Adoptions Report in Power BI

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| --- | --- | --- |
| Version | Author | Date |
| 1.0 | Despoina Evangelakou | 2019 – 04 - 02 |
| 2.0 | Despoina Evangelakou | 2019-10-03 |

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The Adoptions report contains data for adoptions and inspection copies globally for all titles over the past 10 years.

Any **actions** to be taken in a regular or ad hoc basis:

**Weekly**: the data refreshes automatically, however one needs to push the updates to the App manually.

**Once a year**: The period is not updated automatically (currently), so you would need to update it manually when the year changes. Next change in Jan 2020.

# Report structure

# In the following sections, I have outlined the structure of the report and how to update it. I have also added a section with common issues.

## Fields displayed

**Adoption status** = Adopted / Inspection

**Adoption level** = essential / reading list / etc. This is relevant mainly for UK and it was added per request of a couple MM in the UK that are using the report.

**First Name** of the adopter

**Last Name** of the adopter

**Email** of the adopter

**Organization** the adopter is based

**Department** the adopter is based

**City** the organization is located

**State** the organization is located

**Country** the organization is located

**Course Discipline** = SAGE categorization of courses

**Course Category Name** = SAGE categorization of courses

**Course Code**= SAGE categorization of courses

**Course Name** = actual name of the course

**Term Year** = Term-Year the title was adopted/inspected for

**Enrolment** = number of enrolled students to said course, and hence, potential sales estimate

**ISBN** = adopted/inspected title’s ISBN

**Title** = adopted/inspected title

**Author Name** = author’s name of the title

## Fields not displayed

**Marketing Manager** -> this field is not displayed but is there in case it is requested in the future

**RingGold\_ID** -> this field is only displayed as a filter

**Do Not Email** -> this field is not displayed but is there in case we need it in the future and for data validation

## Derived Fields

Course\_Code\_Name = New Column in PBI union table > course\_code & course\_name

rg\_id\_name = New Column in PBI union table > ringgold\_id & organization

isbn\_title = New Column in PBI union table > isbn & title

current\_date = New Table in PBI > New Column to get and display the last refreshed date. See M-query in [App A](#_Appendix_A).

## Data Input

Data are imported via queries in PBI.

**Get Data** > SQL Server

**Server**: svrgac-sql-p08

**Database**: MDW

**Data Connectivity mode**: Import

Advanced options

**Timeout**: <default>

(*repeat the data entry for the two separate queries*)

**Query Editor**:

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--- MS-CRM data – full data after Jan 2017, and some historical data

use mdw

select distinct

b.last\_name as Last\_Name,

b.first\_name as First\_Name,

b.individual\_id,

b.email,

b.do\_not\_email,

o.country,

o.state,

o.city,

o.RinggoldID,

o.mail\_organization\_name as Organization,

b.department\_name AS Department,

co.course\_category\_name AS Course\_Category\_Name,

co.course\_name AS Course\_Name,

co.course\_code AS Course\_Code,

cc.course\_discipline\_name AS Course\_Discipline,

opp.number\_of\_students AS Enrollment

, os.academic\_term\_year AS Term\_Year

, bp.ean13\_number AS isbn

, bk.title\_printed as Title

, bc.name\_printed as Primary\_Author\_Name

, bk.marketing\_manager

, opp.opportunity\_created\_date AS Opportunity\_Date

, case ISNULL((prdSpec.adopted\_flag),'') when 'Y' then 'Adopted'

else 'Inspection' end as Adoption\_Status

, adoption\_level

from f\_opportunity opp

join f\_opportunity\_product c on opp.mdw\_opportunity\_key = c.mdw\_opportunity\_key

join d\_opportunity\_product\_specification prdSpec

on c.mdw\_opportunity\_product\_specification\_key = prdSpec.mdw\_opportunity\_product\_specification\_key

join d\_opportunity\_specification os on opp.mdw\_opportunity\_specification\_key = os.mdw\_opportunity\_specification\_key

join book\_product bp on bp.book\_product\_id = c.book\_product\_id

join book bk on bp.book\_id = bk.book\_id

join a2r.d\_product ar on CONVERT(nvarchar(20), ar.isbn13,0) = bp.ean13\_number

left join book\_contributor bc on bc.book\_id = bk.book\_id

and (bc.authored\_yn = 1 and bc.sequence = 1)

left join d\_course co on opp.mdw\_course\_key=co.mdw\_course\_key

left join course\_category cc on co.course\_code=cc.course\_code

join individual b on opp.individual\_id = b.individual\_id and b.email is not null

join organization o on o.organization\_id = b.organization\_id and o.RinggoldID is not null

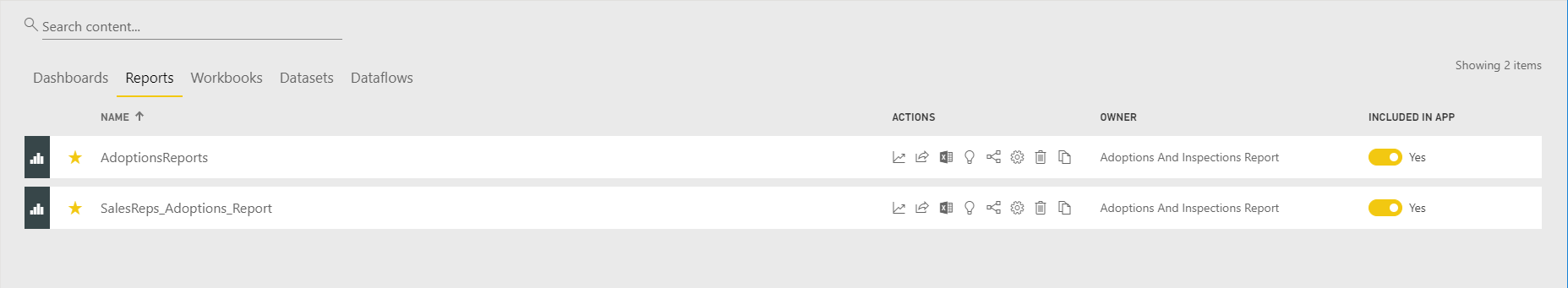
where

b.do\_not\_email like 'N%'

## Online User Experience

The report is hosted in its own workspace: Adoptions and Inspections Report. Users can access it either directly in the workspace, or easier via the App.

Once in the workspace, users find two reports: AdoptionsReports, SalesReps\_Adoptions\_Report. The first is mainly used by US Editorial and the second by US Sales Reps.

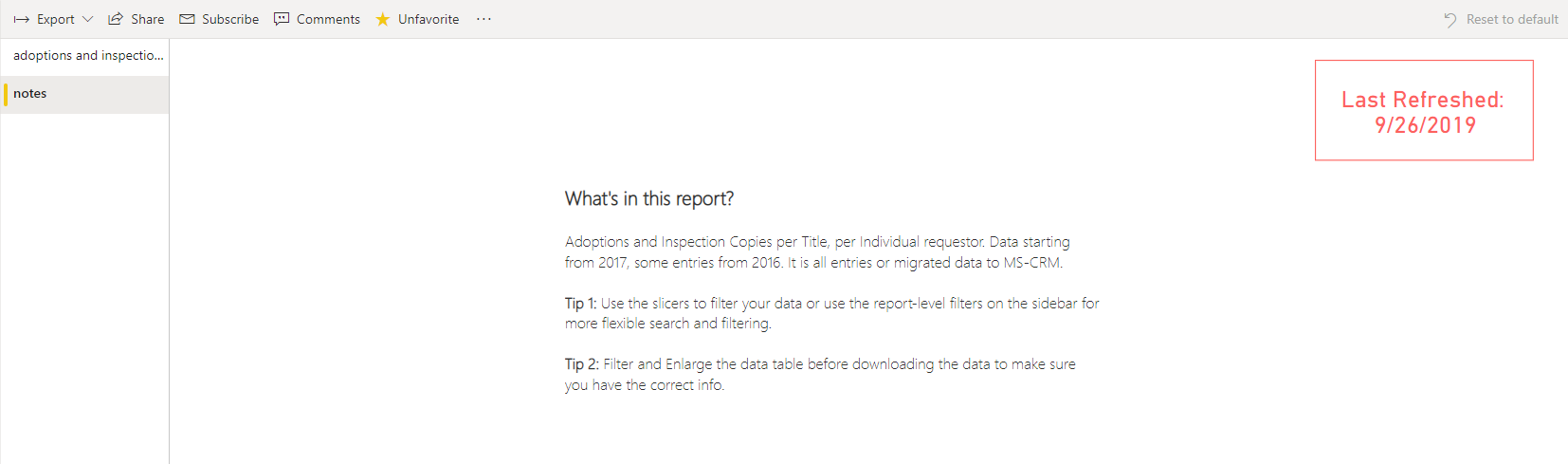


Both reports are produced from the same dataset, AdoptionsReports and auto-refreshed weekly via the Gateway.

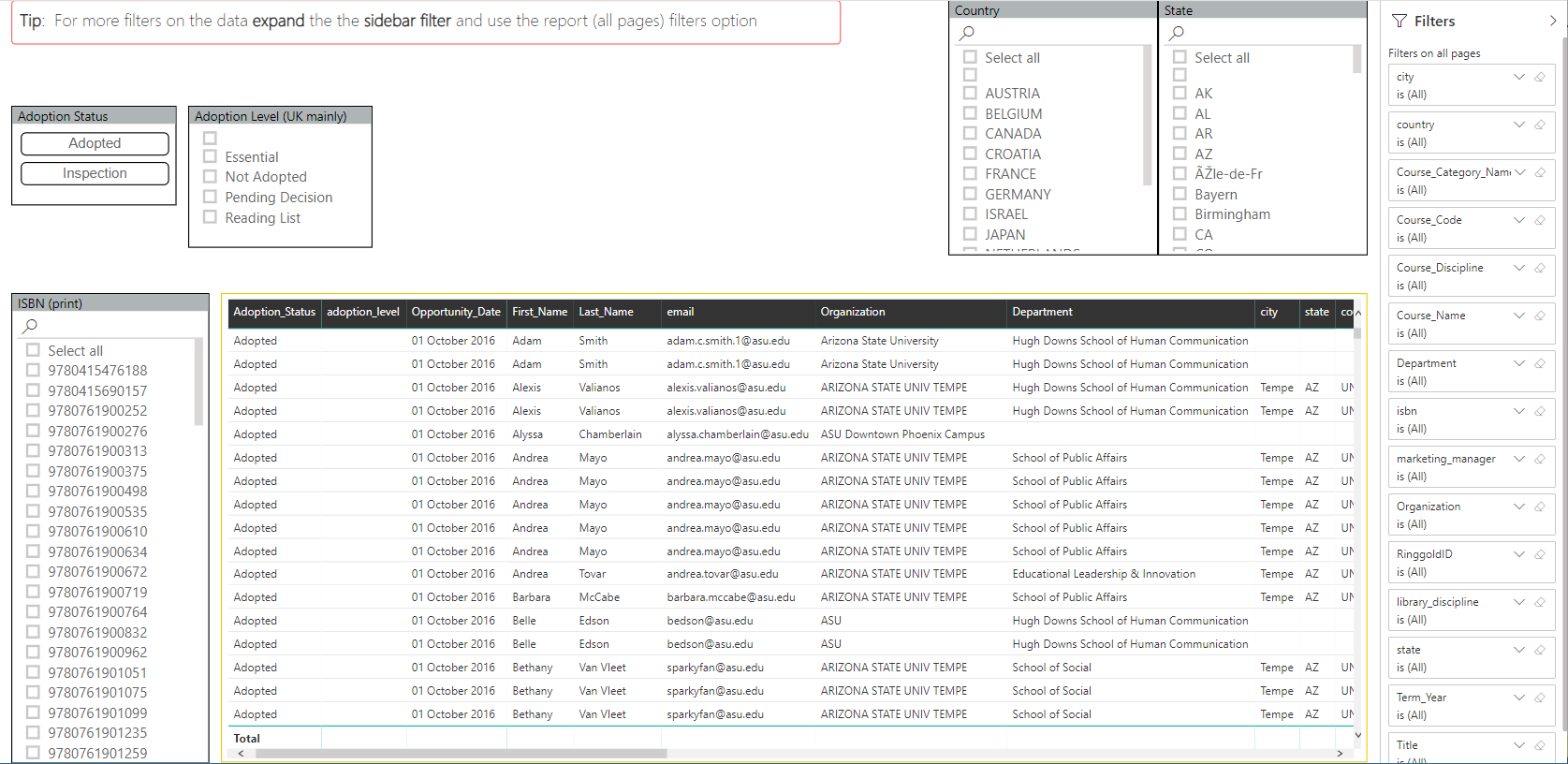
## Report Pages

AdoptionsReports

Landing page is the ‘notes’ where some tips for the users are shown and the last refreshed date. Once the new look is standard for everyone this last piece of information will no longer be needed.



Main report: adoptions and inspection copies



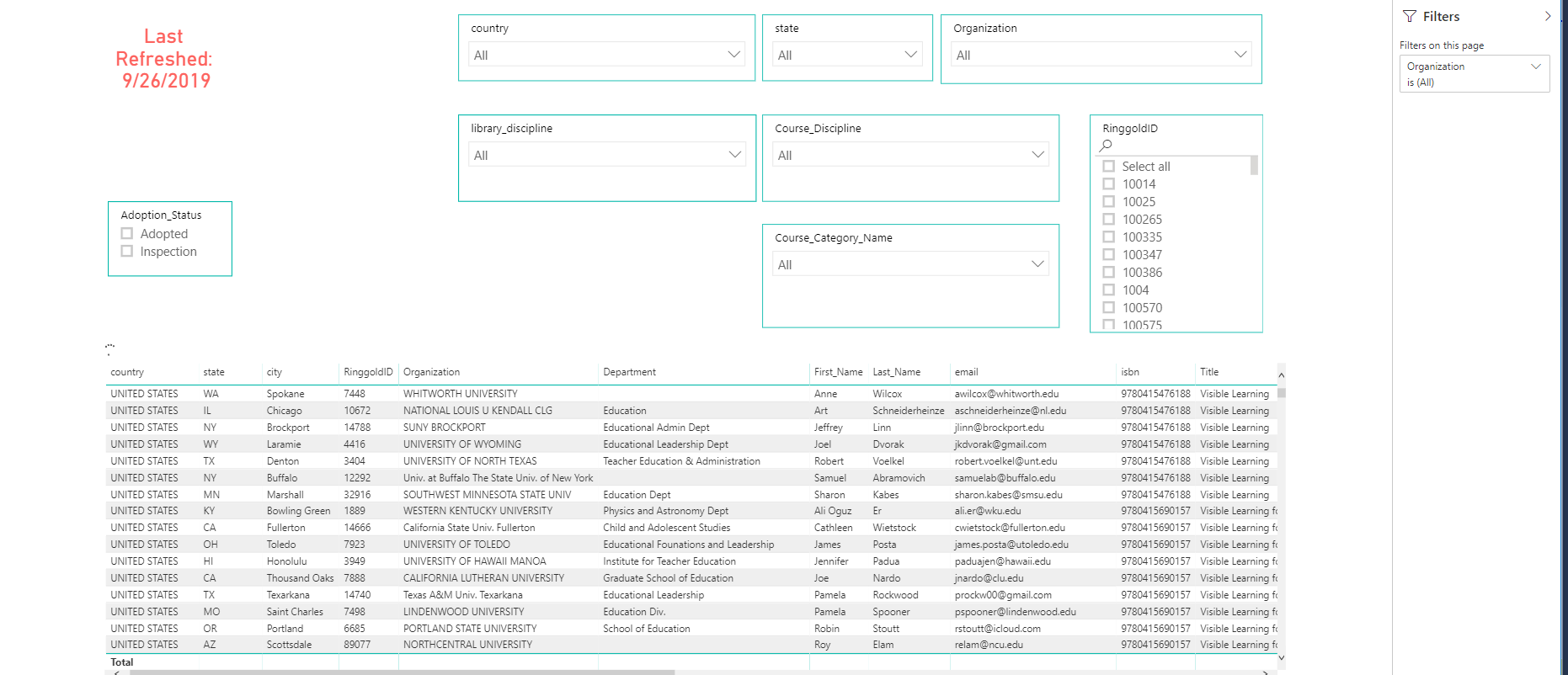
Main page with report data. Users are expected to use the filters provided in this page to extract the data they need from the table visual.

The table contains all the data fields that were listed as “fields displayed” and they can extracted for further analysis in Excel by going to the ellipse > Export Data > Summarized Data > xlsx > Export. I have set it so that users can only get summary data and not the full details. This can be changed in the workspace in PBI online.

The filters are:

* Country > State > City (drop-down)
* Adoption Status > Adoption Level (drop-down)
* ISBN – Title
* Opportunity Created Date: same name field in MSCRM table, or inspection/adoption date in older data
* Ringgold\_ID – Organization
* Course Discipline
* Course Code – Course Name

### SalesReps Report:



This is an online report created off the AdoptionsReports dataset. There is no back-up for this report, as MS –PBI isn’t keeping any versioning – at the moment.

# Known Issues

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Date reported | What | When | Why | How to | Fixed? |
| December 2018 | Data refresh fails | Occasionally | Server updates, Password update,  Gateway failure | Contact DJ,  Update your password | No – but in IT’s backlog  03/10/2019: The refresh is more consistent nowadays, after simplifying the query |
| April 2019 | Join to email\_suppress table slows down the data input and refresh to halt | Always |  | Removed the join for now | 03/10/2019: This is no longer necessary, as we have full adestra integration to MDW. Since June 2019. |
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# Appendix A

* M-query for current\_date table:

**let**

**RefreshDateTime = DateTime.LocalNow(),**

**TimeZoneOffset = -5,**

**RefreshDateTimeAdjusted = RefreshDateTime + #duration(0,TimeZoneOffset,0,0),**

**RefreshDateAdjusted = DateTime.Date(RefreshDateTimeAdjusted),**

**TableCreate = Table.FromRecords({[CurrentDate = RefreshDateAdjusted]}),**

**DateType = Table.TransformColumnTypes(TableCreate,{"CurrentDate", type date})**

**in**

**DateType**

* New Measure for last refreshed date:

**Last Refresh Msg = VAR CurrentDateValue = MAX('current\_date'[CurrentDate]) RETURN "Last Refreshed: " & CurrentDateValue**