Power BI Reporting for i365

mhance

Looking for quick and accurate reports that you can access anytime, anywhere?

Finance teams require the ability to quickly access accurate, real-time reports for efficient day-to-day business operations. However, the common scenario involves grappling with reports that are managed and distributed in various formats, often depending on staff who have to squeeze this task into their regular work schedule. This approach can be very labour-intensive and may lead to inaccuracies in the data. Moreover, by the time these reports are developed, produced, reviewed, and shared, they often become outdated.

Recognising this challenge, we have developed our Power BI reporting module. This tool significantly upgrades the existing reporting features within i365, elevating them to meet the high-paced demands of modern finance operations.

What's Included:

Power BI for i365 comes with a standard set of 17 reports with segmentation and filtering functionality via the analysis codes available, including:

- Income Statement by Month/Year, Department/ Cost Centre
- Job Analysis including Income Statement by Job
- Balance Sheet
- Revenue Analysis
- Cost of Sales Analysis
- Direct Costs/Overhead Analysis
- Aged Trade Debtor/Aged Trade Creditors

- Customer & Supplier Analysis
- Sub-Contractor Analysis
- Full Sub-Contractor Balances Report
- Cash/Purchases/Sales Daybooks including user audit

Power BI Reporting

mhance

Key Features & Benefits

- Data-driven and visual reporting, providing drill-down levels for summarised and detailed reporting as required
- Users can create reports within a desktop environment and publish to the cloud
- Reports are viewed directly through Power BI so viewers will not require access to i365
- Within the cloud, reports can be scheduled to automatically update hourly, daily or weekly
- Mobile compatibility allows users to access data on the go
- Additional add-on reporting capabilities provide a 360 degree view for users across multiple systems

Ahead of implementation, you will be required to complete a Chart of Accounts Excel spreadsheet which enables the categorisation of General Ledger Accounts into a reporting structure. Power BI Online users will also be required to install a data gateway for security.

Additional Key Benefits:

Less emails
The need for files being sent via email is avoided as they can instead be shared online.

Transparent
Is fully transparent to transaction level via drilldown functionality.

Multiple data sources
Add-on capabilities include the ability to incorporate data sources from other systems.

Saves time
The time spent downloading information into Excel is reduced.

Instant reports
Reports of financial information are created instantly across i365's core modules.

Improve efficiency
Users can work more efficiently and see potential issues before they arise.

Contact us
- +44 (0) 330 777 1950
- sayhello@mhance.com
- www.mhance.com