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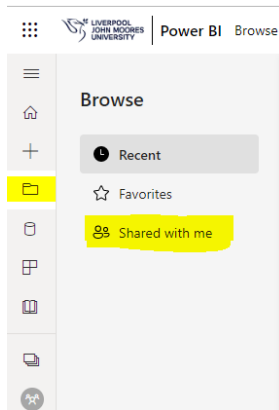
1. Access and Data Included

1.1 Who can access GaP Power BI?

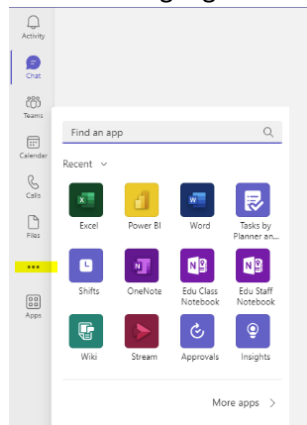
Pro-Vice Chancellors of Faculty, ADRs and Directors of School.

1.2 Where do I find the report?

You can log in to Power BI on your browser [by following this link](#). The report will appear in the Shared with me folder in the left-hand bar [highlighted below]



To view in Teams, you will need to add the Power BI app if you don't already have it. clicking the three dots highlighted below in the left-hand menu and then selecting the app from the library.



Once you have added the app into Teams you will now have a Power BI Icon in your left hand Teams Menu and can right click to pin it to your menu moving forward.

1.3 How often is the data updated?

The data is updated on an hourly basis from 9am – 5pm Monday to Friday. To see the last time it was updated click the arrow to the right of **Data updated date** in the top bar.



1.4 What is included in the reports?

Power BI gives you a dynamic real time view of applications moving through the system.

There are three tabs included in the report

Applications in Progress – see all applications in development from PI Draft to Application Workflow

Submissions – all applications submitted in the current year, with the ability to see a year on year comparison and toggle back to see previous years

Application Detail – this allows you to drill through from the tabs above to see a summary view of all applications included in the tabs above with headline detail

1.5 What is not included in these reports?

Unlike the reports issued to Faculty, these reports do not currently contain Co-Investigator detail. This is available in the Faculty report folder within GaP split between applications and awards.

The data currently includes applications only with the plan to add an award tab into these reports in the future.

1.6 Will we still receive reports on submissions outside of Power BI?

Year-end and Half Year submission reports will still be produced and shared with Faculties to support the SRIR process and for reports required by committees.

1.7 Is any training available on using Power BI?

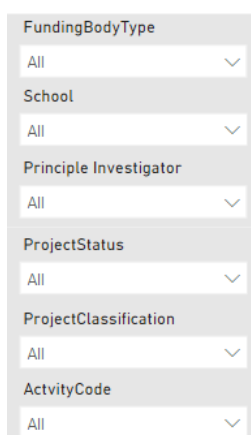
An Introduction to Power BI film is available [via our GaP support webpage](#) that takes you through the key features and navigating the data. Faculties will also be invited to organise a session with the GaP team to run through using these reports.

2. Key Functions

This section uses the Applications in Progress tab to explain the key functions in the reports; you can apply everything covered in this section when using the Submissions Tab.

2.1 Using Filters

The list of filters down the left side of the page will change all the graphics and the headline bar to show only the option/s selected. You can select multiple filters from the left hand menu.



FundingBodyType	All
School	All
Principle Investigator	All
ProjectStatus	All
ProjectClassification	All
ActivityCode	All

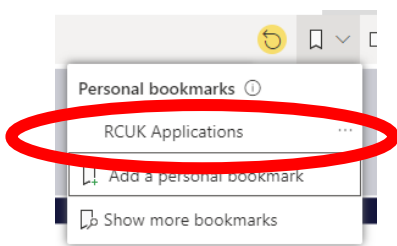
All the filters contain a drop down list which you can see by clicking the arrow, tick the box next to the option you want to filter by in the list and to select multiple options hold down the Control key [Ctrl].

To clear the selection and return to the default option hover your mouse over the arrow and the rubber will appear above it click on that and the filters will be cleared.

2.2 Setting a Bookmark

Once you have selected your filters to a particular view if this is something that you will want to see often [for example a particular funding type combined with type of activity] you can set a Bookmark.

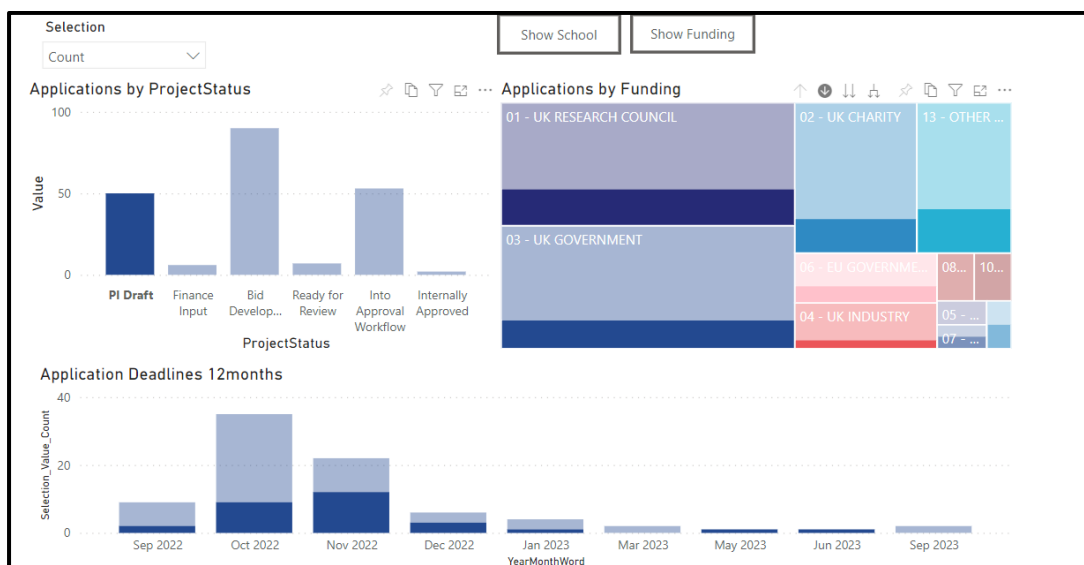
Select your filters and click on the arrow next to Bookmarks above the headline figures at the top right of the screen. Select “Add a personal bookmark” option and give your bookmark a name.



When you have named your bookmark, you have the option to make that your default view. If you chose this option, you can still clear filters as we did above to see the full data and can set up multiple bookmarks to move easily between different views. If you no longer require a bookmark, you can delete them at any point.

2.3 Interactive Visuals

You can click into any of the areas of the three visuals – for example into a project status within Applications by Project Status, for example at PI Draft, and the other two visuals will change to display the number of projects/upcoming deadlines in that Faculty as a proportion of the total. The visual below shows how the image updates when a Status is selected – with the projects in that Status appearing in dark blue.

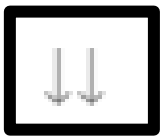


2.4 Overview of Tools Available

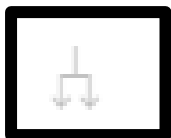
Wherever the options below are available above a graphic you can drilldown into the data or perform other functions – the examples below are all based on the Applications in Funder Tree Map on the Applications in Progress Tab but you can apply them wherever the options are available.



The single down arrow turns on the drill down option – with this option selected if you click on individual area - for example if UK Government is selected it will show the specific funders of those applications in that category for example Innovate UK. To return to the top level press the Up Arrow.



The double down arrow changes the view of the tree map to show the level of data below the top level. In this example, this would show the Funders rather than the Funder Categories. To return to the top level press the Up Arrow.



The trident arrow changes the view of the tree map to show the next hierarchy in the top-level category data. In this example rather than showing the Funders as in the examples above it would show the sub categories of Funders such as RCUK – Medical Research Council. . To return to the top level press the Up Arrow.



The pages symbol will copy the visual to your clipboard to allow you to paste it into a document or email. This copy will include a hyperlink to Power BI and time stamps the export with a note of any filters applied.



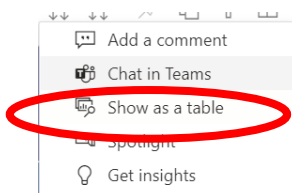
If you hover over the filter symbol, it will display any filters that are being applied to the visual – this is a good check if you are going to copy and use the visual that it contains the data you want to use



This symbol expand the visual to full-page size – this is especially useful if you have drilled down within the Tree Map to a lower level within the data to allow a clearer view.



At the far end of the bar, there are three dots, which open a list of options below.



The key options contained here for these report is the option to show the visual as a table. This will open the visual in full screen and include below a data table of the values contained in each section below.

3. Quick Find Tips

We have included below some tips for finding data based on the most common questions from our experience of using these reports.

3.1 How can I see what deadlines are coming up this month?

Go to the Applications in Progress Tab and in the headline bar is the number of deadlines in the current month. To see what days these deadlines are on go to the Application Deadlines 12 months visual at the bottom of the tab and in the tools bar click the single down arrow to turn on the drilldown. If you now click on the current month in the visual, it will show the deadlines by date.

3.2 How can I see what applications an academic is working on?

Go to the Applications in Progress Tab and use filter by Principal Investigator. You can scroll down the list to find the name you are looking for or start to type the name of the colleague you are looking for where you can see the word search to the right of the magnifying glass.

3.3 How do I see what type of project makes up the applications or submissions?

On both the Applications in Progression and Submissions Tab, there is a Project Classification filter. Use this to select the activity you would like to see. Once selected this will change all the visuals on the tab to reflect this data only.

3.4 How do I see the success rates of submissions to different Funder types?

Go to the submissions tab and use the filters on the left hand side to select a Funding type. Once selected this will change all the visuals on the tab to reflect this data only and the data you need will be displayed in the YTD Submissions by Outcome pie chart.

3.5 How do I see how many successful submissions were made in a previous year?

Go to the submissions tab and on the top right is a GaP Year box. Select the previous year and all visuals on the tab will reflect this and the data you need will be displayed in the YTD Submissions by Outcome pie chart.