Corporate Partner – Power BI – FAQ

What is the purpose of this report?

This report provides you with an overview of your employees who have signed up to be SET members through your corporate partnership offer.

What insights can be obtained from the report?

The report provides details of the membership uptake from your membership allowance, the different levels of membership across your organisation and the engagement they have had with ETF courses, online content and SET Events.

How do I access the report?

Please use this link to access the report – [Corporate Partner Dashboard]

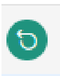
How often will the report be refreshed?

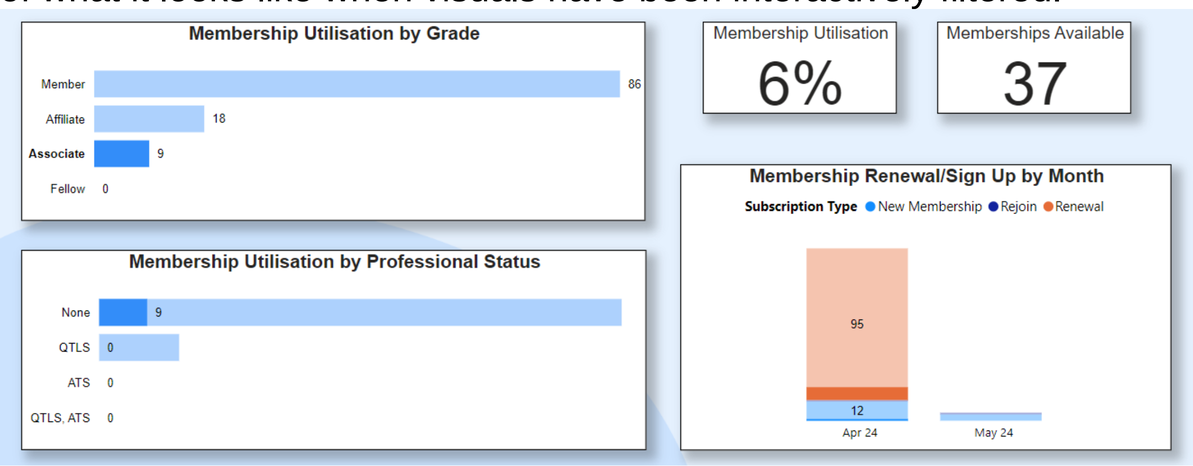
The report is refreshed automatically every morning at 9am. The latest refresh date is displayed on the front page of the report.

How can I or my colleagues request access to the report?

The dashboard is set up so that only one user has access to the dashboard itself, only the main contact that we have for your organisation will be able to use the link. This is for security reasons, but you can export a PDF or Powerpoint version of any of the pages within the report and then share those with colleagues. Use the 'Export' button in the toolbar to view the various options.

The report appears to be filtered, how can I fix this?

PowerBI is an interactive visual tool that allows users to click on visuals in order to filter the other graphs and cards on the page. It's possible you accidentally clicked on something within a visual and it changed the other elements on the page. You can either click on a blank space within a visual or you can click this icon on the top right of the screen . If you do click this, you will need to return to the front page and re-click on your organisation name in the blue box. Below is an example of what it looks like when visuals have been interactively filtered.



Why can’t I see any data in my report?

Check the title page and make sure you have clicked on the blue button that has your organisation name in it (it goes grey when selected). If you are still seeing no data in the report, please contact your ETF Relationship Manager.

There is someone on my memberships report who no longer works at my organisation, how can I remove them?

Contact your ETF Relationship Manager, they will remove them and you can then reallocate that membership.

I don’t think the data displayed on the dashboard is accurate, who do I contact?

Please contact your ETF Relationship Manager and they will pass it onto the right person to investigate for you.

I’d like to request a change to the dashboard, who can I speak to about this?

Please contact your ETF Relationship Manager and they enquire for you. Please provide as much detail as possible about what the update is that you would like and how it would benefit you. It will be looked into and decided whether it would be beneficial for other Corporate Partners before being actioned.