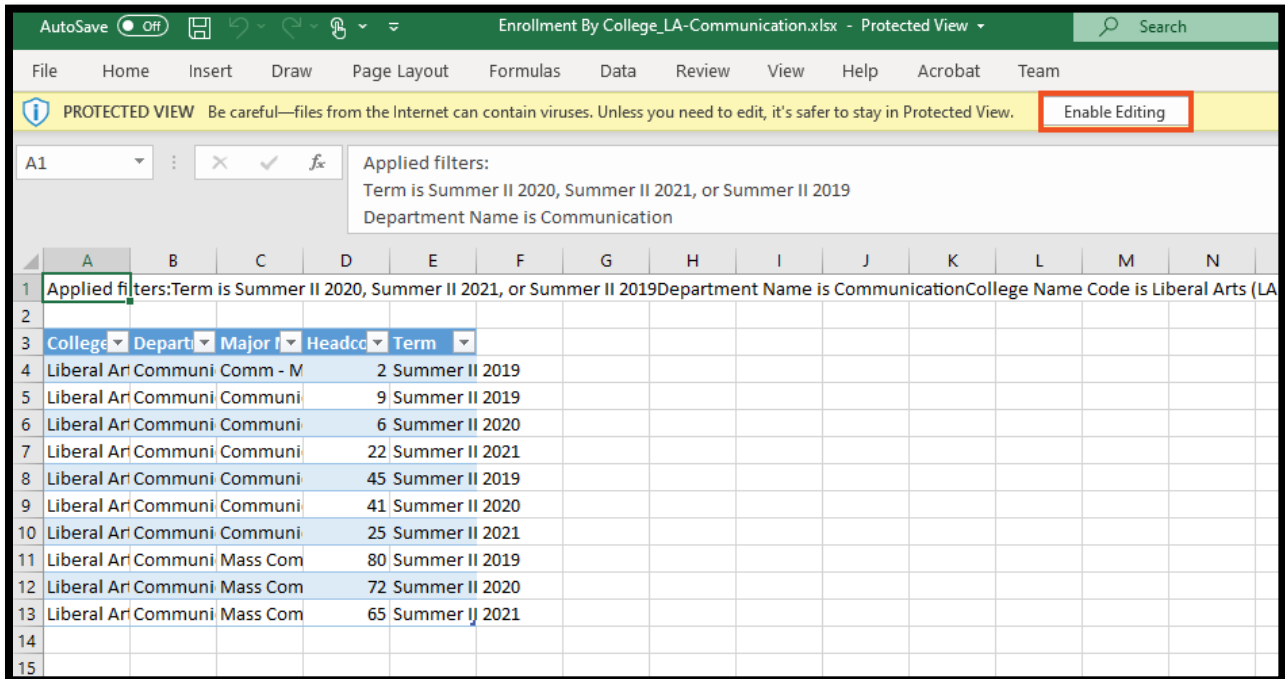
8. To format, I will select the columns I want to adjust the column width.

9. Then in the top **Excel Ribbon**, I will click on **Format**, then **AutoFit Column Width**.

Row 1 has filters that have been Applied:

- Terms: Summer II 2021, Summer II 2020, Summer II 2019
- Department Name: Communication
- College Name: Liberal Arts
- Class Day: -105

|	A	B	C	D	E	F	G	H	I	J	K	L
1	Applied filters:Term is Summer II 2020, Summer II 2021, or Summer II 2019Department Name is CommunicationCollege Name Code is Liberal Arts (LA)NumOfClassDay is -105											
2												
3	College Name Code ▼	Department Name ▼	Major Name ▼	Headcount ▼	Term ▼							
4	Liberal Arts (LA)	Communication	Comm - Mass Communication	2	Summer II 2019							
5	Liberal Arts (LA)	Communication	Communication	9	Summer II 2019							
6	Liberal Arts (LA)	Communication	Communication	6	Summer II 2020							
7	Liberal Arts (LA)	Communication	Communication	22	Summer II 2021							
8	Liberal Arts (LA)	Communication	Communication Studies	45	Summer II 2019							
9	Liberal Arts (LA)	Communication	Communication Studies	41	Summer II 2020							
10	Liberal Arts (LA)	Communication	Communication Studies	25	Summer II 2021							
11	Liberal Arts (LA)	Communication	Mass Communication	80	Summer II 2019							
12	Liberal Arts (LA)	Communication	Mass Communication	72	Summer II 2020							
13	Liberal Arts (LA)	Communication	Mass Communication	65	Summer II 2021							
14												
15												

Exporting a Specific Tab to PDF

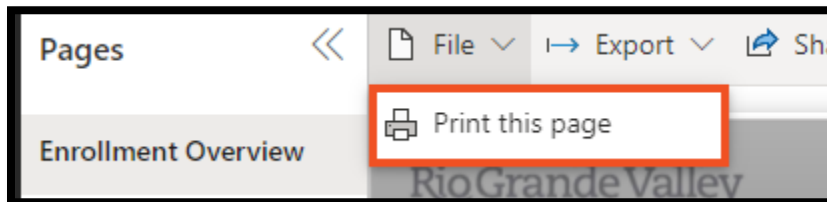You have an option of exporting an Enrollment Power BI tab to PDF.

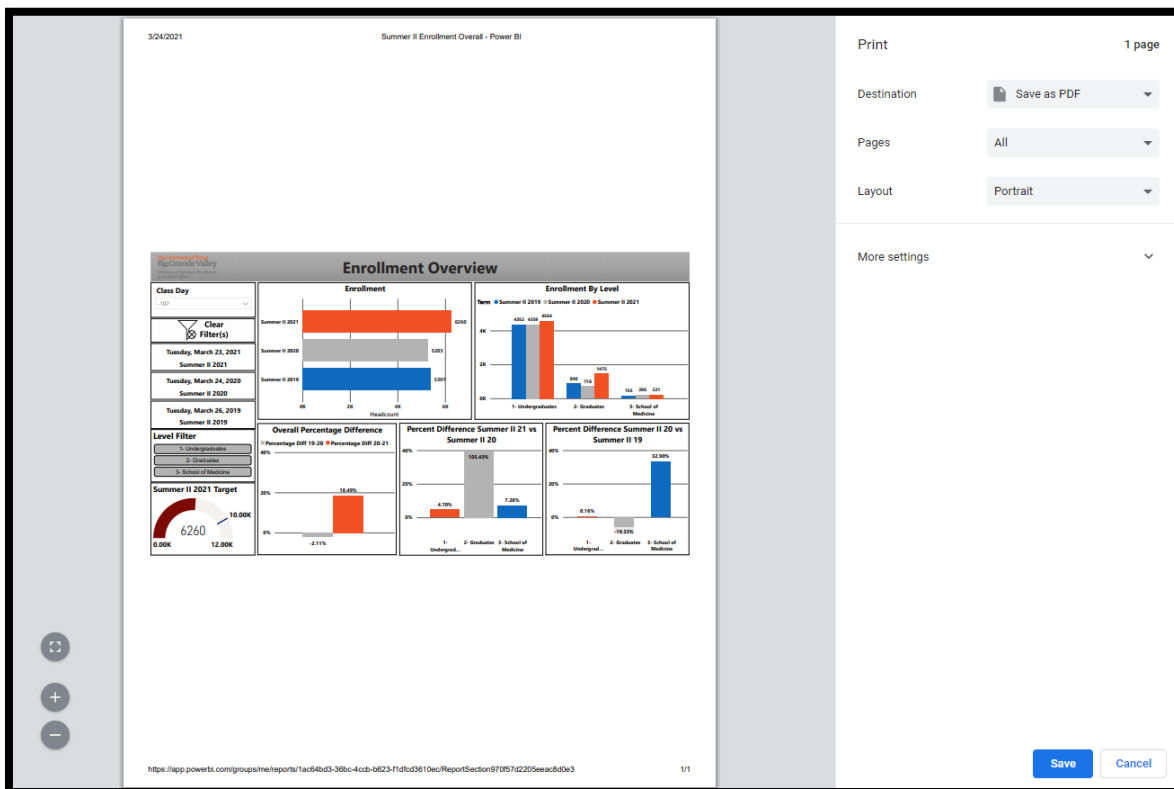1. Be sure you are on the page you want to export.
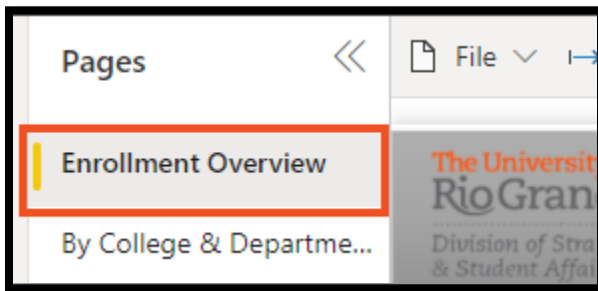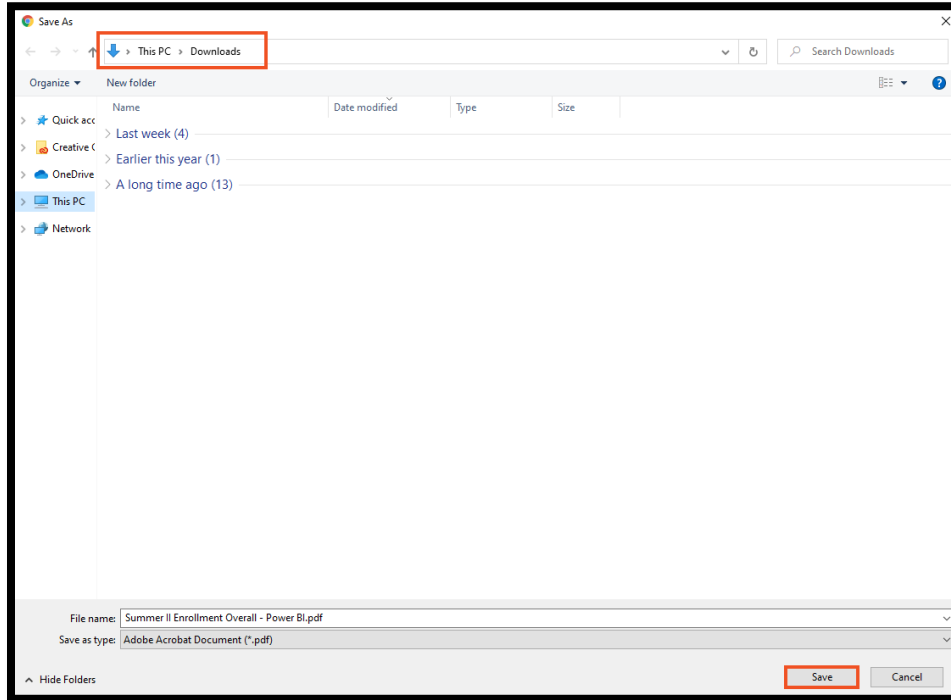

2. Click on the down arrow next to **File**.
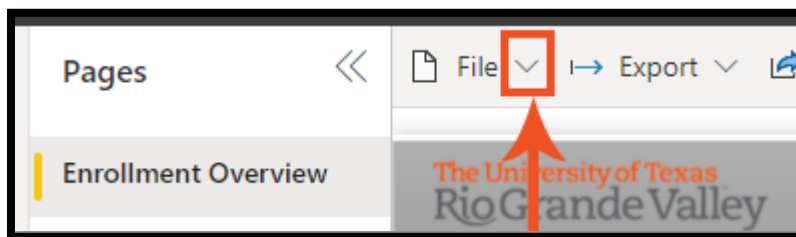
3. Then click **Print this page.**

4. Print Manager window will open where you can then save a page as a PDF. Click **Save**.

5. The **Save As** window will open where you can save the file in a specific location on your computer. For example, I will save mine on my PC's **Downloads** folder.

6. After clicking **Save**, I will navigate to where I saved the file (**Download's folder** in my case), where I can then open the file by double clicking the file.
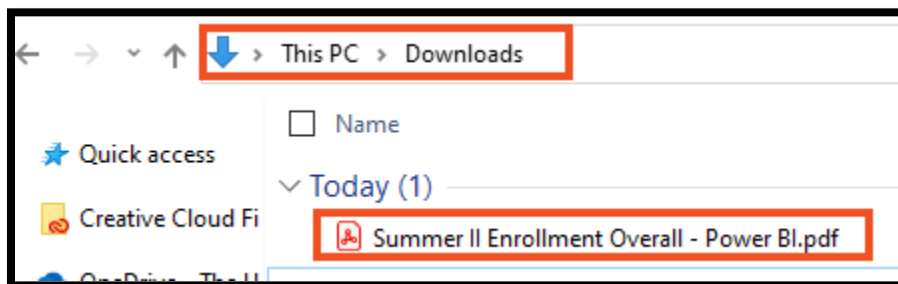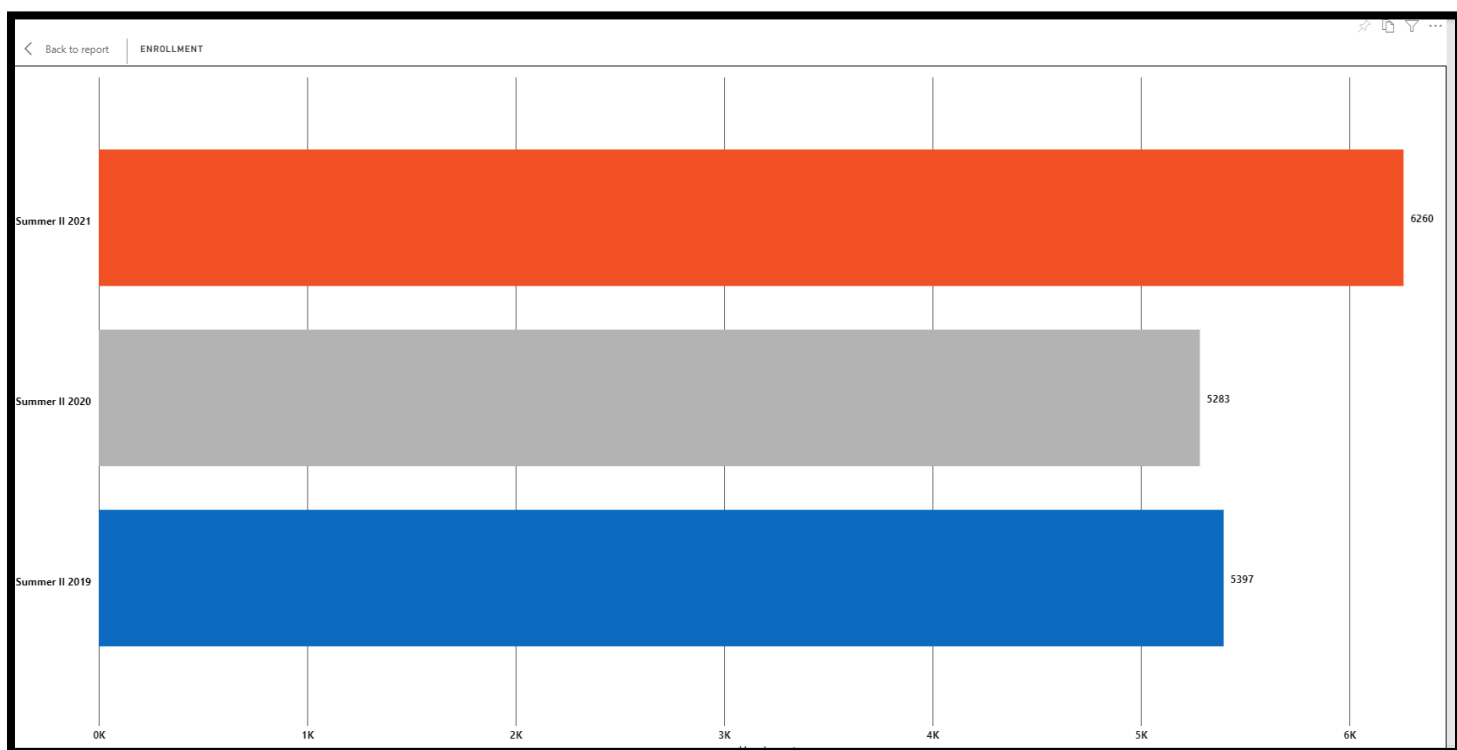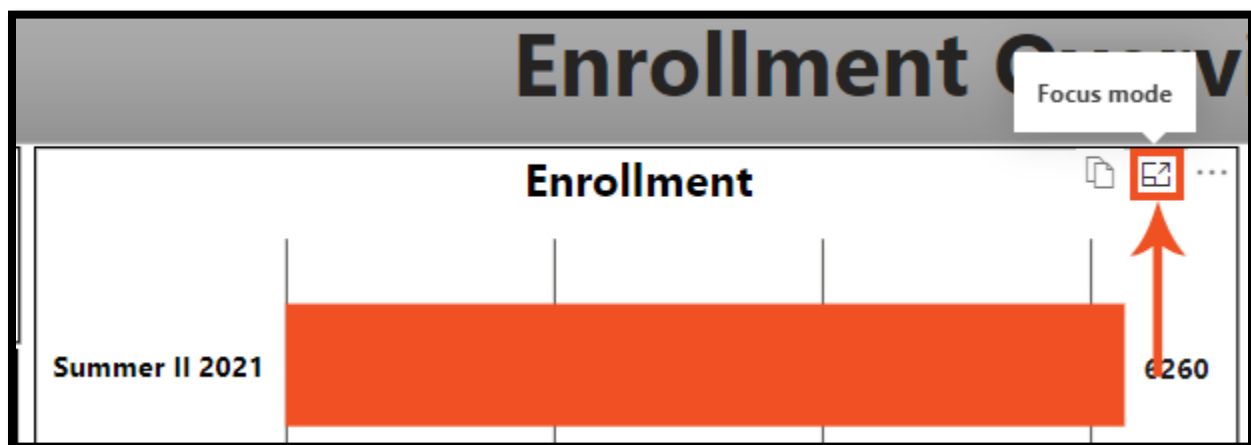
Focus Mode:

If a chart or graph is too small, you have the option of making it bigger by using Focus Mode.

To open focus mode:

1. Click on the **Focus Mode** icon located on the top right corner of the graph or chart. Hovering over the icons will display what each means.


2. To exit **Focus mode**, click on **Back To Report** located on Top Left corner of visual.

Important things to take into consideration

The following items are important things to take into consideration:

- This is not official data. For official/certified data, please reach out to Office of Strategic Analysis and Institutional Reporting (SAIR) **sair@utrgv.edu**
    - Because this is not official data, stats in Power BI Enrollment Reports will differ from Certified/Official Data.
- Data is pulled directly from Banner every morning and is dynamic from day to day. Updates may occur if data happens to be cleaned up in Banner later in the day, which will be reflected the next day when the new report runs.
- Class Day Slicer: Class Days are populated in descending order and are days in which the current term has had a report run.
    - For example: Summer II Overall Enrollment report's current term is Summer II 2021. Due to power outage, Summer II Enrollment did not start until a week later. Therefore, the earliest class day shown is -125.
    - *NOTE: Power BI reports do not automatically go to the latest class day for a term. Therefore, you may need to filter by Class Day to see the current day. Be sure to view the Events Tab to find a specific class day.*
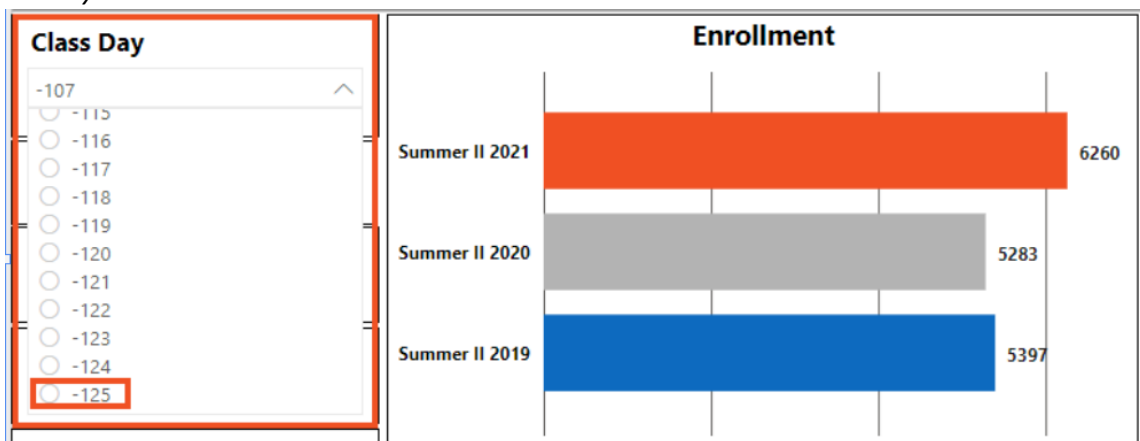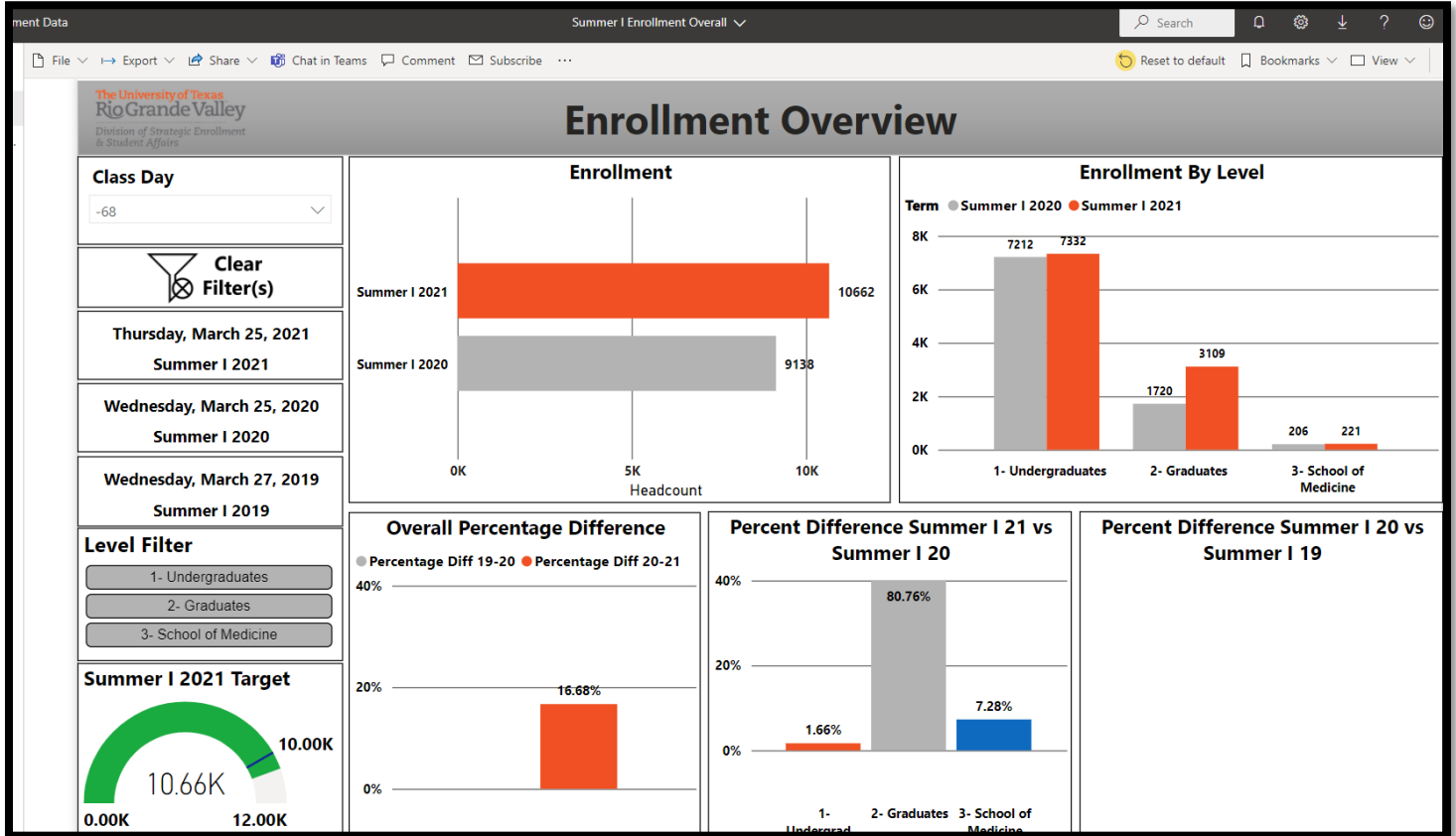

- Be aware when clicking inside of visuals/charts, such as clicking on the Summer II 2021 bar on the Enrollment graph. Graphs are interactive which means that by clicking on it, this visual acts like a filter and affects the rest of the graphs and charts on the page. As you can see below the Summer II 2021 bar is in focus while the other years appear dimmed out.
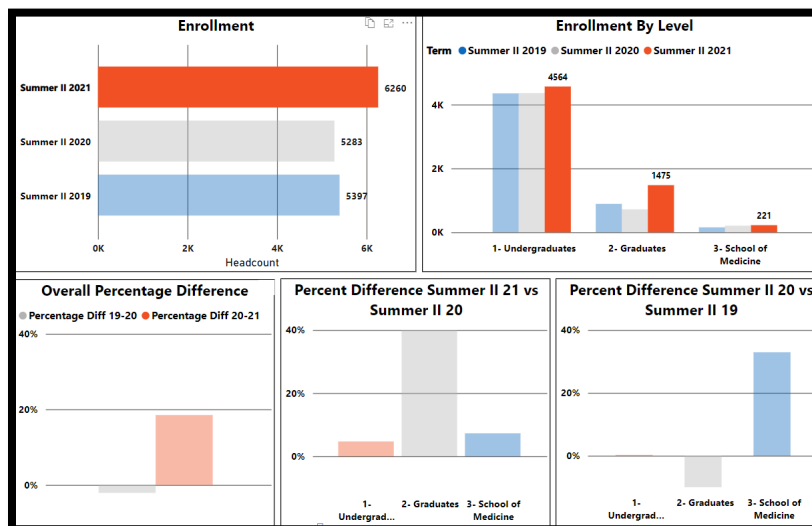
Data not showing up for specific Terms on a Report

Please be aware that on certain days you might not see data for a specific term. For example, for the Power BI Report for Summer I Class Day -68, you will see that Data is only shown for Summer I 2021 and Summer I 2020, Summer I 2019 is missing. The reason for this is the WF Engine was down on March 27,2019, so the WF report for that class day did not run for Summer I 2019. When you see missing data like this, it is always best to check the **Events** page, to see what event was taking place on that day.

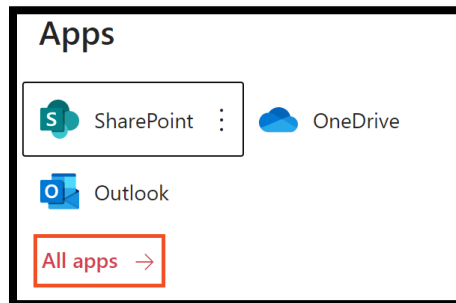## Reaching Enrollment Power BI Reports from Office 365

1. Login to https://my.utrgv.edu/home .
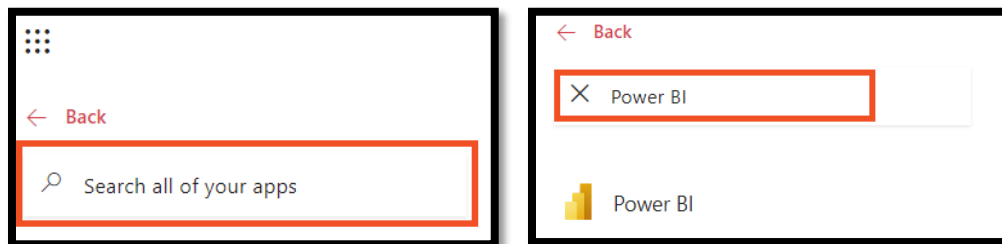2. Under **Applications**, click on **Office 365**.
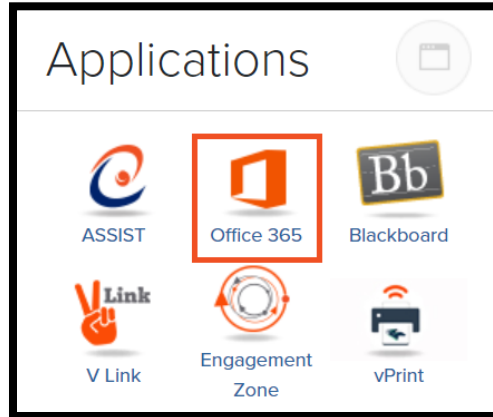
3. Once in Office 365, Click on the **App Launcher** icon located at the top left corner of the screen.
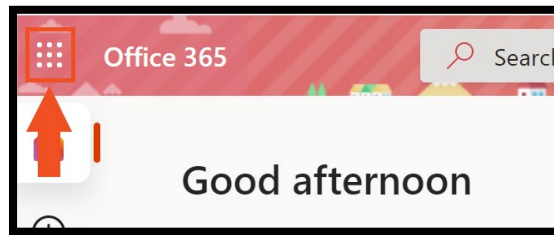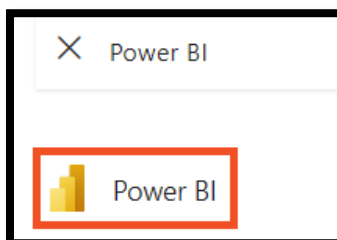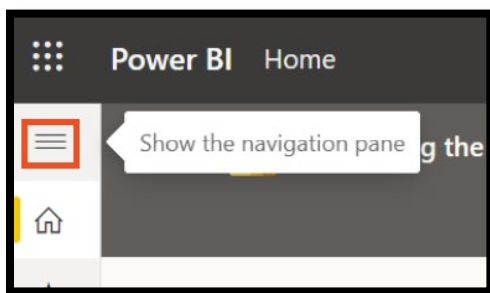

4. Click **All Apps**.

5. In the **Search all of your apps** box, type in Power BI to easily find Power BI bring up apps including Power BI.
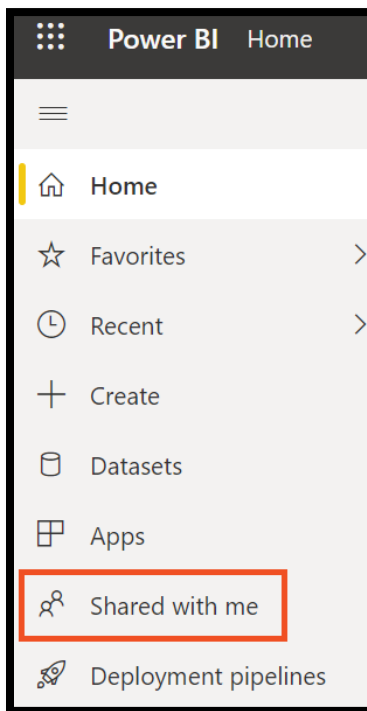

6. Click on **Power BI** to be taken to the app.

7. Once in **Power BI**, click on the **Navigation Pane** (icon is 3 horizontal lines) to expand it.

8. Then click on **Shared with me.**

9. You will then see all the Power BI reports that have been shared with you including the various enrollment Power BI reports shown below.