

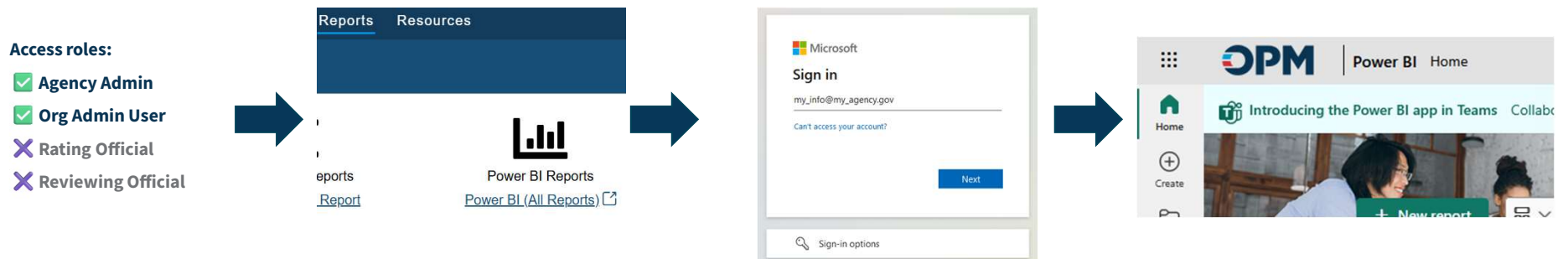


Introduction and Overview of USA Performance®

Navigating and Using Reports in Power BI

Accessing Power BI for USA Performance[®]

- Power BI access via USA Performance[®] Apps Workspace:
<https://www.usaperformance.opm.gov> →  → Reports → **Power BI (All Reports):**



Alternate Access to Power BI

- Save this bookmark (also available from your Account Manager):
<https://app.powerbigov.us/home?ctid=3ce07c0b-30c5-4bcd-ad92-238975b649af>



- Microsoft Authenticator app may be required on an approved phone/device
 - Two Factor Authentication may be the default, depending on the agency
 - For further assistance, contact your Account Manager or email: usapHelp@opm.gov



USA Performance[®] Data and Reporting

Reporting for USA Performance[®]

- **Microsoft Power BI (and Azure) Advantages:**
 - Cloud-based servicing-fast refresh times
 - Wide adoption across multiple platforms
 - Interactive reporting (with visualizations)
 - Data customization (access to data models)
- **Power BI is also used across USA Data[®], to include USA Staffing[®]**

USA Performance[®] Power BI Data Refresh

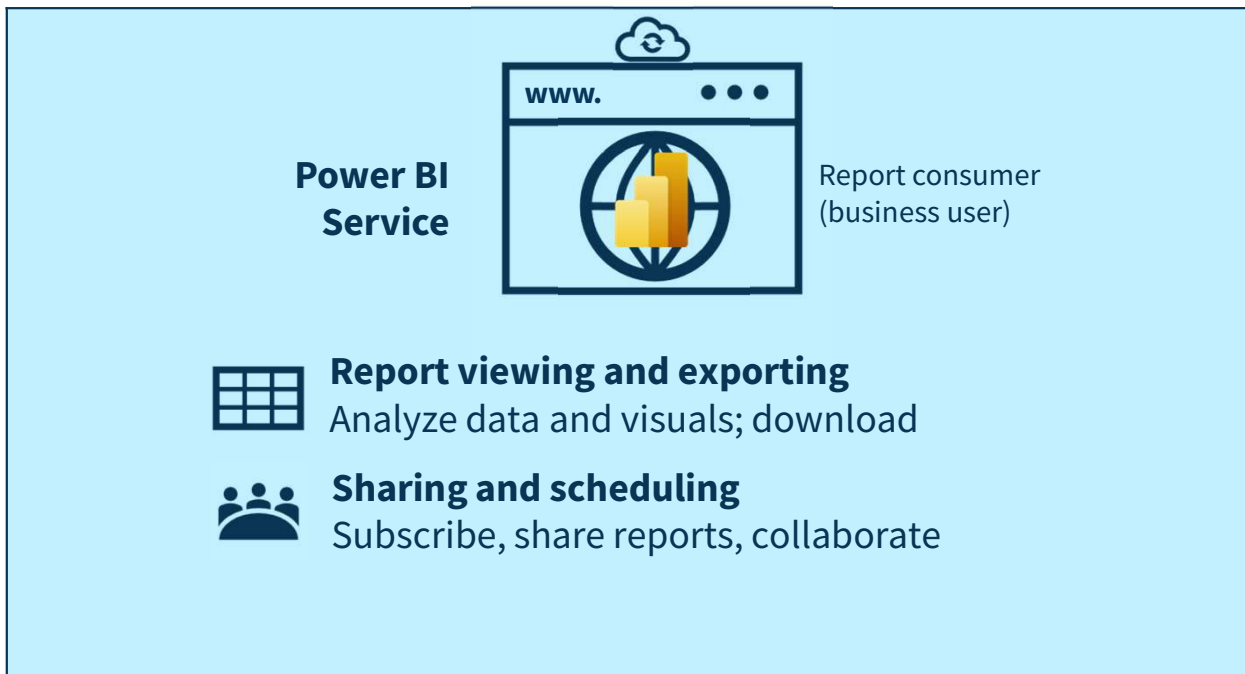


- Daily data refreshes ~ 5 AM Eastern Time
- During peak rating season, refreshes 3x daily
 - Times and frequency can change according to demand
 - Refresh times are fast: < 1 hour






Microsoft Power BI Service Concepts

Microsoft Power BI Service: A Closer Look



For more information, click: [What is the Power BI service? | Microsoft Learn](#)

What is an App? A Workspace? A Report?

<u>App</u> 	<u>Workspace</u> 	<u>Report</u> 
<p>A collection of 1 or more reports, often with dataset access</p> <p>Example: Performance Management App contains 5 reports: PAPR Non-SES, PAPR SES, Administrative Profile, Performance Review Board, eOPF</p>	<p>Environment for sharing and creating apps, reports, dataflows and models).</p> <p>Example: “My Workspace”</p>	<p>A view of a dataset, often including visualizations that represent different findings and insights</p> <p>A report can include several interactive report pages</p> <p>Examples: Administrative Profile report (with 8 report pages)</p>



Navigating Around Power BI Reports

Power BI Basic Navigation for Consumers

- Home
- Left panel navigation
- Browse
- Apps
- Apps Page Layout
 - Sort
 - View
 - Filter by keyword
- Favoriting

Post-login home page

OPM | Power BI Home

New report

New items saved to: My workspace

Recommended

You frequently open this

You favorited this

You frequently open this

You frequently open this

You frequently open this

You frequently open t

SANDBOX : USA Performance ...

UAT : USA Performance - Performan...

USA Performance - Performance Ma...

My workspace

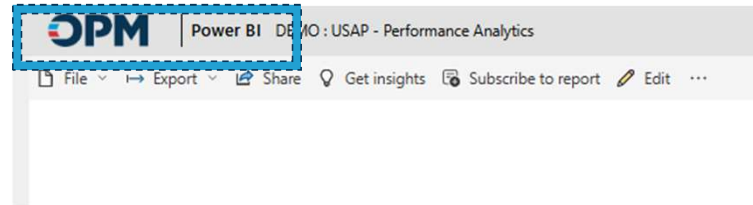
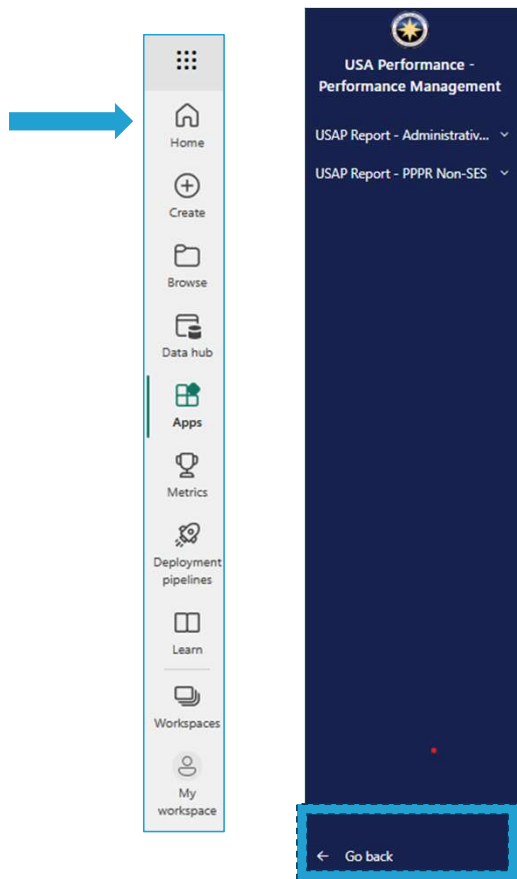
USAP Report - Performance Review ...

USAP Report - Admir

Recent Favorites My apps See all

Name	Type	Opened	Location	Endorsement	Sensitivity
UAT : USA Performance - Performance Management	App		Apps	—	—
SANDBOX : USA Performance - Performance Management	App	7 minutes ago	Apps	—	—
USA Performance - Performance Management	App	14 days ago	Apps	—	—

Returning to the landing page (Home)



- Home Icon
- OPM logo in a report
- “Go back” within App

Browse

The diagram illustrates the navigation process. A blue arrow points from the 'Browse' icon in the left sidebar to a 'Browse' panel. This panel contains three options: 'Recent' (highlighted), 'Favorites', and 'Shared with me'. A second blue arrow points from the 'Recent' option to a table of recent items.

Recent			
	Name	Type	Opened
	UAT : USA Performance - Performance Managemen	App	7 minutes ago
	USA Performance - Authentication Test Repor ☆	Report	10 minutes ago
	DEMO : USAP - Performance Analytics ♡	Workspace	11 minutes ago

- Browse displays recently opened Apps, Favorites, and content that has been shared with you
- Browse searches reports, dataflows, semantic models, etc.

Apps

Apps

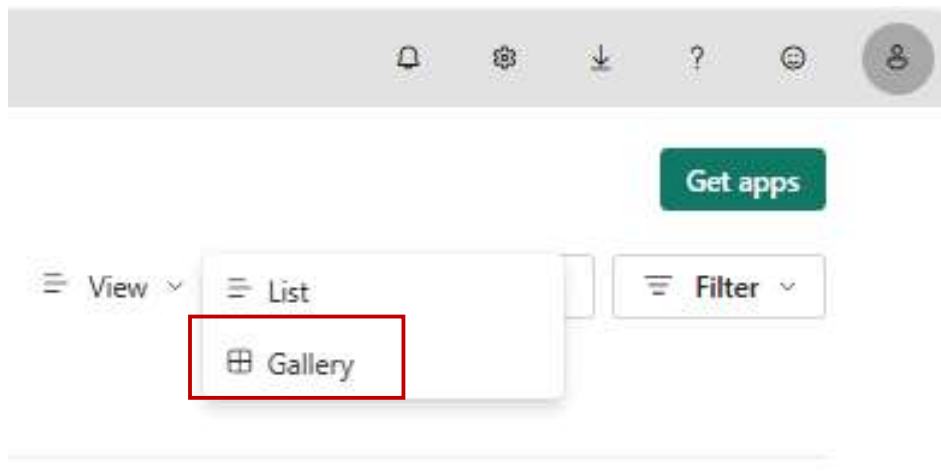
Apps are collections of dashboards and reports in one easy-to-find place.

	Name ↓	Owner	Updated	App ty
	USA Performance - Performance Management			App
				App
				App

- Home
- Create
- Browse
- Data hub
- Apps**
- Metrics
- Deployment pipelines
- Learn
- Workspaces
- My workspace

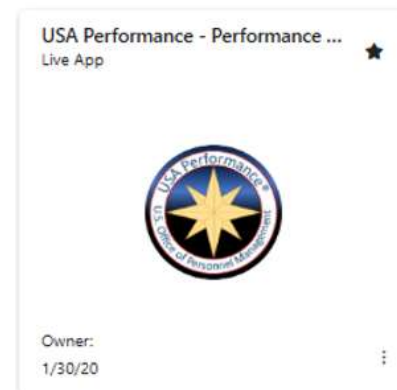
Modifying the Apps Page View

- View: List (default)
 - Table of data
- View: Gallery
 - Larger App icons



Apps

Apps are collections of dashboards and reports in one easy-to-find place.



Filtering Apps by keyword

- Searches apps that contain the keyword(s) in the App name
- Results begin to filter as you type

🔍 Filter by keyword

Apps

Apps are collections of dashboards and reports in one easy-to-find place.

☰ View

	Name ↓	Owner	Updated	App type	Version	Endorsement
	USA Performance - Performance Management				—	—
						—
						—
						—

Favoriting an App

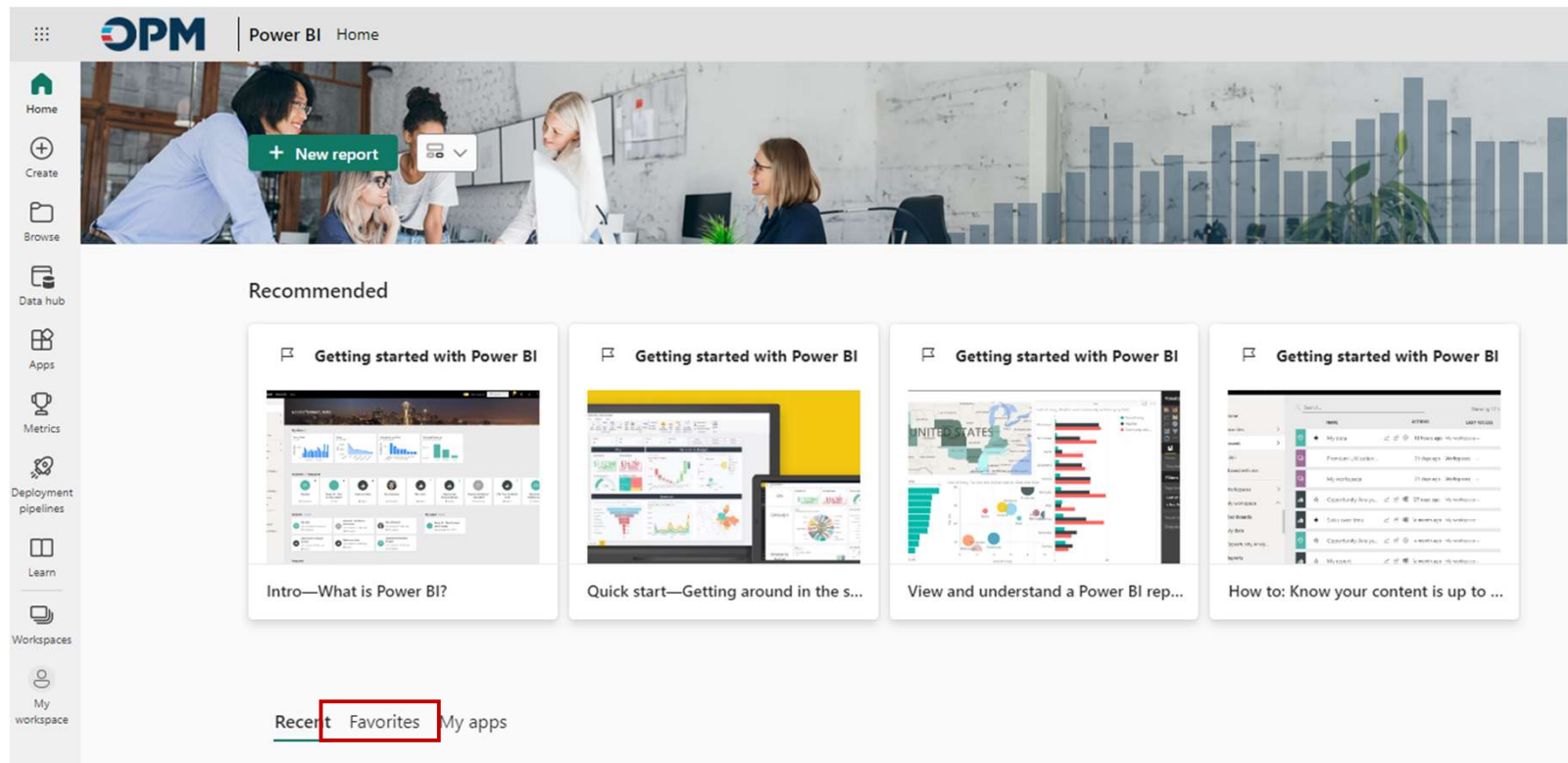
- Used for frequently opened reports
- Adds to Favorites in Browse and on the Home page

Apps

Apps are collections of dashboards and reports in one easy-to-find place.

	Name ↓		Owner	Updated
	USA Performance - Performance Manag			

Favoriting an App (continued)



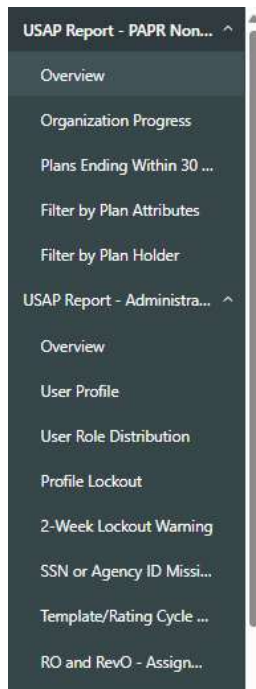


Power BI Report Features and Functionality

Checklist of Interactive Report features

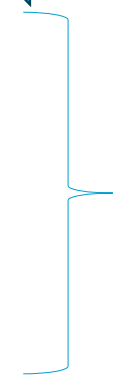
- Report Panel and Report Pages
- Zoom
- Open Report
- Pages within Report
- Expand/collapse Pages
- Filters and clearing filters
- Visual: Focus mode (and Back to Report)
- Visual: Copy as image
- Visual: Export data
- Visual: Show as a table
- Bookmarking
- Make default bookmark view
- File, Export, Subscribe
 - Export limited to 150k rows
- File: Print
- Export (entire report page)
- Subscribe (email)
- Subscriptions In Settings

Report Panel and Report Pages

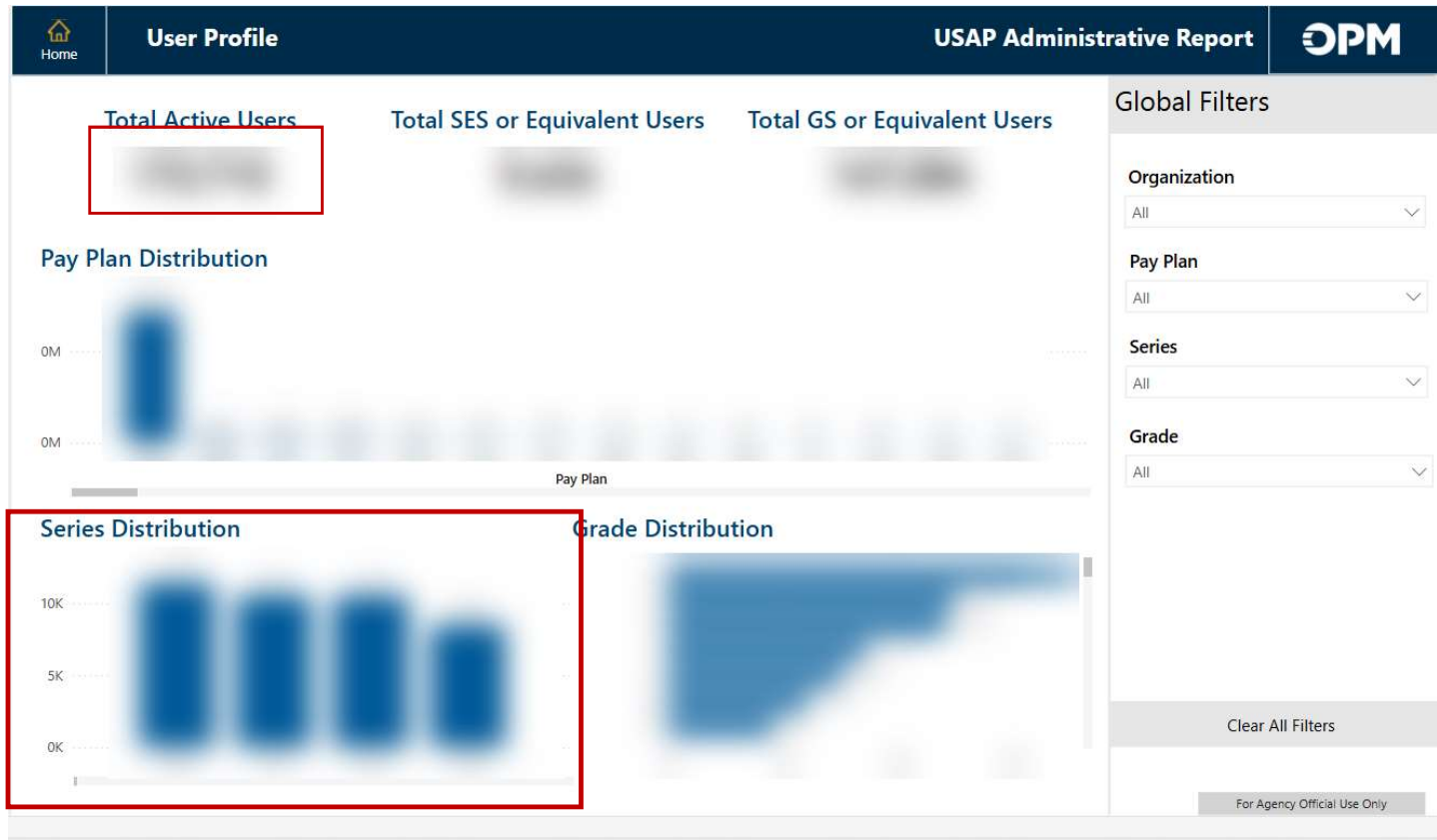


Main report [e.g. USAP Report – PAPR Non-SES, USAP Report-Administrative Profile].

Report Pages [e.g. Overview, User Profile, etc.].



What is a visualization?



Report

[For more information, click on Visualization types in Power BI | Microsoft Learn](#)

Filters

Global filters can be applied at the report or report page level

The screenshot displays a Power BI report interface. At the top, there is a navigation bar with a 'Home' icon, the text 'User Profile', 'USAP Administrative Report', and the OPM logo. Below the navigation bar, the report content is organized into several sections. On the right side, a 'Global Filters' sidebar is highlighted with a red border. This sidebar contains four dropdown menus: 'Organization' (set to 'All'), 'Pay Plan' (set to 'All'), 'Series' (set to 'All'), and 'Grade' (set to 'All'). At the bottom of the sidebar, there is a 'Clear All Filters' button, also highlighted with a red border. The main report area features three summary cards at the top: 'Total Active Users', 'Total SES or Equivalent Users', and 'Total GS or Equivalent Users'. Below these cards, there are two bar charts: 'Pay Plan Distribution' and 'Series Distribution' on the left, and 'Grade Distribution' on the right. The 'Pay Plan Distribution' chart shows a single bar for 'All'. The 'Series Distribution' chart shows three bars for different series. The 'Grade Distribution' chart shows a distribution across various grades. At the bottom of the report, there is a small button labeled 'For Agency Official Use Only'.

For more information, click on Filters and highlighting in Power BI | Microsoft Learn

Filters, continued

The diagram illustrates the expansion of a filter menu. On the left, a 'Global Filters' panel contains four simple dropdown menus: Organization (set to 'All'), Series (set to 'All'), Grade (set to 'All'), and Pay Plan (set to 'All'). A red box highlights the 'Organization' dropdown. A blue arrow points to the right, where the 'Organization' dropdown is expanded into a tree view. This tree view shows a search bar and a list of organizations with checkboxes, including 'HRS - Strategic Cons...', 'HRS - USA Performa...', 'HRS - Performanc...', 'HRS - USA Perfor...', and 'HRS - USA Performance Product Development'. A red box highlights the 'Clear All Filters' button at the bottom of the expanded menu.

Global Filters

Organization

All

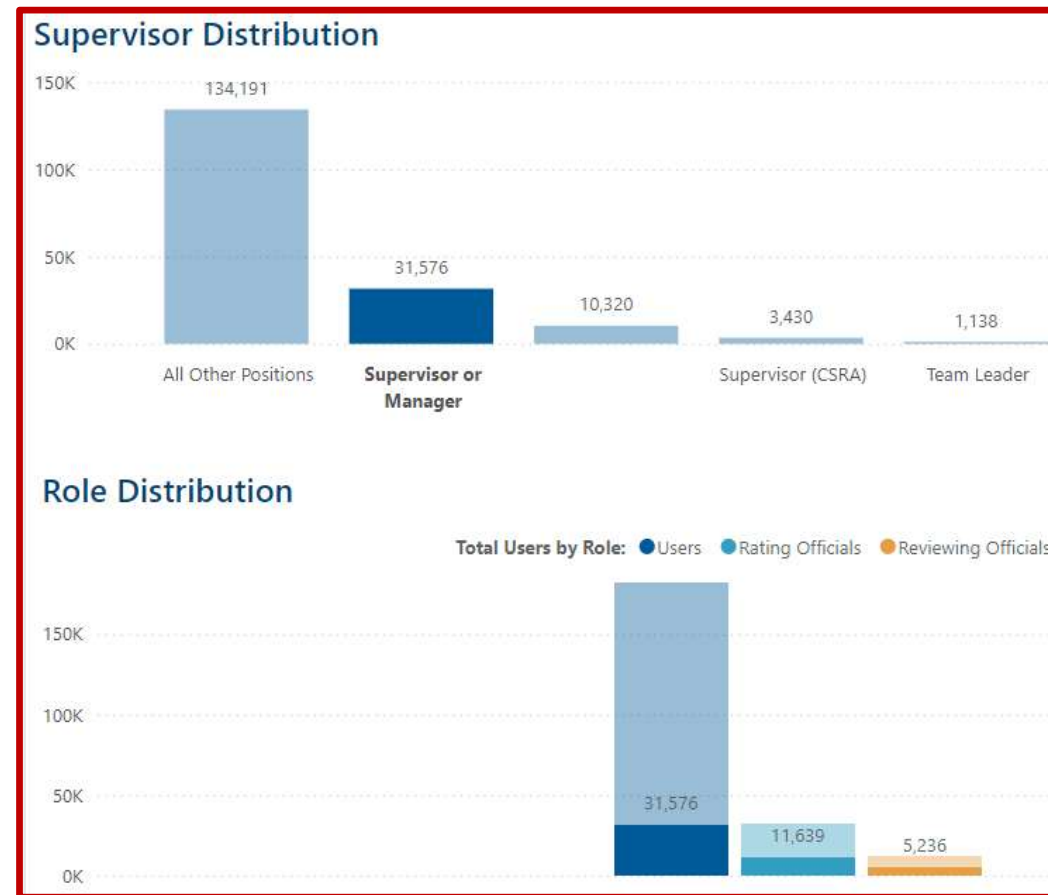
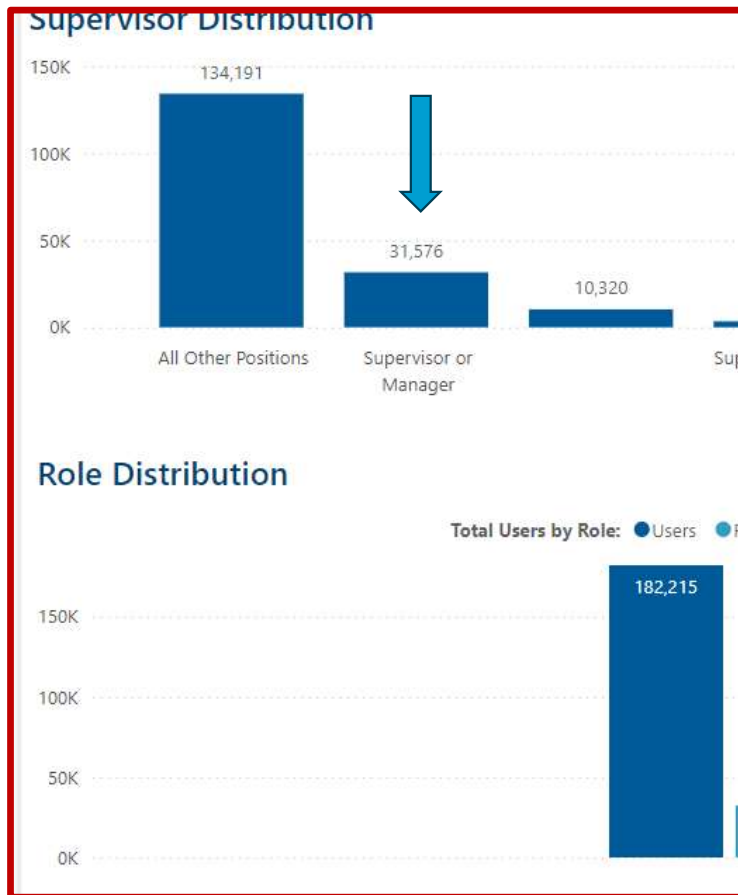
Search

- HRS - Strategic Cons...
- HRS - USA Performa...
-
- HRS - Performanc...
- HRS - USA Perfor...
- HRS - USA Perfor...
- HRS - USA Performance Product Development

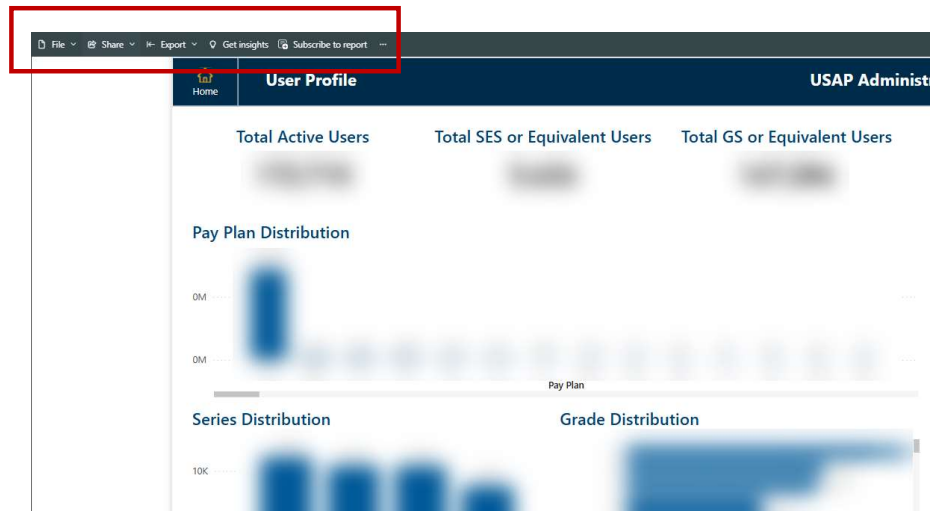
All

Clear All Filters

Additional Filtering-Clicking on Visualizations

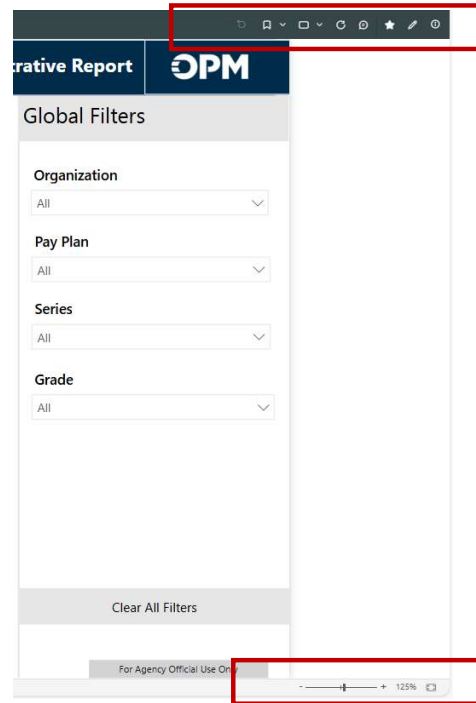


App/Report controls



File Share Export Get insights Subscribe to report

App/Report controls continued



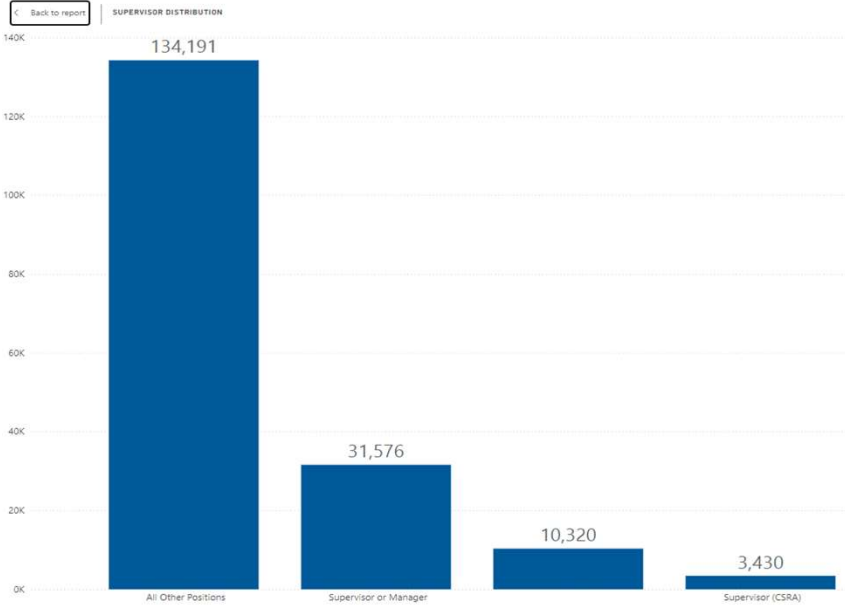
Interactive Report: Visual Controls #1

Grade Distribution



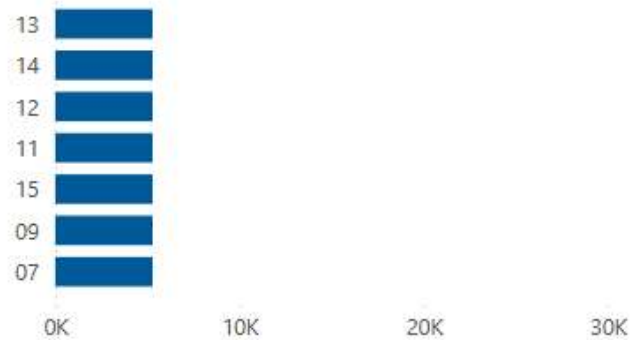
- Copy as image with caption
- Filters and slicers affecting this visual
- **Focus mode**
- **Ellipsis (more options)**

Focus Mode



Interactive Report: Visual Controls #2

Grade Distribution



- Share
- Add a comment
- Export data
- Show as a table
- Spotlight
- Get insights
- Sort axis
 - Grade
 - CountAdminUsersEmails
 - Sort descending
 - Sort ascending

Interactive Report: Export Data



Which data do you want to export?

Export your data in the format that suits your needs. If you have a lot of data, the number of rows you export might be limited depending on the file type you select. [Learn more about exporting data](#)

- Data with current layout**
Export this data in the same layout you see now, but without any icons, colors, or other formatting you added.
- Summarized data**
Export the summarized data used to create your visual (for example, sums, averages, and medians).
- Underlying data**
 Visual does not have aggregates or measures

File format:
.xlsx (Excel 150,000-row max)

Export Cancel

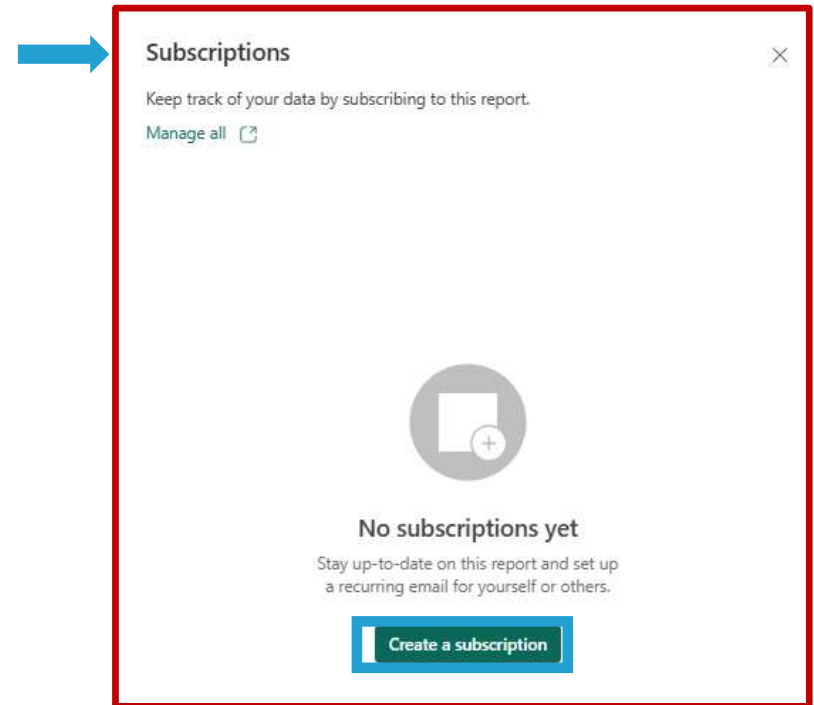
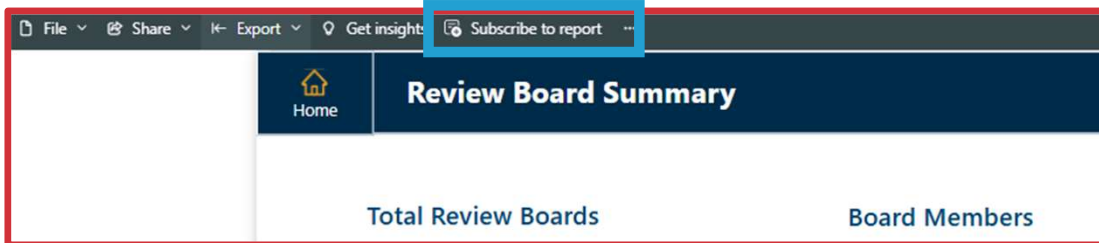


	A	B	C	D
1	Name	Email	Organization	Reason
2				Inactivity User
3				Inactivity User
4				Inactivity Admi
5				Inactivity User
6				Inactivity User
7				Inactivity User
8				Inactivity User
9				Inactivity User
10				Inactivity User
11				Inactivity User
12				Inactivity User
13				Inactivity User
14				Inactivity User
15				Inactivity User
16				Inactivity User
17				Inactivity User
18				Inactivity Admi



Power BI Report Subscriptions

What is a Report Subscription?



Report (standard subscription setup)

Subscriptions

Keep track of your data by subscribing to this report.

[Manage all](#)

Board Summary ✎ 🗑 🟢

⚠ Unsaved changes

Subscription name *

Recipients *

Attach full report

Send to *

Scheduled date and time

Start date * End date

Repeat *

Scheduled time *

Time zone *

Emails will be sent daily at 01:45 PM (UTC-05:00) Eastern Time (US and Canada) starting Friday, May 23, 2025.

Link to report in Power BI

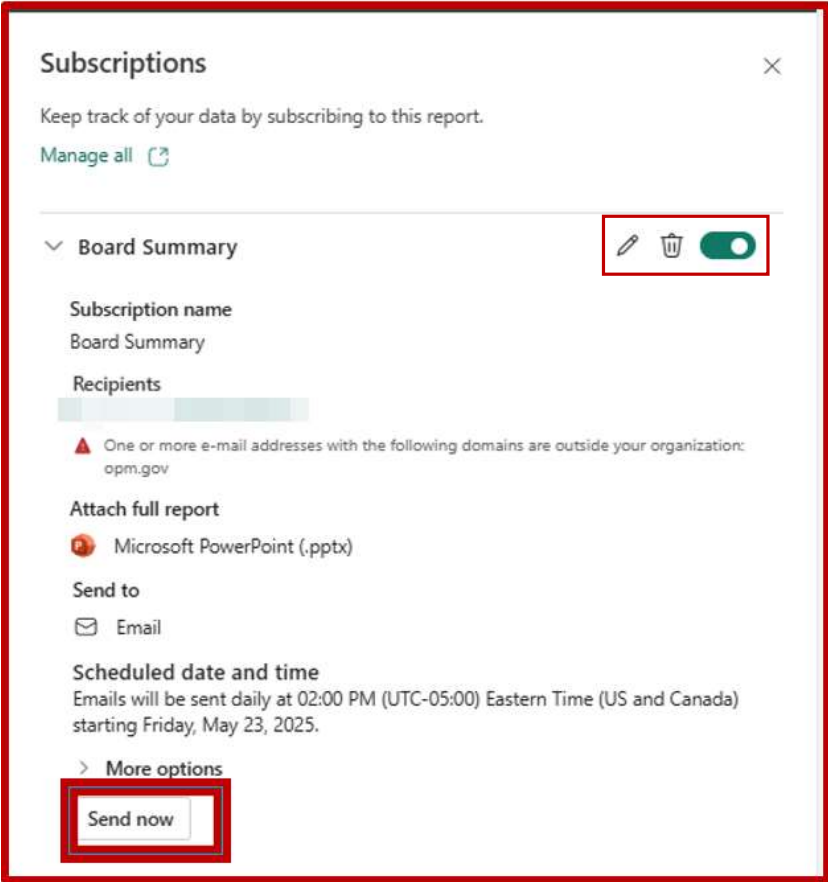
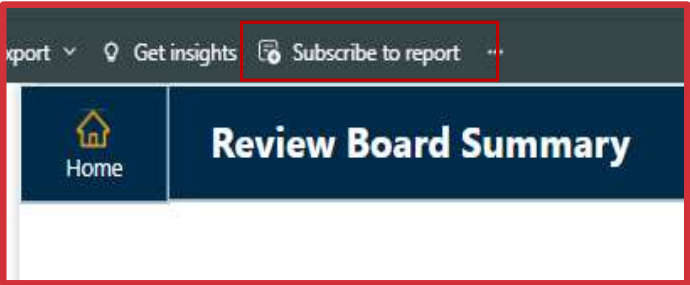
Report page preview

My changes
Include any changes to the report, such as applied filters, drilling, spotlights and more. [What's included?](#)

Include my changes

Subscription must be saved before sending.

Report (send subscription now)





Subscribed Report (scheduled email)

Subscription for USAP Report - Performance Review Board - Version 1.0.1 (Board Summary)

MP Microsoft Power BI <no-reply-powerbi@microsoft.com>
Tc

[If there are problems with how this message is displayed, click here to view it in a web browser.](#)

 USAP Report - Performance Review Board - Version 1.0.1.pptx
2 MB

 Microsoft Power BI

Board Summary

[Open report in Power BI >](#)

Review Board Summary			DRAFT	Performance Review Board
Total Review Boards	Board Members	Board Assignments	Global Filters	
152	426	4,581	Organization	All
			Performance Review Board	All

Member to Workload Distribution

Manage All Subscriptions

⚙️ Settings menu → Settings → Subscriptions Tab



The screenshot shows the Power BI 'My workspace' interface. The top navigation bar includes 'OPM', 'Power BI', and 'My workspace'. Below this, a menu bar contains 'General', 'Alerts', 'Subscriptions', 'Dashboards', 'Semantic models', 'Workbooks', 'Reports', and 'Dataflows'. The 'Subscriptions' tab is selected. On the left, there is a 'My workspace' section with a table for subscriptions. On the right, a settings dropdown menu is open, with 'Settings' highlighted. Below the menu, a table of subscriptions is visible.

Subscription name ↑	Workspace	Owner
2-Week Lockout Warning		
Board Summary		

Content name		
USAP Report - Administrative Profile - Version 1.0.2	Report	State as of 5/23/2025, 1:53 PM.
USAP Report - Performance Review Board - Version 1.0.1	Report	Default

[For more information, click on troubleshooting Power BI subscriptions | Microsoft Learn](#)



In Summary

- usaperformance.opm.gov->Reports
 - [*Click here for URL to Power BI Apps homepage:*](#)
- [Apps are where it's at](#)
 - Apps->Power BI Reports->Report Pages
- [Power BI Reports are interactive](#)
 - Visualizations are exportable
 - Filtering is dynamic
- [Subscribe to receive reports via email](#)
- Submit a Help Desk ticket with any questions, by emailing USAPHelp@opm.gov (with “Power BI” in the subject line)