ADASTRA

Success Story: Enabling Self-Service Analytics with Microsoft Power BI Implementation

200-250 Power BI Pro Users

Self-Serve Citizen BI Enablement

Security & Governance Best Practices (SA&A)

Time & Resource Savings

Standardized Reports

ABOUT THE CLIENT

Industry: Public Sector
Region: Canada

Background and Challenge

Our client, a federal government organization, wanted to deploy Microsoft Power BI as their default business intelligence and analytics platform. At the time, the client was using on-premise services and their objective was to enable self-service analytics across the organization using Microsoft Azure and Power BI capabilities. The client wanted to leverage Adastra's expertise to design the information architecture, security model, and governance for all users and administrators, to ensure successful roll-out of Power BI.

Adastra's Approach

Adastra was brought on board to help establish a Power BI Centre of Excellence and BI competency centre. The CoE included aspects of security and governance, datasets and report development, integration with pre-identified use cases, development of pre-identified use case reports, and enabling self-service reporting capabilities within the organization.

Since the client was still using on-premise services, we also needed to make them compliant with the Azure cloud stack and Power BI. This entailed the process of establishing their SA&A (Security Assessment and Authorization) and going through different configurations for Power BI to ensure compliance with data standards, so that the client could get Authorization to Operate (ATO) from their CIO to move their data and Power BI reports to the cloud.

DISCOVERY AND ASSESSMENT

Our team started off by taking an inventory of their client's on-premise, cloud, and Power BI landscape, including existing dashboards and reports. We interviewed client stakeholders to gather requirements for the new Power BI portal and workspaces. We also worked with their technical team to understand the current topology and interoperability requirements. Based on this, we developed our refactoring approach for existing packages and reports and created a framework for prioritizing development work. All of this was documented along with our recommendations and validated with the client's stakeholders to firm up the implementation approach.

DESIGN AND PLANNING

The next phase involved creating a reference solution architecture and a flexible timeline for adoption, based on the availability of cloud capabilities. A Power BI implementation plan was created, outlining the efforts and resources that would be required. The Adastra team then created rehosting and refactoring plans to leverage the report server from on-premise to Power BI cloud and estimated projected Azure and Power BI run costs based on current usage patterns. Our team then developed and documented the promotion model and made recommendations for the Power BI Service portal's overall look and feel. Finally, we advised on using deployment pipelines and on the configuration of DEV/CQ/UAT/PROD workspaces.

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Enterprise BI/Analytics Platform

Aligns to big data, complex integration, advanced analytics, data governance and Data as a Service (DaaS) objectives at Client.

Benefits:

- Facilitate DaaS for Client, so analysts do not have to source/integrate data themselves
- Maintain one version of corporate data supporting all use cases, accessible through on data exploration/discovery platform
- Centrally control data access and data governance to ensure all sensitive PII/PHI data is restricted, masked anonymized...
- Handle complex data ingestion/data integration/data volume use cases, aligned to the future Client data governance solution
- Handle advanced analytic use cases, including IoT real team analytics, forecast analytics...
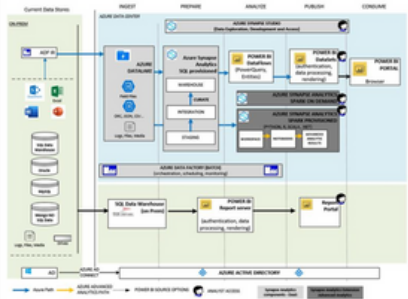
POWER BI SECURITY AND GOVERNANCE DESIGN:

In this phase, Adastra's experts designed, developed, and documented best practice guidelines for the Power BI portal and workspace layout, naming conventions, and security model. A template and security model was also created for datasets and dataflows. We developed the security design and defined governance processes, built a Power BI theme for the client, and established best practices for service and development.

POWER BI GATEWAY IMPLEMENTATION:

Next, we implemented and verified Power BI data gateways, licensing solution, and the Azure AD setup with Power BI. Our team implemented Power BI data sources and developed some showcase reports using the client's data. We also designed row-level security solution design and prepared a support runbook.

WORKSPACE DESIGN:

Adastra then implemented the Power BI workspace design and security design. At this stage, we initiated knowledge transfer for the client's Power BI administrators. We also established the Power BI Admin Portal settings and policies and prepared the Extended Functionality Showcase.

REPORTING

In this phase, we migrated the reports in scope from the existing environment to Power BI. We also developed new reports in Power BI. Adastra integrated the security design and governance protocols and implemented row-level security. Next, we set up reporting distribution to internal and external users and tested user acceptance.

To ensure successful deployment and transition to self-service BI, we conducted trainings for Power BI administrators, super users, and end users across various business groups. The entire project, including training, was completed and delivered in 8 weeks.

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Impact

Prior to our project, the client's users completely relied on the IT team to create reports, enable data source connections, and develop dashboards. This "IT-heavy" approach required considerable resources and resulted in long wait times to get reports made.

Adastra enabled a shift to self-service analytics by establishing a Power BI CoE and developing the right guardrails, governance mechanisms, and security considerations for Power BI. We created a blueprint of the configuration settings for the Power BI Administration console and helped them establish their SA&A (Security Assessment and Authorization) report, which the CIO was then able to sign off on to get Authorization to Operate (ATO) to initiate the move to the cloud.

Since most of the users were not proficient with Power BI, we also provided documentation and coached the agile development teams on the best practices for developing and deploying Power BI objects (reports, dashboards, datasets, data flows) in a hybrid cloud environment. By the end of the project, Adastra had enabled over 200 of Power BI Pro across 3 of the client's lines of business.

In addition to migrating existing in-scope reports to Power BI and modernizing them, we also developed several new reports for the client's use and put in place the necessary security design and governance protocols to facilitate Citizen BI enablement across the client's organization.

ABOUT ADASTRA

For over two decades, Adastra Corporation has transformed businesses into digital leaders, helping global organizations innovate, achieve operational excellence, and create unforgettable customer experiences, all with the power of their data. At the forefront of Artificial Intelligence, Data, Cloud, Digital and Governance services, Adastra delivers solutions to enterprises to leverage data they can control and trust, connecting them to their customers – and their customers to the world.

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