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# Microsoft Power BI in Technical Services: A Review

by Philip Evans

Having recently stepped into a role that involves reporting on library acquisitions and spending, I've been experimenting with different tools that streamline the reporting process. One tool I've come back to again and again is Microsoft Power BI (BI = Business Intelligence). Power BI is a data visualization tool that allows users to use datasets to create reports with various types of visuals. Power BI reports are stored in the cloud, are shareable, and contain visuals that can be manipulated and filtered by the report's end users. If they wish, users can also get behind the visuals to the data itself.

The process of creating a report with Power BI is straightforward: Determine the types of questions the report should answer, procure, and import a relevant dataset (perhaps obtained from your ILS), select appropriate Power BI visuals to answer the questions, and populate the visuals with the relevant data fields and filters from the dataset. Microsoft Excel users will find that Power BI provides familiar chart types: bar and line graphs, pie charts, scatter plots, etc. However, there are additional chart options that are less common outside of data-visualization software: treemaps, geographical maps, and info cards, to name a few.

I have used Power BI primarily to report on our library's historical and current-year spending. These reports allow my colleagues to easily answer questions like how much we have spent on ebooks vs. physical books over the past five years, how much we typically spent on journals in various subject areas, and how well YTD spending is tracking with the budget. After creating a report, I simply share the link with relevant colleagues, and they can refer to the report as needed. What's more, I can make changes to the report without re-sharing the link. Or, if one is willing to go down a slightly more technical path, a report can be linked directly to a self-updating data source, like your ILS's reporting module or a database.

Despite its usefulness, Power BI does have some downsides. A frequent user complaint is that going beyond the basics in Power BI can get technical rather quickly. Users who are willing to dive into learning more advanced techniques will find their reporting capabilities extended, but the learning curve can be intimidating. Additionally, some who have used other data visualization tools might find the configuration and formatting options in Power BI more limited. Microsoft has seemingly traded customizability for enhanced system stability, making some desirable visualization options unavailable.

All in all, I have found Power BI to be a powerful and (mostly) user-friendly tool. It has allowed me to provide enhanced and efficient access to acquisitions data while saving me many hours of work. I believe this software is worth a look for anyone who is interested in achieving similar outcomes.