

# Modernizing Enterprise Reporting for Enhanced Visibility and Decision-Making



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### WHO WE ARE

“UB Technology Innovations is a Microsoft Power Platform delivery partner offering no/lowcode solutions, virtual bots, RPA, and data insights. We help clients on their digitalization journey by automating tasks, optimizing workflows, and providing a competitive edge through quick app deployment”

### WHAT WE DO

- Compliance and Security
- Enhance Productivity
- Improve Time to Market
- Reduce Operational Costs
- Maximize Profits
- Customer Experience



### THE CLIENT

The client is a leading global asset management firm specializing in alternative investments and value-oriented investment strategies. With more than three decades of industry experience, they manage diversified investment portfolios across corporate credit, direct lending, real estate, and other specialized opportunities. Backed by a global team of investment and business professionals, the client serves a broad base of institutional investors while focusing on disciplined research, risk-aware investment management, and long-term value creation.



### CHALLENGES

The client was using SQL Server Reporting Services (SSRS) as their primary platform for delivering operational and management insights. Business teams relied on it to monitor portfolio performance, asset management-related activities, and key organizational metrics. Over time, the increasing volume and complexity of reporting made the existing approach more difficult to maintain and support consistently:

- Business demand grew faster than the existing platform: More teams across the organization began relying on business information to monitor portfolio activity, operational performance, and management metrics. As data volumes and business requests increased, their existing SSRS environment struggled to keep pace with the organization's growing needs.
- Static reports limited analytical capabilities: Users needed specific operational and portfolio data, but most information was presented in a fixed format with limited opportunities to explore trends or compare results. As analytical needs matured, teams required a more flexible way to interpret business information without depending on multiple static outputs.



- Complex reports took longer to generate: Many reports contained extensive formatting, calculations, and expressions to present business data in the required format. As they became more sophisticated, rendering times increased, delaying information for business users.
- Report administration became harder to manage: As the reporting environment expanded, managing user access and data connections became increasingly challenging.
- The existing environment could not support long-term growth: The client required a future-ready business intelligence environment that aligned with Microsoft's reporting strategy while preserving existing reporting assets and supporting future business needs.



## SOLUTION

After reviewing the client's reporting environment, UBTI identified opportunities to modernize the overall reporting process without disrupting established business operations. Rather than rebuilding the existing reporting setup, our experts recommended a more modern analytics environment that would preserve existing reporting investments while improving the overall BI experience:

- The existing reporting environment was thoroughly assessed: The client's SSRS reports, data dependencies, and sources were reviewed to understand how information flowed across business functions to establish a clear modernization roadmap.
- Existing reports were migrated to PBIRS: Once the preliminary assessment was complete, existing reports were transitioned to Power BI Report Server (PBIRS) while preserving their functionality, report schedules, subscriptions, and business logic. This allowed users to continue working with familiar reports while moving to a more modern reporting platform.
- Interactive reporting capabilities were introduced: While existing RDL (Report Definition Language) reports were retained, the client could now also publish interactive Power BI (.pbix) reports alongside them. This enabled richer visualizations such as pie charts and histograms, allowing users to analyze market data more effectively than traditional tabular reports.
- Report access and data management were standardized: To support the growing reporting environment, our technical specialists established group-based accesses, server-level permissions, and shared data source connections. This standardized user access management and simplified how multiple PBIRS reports are connected to common business data.
- The reporting environment was prepared for future growth: Finally, the overall reporting platform was modernized to align with Microsoft's evolving reporting strategy while preserving existing reporting assets. This established a scalable foundation that could support future reporting requirements.





By moving the client from SQL Server Reporting Services (SSRS) to Power BI Report Server (PBIRS), the reporting modernization initiative replaced a traditional reporting environment with one that was more scalable, interactive, and better suited to the client's growing business needs:

- Large-scale report modernization was completed efficiently: Nearly 150+ reports were modernized using automated PowerShell scripts (used to automate repetitive migration tasks). This streamlined the transition while maintaining consistency across reports.
- Business users gained better visibility: Richer reporting and improved data presentation made it easier for teams to monitor portfolio performance, operational activities, and key management metrics. This provided clearer visibility into day-to-day business operations.
- Decision-making became faster and more informed: Timely access to business information enabled asset managers to review operational and portfolio data more efficiently, helping them make informed capital market decisions with greater confidence.
- Reporting governance became more structured: A standardized approach to managing access and reporting resources made it easier to support a growing user base while maintaining appropriate control over sensitive information related to asset management.
- The organization established a future-ready reporting foundation: The modernized reporting environment reduced dependence on legacy BI tools while preserving existing reports, providing a scalable foundation for growing needs.

### Conclusion:

As reporting requirements grew, the client's traditional SSRS environment became challenging to support timely, meaningful analytics that asset managers needed. This made it harder to keep pace with evolving reporting needs and growing operational demands. By modernizing the reporting environment with Power BI Report Server (PBIRS), UBTI preserved existing reports while establishing a more scalable and interactive analytics experience. This strengthened the client's ability to access and analyze capital market data, creating a strong foundation for future reporting needs. By combining Microsoft's data and analytics technologies with industry expertise, UB Technology Innovations, Inc. helps asset management leaders modernize their reporting environments, enabling investment and operations teams to make faster, data-driven decisions in a rapidly changing market.





## ABOUT US

UB Technology Innovations, Inc. (UBTI) is a leading global technology solution provider with over 3 decades of experience across all industries, specializing in Capital Markets (Asset Management), Logistics, and Healthcare. We are the preferred Microsoft Solutions 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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