

Capita



Power BI Setup and Reports

Professional Services

Copyright

Copyright © 2023 Capita Business Services Limited. All rights reserved. No part of this publication may be reproduced, photocopied, stored on a retrieval system, translated, or transmitted without the express written consent of the publisher. Microsoft® and Windows® are either registered trademarks or trademarks of Microsoft Corporation in the United States and/or other countries.

Contact Capita

Contact your account manager or simon.pixley@capita.com for further details relating to this.

Contents

- Contents.....2**
- Introduction3**
- Setup3**
- Reports.....4**
 - Students at a Base4
 - Admissions Statuses and Preferences4
 - Preference on a Map4
 - CSS Caseload4
 - EHCPs by Status4
 - EHCP Reviews due by School4
 - School Places Available4
 - Attendance.....4

Introduction

Power BI is an extremely powerful reporting tool aimed at Management Level to allow managers to easily get information on Reports via a visual interface. There is a built-in analytical tool that will provide an automatic insight on various trends of the data.

Setup

As Power BI is a Microsoft product, Capita cannot support the install side. Capita can only offer advice on our own experience of setup.

- Install Power BI Desktop (ensure you download this from the Microsoft website and NOT the Windows Store)
- Install Oracle ODSC connector. ODAC122010Xcopy_x64.zip from <https://go.microsoft.com/fwlink/p/?LinkID=272376>
- Install Oracle Client
- Connect to 'Oracle Database' and enter the database name
- To link with SharePoint ensure you download the PowerBI On Premise Gateway and install on the report server.

Reports

Students at a Base

The simplest of reports, yet very useful. Shows the number of registered and non-registered students at a base or specific bases and their location on a map.

Admissions Statuses and Preferences

The Admissions report provides the ability to view various information on any Transfer group or selection of groups. Such as Allocation Status or Preference Base, or Banding order.

Preference on a Map.

Displays preferences on a map linking in with Power BI Maps

CSS Caseload

This report is a template of Involvements linked to Activities, UDFs and Communication Logs. The report can be used as a starting point for all CSS reports, without the need to edit any SQL. We have captured the fields we think you will need based on our report writing experience.

EHCPs by Status

A report to show a count of EHCP Assessments by their status. Potentially this report could link to EHCP reviews as a separate Page

EHCP Reviews due by School

Various visuals displaying reviews due by schools between dates.

School Places Available

Using PAN

Attendance