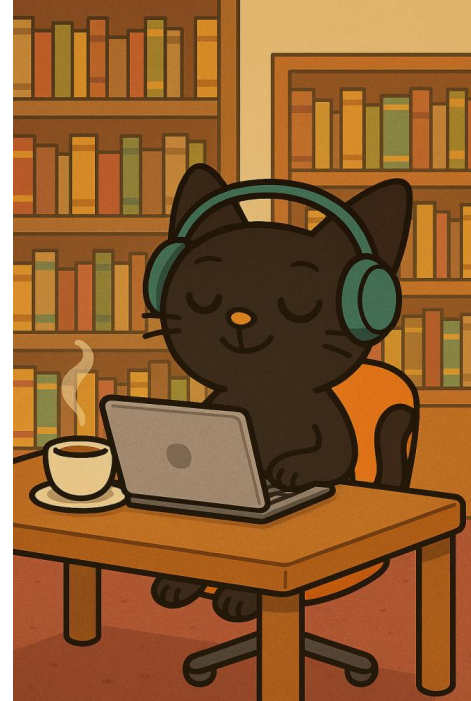
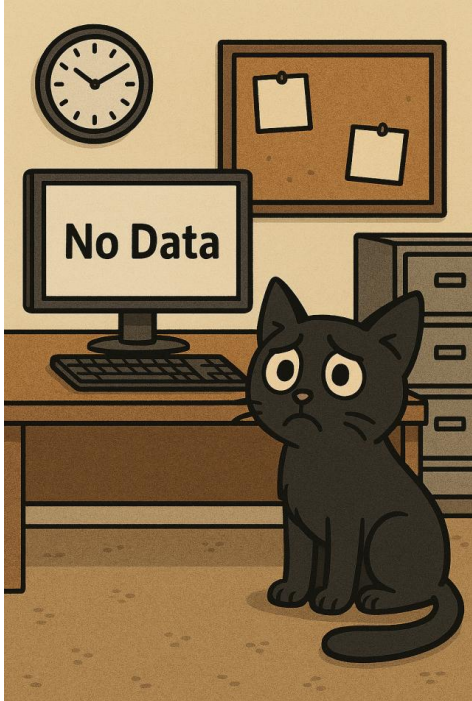


Turning “*I think that happens a lot?*”
into “*Here’s the data*”

: enquiry logging with PowerBI

Katie Mann, Mercian Conference 2025





About Birmingham Newman University

- Located in Bartley Green (south-west Birmingham).
- ~3300 students, most are local.
- High proportion of students from lower socio-economic backgrounds.
- Started as a teacher training college, now offers wide range of courses across humanities, health, business and social sciences subjects.



How about the library?



- 3 floors, 500 study spaces, 80k print stock.
- 17.3 FTE split across 22 individual staff members.
- Technical & Digital Services Team: acquisitions, serials, e-resources, repository, doc supply, finance & admin.
- Engagement & Experience Team: subject librarians, customer service team, shelvers, all front-facing staff.

Customer Service

Service Desk: Open 8.45am til 5 or 6pm weekdays, 3 staff members.
Near the entrance to the Library.



Enquiry Desk: Open 11am til 2pm
term-time weekdays, 1 staff member.
Upstairs in Quiet Study zone.



...Me



I joined in 2021



When I arrived, no data was being collected.



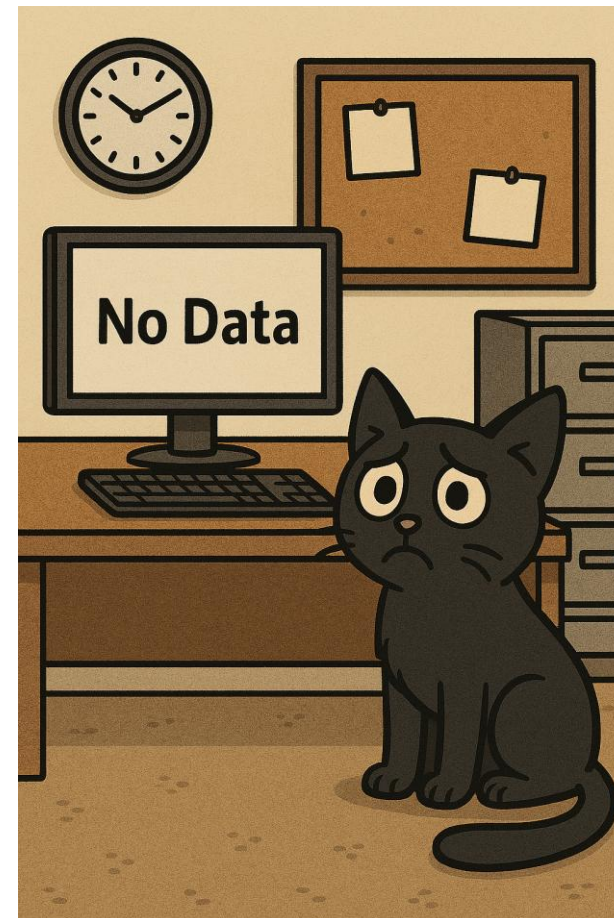
Didn't have any overview of the services, pinch points, common issues etc.
– all context was anecdotal and differed depending on who you asked.



I love data! I wanted data! Give me data, dag nabbit!



But... I didn't want to overwhelm my team.





1. Do you log enquiry data?

2. If yes, how?

3. What do you wish you knew about your services?

Desk: Service Desk

Date: 08/11/22

	9am	10am	11am	12pm	1pm	2pm	3pm	4pm	5pm	6pm
Circulation	I	II		I	III	I	I		I	
Finding books		I			II		I			
Catalogue	I		I					I		
Laptops			I							
Membership				I						
Space booking			I							I
General library use										
ASLs					I	I				
Referencing										
Printing	II	I	I	II	III	II		I		
Logging in			II			I				
Wi-fi		I			I		I		I	
Other IT			I							
Directions		I		I	I		II			
Stationery			I	I	I			I		
Miscellaneous				I		III				

Introducing...
the tally sheet

Pros:

- ✓ Minimal effort for team members
- ✓ I had some data 🎉

Cons:

- ✗ Details captured were very basic
- ✗ Transfer to Excel was cumbersome
- ✗ Huge amount of manipulation required
- ✗ Not helpful in real time

	A	B	C
1	Submission date ▾	Enquiry timeslot ▾	Enquiry type
2	04/10/2021	08:45-09:59	Printing
3	04/10/2021	08:45-09:59	Circulation
4	04/10/2021	10:00-10:59	Circulation
5	04/10/2021	10:00-10:59	Directions
6	04/10/2021	11:00-11:59	Stationery/equipment
7	04/10/2021	11:00-11:59	Space booking
8	04/10/2021	12:00-12:59	Circulation
9	04/10/2021	12:00-12:59	Circulation
10	04/10/2021	15:00-15:59	Printing
11	04/10/2021	15:00-15:59	Logging in
12	04/10/2021	08:45-09:59	Directions
13	04/10/2021	08:45-09:59	Directions
14	04/10/2021	08:45-09:59	General library use
15	04/10/2021	10:00-10:59	General library use
16	04/10/2021	10:00-10:59	Circulation
17	04/10/2021	11:00-11:59	Finding book
18	04/10/2021	11:00-11:59	Miscellaneous
19	04/10/2021	12:00-12:59	Miscellaneous
20	04/10/2021	12:00-12:59	Stationery/equipment
21	04/10/2021	12:00-12:59	Directions
22	04/10/2021	12:00-12:59	Directions
23	04/10/2021	12:00-12:59	General library use
24	04/10/2021	13:00-13:59	Circulation
25	04/10/2021	13:00-13:59	Stationery/equipment
26	04/10/2021	14:00-14:59	General library use



But then...



IT Services – spaces on Power BI course – external trainer.



I had no idea what Power BI was, but sure, why not.



Spent a week on intensive course.



Mind = blown 🤯



...Could I overhaul my enquiry stats?





What is Power BI?

A tool from Microsoft that helps people understand their data by turning it into visual reports and dashboards.

People use it to make complex data easier to interpret, to quickly spot what's working and what's not, and to share information with teams or stakeholders.

Designed to be accessible to people in all kinds of roles.

Described by our Director of IT as “*Excel on steroids*”.

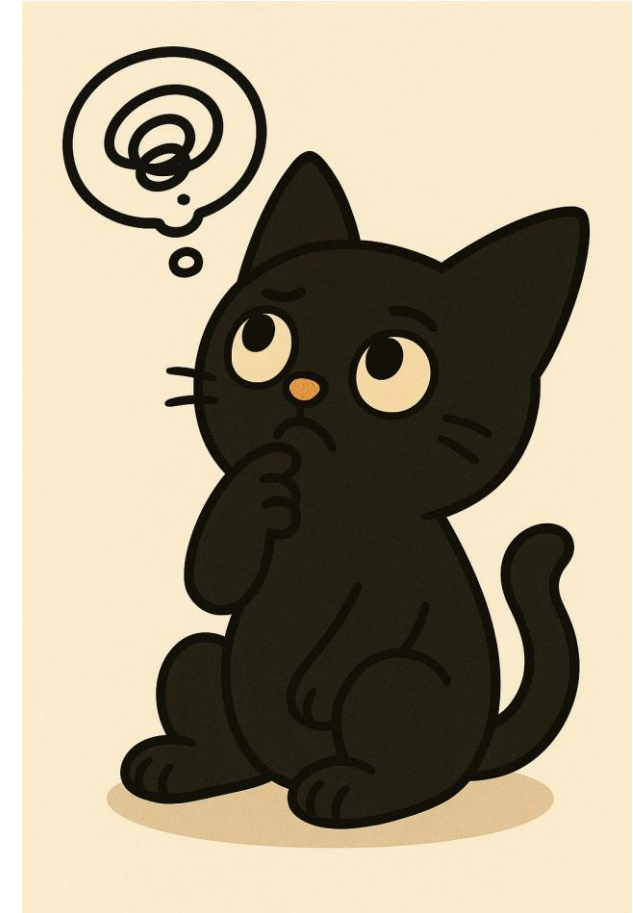




First things first: what did I want to know?

- **When** enquiries take place: identify timeslots & weekdays that are busiest, view services across the academic year, compare with previous years.
- **What** enquiries take place: better information about the enquiry types – more categories, & way of catching content of miscellaneous enquiries.
- **Where** enquiries take place: compare Service Desk with Enquiry Desk.
- **Real-time data** to get a snapshot of services immediately, with no manual data handling.

BUT, to do any of this, I needed to capture better data than the tally sheets could.





But... how?

- Power BI can use information from different types of source to create visual representations of data:

Excel spreadsheets

SharePoint sites

Websites & databases

...many other places that I don't understand because I'm not *actually* a data person

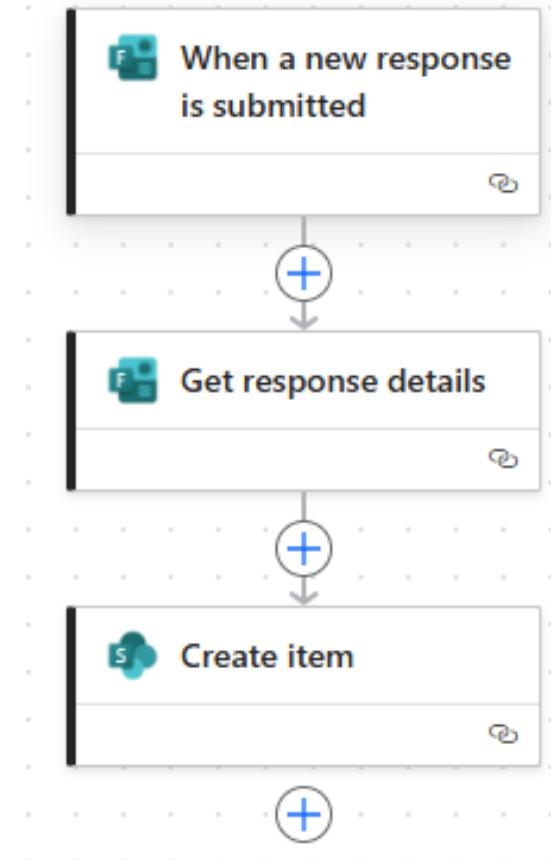
- A compatible source I was already comfortable with was SharePoint Lists, which seemed a sensible choice for the kind of data I wanted to capture.
- But updating entries in Lists is arduous and not what I wanted for my team.
- The easiest digital method for my team to record the data I wanted would be Microsoft Forms, but Power BI does not connect to this.





Cue... Power Automate

- A Microsoft product that... automates stuff.
- It is scary, I don't understand how it works, I'd never used it before, and I don't like it.
- But it could create a workflow enabling Form responses to automatically transfer into a List.
- I muddled through, it works, and I am never touching it again.





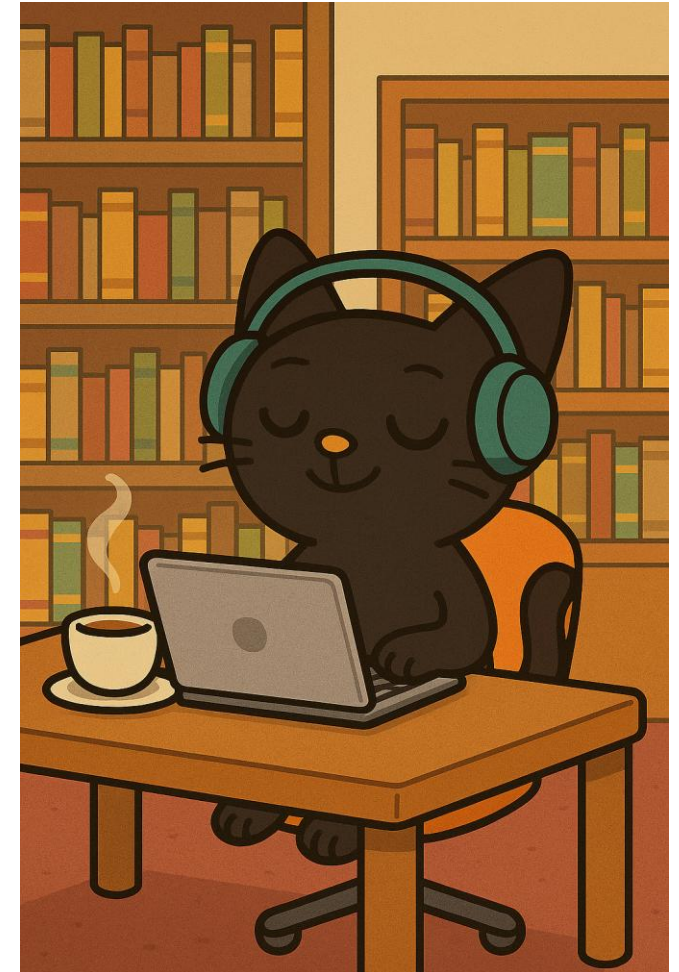
Birmingham
Newman
University

Introducing... the Form and the List!



Preparing to make the enquiries dashboard

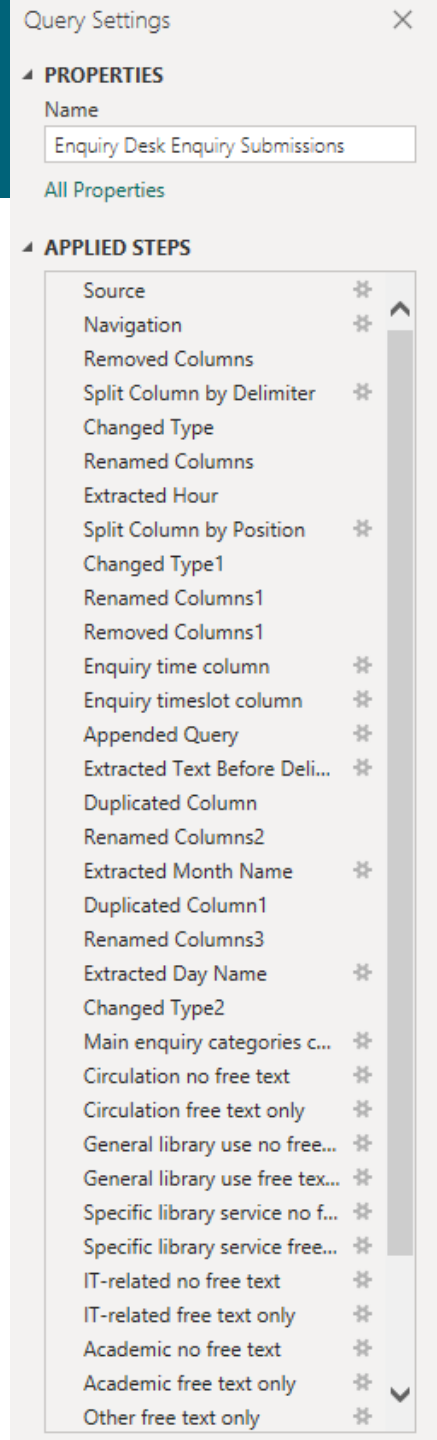
- Waited until a mythical “quiet” summer month 🦄
- Gave myself permission to prioritise this task.
- Gave myself permission to play around and to learn.
- It was important that I was not trying to multi-task.
- Shut myself away / hid in Silent Study.





Getting hands-on with Power BI

- Didn't remember exactly what to do but did have the overall *concepts* down.
- Connected Power BI up to my data source (Microsoft Lists).
- “Transformed” the data to get from the basic Forms responses to columns of data I could work with.
- Relied *heavily* on Copilot, YouTube & Microsoft training videos to point me in the right direction.





So, Katie... how long did the data transformation take?

SO. LONG.

I am not a data expert.

I had never done anything like this before.

Elements of writing DAX fried my brain.

If my Form hadn't been kept as basic as possible, I would not have needed to do anywhere near as much transformation work and the process would have been much easier.

But my priority was keeping front-line staff happy.

On the plus side: the data transformation only needs to be done once!



What came next?

- Once the data was taken care of, I could do the ‘fun’ part: actually create the dashboard!
- Lots of playing around.
- I needed to go back and add more custom columns to the data several times to create the charts that I wanted.
- I needed to find a way to integrate the previous years’ tally data.



The Big Reveal

So what?



Staffing decisions – helps with rota creation, leave requests, staff approval requests etc.



Understanding student behaviour – what they need help with, when, and where they will present.



Targeted support – if we know when specific topics will come up, we can be prepared.



Communicating problems to other departments – e.g. showing IT the impact of printing issues.



Identifying knowledge gaps – recording miscellaneous enquiries helps identify things we didn't know were problems.



**Is there anything you would like to track
that you don't currently?**

What next for me?

Information literacy teaching/appointments dashboard



Help to keep track of teaching inputs for each course

Help to quickly identify areas needing specific librarian intervention

Any questions?