





User License Power Bl App Job Aid

V1 – August 2023 V2 – October 2023 V3 – December 2023

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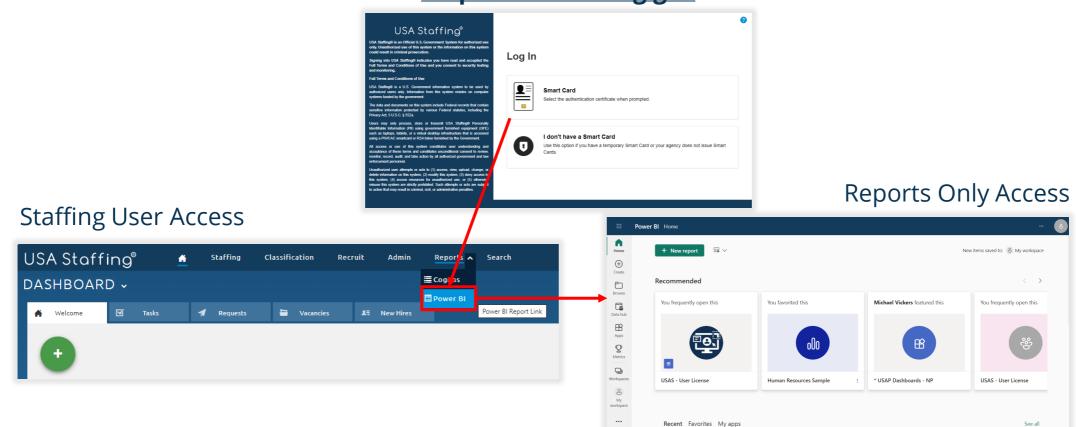






Accessing Power BI through USA Staffing

USA Staffing Login https://usastaffing.gov



The USA Staffing Power BI environment, connect.opm.gov, can be accessed directly at <u>https://app.powerbigov.us/home?ctid=3ce07c0b-30c5-4bcd-ad92-238975b649af</u>



The User License App enables simplified, detailed reporting on user accounts and permission profiles. The User License App dataset is updated multiple times per day.

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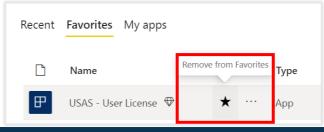
Select the **Apps** icon from the navigation panel or **My apps** from the tabs in the center of the page to display all of your available Apps. Select **USAS - User License** to open the User License App.

Favoriting an App

You can make commonly used apps even easier to locate by adding them to your favorites. To favorite an app, hover over the app row near the app name and select the star icon to "Add to Favorites." These actions can also be done under the My apps tab on the Home screen or within the app itself.

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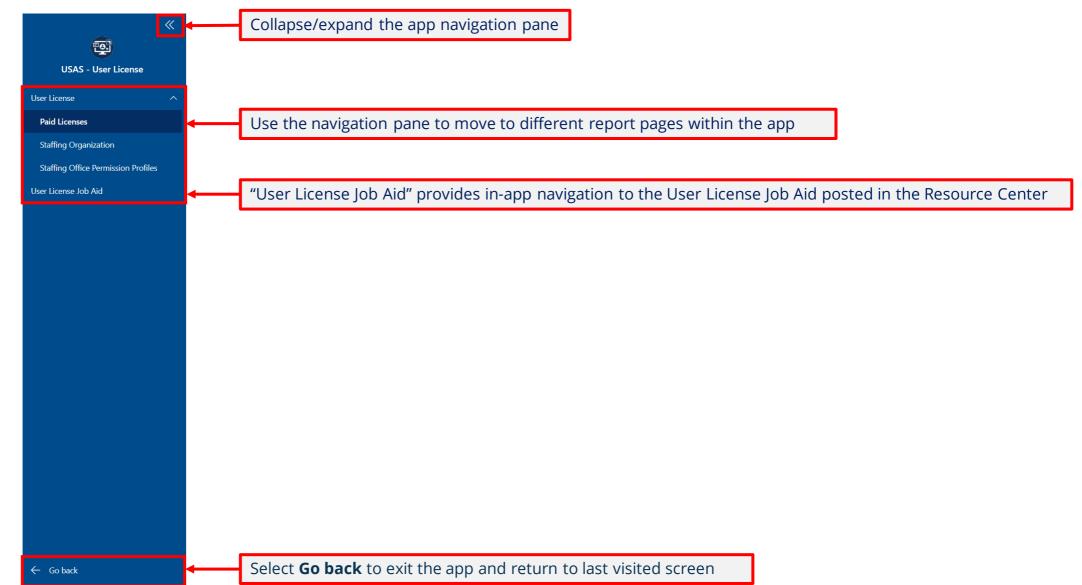
To remove a favorite, select the **star icon** again from the Favorites tab or My apps tab on the Home screen, from the Apps icon, or within the app itself.



Navigating within a Power BI App

III Power BI USAS - User License			User License Data u	pdated 11/14/23 ~	Menu Bar	¢	\$ ⊻ ? © .
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App Navigation Pane



Menu Bar Options (Left Side)

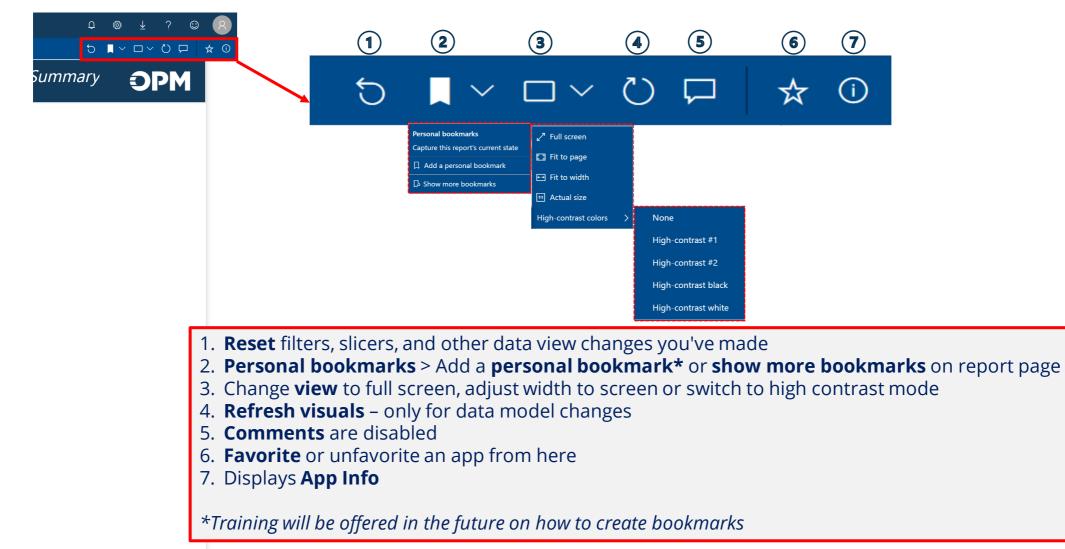


- 1. File > Print this page (opens Print menu); Generate a QR code (creates copy link)
- 2. **Share** > Copy link (only those with existing access can use link)
- 3. Export > Analyze in Excel (currently not available in connect.opm.gov); PowerPoint; PDF
- 4. Get insights: Currently not available in Power BI Apps
- 5. **Subscribe to report**: Send screenshot, link to report, and/or full report attachment as PDF or PowerPoint to email (self-only)
- 6. See related content: Shows related dashboards and datasets
- 7. **View dataset**: Displays last refresh information for the report's underlying dataset. Explore related reports that you have access to and create report from underlying dataset*

*Training will be offered in the future on how to create a report from a dataset in Power BI

Menu Bar Options (Right Side)

- + 132%



Fit to page is selected by default. Use slider to zoom in and out of the page.

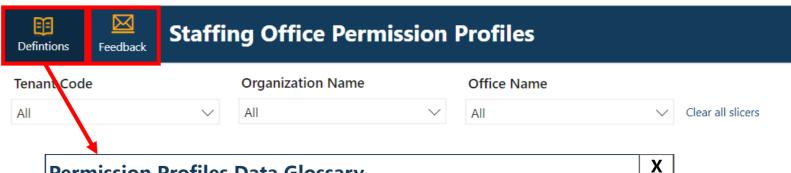
Report Page Header

Definitions:

- Each report page contains a data ٠ glossary with a description of the report page, data source, and definitions of each data item or measure used in the visuals on the page.
- The glossary is specific to each report page. •

Feedback:

Use the Feedback button to open an email • to USAStaffingData@opm.gov to provide feedback on the User License app.



Permission Profiles Data Glossary

Paid Licenses summarizes paid accounts and license allocations by Tenant Code, Organization Name, and Office Name for each user's designated Primary Office. Drill-through reports displaying user details by organization or office, as well as contact cards for individual users are available from the report page. Data items listed are those that are visible on the report page as well as those included via drill-throughs and contact cards. Retired users and excepted users are excluded from the report, drill-throughs, and the underlying dataset.

seted and the difference (. () from the number of noid licenses
cated and the difference (+/-) from the number of paid licenses.
mission to access applicant flow data via the reporting tool.
Human Resources user with at least one paid permission profile logged in as a
user with office-based permissions (Human Resources, Reports Only, Applicant rus of the user's permission profile(s) last logged in.
of the user as designated in their user profile.
nt logged into their account in the last 60 days). Note: Applicant Flow Data Only Cognos upon providing log-in information; if their account is more than 60
ssion profiles assigned to users by user type (Permission Profiles by User Type) d to users by permission profile paid status (Days since last login for User's
n Resources user accounts (i.e., has logged into their account within the last 60

User License Dataset & Row-Level Security

- The User License dataset currently **excludes** Retired and Excepted Users due to report performance impacts. There will eventually be a separate dataset developed to include Retired and Excepted Users.
- The dataset includes row-level security (RLS), which filters data to the row-level, restricting data access to only the data the user would see in the USA Staffing interface.
- RLS applies to the dataset when viewing the report in connect.opm.gov and when connecting to the dataset in Power BI Desktop to build a new report.

Report Page Slicers

Slicers offer a way to filter visuals on the report page.

The User License app has Tenant Code, Organization Name, and Office Name slicers on each page.

Definitions F	Feedback	Paid L	icenses by Prima	ry Offi		OPM	
Tenant Code		\sim	Organization Name	\sim	Office Name	\sim	
All		\sim	All	\sim	All	\sim	Clear all slicers

Hovering near the top of an individual slicer reveals the **Clear selections** button that will remove selections from that slicer. The **Clear Filters** button will clear selections from all slicers.

5.	Definitions			icenses by Prima	Clear selections			
Ŀ	Tenant Code	9		Organization Name		Office Name	\diamond \sim	
	All		\checkmark	All	\checkmark	All	\sim	Clear all slicers

To make multiple selections in a slicer, hold down the **Ctrl** button while selecting options. By default, the slicers are set to include all data. Use the **Select all** option to more efficiently make multiple selections by unselecting options. Use the **Search bar** to search for specific Organization or Office Names.

lenant Code		Organization N	ante	Office	Name	~	Organization N	ame
Multiple selections	^	All	\sim	All		\sim	All	^
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Report Page Visual Interactions

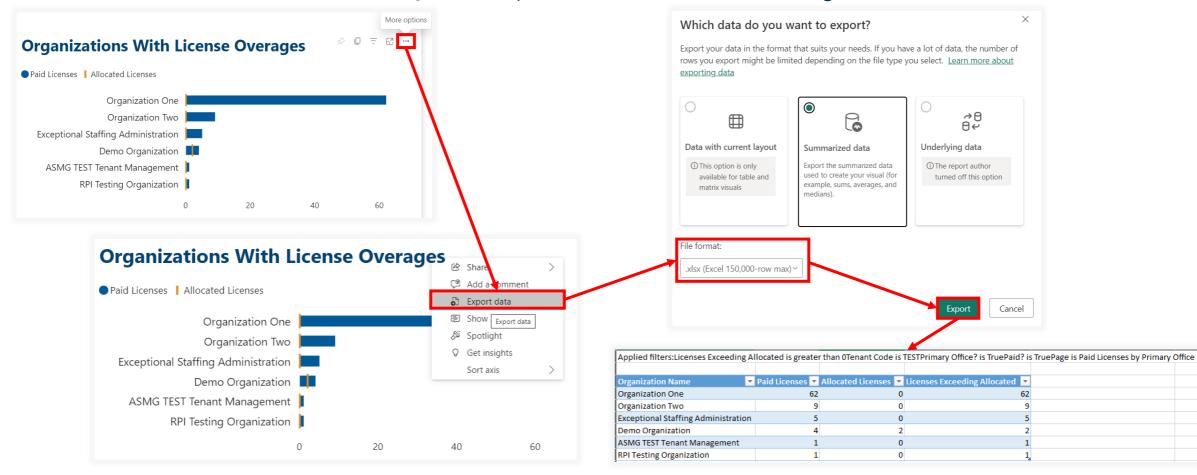
Visuals on the report pages are interconnected. Selecting a data point in one visual will change all related visuals where that data point also appears. To de-select, click again on the selected value in the visual.

Definitions Feedback	Paid Licenses by Pr	imary Office			OPM	Definitions Feedback	Paid Licenses by Pi	rimary Office			OPM
Tenant Code	Organization Nam	ne Office	Name 🗸 🗸 🗸 🗸	Clear all slicers		Tenant Code	Organization Nar All	ne × Office		Clear all slicers	
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Difference from allocated Days Since Last 50		46		Organization Two Exceptional Staffing Administration Demo Organization ASMG TEST Tennah Management RPI Testing Organization		Difference from allocated Days Since Last L	ogin			Organization Two Exceptional Staffing Administration Demo Organization ASMG TEST Tenant Management RPI Testing Organization	
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10						10					
0	31+ Days	Never Logged I	n			0	1 31+ Days	Never Logged In			

In this example, the organization, "RPI Testing Organization" was selected from the "Organizations With License Overages" visual. This is indicated by the other columns becoming transparent. The large number tiles and "Days Since Last Login for Paid HR Users" visuals are cross-filtered and cross-highlighted to reflect licenses or Paid HR User counts specific to the selected organization.

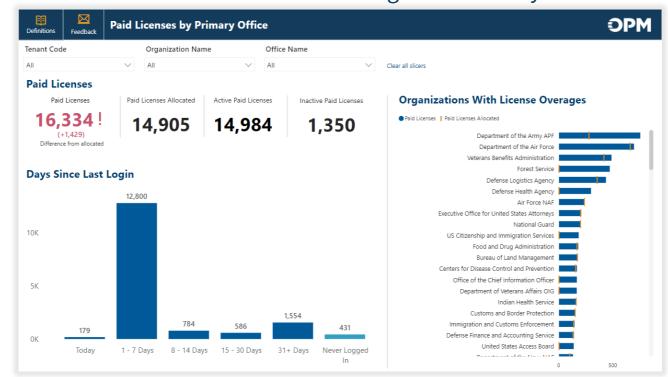
Exporting Data from Visuals

The summarized data used to create visuals can be exported to Excel for further analysis. Select the **More options** menu by hovering near the top right corner of the report visual, select **Export data**, update the file format to **.xlsx (Excel 150,000-row max)**, select **Export**, and open the Excel file after downloading.



Paid Licenses by Primary Office Page

Paid Licenses by Primary Office summarizes paid accounts and license allocations by Tenant Code, Organization Name, and Office Name for each user's designated Primary Office.



Slicers:

- Tenant Code
- Organization Name
- Office Name

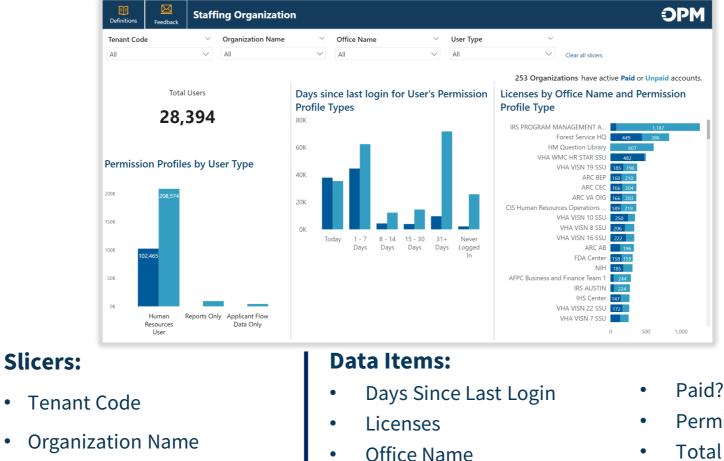
Data Items:

- Active Paid Licenses
- Days Since Last Login
- Inactive Paid Licenses
- Licenses Exceeding Allocated

- Paid Licenses
- Paid Licenses Allocated
- Row Count User Profiles

Staffing Organization Page

Staffing Organization provides user metrics related to paid and unpaid status and permission profiles by Tenant Code, Organization Name, and Office Name for user types who permissions are office-based (i.e., Human Resources, Reports Only, and Applicant Flow Data Only).



- Permission Profile Type
- **Total Users**
- User Type

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Office Name

Staffing Office Permission Profiles Page

Staffing Office Permission Profiles provides permission profile metrics as well as user level details by Tenant Code, Organization Name, and Office Name for user types whose permissions are office-based (i.e., Human Resources, Reports Only, and Applicant Flow Data Only).

Definitions	Feedback	Staffing Office Pe	ermission Profiles			OPM	Definitions	Staffing Office Permi	ssion Profiles			Ĵ	PM
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		User Details Permission P	rofiles		User Permission	Profiles		User Details Permission Profiles	1	Permission Pro	ofiles Assigned		
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		Able, Always		Office A 2	Able, Always	Paid Standard HR User	iotal osers			Human Resources User	119379 Test	Paid	2
		Acres, Test Account		Office A 4	Acres, Test Account	Paid HR Assistant				Applicant Flow Data Only	Applicant Flow Data Access		4
		Adair, Automated		Office Alpha 2	Acres, Test Account	Onboarding Only User				Human Resources User	Beta Levi - Test	Paid	1
		Adam, Automated		Office Charlie 2	Adair, Automated	Paid JR HR Test Feb				Human Resources User	Bri's test	Paid	1
30		Adame, Automated		Office Beta 2	Adair, Automated	Paid Office Administrator	30			Human Resources User	CG (HR - Requests Permissions)	Paid	1
Permission F		Adamson, Automated		Office Alpha 1	Adam, Automated	Paid Office Administrator				Reports Only	General HR Manager	Paid	1
- critission -	- Connect	Adcock, Automated		Office Beta 1	Adame, Automated	Paid Office Administrator	Permission Profiles			Human Resources User	Grenz Bug Testing HR		1
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Unpaid	6	Adjudicator, RA		Office A 1	Adcock, Automated	Paid Standard HR User	Paid 24 Unpaid 6			Human Resources User	HR User Test 1	Paid	1
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		Adler, Automated		Office Charlie 2	Adjudicator, RA	Paid Reasonable Accommodation Adjudicator				Human Resources User	JD Created for Regression Testing	Paid	6
		AFD Account, Test		10	Adkins, Automated	Paid Standard HR User				Human Resources User	JR HR Test Feb	Paid	1
	_	Agee, Automated		Office Beta 2	Adler, Automated	Paid Standard HR User				Human Resources User	Kasey - Test	Paid	1
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Slicers:

- Tenant Code
- Organization Name
- Office Name

Data Items:

Offices

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- Permission Profile Name
- Permission Profile Type

- Permission Profiles
- Primary Office
- Total Users

- User Full Name
- User Type
- Users

Staffing Office Permission Profiles: User Details View

On the User Details view of the Permission Profiles report page, use the paid/unpaid rows on the left side to filter the user detail tables.

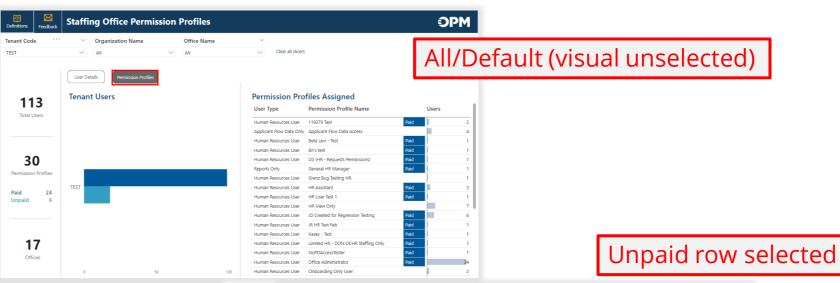
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Total Users	User Full Name	Primary Office	Offic	es 📔	User Full Name		Permission Profile Name	e					
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	Acres, Test Account		Office A	4	Acres, Test Account	Paid	HR Assistant						
	Adair, Automated		Office Alpha	2	Acres, Test Account		Onboarding Only User						
	Adam, Automated		Office Charlie	2	Adair, Automated	Paid	JR HR Test Feb						
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	User Details Permissio	in Profiles						User Details Permission Profiles					
99	User Offices			User Perr	nission Profiles	10	18	User Offices			User Permission Profiles		
	User Full Name	Primary Office	Offices	User Full Na	ne Permission Profile I	Name	Total Users	User Full Name	Primary Office	Offices	User Full Name	Permission Profile Name	
Total Users	Able, Always	0	ffice A	Able, Always	Paid Standard HR User		Iotal Osels	Acres, Test Account		1	Acres, Test Account	Onboarding Only User	
	Acres, Test Account	0	ffice A	Acres, Test Acco	unt Paid HR Assistant			AFD Account, Test		10	AFD Account, Test	Applicant Flow Data Access	
	Adair, Automated	Office	Alpha 3	Adair, Automat	d Paid JR HR Test Feb			Bachrach, Pete		1	Bachrach, Pete	Applicant Flow Data Access	
	Adam, Automated	Office C	Charlie 2	Adair, Automat	ed Paid Office Administrator			Bartowski, Charles	of	ice A 1	Bartowski, Charles	HR View Only	
24	Adame, Automated	Offic	e Beta 🛛 🕯	Adam, Automat	ed Paid Office Administrator		6	Berry, Blue	of	fice B 1	Berry, Blue	Onboarding Only User	
rmission Profiles	Adamson, Automated	Office	Alpha	Adame, Autom	ted Paid Office Administrator		Permission Profiles	Bookhultz, Victoria		2	Bookhultz, Victoria	Staffing Reports Data Access	
simission Promes	Adcock, Automated	Offic	e Beta	Adamson, Auto	mated Paid Standard HR User		Permission Profiles	Cho, Yi Tien		6	Cho, Yi Tien	Staffing Reports Data Access	
24	Addison, Automatedsssss	Office	Alpha 3	Adcock, Autom	ated Paid Standard HR User			Dwyer, A		5	Dwyer, A	Applicant Flow Data Access	
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	Agnew, Automated	Office	Alpha 3	Agee, Automate	d Paid Standard HR User			Rosenberg, Willow		1	Rosenberg, Willow	HR View Only	
17	Aiken, Automated	0	ffice A	Agnew, Automa	ted Paid Standard HR User		13	Testing, Productionelevenfour	Eastern R	egion 13	Testing,	HR View Only	
Offices	Alexander, Elizabith	0	ffice A 1	Aiken, Automat	ed Paid Beta Levi - Test		Offices	Testing, Test	Eastern R	egion 1	Productionelevenfour		
	AS Test, JustA	0	ffice A	Alexander, Eliza	bith Paid Office Administrator		Offices	Thompson, Tessa	of	ice A 3	Testing, Test	HR View Only	
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Staffing Office Permission Profiles: Permission Profiles View



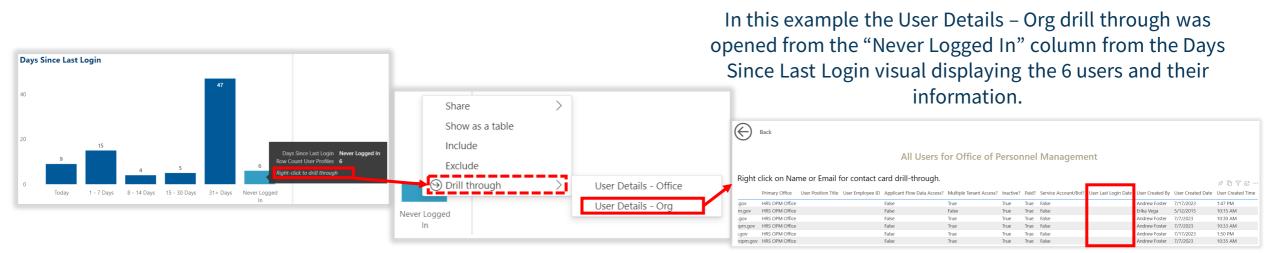
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Definitions	Staffing Office Permis	ssion Profiles				OP	М
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	User Details Permission Profiles						
00	Tenant Users		Permission Pro	ofiles Assigned			
99 Total Users			User Type	Permission Profile Name		Users	
lotal Users			Human Resources User	119379 Test	Paid		2
			Human Resources User	Beta Levi - Test	Paid		1
			Human Resources User	Bri's test	Paid		1
			Human Resources User	CG (HR - Requests Permissions)	Paid		1
24			Reports Only	General HR Manager	Paid		1
Permission Profiles			Human Resources User	HR Assistant	Paid		3
Permission Promes			Human Resources User	HR User Test 1	Paid		1
Paid 24	TEST		Human Resources User	JD Created for Regression Testing	Paid		6
Unpaid 6			Human Resources User	JR HR Test Feb	Paid	1	1
			Human Resources User	Kasey - Test	Paid		1
			Human Resources User	Limited HR - DON OCHR Staffing Only	Paid	1	1
			Human Resources User	NoPDAccessTester	Paid		1
			Human Resources User	Office Administrator	Paid		34
17			Reports Only	Permissions Testing	Paid		1
Offices			Human Resources User	Production Testing	Paid		2
Onices			Human Resources User	Reasonable Accommodation Adjudicator	Paid		8
	0 5	0 10	0 Human Resources User	SMG-Scotty Testing	Paid		1

\boxtimes **OPM Staffing Office Permission Profiles** Tenant Code Organization Name Office Name Clear all slicers TEST V All \sim All User Details Tenant Users Permission Profiles Assigned 18 User Type Permission Profile Name Users Total Users Applicant Flow Data Only Applicant Flow Data Acces Human Resources User Grenz Bug Testing HR Human Resources User HR View Only Human Resources User Onboarding Only User 6 Reports Only Onboarding Only User Reports Only Staffing Reports Data Access Permission Profiles Unpaid 6 13 Office

Drill Through Reports & Contact Card

Drill through reports to more granular user details are available on each report page visual where the Organization Name, Days Since Last Login or User Type data items appear. The visual's tooltip will indicate when a drill through is available. Right-click to drill through. Information displayed in the drill through report is contextual based on the part of the visual from where it is opened.



An individual user Contact Card can be accessed from the User Details drill through report by right clicking on their Name or Email. Use the **Back** button to return to the original report page from any drill through report.

Primary Office	User Position Title	User Employ	yee ID Applicant Flow Data Access	? Multiple Ten	OPM	
Office of Personnel Mar	-+ UBO		False	False		
Office of Personnel Ma	Show as a table		False	False	Adkins, Automated	
Office of Personnel Ma			False	False		
Office of Personnel Ma	Include		False	False	HR Specialist	
HRS OPM Office			False	True	Primary Office	
Office of Personnel Ma	Exclude		True	False	Philadelphia Services Branch	
Office of Personnel Ma Office of Personnel Ma Office of Personnel Ma		>	Contact Card		automatedstaffingtest+22@gmail.com	
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Office of Personnel Management HKO			raise	T		

Exporting Drill Through Reports

Drill through reports can be exported to Excel for further editing or analysis. After opening the User Details drill through report, select the **More options** menu by hovering near the top right corner of the report visual, select **Export data**, select **Export**, and open the file after



If exporting summarized data, be sure to select .xlsx (Excel 150,000-row max) (without Live connection) or .csv as the file format.

AutoSave 💽 🖪 🏷 - 🖓 - 🗢	data (7).xlsx ∽	✓ Search (Alt+Q)			• • • ×
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4 • : × ✓ fx Usertypes, Dual					×
	A	в			F 🗖
User Full Name		User Email	User Position Title	Inactive? User Last Login Date	User Created By
CaseTwo, Test		137344.testcase2@opm.gov		TRUE	Corey Hurst
Test, Stephanie		30774test2@mail.com		TRUE 4/10/2019	Test HR
Usertypes, Dual		9876infinity+12@gmail.com		TRUE 11/7/2018	Test HR
Usertypes, Three		9876infinity+13@gmail.com		TRUE 2/10/2021	Test HR
Tabor, Abby		AbbyTabor15@outlook.com		TRUE 12/7/2015	Casye Gabbard
TestFlow, Andrew		addouglas@gfsafafasmail.c	m AFD & amp; Reports	TRUE	Test Admin

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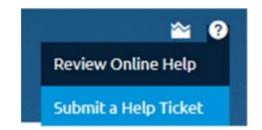
Resource Center

- **Job Aid**: Step-by-step Microsoft Authenticator App Job Aid is available (User License Job Aid also available within the User License Power BI app)
- **Release Notes**: USAS User License Power BI App Special Release Notes available <u>https://help.usastaffing.gov/ResourceCenter/index.php/Reporting_and_Analytics</u>

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HR Users Submit a ticket through USA Staffing



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Or send an email to <u>USAStaffingData@opm.gov</u>