

A background image showing a woman and a man in a modern office setting. The man is pointing at a tablet while the woman looks on. In the background, a large vertical monitor displays a complex data dashboard with various charts and graphs.

Case Study

Datavail Helps Top Organic Berry Farm Modernize its Data and Analytics Strategy with Power BI

A top organic berry farm conglomerate needed a data warehouse for financial data with a modern, reimaged Power BI front end. The customer used an industry-specific enterprise resource planning (ERP) solution for agriculture and produce called Famous that did not offer the analytics/reporting options that it needed.

Challenges

As a conglomerate of 10+ companies, the customer's team had to manage financial reporting for many companies through Excel exports, which was time-consuming and required too many manual updates. It could be days before the necessary reports were available.

Datavail's customer decided it was time to reimagine their data and analytics strategy. It wanted to feed data from the on-premises Famous system, which was hosted on an Oracle 12C database server, into a centralized data warehouse using Microsoft SQL Server 2019, allowing for cross-subject analysis.

The customer's financial data was the primary focus for this data modernization effort, with an emphasis on days sales outstanding, cash flow forecasting, weekly P&Ls, AR aging, and the entities supporting the details surrounding this data.

Technologies Used

Power BI

SQL Server 2019

SSIS

Solution

The customer partnered with Datavail's data management and analytics experts for their data warehouse and Power BI modernization project. This project had an aggressive, four-month timeline to meet.

Datavail, a Microsoft Solution Partner, came to the table with extensive experience in developing successful financial analytics systems and a tried-and-true methodology for Enterprise Data Warehouse projects. The team, composed of data and analytics specialists with an average of 10-15 years of experience, set out to develop a customized, optimized solution that brings together people, process, and technology.

A cohesive data warehouse is one of the most critical components of any organization's BI and analytics solution. By pulling together data from disparate sources into a single, enterprise-wide, unifying repository, a data warehouse provides high-level executives and key decision-makers with quick and efficient access to the information necessary through comprehensive reports to make effective business-oriented decisions.

The data warehouse solution was built upon the customer's existing on-site infrastructure. SQL Server Integration Services (SSIS) was used for the data movement between the systems. The structures and data for the data warehouse were also compatible with the customer's SQL Server 2019 Standard Edition instance. The Oracle 12c Enterprise Edition database underpinning the Famous ERP acted as the data source.

Datavail's solution included:

- **Addition of budget data:** The customer could move away from using Excel spreadsheets to manage their budget. Datavail developed a report that includes a budget data placeholder, which streamlines the process of inserting it into the Famous ERP and allowing reports to consume that data.
- **Chart of Accounts (CoA) for reporting:** For regulatory compliance and more accurate financial control, the customer needed a customized and reorganized ERP chart of accounts tailored to their financial reporting needs.
- **Report automation:** To address the multi-day delays in reporting that came from manual processes, the daily data warehouse refresh allowed the customer to easily have data available from the previous operation day.
- **Agnostic business intelligence reporting solution:** Datavail developed the data warehouse to work with any BI solution. The logic and business rules are pushed down to the database, rather than on the reporting tool. The reports were also developed so they could be used in any reporting tool with minimal changes.
- **Modernized reports:** The newly modernized reports included the Balance Sheet, Income Statement, Trial Balance, and AR Analysis.

Results

Gained Full Control of Their Data

The customer gained control of their financial data, rather than the ERP vendor. It's now able to use this data for other purposes. For example, the data analysts could add more tables to the data warehouse or add elaboration in the finance reports.

Faster Accounting Month End Closing and Time-to-Insights

Now that the data warehouse refreshed daily and key reports are automated, the customer no longer needed to wait multiple days for manual processes before it can access insights.

Streamlined and Modernized Reporting

The Power BI solution eliminated the need to create and then combine separate reports for each company. In one report, the customer can visualize all the companies and information faster.