

# MICROSOFT POWER BI OR JET REPORTS FOR FINANCIAL AND OPERATIONAL REPORTING?



Power BI is Microsoft's own business intelligence services. It provides self-service visualizations, dashboards and business intelligence capabilities. Power BI is one of the best available tools for interactive dashboards providing trend analysis and it is a great compliment to Jet Analytics solutions, which helps you manage your data models.

However, for financial and operational reporting, here are some of the things to keep in mind, along with a handy comparison chart that shows how Power BI stacks up against Jet Reports for financial and operational reporting.

## THE CHALLENGE WITH POWER BI

**Creating new reports in Power BI is not easy**, given the complexity of navigating the Microsoft Dynamics data model.

For more complex reports, **you need to master the proprietary DAX scripting language**.

**Data preparation can be slow and cumbersome** and requires technical Power Query and Power Pivot knowledge.

**Learning Power BI takes time and requires a lot of training** because of its complexity and different options.

**There is no drill-down capability to launch Microsoft Dynamics 365 Business Central client.** You need to include detailed transactions in the Power BI data model for users to view them.

**Power BI has no automatic real-time reporting**; the data model must be refreshed either manually or on a schedule. Data refreshes in Power BI Pro are limited to 8 times per day (Power BI Pro) or 48 times per day (Power BI Premium).

## THE BENEFITS OF JET REPORTS

**Reporting against real-time Microsoft Dynamics 365 Business Central data directly in Excel** with reports that drill down into transactional details and can report across multiple legal entities.

**Get up and running with reports immediately.** Easily create and modify reports using drag-and-drop tools and report creation wizards. Use the extensive, purpose-built, out of the box templates to be up and running fast.

**No need to master complex scripting languages.** Leverage existing Excel skills and allow your team to easily build and modify the reports they need, without requiring coding or programming skills.

**Refresh against live data.** Refresh reports directly against your Microsoft Dynamics system in real time, so you always have up-to-date, accurate data to support time-critical processes throughout the month and during your close.

**Always have the answers.** Drill down on the numbers directly in Excel to view detailed transactions, with direct integration with BC client.

## THE SOLUTION

# JET REPORTS

Jet Reports offers fast, flexible financial and business reporting inside of Excel or in the browser.

Simplify access to information by reporting against real-time Microsoft Dynamics data and collaborate by easily sharing reports across your organization.

### POWER BI

vs

### JET REPORTS

<b>Product Positioning</b>	Microsoft's analytics and data visualization solution.	Purpose-built financial and operational reporting solution built inside Microsoft Excel.
<b>Real-Time Reporting</b>	No. Data model must be refreshed either manually or on a schedule.	Yes. Reports are refreshed directly against the live ERP system.
<b>Drill Down</b>	No drill-down capability to the ERP. Detailed transactions would need to be included in the Power BI data model to enable users to view.	Yes. Integration with ERP client. Ability to drill down to view detailed transactions.
<b>Reporting Scheduling and Distribution</b>	Partial. Power BI can refresh a data model in a schedule, but has no distribution capabilities via email.	Yes. Jet Reports has a scheduler that allows reports to be refreshed automatically, saved in several different formats and distributed via email. It can also schedule reports in batches, for example, so the same report can be run and filtered for each salesperson.
<b>Access to Custom Tables and Fields</b>	Yes, but requires custom queries to be written as objects in NAV/BC which needs development skills. Pages can also be published as web services, but this requires extra management.	Yes. The entire database is accessible from Jet Reports, with no technical skills needed.
<b>Multi-Company Reporting</b>	Yes. It is possible to pull data from multiple companies with the Power Query Editor.	Yes. Ability to run a report, pulling data from multiple companies and multiple data sources.
<b>Security</b>	If data are exposed with Queries, then security roles in NAV/BC need to be set up and managed for this.	Uses NAV/BC security model - no need to manage separate security model.



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<b>Dimensions</b>	Partial. Reporting against two global dimensions is straightforward. Reporting against non-global dimensions requires building a data model including Dimension Set IDs.	Yes. Ability to run reports based on global or non-global dimensions.
<b>User Permissions</b>	Needs to be manually managed.	Inherited from Microsoft Dynamics.
<b>Designing Reports</b>	Slow and cumbersome, because it requires technical skills and the UI is unfamiliar.	Fast and easy, thanks to the familiar Excel UI.
<b>Financial Reports</b>	Not suitable.	Yes.
<b>Sharing Reports</b>	Requires Power BI Pro minimum to be able to share outside of Office 365 tenant.	Reports can be shared widely with Jet Hub/Scheduler.
<b>Trigger-Based Email/ Notification</b>	No.	Yes.
<b>Microsoft Dynamics Focus</b>	No.	Yes.

Microsoft Power BI is not necessarily optimized to serve all reporting needs. It is a great tool for dashboards and visualization - specifically, presenting summary-level management information.

**Jet Reports** provides everything finance teams needs in a cost-effective, easy-to-use solution, from advanced business reports to sophisticated financial statements. There is no exporting, no copying and pasting, and no programming required. Financial teams can use Excel for reporting with Jet Reports and is often preferred when they need real-time access to data and the ability to drill-down into underlying transactions.

Learn more about  
Jet Reports.



Questions?

Call 403 744 5358  
Email [info@systemasolutions.ca](mailto:info@systemasolutions.ca)  
Visit [www.systemasolutions.ca](http://www.systemasolutions.ca)