

# Enterprise Reporting & Automation Strategy

Using Microsoft Power Platform and SSRS

---

## 1. Business Context

The organization is a mid-sized enterprise using Microsoft Dynamics 365 for CRM and SQL Server for transactional data. As the business is scaling rapidly, it faces challenges in timely reporting, manual approval processes, and fragmented dashboards. There is also confusion about when to use SSRS versus Power BI. The leadership wants a future-ready reporting and automation strategy using existing Microsoft technologies without investing in new tools or custom development.

---

## 2. Key Constraints

- No hands-on development
  - No direct access to Power BI, Power Apps, Power Automate, or SSRS
  - Decisions are based on architecture and business use cases
  - Focus is on reasoning and tool selection, not implementation
- 

## 3. User Story–Based Tool Selection

### Executive Leadership

**Requirement:** A consolidated and interactive view of sales performance.

**Recommended Tool:** Power BI

**Reason:** Power BI provides interactive dashboards, real-time slicing, and cloud-based access, enabling executives to make faster strategic decisions.

---

### Operations Team

**Requirement:** Daily operational reports delivered automatically.

**Recommended Tool:** SSRS

**Reason:** SSRS supports pixel-perfect tabular reports, scheduled report delivery through email subscriptions, and parameterized execution, making it suitable for operational reporting.

---

## Finance Department

**Requirement:** Standardized monthly compliance and audit reports.

**Recommended Tool:** SSRS

**Reason:** SSRS offers structured report layouts, SQL-based datasets, and controlled deployment, ensuring reports remain consistent and audit-ready.

---

## Business Users (Sales Team)

**Requirement:** A simple interface to raise discount approval requests.

**Recommended Tools:** Power Apps and Power Automate

**Reason:** Power Apps allows creation of a low-code user interface for request entry, while Power Automate enables automated approval workflows, reducing manual effort and approval time.

---

## IT Leadership

**Requirement:** Minimal development effort with maximum reuse.

**Recommended Tool:** Microsoft Power Platform

**Reason:** The Power Platform provides a low-code ecosystem with native integration to Dynamics 365 and Microsoft 365, reducing maintenance costs and improving scalability.

---

## 4. Role of SSRS in Enterprise Reporting

SSRS plays a key role in enterprise reporting by connecting to centralized SQL Server and Dynamics 365 data sources. It uses datasets to apply business logic and filtering, supports report parameters for user-driven inputs, and generates paginated reports suitable for operational and compliance needs. Controlled deployment ensures secure and governed access to reports.

---

## 5. SSRS vs Power BI – Tool Comparison

Criteria	SSRS	Power BI
Primary Purpose	Operational reporting	Analytical insights

Criteria	SSRS	Power BI
Interactivity	Limited	High
Scheduling	Strong	Limited
Data Type	High-volume transactional data	Aggregated data
Target Users	Finance and Operations	Executive Leadership

---

## 6. Final Conclusion

An effective enterprise reporting strategy does not replace SSRS with Power BI or vice versa. SSRS remains essential for operational accuracy, compliance, and scheduled reporting, while Power BI enables interactive, insight-driven decision-making for leadership. The Microsoft Power Platform connects data, processes, and users through low-code automation. Selecting the right tool based on business intent ensures scalability, governance, and agility.