Power BI (Business Intelligence): Cayuse Reports

Cayuse Reports enables users to garner insights from different types of proposal and grant data. By employing a variety of tools and methods that allow for the collection of this information, users are able to see, analyze, understand, and make critical decisions related to the collected data.

Cayuse Reports is interactive, allowing users to manipulate data by selecting date parameters, specific colleges, departments, and principal investigators. Each component of Cayuse Reports, if selected, can provide users more detailed information which, in turn, allows for filterable and customizable reporting.

Information within this manual outlines

- Navigation of the system
- Collection of information
- Cultivation of reports
Cayuse Reports: Basic Navigation

1. From a browser, navigate to SPA Power BI: Cayuse Reports - https://research.wayne.edu/spa/spapowerbireports

2. Use your Access ID@wayne.edu and Wayne State University password

3. You will land on the SPA Power BI Cayuse Reports page

Reports:

- Cayuse Awards by Sponsor Type
- Cayuse Proposals by Sponsor Type
- Cayuse Credit Split Awards by Sponsor Type

4. All three report modules share basic features

- **Chart tabs** summarize Proposal, Award, and Credit Split Awards data that can be drilled down to specific record information
- **Table tabs** summarize the same information as Chart Tabs but, provide another level of detail relevant to each record
Cayuse Reports features similar functionality among report tabs:

1. Select **College**
2. Select **Department**
3. Establish date parameters
4. Select **PI Name**
5. Select **Months** within date parameters

**NOTE:** You can select any combination of these factors in creating a report that suits your needs.

Other common features:

- **SelExplore** enables users to see specific data within a page and allows for
  - Showing next level of information
  - Expansion of next level of information
  - Drilling Up
  - Drilling Down

**NOTE:** These functions are also accessible within each section of a report page on the drill-through menu.
Expand Reports:
Via the drill-down icons present within each section of the report:

NOTE: Users can also right click next to a section to call up the detail commands.

Select Expand to Next Level to get a more detailed result:

1. Adjusted Fed NonFed

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**View Report: Chart: Sponsor Type**

Scenario: User from Civil Engineering is seeking totals of obligated award amounts by Fiscal Year from 2014 to 2019.

1. Select College
2. Select Department
3. Set fiscal year periods and select months

*As the parameters are set, the data changes accordingly - example: 6 years vs. 4 years:*
Each level provides more detail than the last. All tabs within Cayuse Reports can be drilled down for detail.
- Hovering over a column section with the mouse populates a high-level pop-up of related information.
- Likewise, if you click on the column, more detailed information will be highlighted for population.

- To go back to inclusive view, click the highlighted portion.
- The same steps are utilized for the “donut charts”
  - Highlight a section and the specific information will populate for viewing.

- Hovering over a donut chart section with the mouse populates a high-level pop-up of related information.
Clicking on a specific portion of the donut graph will populate specific information within both the color graph and the rows of, in this example, grant information. To de-select, click on the highlighted area again.

Pull certain pieces of report queries into an isolated view called **Focus Mode**.

- This feature can be utilized for the Donut Graph, Color Charts, or Information Rows.

- Select the Focus Mode Icon (within the drill-through section) to populate the isolated view.
Filters

User can apply filters in the Filters pane by making selections on the reports. The Filters pane shows the tables and fields used in the report and the filters that have been applied, if any.

Available Filters change depending on what information is selected within the report.

1. Select a report line or section to enable the filter.
2. Select filter parameters to generate specific reporting fields.

⇒ Depending on the type of report and selected section, users can filter

- Sponsor
- Federal/Non-Federal
- Sponsor Type
- Fiscal Year
- Obligated Amount
- Quarter
- Sponsor Award Number
- Index
- Department
- Grant Code
- PI Name
- Begin and End Dates

More Options: click on the ellipsis (...) within the drill-through menu

- Report data can be sorted in ascending or descending order or by a particular column within a specific report module.
- Select Show Data presents the Row Information in an easy-to-read format
- Spotlight highlights the specifically chosen of a report page for viewing
- Export Data allows users to download information into a CSV file. The CSV file can be opened with Excel for custom usage.
**Table Tabs**

Though the basics of Cayuse Reports are shared for both chart and table reports, there are additional functionalities within **Table** tabs which provide more in-depth information.

**Example:**

1. Select Table: Sponsor Type
2. Select “All” for College, Department, and PI Name
3. Set Fiscal Year (FY) to 2014 to 2019

- Generated report outlines all Research and Non-Research for the specified time period
- Selecting any line item will bring about corresponding information for that line item; in other words, if Clinical Trials is selected, the donut graphs, and row information will accordingly change

4. Hover the mouse over a particular row to get a “snap-shot” of account information. Users can select the “link” icon within Cayuse Reports which will direct them to Researcher’s Dashboard* should they wish to see more detailed account information.

*NOTE: In order to successfully view Researcher’s Dashboard information, users must be logged into Dashboard while utilizing this feature.