



9.17 Release Notes



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Platform

Insights

- **New Exports and Performance Grid Improvements in Insights**

We're excited to introduce enhanced download capabilities and usability improvements designed to help districts gain deeper operational insight and work more efficiently within Insights.

A La Carte

Monitor non-reimbursable sales through a dedicated KPI that breaks out a la carte revenue from overall revenue. Analyze sales by meal type and compare performance against benchmarks.

Reimbursement

View reimbursable meal revenue in its own KPI, including Free, Reduced, and Paid reimbursement totals. This dedicated view makes it easier to analyze reimbursement trends without having to navigate the broader Revenue KPI.

Dashboard PDF Export

You can now generate a PDF of your Insights dashboard, making it easier to share KPI summaries with administrators, leadership teams, and other stakeholders.

Dashboard exports include your currently selected filters and displayed dashboard information.

Export & Sharing Improvements:

- Added Dashboard PDF export.
- Added KPI Detail PDF export.
- Added KPI Detail Excel export.
- Added Performance Grid actions for copying data or images.
- Added Trend Chart actions for copying data or images.

KPI Detail Downloads

Each KPI detail page now supports additional download options.

Available downloads include:

- PDF summary of the KPI detail view
- Microsoft Excel export of the data displayed within the KPI detail page

Note: KPI downloads include the information currently displayed in the selected KPI view. Full transactional data exports are not included in this release.

Performance Grid Enhancements

The School Performance grid has been enhanced to improve usability, particularly for larger districts.

New enhancements include:

- Sticky column headers that remain visible while scrolling
- Column sorting for faster analysis
- Paging for improved navigation through large data sets

These enhancements make it easier to locate, compare, and analyze school performance across your district.

Availability

These enhancements are available to districts licensed for Insights.

Insights > Workspace Insights

System

- **Power BI Distributed Reports**

SchoolCafé now supports the distribution and management of **Power BI paginated reports** using the same proven reporting, scheduling, and distribution capabilities available for Custom Reports and Managed View Reports.

This enhancement allows users to configure Power BI reports for scheduled or ad hoc distribution, manage report configurations from a centralized Report Center, and access distributed reports across SchoolCafé and K12 Insights.

What's New

Power BI Reports Center

A new **Power BI Reports** page is available within the Reports module. From this page, Directors can view and manage their configured Power BI reports using an experience consistent with Managed View Reports.

Users can:

- Search and filter Power BI report configurations
- Mark reports as favorites
- Edit existing report configurations
- View the complete configuration without entering Edit mode
- Review configuration history

- View recently executed and distributed reports
- Download reports
- Email reports on demand
- Delete report configurations when applicable
- Export dashboard grid results

Configure Power BI Report Distribution

Power BI reports can be configured using the existing SchoolCafé report configuration process.

The configuration workflow allows users to define report information, distribution settings, scheduling, and other applicable options using the shared reporting framework already used throughout SchoolCafé.

The **Activity Report** is the initial Power BI report enabled for this functionality.

From the Activity Report, a Director can select **Distribute** to either create a distribution configuration or use an existing configuration to distribute the report on demand.

Scheduled and Ad Hoc Distribution

Power BI reports can use SchoolCafé's existing distribution and scheduling framework to support both scheduled and on-demand report delivery.

Because large reports may require additional processing time, report generation and distribution are processed asynchronously. Users can continue working in SchoolCafé while the report is generated and are notified when processing is complete.

Download and Email Now

Directors can initiate report delivery directly from the Power BI Reports Center.

Download generates the report and delivers the completed file to the user's SchoolCafé Inbox.

Email Now allows the Director to select system users or external email addresses, customize the email subject and message, and send the generated report directly by email.

Completed report executions are also available from **Recently Run Reports**.

Favorites

Power BI reports can be marked or unmarked as favorites using the star on the Power BI Reports page.

Starred Power BI reports are also available from the user's **Workspace** alongside existing Custom Reports and Managed View Reports.

Report History

Power BI reports include two distinct types of history:

Configuration History displays changes made to the report configuration, including creation, editing, and deletion. Power BI reports use the newer SchoolCafé Tailwind CSS history experience.

Recently Run Reports displays previously executed and distributed report outputs and allows users to download the generated report file.

Workspace Integration

Power BI reports are integrated into the existing SchoolCafé Workspace experience.

Users can access:

- Power BI reports delivered to their SchoolCafé Inbox
- Starred Power BI reports
- Reports distributed to them through scheduled or ad hoc distribution

Power BI report messages and distributed reports use the same existing functionality available for Custom Reports and Managed View Reports.

Security

Access to the Power BI Reports page and available report management actions follows SchoolCafé Resource Catalog permissions.

View, Edit, and Delete permissions determine which capabilities are available to each user, consistent with existing SchoolCafé security patterns.

Benefits

Power BI Distributed Reports provides Directors with a consistent way to automate and manage Power BI reporting, eliminating the need for users to manually generate and distribute recurring reports.

By integrating Power BI with the existing SchoolCafé reporting framework, users gain a common experience for configuring, scheduling, distributing, tracking, and accessing reports.

Reports > Power BI Reports