

# Grains of insight, powered by data

Modernizing expense reporting with MS Fabric and Power BI

The Modernization Engineering Company



## Summary

A global manufacturing leader in Agri-tech and animal nutrition struggled with fragmented expense data across D365, leading to inconsistent reporting and delayed insights. Sonata Software implemented a unified data platform using Microsoft Fabric and Power BI, creating a single source of truth for expense reporting. The solution enabled self-service analytics, improved cross-company reporting accuracy, and significantly reduced time-to-insights for business users.

## Customer overview

A global company specializing in animal health and nutrition, crop science, and food and beverage production. It focuses on advancing agriculture through innovative technologies, sustainable practices, and science-driven solutions.

## Pressure points

The client faced major hurdles in managing expense reporting due to data scattered across SAP Concur, D365, and multiple business entities. Manual interventions, inconsistent master data, and limited analytical capabilities created delays, inaccuracies, and operational inefficiencies.

Lacked a standardized data model to support consolidated reporting across AX 2012 and D365 F&O

Absence of a unified platform and inconsistent master data

Limited ability to perform independent analysis, relying heavily on manual interventions

Lack of secure self-service reporting for business users due to limited data security and governance controls

To address these challenges, the company decided to build a modern, scalable enterprise data platform on Microsoft Fabric. The client needed a centralized view to track and analyze travel and expense data incurred by business executives across multiple regions and locations.

## Solution highlights

Sonata implemented a modern, unified expense reporting ecosystem leveraging Microsoft Fabric, Dynamics 365 Finance & Operations, and Power BI. Through seamless data ingestion, centralized master data management, and a business-oriented semantic model, the platform enabled intuitive, self-service reporting and improved accuracy across all entities.

Built Fabric to seamlessly ingest expense data from Dynamics and SAP Concur for a complete view

Designed a user-friendly semantic data model on Dynamics F&O to simplify reconciliation of accounts and the general ledger with revenue breakdowns

Leveraged Power BI and Q&A to provide business users with self-service reporting capabilities

Established a centralized system for mastering data across companies, ensuring accuracy and consistency for cross-company analysis

Sonata built a collaborative, agile engagement model, where the client and Sonata jointly defined, prioritized, and refined backlog items through continuous discussions and iterations.

Domain-driven data platform design, built to support scalability, extensibility, and future business growth across functional domains

Modern medallion architecture implemented on Microsoft Fabric, ensuring a clear separation of raw, curated, and business-ready data layers

Metadata-driven standardization of the silver layer, enabling consistent data transformation, quality, and reusability across domains

Fabric warehouse leveraged as the gold layer, with enterprise-grade security and governance built-in, along with secure self-service analytics for business users

## Results that speak volumes

Trusted, unified finance data available daily, enabling faster and more accurate business decision-making across the organization

Cost-effective and scalable data platform, optimizing infrastructure spend while supporting growth data volumes and analytics needs

Empowered business users through self-service reporting, reducing dependency on IT and accelerating time to insights

Enterprise-grade data governance and security, ensuring compliance, data privacy, and controlled access across users and regions

Future-ready platform to onboard additional business domains, enabling seamless expansion of analytics and reporting capabilities over time