

# Power BI for Manufacturing Industry

Redesigning and data modeling for over 1,000 individual reports.

Enhancing executive, operational, financial and end-user reporting.

## OVERVIEW

After the completion of a very successful Proof of Value engagement, Oakwood was engaged to assist with the complete redesign, data modeling and development of what was previous over 1000 individual reports across 4 of their manufacturing clients. In addition to reporting, Oakwood deployed and configured their new Azure Managed Instance for reporting, designed and developed a number of ETL processes for migrating data to the managed instance and configuring their Power BI tenant, including data refreshes.

## CHALLENGE

Executive and operational need for more robust, up-to-date, timely and actionable reporting, both daily operational reports, financial reporting as well as historical, rolling month over month, quarter over quarter and annual reporting needs.

Conversion of existing Rapid Reports to Power BI.

Some complexity in their financial and GL reporting that had to be overcome.

## SOLUTION

The Oakwood Data and Analytics team delivered value to this important strategic client in a variety of ways:

- Conducted strategic stakeholder discussions and analysis to understand strategic and tactical BI objectives to develop deeper understanding of client current state.
- Conducted interviews and whiteboarding sessions, as well as envisioning exercises to develop a future state

## PROFILE

A professional IT managed services firm, established in 2012, from the spin-off and merging of professional IT departments supporting small to mid-size corporations in the service and manufacturing Industry. This firm provides many IT services, including enterprise reporting capabilities.

## VALUE

The organization derived immediate value from the Power BI portion of the engagement through enhanced executive, operational, financial and end user reporting.

Additional value was delivered in assisting the organization achieve a strategic vision for the future through an enhanced data and analytics environment, reporting models and ETL processes. Delivered a current state architectural design document, future state reference architecture, as well as well as a strategic roadmap for BI Program services, Data governance, Technology governance, Integration and ETL strategies, Operational Data stores and an enterprise data warehouse design.

architectural design and strategic roadmap for a future state modern BI and analytics environment.

- Provisioned and configured an Azure SQL Managed Instance. Configured the security, access and data architecture.
- Redesigned and architected various ETL processes to facilitate data movement to the managed Instance for reporting
- Configured a Microsoft Power BI reporting environment to support multiple users
- Installed an Enterprise Data Gateway to support Power BI Access to on premises data sources
- Configured the Data Gateway to support multiple data sources
- Power BI knowledge transfer and training

### TECHNOLOGIES

Azure SQL Managed Instance, SSIS, Power BI, Power BI Enterprise Data Gateway, and Oakwood proprietary frameworks and methodologies.