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 **Microsoft**

**JASON MORALES**

Jason currently works for Microsoft as a Data & AI Specialist on the US Education team.

The technology platform products that he represents include Azure, SQL Server, Dynamics, and Power BI.

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 **Schreiner University**

**WHO IS SCHREINER?**

- Founded in 1923, Schreiner is an independent and coeducational university with a rich history steeped in Texas heritage and tradition.
- We are a private, nonprofit Presbyterian university.
- We offer certifications, associates, bachelors, and Master's Degrees.
- Our 2018 fall census student population totaled 1,418 and our current fall freshman class totals 359.

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 **Schreiner University**

**SCHREINER'S INSTITUTIONAL RESEARCH TEAM BACKGROUND**

- Our team began with one director and one associate in fall 2015. We were both new to the IR world.
- We have since grown to three, our director was promoted AVP of Institutional Planning and Financial Services, we added a Data Scientist teammate (also new to IR), and I was promoted to Data Analyst.
- We perform all manners of institutional data reporting and a very wide variety of internally requested ad-hoc data requests.
- So, you could say that we started from the ground up with a small school.
- We love what we do!

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### ABOUT YOU

- How many have used Power BI before?
- How many use Excel?
- How many use SQL?
- What are some of the other services or methods or services you use for data collection, cleaning, prep, calculation, and analysis?

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### SCHREINER'S IR EVOLUTION



-  Excel ( We love Microsoft ! )
-  Excel Tables
-  Excel Power Pivot Add-In
-  SQL with Database Connected Tables in Excel  
( Enabled us to create dynamically connected data sets )
-  And Finally...  
Power BI

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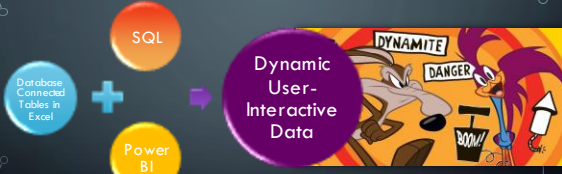
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### WE DISCOVERED...

SQL + EXCEL + POWER BI ARE A DYNAMITE COMBO



Database Connected Tables in Excel + SQL + Power BI = Dynamic User-Interactive Data

We will circle back to the specifics of this in a bit...

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### DEFINING THE PROBLEM

- We needed to share data in the way each user wanted to see it.
- Excel charts and graphs, while dynamic and shareable, were **CLUNKY** and couldn't be adequately or securely shared interactively in an internet browser ( giant sigh !).
- But we were determined and performed a research marathon only to find...



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### DISCOVERING THE SOLUTION

Power BI was perfect and already provided with our Office 365 license, yep, right there with our apps !

not kidding...  
wasn't funny...  
seriously...  
I'm still crying.



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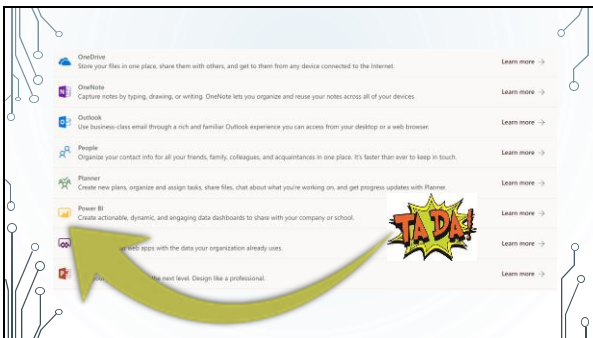
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OneDrive	Store your files in one place, share them with others, and get to them from any device connected to the Internet.	Learn more ->
OneNote	Capture notes by typing, drawing, or writing. OneNote lets you organize and reuse your notes across all of your devices.	Learn more ->
Outlook	Use business-class email through a rich and familiar Outlook experience you can access from your desktop or a web browser.	Learn more ->
People	Organize your contact info for all your friends, family, colleagues, and acquaintances in one place. It's faster than ever to keep in touch.	Learn more ->
Planner	Create new plans, organize and assign tasks, share files, chat about what you're working on, and get progress updates with Planner.	Learn more ->
Power BI	Create actionable, dynamic, and engaging data dashboards to share with your company or school.	Learn more ->
PowerApps	Create custom apps with the data your organization already uses.	Learn more ->
Power Automate	Automate the most menial tasks. Design like a professional.	Learn more ->

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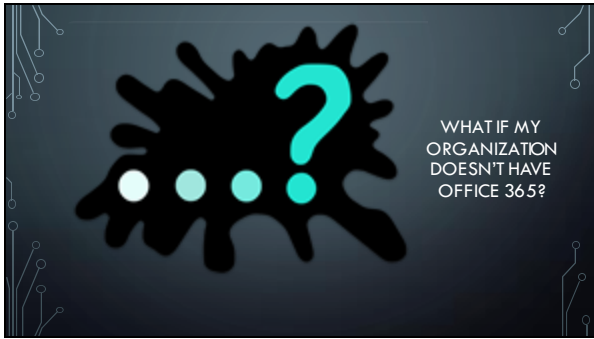
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**POWER BI**

**FREE VERSUS PRO**

**Per-user license type comparison**

Here is a list of features supported by per-user license type:

Feature	Free	Pro
Connect to 70+ data sources	✓	✓
Publish to Web	✓	✓
Export to PowerPoint, Excel, CSV	✓	✓
Enterprise distribution		✓
Apps	X	✓
Email subscriptions	X	✓
Serialized APIs and controls	X	✓
Collaboration		✓
Peer-to-peer sharing	X	✓
App workspaces	X	✓
Analyze in Excel, analyze in Power BI Desktop	X	✓

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**POWER BI**

**PRICE COMPARISON**

Author	Share and collaborate	Scale large deployments
Power BI Desktop Free <a href="#">Learn more</a>	Power BI Pro \$9.99 per user per month <a href="#">Learn more</a>	Power BI Premium Capacity pricing <a href="#">Learn more</a>

**TABLEAU**

Tableau Creator	Tableau Explorer	Tableau Viewer
\$70 per user per month <a href="#">Learn more</a>	\$35 per user per month <a href="#">Learn more</a>	\$12 per user per month <a href="#">Learn more</a>

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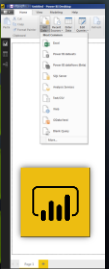
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THERE ARE MANY WAYS TO CONNECT DATA WITH POWER BI

- FILES ( e.g., .xlsx, .xlsm, .csv, .txt, .xml )
- CONTENT PACKS ( e.g., Google Analytics, Marketo, Salesforce, and many more )
- DATABASES IN THE CLOUD ( Think Azure! )
- DATABASES ON PREMISES



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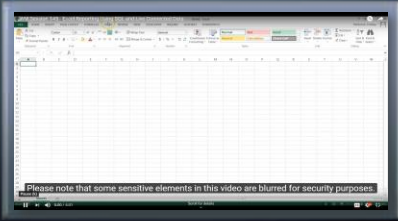

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SCHREINER IR'S CURRENT PREFERENCE...  
SQL ⇒ EXCEL ⇒ POWER BI



Please note that some sensitive elements in this video are blurred for security purposes.

A LINK TO THIS VIDEO WILL BE PROVIDED AT THE END OF THIS PRESENTATION.

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DEMONSTRATION  
OF  
STUDENT  
RETENTION  
DATA IN  
POWER BI

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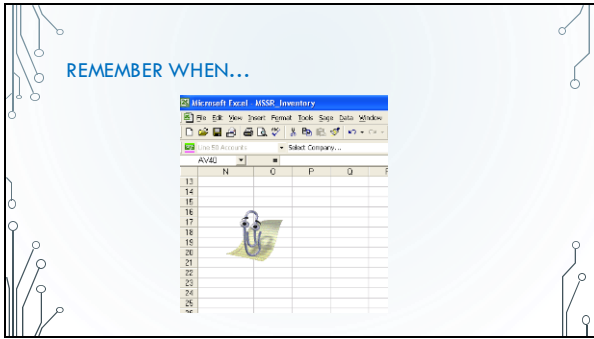
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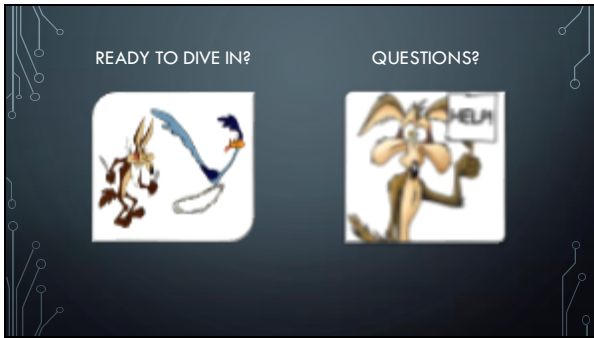
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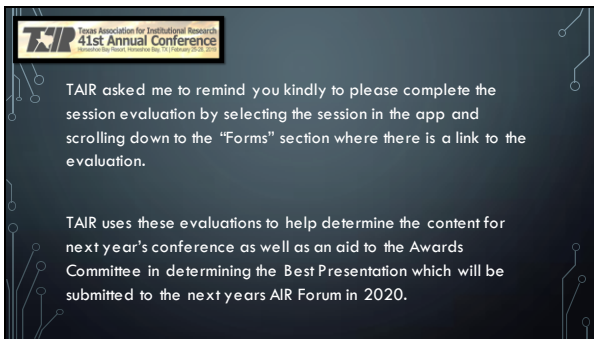
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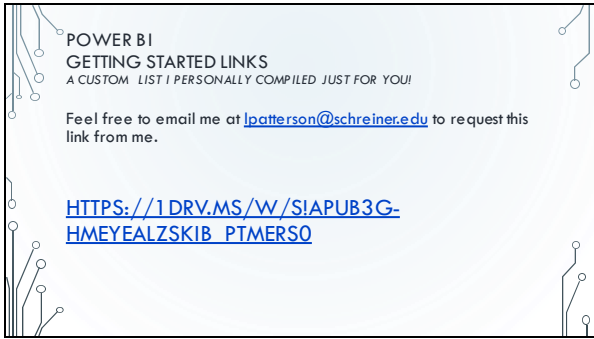
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POWER BI  
GETTING STARTED LINKS  
*A CUSTOM LIST I PERSONALLY COMPILED JUST FOR YOU!*

Feel free to email me at [lpatterson@schreiner.edu](mailto:lpatterson@schreiner.edu) to request this link from me.

[HTTPS://1DRV.MS/W/SIAPUB3G-HMEYEALZSKIB PTMERSO](https://1drv.ms/w/SIAPUB3G-HMEYEALZSKIB?ptmerso)

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