

# TRANSFORMING FINANCIAL REPORTING: STREAMLINING DATA FOR FASTER, SMARTER DECISIONS

## INTRODUCTION:

Our client faced challenges in consolidating financial and sales data across multiple business entities.

Engaging Data was brought in to design and implement a centralised data solution that would streamline reporting, improve data accuracy, and establish a self-service reporting framework.

## CLIENT BACKGROUND:

- Food Manufacturing
- United Kingdom
- SAP, Data Engineering, Data Modelling, Power BI, First Level Support

The client operates multiple business units, each running its own instance of SAP Business One.

These independent systems had unique financial calculations and reporting functions, leading to inconsistencies and inefficiencies in financial reporting.

## CHALLENGES:

The existing reporting process was highly manual, time-consuming, and prone to errors, impacting decision-making and operational efficiency.

- The client operated nine separate SAP Business One instances, each with its own reporting logic.
- Manual data corrections and disparate financial calculations led to inconsistencies and errors.
- The financial reporting process required extensive manual effort, taking between three to five man-days per month per business unit.
- There was no unified, real-time view of financial performance across the group.
- A lack of self-service reporting limited business teams from accessing and analysing data efficiently.

## ENGAGEMENT:

Engaging Data worked closely with the client's business teams and leadership to develop a solution that met their reporting and data governance needs.

Key activities included:

- Collaborating with business teams to standardise financial calculations and establish a central glossary of terms.
- Implementing a Data Vault data model to ensure consistency across multiple systems.
- Extracting data from all SAP instances into a central data warehouse using WhereScape Automation.
- Applying business logic to standardise financial data and calculations across entities.
- Developing a tabular data model with row-level security, enabling secure self-service analytics via Power BI.

## CONCLUSION:

By implementing a scalable and automated data solution, Engaging Data significantly improved the client's financial reporting processes.

The transition from manual reporting to a centralised data warehouse not only enhanced efficiency but also fostered a culture of data-driven decision-making within the organisation.

This project exemplifies how strategic data integration and governance can drive operational excellence and business intelligence.

## RESULTS:

- The solution successfully integrated data from all nine SAP instances into a unified data warehouse.
- The time required to extract and process SAP data was reduced from 36 man-days to just three hours—a 98.95% efficiency improvement.
- Daily reporting enabled faster, data-driven decision-making across the business.
- The self-service reporting model empowered business users to access financial insights without IT dependency.
- The automated solution helped identify and flag data quality issues for resolution by data owners.

**LET'S MAKE YOUR ORGANISATION A SUCCESS STORY!**

**GET IN TOUCH NOW:**

(+44) 0204 566 5056

ENGAGINGDATA.CO.UK

SALES@ENGAGINGDATA.CO.UK