UNIVERSITY OF SOUTH FLORIDA
A PREEMINENT RESEARCH UNIVERSITY

IC Supervisor Report

This Guide gives you tips on using the USF IC Supervisor report; the report provides metrics to view student/advisor appointments.

The report has three pages:

1. **Supervisor Summary:** Report visuals display metrics for advisor appointments.
2. **Supervisor Details:** Table lists details of appointments.
3. **Students with No Appts Details:** Table lists details of students with NO appointments in timeframe.

Important to Know

Hover over the pie charts to view actual counts of appointments:

Appointment Status: The current status for past and future appts

Contact Method: How students and advisors meet, e.g., phone, office

Appt Outcome: How the appt was resolved, or In Progress (future appts)

The Drill-Down Feature

These symbols: mean you can drill-down to see more detail. For example, drill down on the Total Appointments visual to see appts by month and then calendar day.

Data Refresh

Data are refreshed daily; the date displays in the bottom right: Data Refreshed at mm/dd/yyyy hh:mm:ss

Log In to Power BI:

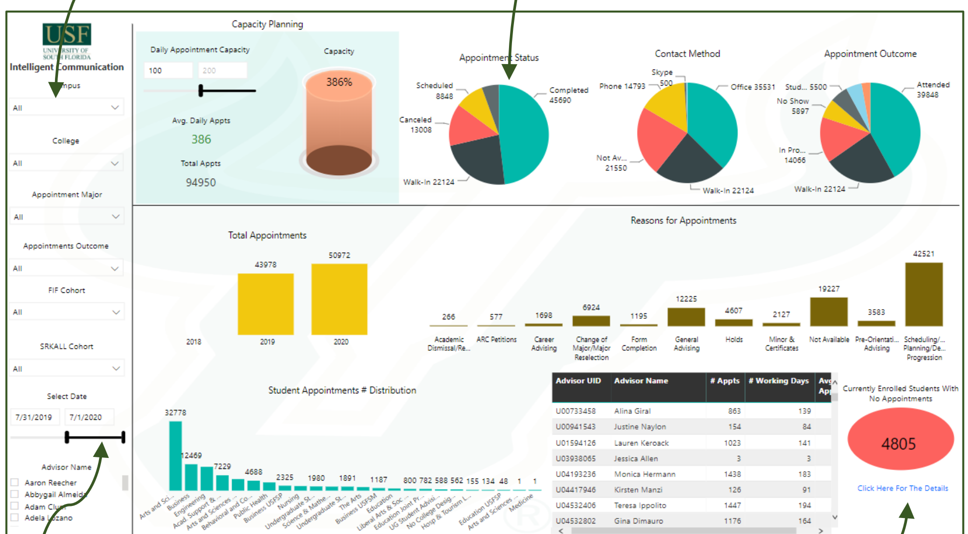
1. Open the email sharing the report.
2. Click **Sign in**.
3. Enter your USF email address and click **Next**.
4. Enter your USF password and click **Sign in** (some browsers skip this step) *.
   -> PowerBI displays the IC – Supervisor Summary report.

*After your initial login, you will access app.powerbi.com to view your reports. Enter your USF NetID, then select **Shared with me** on the PowerBI menu (to the left of the Data Panel / Workspace).

Navigate the Reports:

Report Visuals

Filter Panel



Date Filter:
Use to narrow appointment timeframe

Link to Student Details:
View list of students without appointments

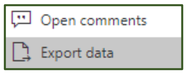
All visuals are *interactive:*

- Select a filter element to see visuals adjust their display.
- Select a component in a visual, such as “Completed” Appointment Status to see all other visuals adjust.

Note: Filters remain in place for all pages of the report, e,g,. If you select College = Education, all pages show appointments for Education.
To reset all filters, click **Reset to Default** at the top of the report.

Export Data to Excel:

You can export the data from reports:

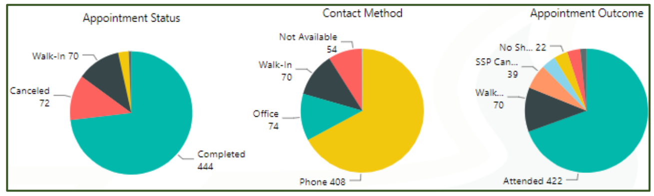
1. After applying desired filters, select the Supervisor Details table.
2. Hover over the table, then click the ellipses in the top right corner  .
3. Select Export data… 

…to **Export** & work with data in Excel.

View by Contact Method

It is important to see *how* students are meeting:

1. On the Supervisor Summary page, select Advisor(s), then select date ranges.
2. View the pie charts to analyze appt statuses and contact methods.



View Non-Major Appts:

View how many appts are with students majoring in other fields:

1. Filter by Appointment Major, such as Criminology.
2. Optionally filter by Advisor.
3. Hover over the Student Appointments and Distribution visual
4. Select Focus Mode -> 
5. View the distribution of students across the colleges who chose Criminology major for their appointment.

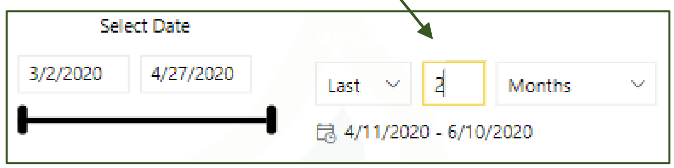
Compare Time Periods

You can compare year-over-year metrics using the Date Metrics and Export to Excel features:

1. On the Supervisor Details, select a time period for one or more advisors or colleges, for example, April and May.
2. Select the table and export to Excel (see above).
3. Change the time period to a previous year.
4. Export this table to Excel.

View Appointment Date Metrics

1. Select the Supervisor Details page
2. Type into the Select Date fields or select from the *relative date* options.

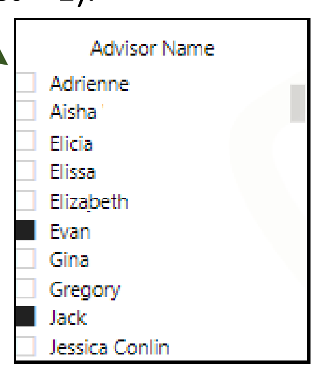


3. Select one or more specific Advisors or Colleges to view student appointment details.
4. Select the Summary page to view metrics for the selected date range, for example
   - Appointment Outcome: shows the results of an appointment, such as No Show or Attended.
   - Appointment Status: shows the status of the appointment, such as Completed or Canceled.

View Appointment Details by Advisor

1. Select the Supervisor Details page.
2. Select Advisors (Ctrl+click to select > 1).

   The table shows all students having appointments with your advisors.



3. Select the Summary page to view visuals for totals, distributions, and other details for the selected advisors.

Detailed instructions for the IC reports are located here:
https://confluence.usf.edu/display/ReportGlossary/Intelligent+Communication