

# Automated Project Costing Report: A Power BI Success Story

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### WHO WE ARE

“UB Technology Innovations is a leading provider of Power BI services, offering expertise in crafting exceptional dashboards. Our expertise assists clients in their digital transformation endeavors by streamlining the process and gaining a competitive advantage through rapid app deployment”



### WHAT WE DO

- Streamlined data management process
- Cost-effective
- User interface
- Sustainability
- Scalability



### THE CLIENT

The client is a reputed IT company with over 30 years of experience, delivering high-end BI and technology services to global businesses. They demonstrate a strong commitment to quality and service excellence and are considered one of the trusted Microsoft Partners in the market.



### CHALLENGES

The Finance team faced several hurdles in preparing and submitting monthly project costing reports:

- Firstly, they had to painstakingly extract data from multiple sources, including their accounting and payroll applications. This step was time-consuming and required a keen eye for detail.
- The team performs complex validations upon data collection to ensure accuracy. These tasks were labor-intensive, requiring significant manpower to cross-check figures and verify accuracy, further straining the team's resources.
- After preparing the reports, the team manually sent them to the respective stakeholders each month. This involves compiling, formatting, and emailing the reports, which is not only time-consuming but also prone to incorrect data entries or sending incorrect versions.
- The manual nature of the entire process increased the likelihood of errors, compromising the reliability of the reports, and affecting the company's long-term financial health.
- All these processes frequently delay report submission, impacting the client's ability to make swift decisions and allocate budgets appropriately.

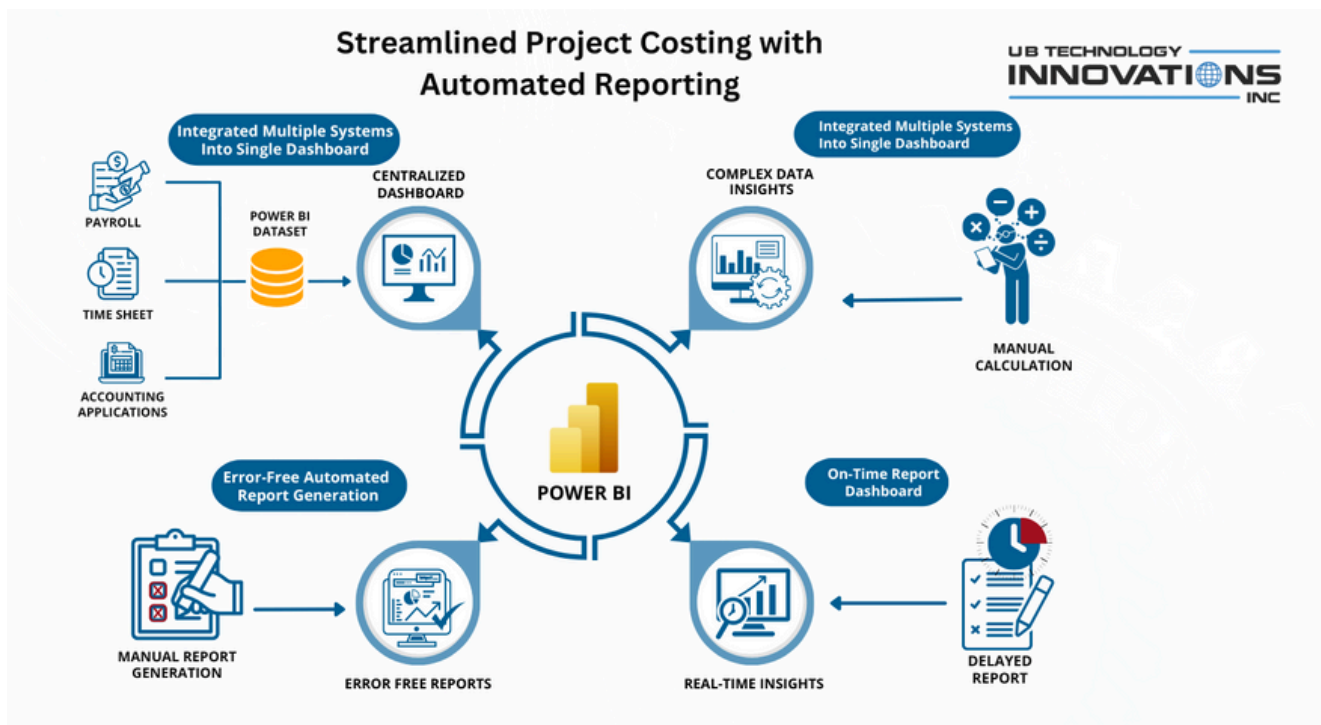




## SOLUTION

With extensive experience in Microsoft technologies, our experts at UB Technology Innovations, Inc. designed, developed, and implemented an Automated Power BI Reports solution for the client and resolved their challenges as follows:

- **Automated Data Integration:** We integrated the client's data source systems, including their Payroll (HRWorks), Timesheet (In-house Software), and Accounting (Tally) Applications. This integration automated the data collection process, ensuring data from all sources were consistently and accurately updated without manual intervention.
- **Complex Calculations Simplified:** We automated complex data calculations and validations within the reporting system. This ensured accurate reconciliation and processing of financial data from multiple sources, achieving 100% report reliability.
- **Automated Report Generation:** Our system automated the generation of Project Costing Reports, providing near real-time visibility into costs and resource utilization and eliminating the need for manual expense tracking and report preparation.
- **Comprehensive Reporting:** We designed and categorized key reports, such as profitability statements, based on their projects and categories. These detailed insights helped understand a project's performance, tailored to meet the client's needs and enabling informed decision-making.
- **Scalability:** We ensured that the solutions were highly flexible, so the client could adapt and scale with evolving reporting requirements. This design consideration enabled the system to handle extensive data volumes and diverse metrics, supporting the client's long-term financial forecasting, budgeting, and strategic planning.



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## SOLUTION BENEFITS

- Fully Automated Reports: The solution automated the generation of Project Costing Reports, increasing productivity by up to 30%.
- Direct Data Source Integration: All data sources were directly connected to the reporting solutions, eliminating even minor numerical errors.
- Efficiency Improvements: The client’s operational efficiency increased through automation and redirected their efforts to more strategic activities.
- Cost Reduction: Automation led to cost savings by optimizing resource utilization and reducing the potential for financial errors.

### Conclusion:

The Automated Power BI Reports solution significantly improved the client's reporting process. By automating data integration, calculations, and report generation, the client achieved accurate, timely, and reliable Costing and Invoice Annexure reports. This exemplifies UB Technology Innovations, Inc.'s commitment to delivering solutions that reduce costs while supporting strategic financial goals.



## ABOUT US

UB Technology Innovations, Inc. (UBTI) is a leading global technology solution provider with more than 3 decades of experience across all industries, specializing in Capital Markets (Asset Management), Logistics and Healthcare. We are the preferred Microsoft Gold Certified partner backed by a world-class team of Microsoft Certified experts with rich experience in Azure Cloud Platform and Data Analytics.



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