

Northern Care Alliance

# Power BI tutorial





## Accessing Microsoft Power BI Reports

<http://srhtproweb2/InformationReports/> : Salford users

<http://nm-biapps-01/informationreports> : Pennine Users

When accessing a Power BI report from the Information Reporting page for the first time, there is an initial sign in process that you will need to follow. Within this document we are using the planned care dashboard as an example.

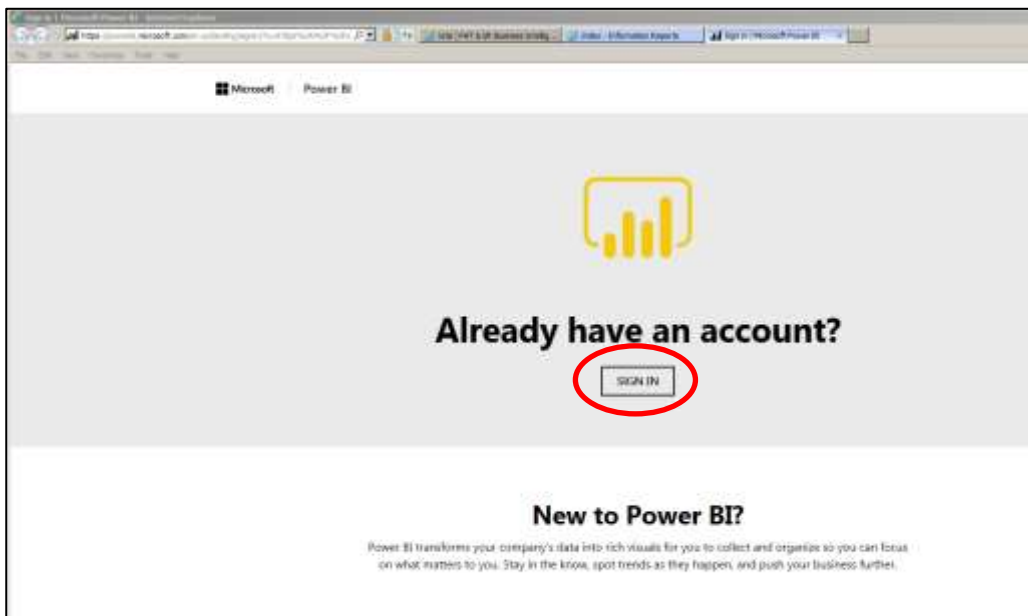
1. Go to the link above & it will take you to the following page. Once on this page type in the search bar “Planned care”.

A screenshot of the Microsoft Power BI Information Reports web application. The page has a dark blue header with navigation links: "Information Reports", "Reports", "Favourites", "New Report Request", "About", "Create Link", "DW Status", and "Log Issue". A search bar is located in the top right corner of the header, containing the text "Search" and a magnifying glass icon; this search bar is circled in red. Below the header, the page title is "Top 20 Reports". The main content area is a table with three columns: "Report Title", "Link", and "Add to My". The table lists 20 reports, each with a "Go to Report" link and a green "Add" button. The first report is "Outpatient Waiting List". At the bottom of the page, there is a footer with the text "© 2018 - Information Business Intelligence" and a notification bar that says "Several add-ons are ready for use." with "Choose add-ons" and "Don't enable" buttons.

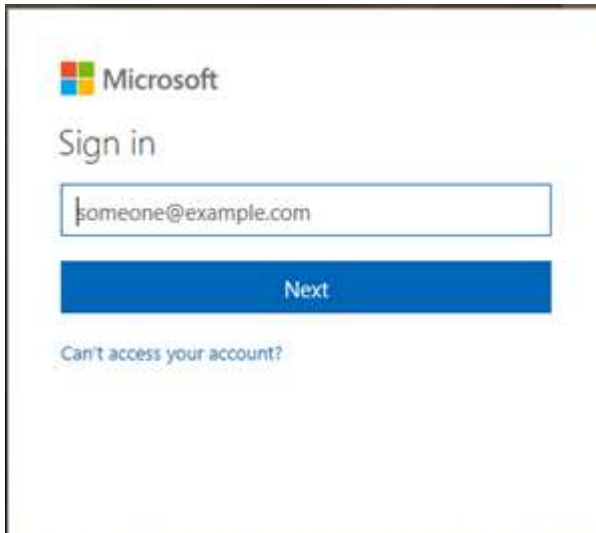
2. From the screen below click on the link 'Go to Report'.



3. From the following screen, click 'Sign-in'.

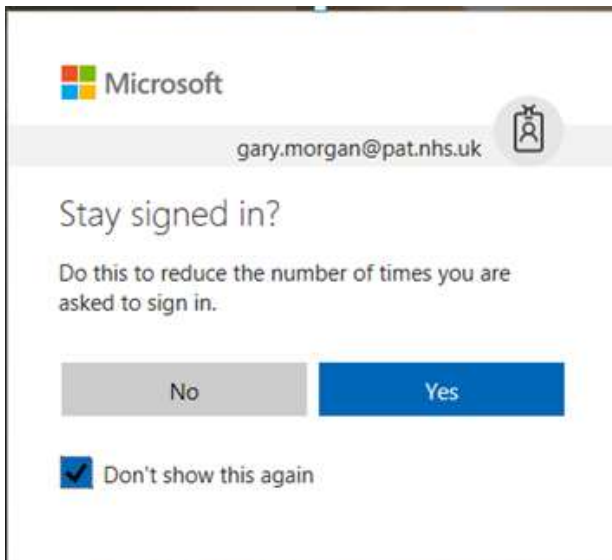


- Next enter your Trust email address and your password that you use to sign into your computer.



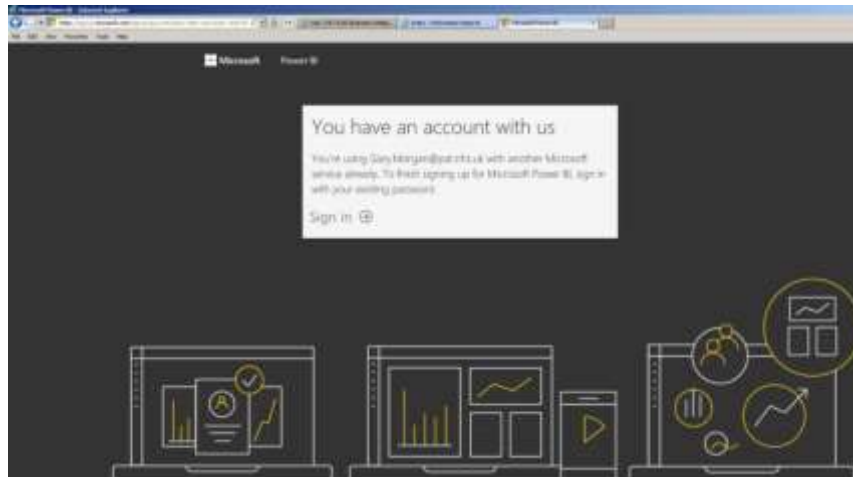
The image shows a Microsoft sign-in screen. At the top left is the Microsoft logo. Below it, the text "Sign in" is displayed. A text input field contains the email address "someone@example.com". Below the input field is a blue button labeled "Next". At the bottom left, there is a link that says "Can't access your account?".

- On the following screen tick 'Don't show this again' and then click 'yes'.

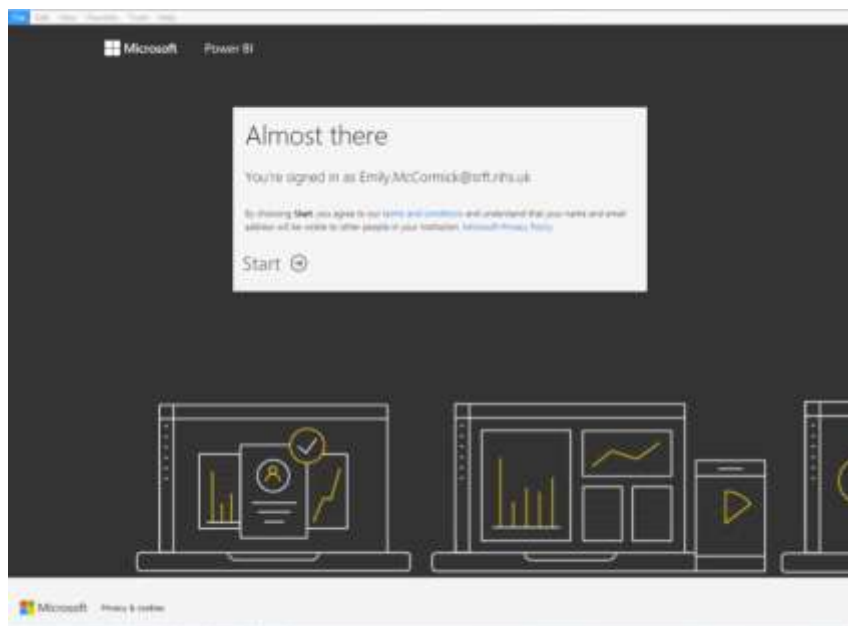


The image shows a Microsoft "Stay signed in?" screen. At the top left is the Microsoft logo. Below it, the text "Stay signed in?" is displayed. Underneath, there is a message: "Do this to reduce the number of times you are asked to sign in." Below this message are two buttons: a grey button labeled "No" and a blue button labeled "Yes". At the bottom left, there is a checked checkbox followed by the text "Don't show this again".

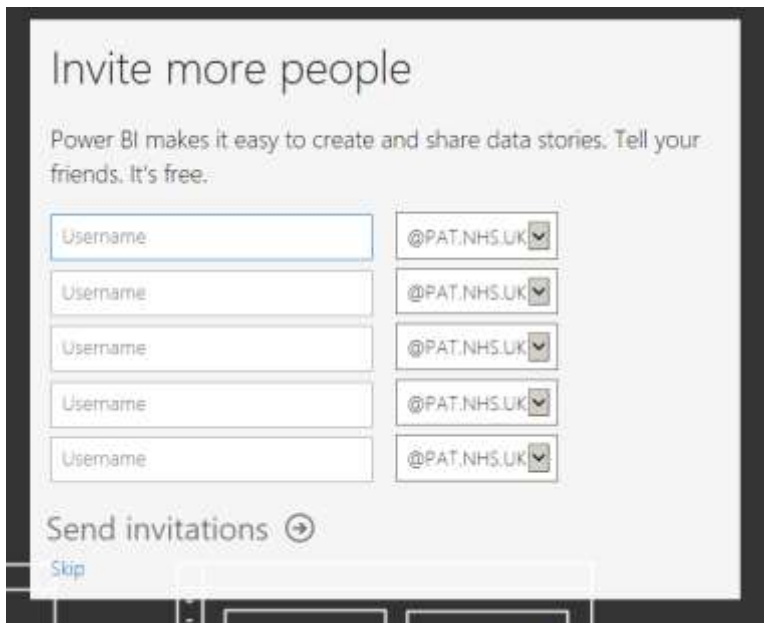
6. When you see this, click 'Sign-in'.



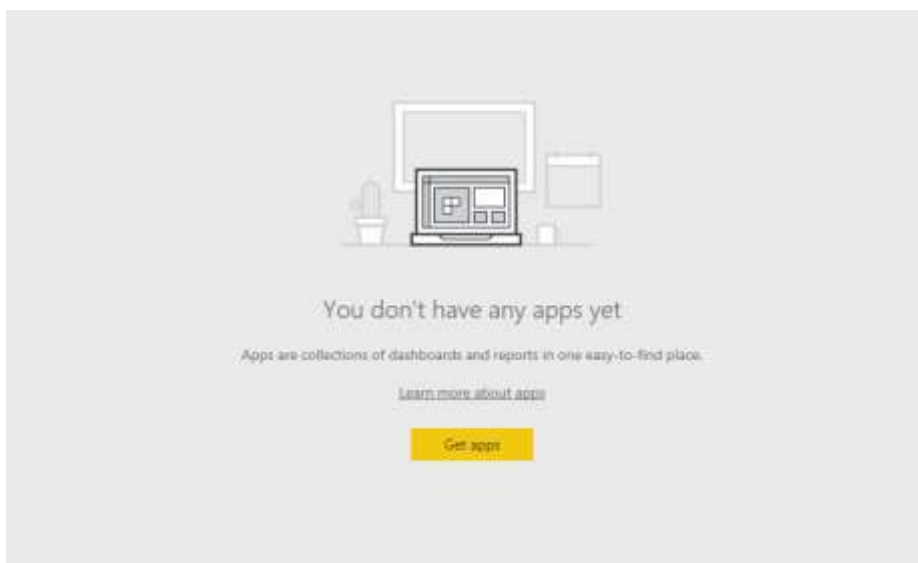
7. Click on 'Start'.



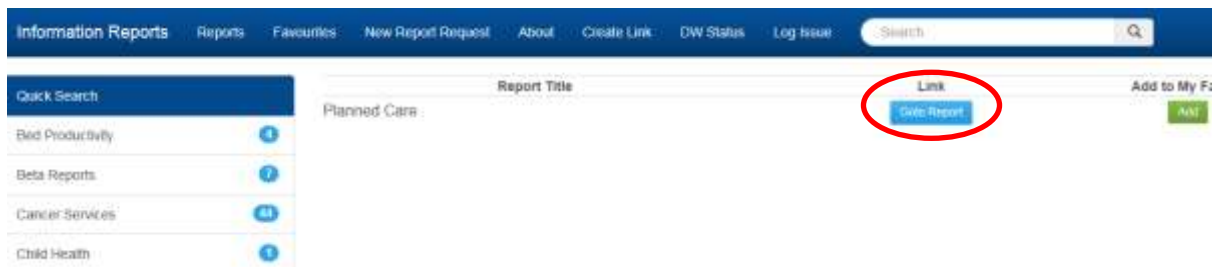
8. On this screen click 'Skip'.



9. You will then see the screen below.



10. The sign-in process is now complete, close this tab and return to the Information reports page, click on 'Go to Report' again; the Power BI report should now open.

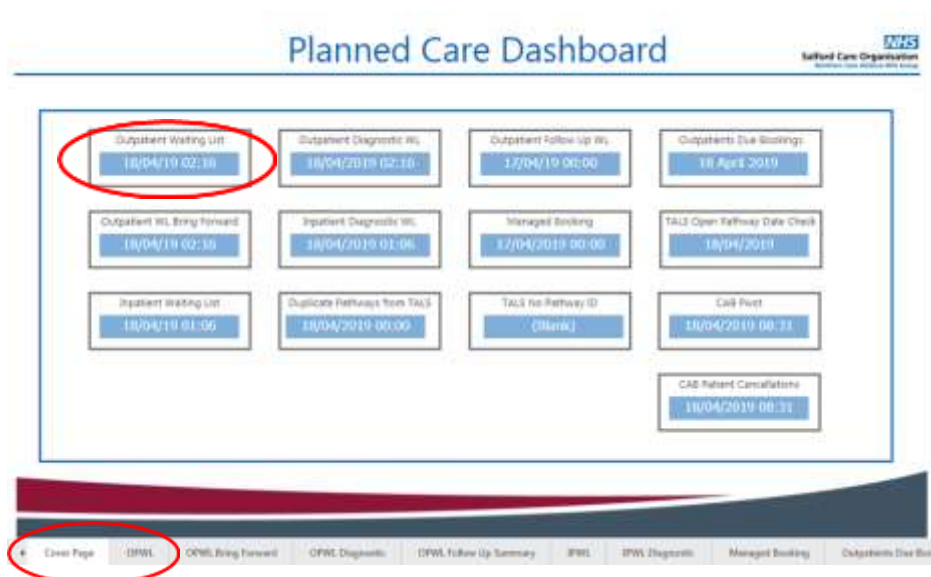


## Planned Care Dashboard Example

In the handover process the dashboard team will take you through your individual dashboard however below is a guide to learn the basics of how to use a dashboard.

An example we will be using is the planned care Dashboard.

- ❖ Below is the home page of the Planned Care Dashboard. To access the specific section you want, click on the button you require, as shown below. Alternatively you can click on the tabs at the bottom.



- ❖ **To drill down** the total waiting list to the appointment status click on the button with the two down arrows as highlighted below.

https://app.powerbi.com/groups/me/apps/

File Edit View Favorites Tools Help

# Outpatient WL

Drill on Rows

Specialty	0	1
ACCIDENT & EMERGENCY	8	13

This will drill down the total WL as follows:

# Outpatient WL

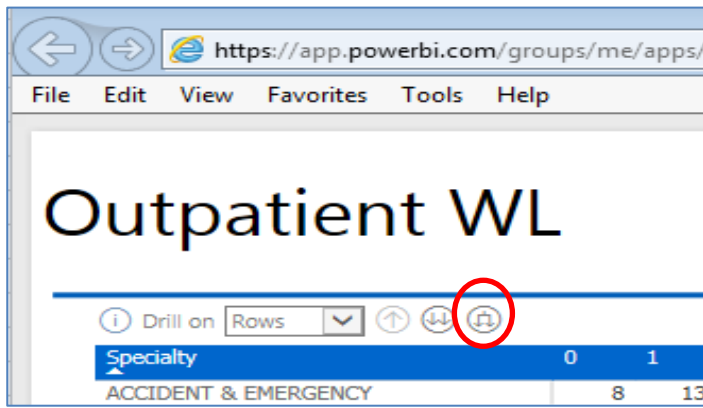
Clear A

Drill on Rows

AppointmentStatus	0	1	2	3	4	5	6	7	8	9
Appointment OK	2179	776	507	2263	1358	983	953	2444	1368	873
Appointment Required	2467	1498	995	4085	2817	2093	2644	4675	3420	2622
Bring Forward	545	396	461	1493	1299	1316	1620	2175	1973	1811
Overdue	8	6	2	18	16	14	21	31	28	23
TAL	182	140	111	371	301	264	288	433	352	256

- ❖ You may find it more useful **to drill each specialty down** to the appointment status, click on the next button along as highlighted below:





This will produce the following:

Outpatient WL Clear All Selections

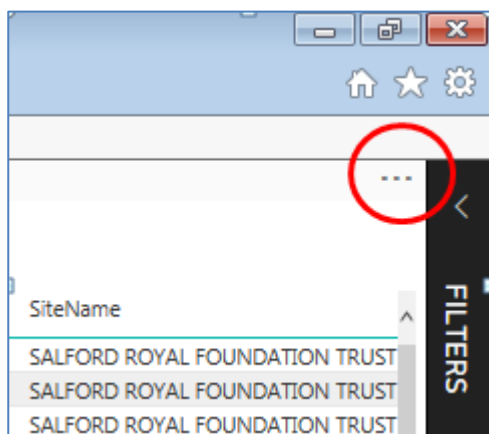
Drill on: Rows

Specialty	0	1	2	3	4	5	6	7	8	9
ACCIDENT & EMERGENCY										
Appointment OK	2	2	4	2	1	6	2	5	4	
Appointment Required	4	7	2	6	8	7	1	1	9	1
Bring Forward	1	1	2	2	3	1	1	1	1	
Total	8	13	9	14	14	11	6	9	15	9
ACTIVE GENETICS										
Appointment OK	2		1	3	1	1	1	4	1	
Appointment Required	2	3	4	14	12	7	24	27	26	30
Bring Forward	4	3	5	17	13	8	25	43	26	31
Total	4	3	5	17	13	8	25	43	26	31
ACTIVE INTERNAL MEDICINE										
Appointment OK	1	1	4	5	2	6	4	2	3	4
Appointment Required										
Bring Forward										
Total	1	1	4	5	2	6	4	2	3	4
ACTIVE PEDI ASTHMA										
Appointment OK										
Appointment Required										
Bring Forward										
Total										
ACTIVE PEDI GEN										
Appointment OK										
Appointment Required										
Bring Forward										
Total										

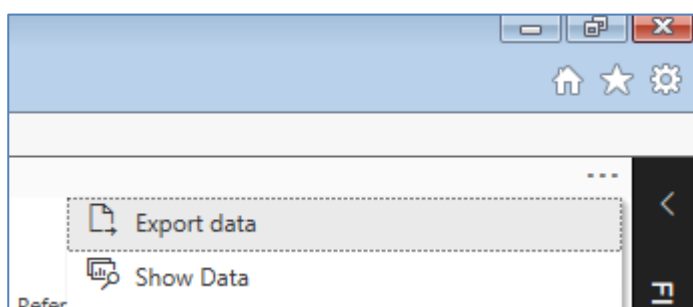
- ❖ **To expand and collapse row headers**, you click on the +/- buttons which show what's in that speciality.

ADULT AUDIOLOGY COMM	51	25	28	37	12	22		1		
CARDIO RESPIRATORY INVEST	400	417	310	246	229	135	122	66	67	79
Appointment OK	203	189	132	94	91	26				
Appointment Required	163	63	33	33	47	16	60	34	23	43
Bring Forward	34	165	145	119	90	93	62	32	44	36
Overdue						1				

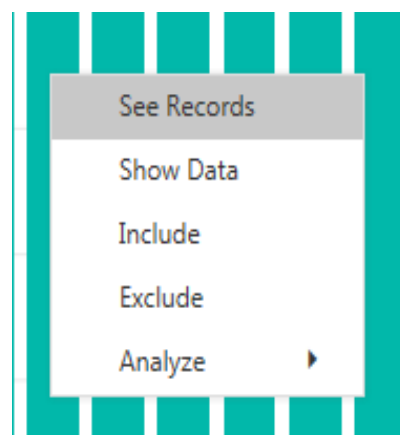
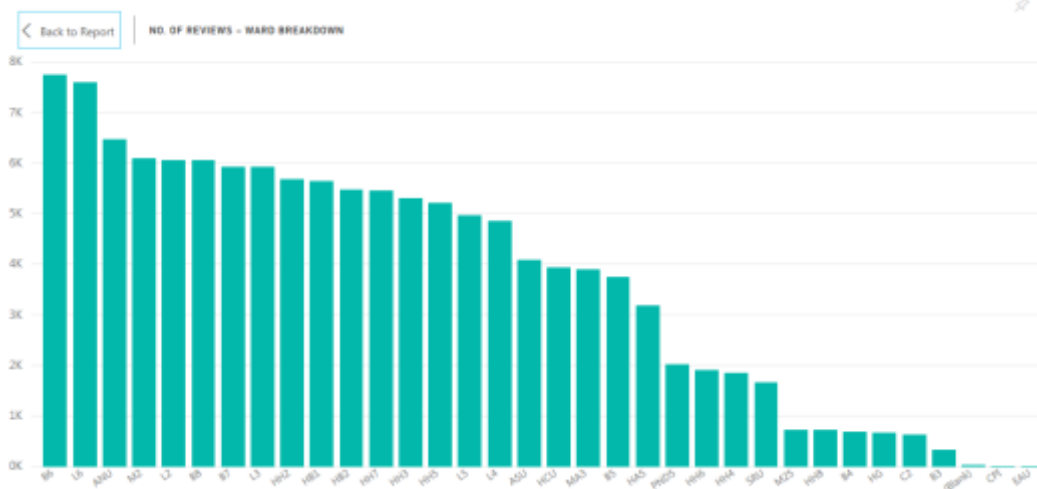
- ❖ **To export to Excel** click on the three dots in the top right hand corner of the screen.



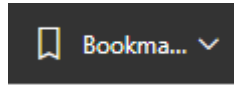
Then click on Export Data



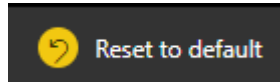
- ❖ To drill down from a bar chart to **view patient records** you must right click and select 'see records', This also applies to pie charts.



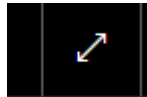
- ❖ To **save specific specialty & value's**, click on this bookmark icon. This makes it quicker and easier to access the specific sections you look at.



- ❖ To go back to the way the **original report** was, Click on the 'reset to default' icon



- ❖ To make the **report full screen**, click on the following icon below



- ❖ To expand a specific graph, click on the **focus mode** icon, you may need to hover over the graph/table.



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