reportworq℠

UPGRADE GUIDE | VERSION 5 TO 6

What you get by moving to Reportworq 6

Every change from Reportworq 5, at a glance.

Beyond the refreshed interface, version 6 adds business AI that finance controls and a real Excel add-in for charts and maps.

Underneath it sits a cleaner role model with folder- and report-level security, and a faster way to run and audit your reporting.

AT A GLANCE

Business AI that finance controls
Interact through the Copilot or Claude your team already uses, on finance's terms. Every interaction and every dollar is audited.

Three clean roles
Administrator, Author, and User, with folder- and report-level security that keeps each team to its own.

Excel, supercharged
Waterfalls and maps, plus reports built on SQL, DAX, MDX, or API datasources.

Contribution at scale
A brand-new high-speed input grid, with tools to profile memory and load-test capacity.

KEY **New** capability introduced in v6 **Enhanced** existing capability, improved in v6 **Both** present in v5 and v6, unchanged

ROLES, ACCESS + SECURITY

Capability	Reportworq 5	Reportworq 6
Role model	Administrators, Authors, PowerPoint Users and Contributors	Enhanced Three clean roles: Administrator, Author, and User. The new User role carries real value: view, download, get it emailed, and ask AI about their own reports, all in the portal.
Separate teams duties + access	Workspace-level access	New Folder-level security isolates each team's content and duties across the workspace.
Everyone sees only their own	Portal access controls	Enhanced Report-level security: a User sees only their own content, enforced in the portal and through AI, so an assistant never surfaces a report they can't access.
Single sign-on	Native + Microsoft	Enhanced Native, Microsoft Entra ID, Google, and any Custom OIDC identity provider.

EXCEL ADD-IN

Capability	Reportworq 5	Reportworq 6
Charting + maps	None	New In-add-in chart and map builder: Waterfall, Combo, stacked, plus data-bound maps.
Data from anywhere	Refreshable SQL queries	Enhanced Build reports on SQL, DAX, MDX, or API datasources: TM1 / Planning Analytics, Power BI, Adaptive, Anaplan, SQL and Snowflake, and more.
Performance + scalability	Refresh runs inline with the web app	New Interactive refresh runs in isolated workers, so heavy, adhoc queries stay fast and can't stall the app, leaving room for many more analysts to explore live.

POWERPOINT ADD-IN

Capability	Reportworq 5	Reportworq 6
Slide authoring	Prior add-in and shape linking	Enhanced Refreshed pane; link live data into existing decks via a unified Report › Sheet › Object picker.

AI ENABLEMENT

Capability	Reportworq 5	Reportworq 6
AI insights in email + report	AI-written narrative, powered by your own AI	Both AI-written narrative via RWAIINSIGHT, powered by your own OpenAI / Azure / Bedrock, the same foundation in v5 and v6.
Teach reports to AI	None	New The new AI Profile step describes each report (audience and relevance) so assistants and search know when to surface it.
Connect Copilot / Claude to your reports	None	New Point Microsoft 365 Copilot or Claude at your financial reports; recipients can ask AI about their own reports through Reportworq's governed MCP server, scoped to their permissions.
Finance sets the limits	None	New Role-based access decides what each connector and each AI query can reach, so every assistant works within finance's rules. Every interaction, and its cost, is audited.

DISTRIBUTION

Capability	Reportworq 5	Reportworq 6
Job Editor	Prior job editor	Enhanced A refreshed six-step Job Editor: Reports → Parameters → Bursting → Distribution → AI Profile → Test.
Report Viewer	Download outputs	Enhanced A portal Report Viewer to browse a report's run history, parameter variations, and every output format (HTML, PDF, Excel, PowerPoint, CSV, Markdown).
Validate a send	None	New An in-app Email Inbox that mimics distribution, so you can validate a send as the end user, in demo/trial/training mode.
Performance tools	Job Audit Log with timings and data points	Enhanced Detailed analysis of where time is spent, plus memory and CPU compared across job runs and software releases, and a live estimate of the time remaining on running jobs.

CONTRIBUTION

Capability	Reportworq 5	Reportworq 6
Input grid	Prior input grid	New A brand-new high-speed input grid: fast loading, fast entry, with built-in planning tools (Adjust, Spread, Paste special).
Capacity planning	None	New New tools to profile a form's memory and load-test how many run at once, so you can plan capacity with confidence.

PLATFORM + GOVERNANCE

Capability	Reportworq 5	Reportworq 6
Impersonation	None	New Impersonate any role to see exactly what they see, and verify your security and User access before you roll it out.
One audit surface	System, Job and Contribution logs	New Adds AI Interactions and MCP Server logs: every AI/assistant call, on one screen, exportable to Excel.
Output retention	Single retention setting	Enhanced Per-folder / per-report Inherit · Keep all · Keep for a period, with a pin to keep period-close runs.

Finance stays in control.
See how much time your team can reclaim.

Schedule a walkthrough

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