Enterprise Reporting & Automation Strategy-DAY28ASSESMENT

Business Context:

The company uses Microsoft Dynamics 365 for CRM and SQL Server for storing data.

As the company grows, reporting is slow and approvals are manual.

There is confusion about when to use SSRS and when to use Power BI.

User Story 1 – Executive Leadership

Need: Interactive sales dashboard.

Tool: Power BI.

Reason: It provides interactive charts, filters, and real-time insights.

User Story 2 – Operations Team

Need: Daily reports automatically.

Tool: SSRS.

Reason: It supports scheduled reports, email delivery, and detailed tables.

User Story 3 – Finance Department

Need: Monthly compliance reports.

Tool: SSRS.

Reason: It creates structured and audit-ready reports.

User Story 4 – Business Users

Need: Discount approval system.

Tools: Power Apps and Power Automate.

Reason: Power Apps creates forms. Power Automate manages approval workflow.

User Story 5 – IT Leadership

Need: Low development and easy maintenance.

Solution: Use Microsoft Power Platform.

Reason: It is low-code and integrates with Dynamics and Microsoft 365.

Tool Comparison:

SSRS is best for operational and compliance reports.

Power BI is best for interactive dashboards and analytics.

Final Conclusion:

SSRS and Power BI should both be used.

SSRS handles detailed reports.

Power BI handles dashboards and analysis.

Power Platform connects apps, workflows, and data.

Choosing the right tool based on business need ensures scalability and efficiency.