We have been asked many times if it is possible to copy our reports and make changes to them in the same way you could in Discoverer, such as adding or removing fields and filters. Up until now we have said this was not possible and we advised you to contact us if you need a field adding to a report or noting that you don't need your own copy of a report in order to filter it to a particular school or programme for example, because Power BI remembers your filters the next time you use a report. However, new functionality called personalised visuals has been released by Microsoft which enables you to make a variety of changes to our standard reports; bookmarks enable you to save your modified view for future use.

Personalised visuals

When you see this icon in the visual header of a visual, this means you are able to make changes to the visual such as:

- Changing the visual type e.g. from a table to a matrix or a line graph to a bar chart
- Changing fields on the axis or the aggregations of a matrix or graph
- Adding and removing fields in a table – adding fields also allows you to filter on this field

1. Click the 'personalize this visual' icon on the visual header, this will open the 'personalize' toolbar.
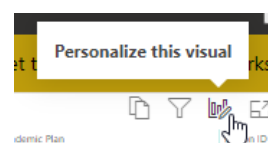

2. To change the type of visual, click the visualization type and choose a different visual.

3. To remove a field, click the three dots next to the field name and click 'Remove field'.
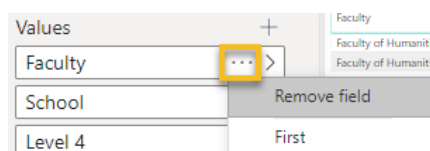

4. To add a field, click the '+' button. You'll be presented with a list of all the tables in the data model. You can either search for a field or open the folder which contains the field you want to add; add the field by clicking the field name. If you need help locating fields in the data model or if you are unsure if a field you want exists, contact datateam@manchester.ac.uk (student records) or admissions.data@manchester.ac.uk (admissions).
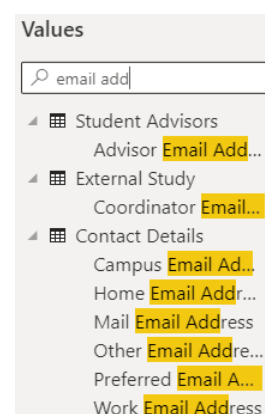
Note, fields that are formatted as a number will always aggregate when added to a table visual e.g. sum, average, maximum, minimum, which may not always be desired. To just show the value, click 'Don't Summarize'.

5. In order to add a filter to a report, you need to add the field to the visual; the field will be added as a visual level filter, this means when you click the data in the visual, the filter will appear on the right hand side of the page for you to use, above the page level filters.
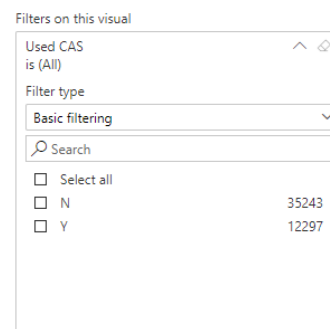
Bookmarks

If you have made changes to a report, such as adding or removing fields using personalised visuals or setting different filters and you want to reuse this configuration again in the future, you can save it using Bookmarks.

You can save multiple bookmarks for the same report in order to use it for different purposes.

You can revert to the report's original settings by clicking the 'Reset to default' button.

1. Click the 'Bookmarks' button followed by 'Add a personal bookmark' and give this a meaningful name. If you make a bookmark the 'default view', every time you open the report, this particular set of fields and filters will be applied, regardless of what filters were set the last time you used it. Click the 'Save' button to save the bookmark.