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Case Study

Education Provider - Financial Reporting

with Power BI

Delivery of an efficient and
reliable reporting solution
using Azure Cloud Services

Education Provider – Financial Reporting with Power BI

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Delivery of an enhanced Power BI reporting solution, utilising the Microsoft Azure ecosystem, providing deep and accurate insights for decision making

Problem.

For many years, this education provider, like numerous other long-standing organisations, traditionally produced their financial reports using a collection of spreadsheets, all with embedded complex macros and rigid structures which can be difficult to implement the most simplistic of changes.

Every end of month period process depended on critical sources such as uniform shop sales, canteen, tuition, etc. All information had to be collected, validated and finally merged to assist in demonstrating the school's financial health progress. This process would take several days with a serious risk that if any component was incorrect, the whole process had to be reperformed.

Questionable values that required explanation had to be requested from service desk for detailed reports, which in most cases resulted in further questions. Getting to the bottom of these questions were time-consuming and inefficient as it delayed the publishing of the financial statements.

Solved.

Leveraging Azure cloud services offering resulted in the identified and secured on-premise data to be lifted, transformed and land into the Azure Data Lake using Azure Data Factory.

Once the files were transferred in the Lake, Azure Synapse demonstrated its proficiency as it processed tremendous amount of data instantaneously.

As a result, a well crafted Power BI Financial Statement Reporting solution was developed based on a customisable layout which presented the information as the client envisioned. Under the presentation layer was a scalable, business-friendly and robust Power BI Model linking into Azure Synapse On-Demand SQL Database.

Business Benefits.

Through this adapted solution, commentary explaining values on the reports can now be communicated to the business, whereby email trails are avoided. It also provides subject matter experts the right tools for complete insight instantly to areas of concerns.

It is common for departments to change, cost codes to change, etc. so now their financial reports are able adapt as the Accountant does not need to rely on IT.

Moving away from the client's traditional financial reports using spreadsheets, it eliminates the potential human error relating to manual processes which in turn, is more cost-effective, and accurate, for the business.

Agile Delivery ● Power BI ● Dataflows ● Azure Data Lake ● Azure Synapse Analytics ● Azure Data Factory

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Do you have any additional questions, or
want to know more?

We would love to hear from you.

#exposedata

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