



CASE STUDY

- SYSCO

IRELAND

Digital Transformation brought by
BDO

ORACLE DISCOVERER REPORT MIGRATION

Discover how BDO partnered with Sysco Ireland to transition existing reporting processes from Oracle BI to Power BI Online, ensuring data accuracy, security, and accessibility while enabling self-service reporting for the payroll team.

BDO, as seen by our clients

"We cannot stress enough how much of an absolute pleasure you are to work with. Nothing is too much trouble; you are so helpful and practical and always on hand to offer advice and best practices. We would genuinely be lost without you and very much value your contribution to the Sysco Ireland family!"

Summary

Sysco is the largest food business on the island of Ireland. With a team of over 1,300 people delivering food solutions to thousands of customers every night, they provide businesses with a range of over 10,000 fresh, frozen, ambient food products, and non-food products.

Their reporting requirements became unsupported by the software vendor, and the whole organisation was facing challenges with the legacy software used. With no mechanism in place to migrate these reports to another software, Sysco Ireland sought a comprehensive reporting solution. They needed to efficiently migrate approximately 100 critical and non-critical reports to a cloud-based analytical tool.

BDO's approach aligned technology with their specific needs, resulting in successful implementation and establishing the first successful stepping stone to a wider adoption of Power BI within the Sysco Ireland organisation.

Sysco Ireland Explained

Sysco is the largest food business on the island of Ireland. What once was started by the Geary family has now grown to a team of over 1,300 people delivering food solutions to thousands of customers every night.

Operating from a central Dublin location and seven regional centres, Sysco guarantees next-day island-wide delivery. They are the only food business in the country capable of delivering on their customers' expectations regardless of how remote the business location is.

Sysco Ireland Purpose

Sysco Ireland values connecting the world to share food and care for one another, above all else.

Sysco Ireland Mission

As an established organisation, Sysco Ireland aims to deliver success to their customers through industry-leading products and solutions.

Sysco Ireland Identity

They are clear on their identity - to define the future of food service and supply chain.

Sysco Ireland Values

- Rooted in integrity.
- Committed to inclusion.

- Drive together.
- Define excellence.
- Grow responsibly.

Sysco Ireland Project Overview

The project involved migrating the payroll reporting system of Sysco Ireland from Oracle Discoverer BI, which became defunct in September 2021, to Microsoft Power BI.

The migration was necessary due to the discontinuation of Discoverer and the need for a more robust long-term reporting solution.

The project aimed to seamlessly transition critical payroll reports and provide the payroll team with the capability to create ad-hoc reports using Power BI.

Sysco Ireland Project Objectives

Migrate Existing Reports

- Migrate approximately 50 existing reports, including critical ones such as Payroll Journals, Salary Listings, Pensions, Deductions, and Audit reports, from Oracle Discoverer BI to Power BI.

Maintain Continuity

- Ensure the uninterrupted availability of critical reports, especially Payroll Journals, during and after the migration to avoid disruptions in payroll processing.

Set up VPN for Database Connection

- Establish a Virtual Private Network (VPN) connection managed by CoreHR DBAs to ensure secure and reliable access to the CoreHR database for data retrieval and reporting purposes.

Assist with Power BI Licensing and Setup

- Provide support in managing Power BI licensing and setting up the Power BI environment as required.

Implement Data Access Mechanism

- Build a robust data access mechanism to connect Power BI with CoreHR data sources, enabling accurate and real-time data retrieval for reporting purposes.

Build Data Models in Power BI

- Create data models in Power BI to support the migrated reports and enable efficient data analysis and visualisation.

Implement Power BI Gateway for Live Data Connection

- Set up and utilise Power BI Gateway to maintain live data connections, ensuring that reports are up-to-date and accurate.

Test Data Connections and Ensure Data Integrity

- Conduct testing to ensure that data connections via Power BI are successful and that data integrity is maintained throughout the migration and reporting process.

Training and Upskilling

- Provide training and support to the Sysco Ireland team to enable them to effectively use Power BI for creating ad-hoc reports and queries on CoreHR data.

Report Prioritisation

- Collaborate with Sysco Ireland to finalise and prioritise the list of reports for migration, ensuring that critical reports are given top priority.

Stakeholder Collaboration

- Continue working closely with BDO Eaton Square, Sysco Ireland, and the payroll team to ensure successful project execution and knowledge transfer.

Post-Migration Support

- Provide ongoing support to address any issues, optimise report performance, and ensure a smooth transition to Power BI.

Sysco Ireland Challenges

Data Migration Complexity

- Migrating data and reports from Oracle BI to Power BI was complex, particularly when data structures, formats, or schemas differed between the two systems. Ensuring a smooth and accurate transition presented significant challenges.

Data Source Integration

- Connecting and integrating data sources from CoreHR and other systems into Power BI posed challenges. Compatibility issues, data cleansing, and data transformation were required.

VPN Setup and Security

- Establishing a VPN for secure database access was critical but proved challenging due to network configurations, firewall rules, and security protocols. Ensuring data privacy and compliance with regulations was essential.

Data Validation and Quality Assurance

- Verifying the accuracy and consistency of migrated data was vital. Data validation and quality assurance processes were time-consuming and required significant effort.

Power BI Licensing and Configuration

- Configuring Power BI, obtaining the appropriate licenses, and ensuring compliance with licensing terms were challenging. This included understanding the licensing requirements for different users and roles.

User Training and Adoption

- Enabling self-service reporting for the payroll team required adequate training and support. Ensuring that users could effectively use Power BI required an investment in training programs and documentation.

Technical Compatibility

- Ensuring that the existing reports and data models were compatible with Power BI and that any custom functionalities were preserved presented challenges. Adjustments and redesigns were necessary.

Data Governance

- Implementing data governance policies and practices within Power BI to maintain data integrity, security, and compliance with data protection regulations was a complex task.

Communication and Collaboration

- Effective communication and collaboration between the service provider (BDOES), CoreHR DBAs, Sysco Ireland IT, and the client's IT team were essential. Overcoming communication barriers and aligning goals were challenging, especially in a remote working environment.

Project Timeline and Resources

- Managing the project timeline and allocating sufficient resources to complete the migration, testing, and user training within the expected timeframe posed challenges, particularly if unexpected issues arose.

Change Management

- Managing the transition from Oracle BI to Power BI faced resistance from users accustomed to the old system. Effective change management strategies were necessary to address this challenge.

Scalability and Performance

- Ensuring that Power BI could handle the scalability and performance requirements of the organisation, especially with live data connections, was a concern.

Project Timeline

- The project was expected to be completed before the September 2021 deadline when Oracle Discoverer became defunct. The exact timeline was determined based on the prioritisation of reports and the complexity of the migration.

Addressing these challenges required careful planning, technical expertise, effective project management, and collaboration between all stakeholders involved in the project.

BDO's approach

Our approach neutralises the problems that emerge in a technology-focused delivery.

- **BDO** helps clients to be clear on what they want to achieve and why. Only then we configure or customise. This avoids unnecessary spending and time lost on things that clients will simply not use based on their current and projected needs.

This can also reduce annual licensing costs.

- **BDO** talks to business leaders and managers about what they really need to achieve and why. We aim to understand what they are asking for on a non-technical level first. Then, we solve their challenges through technology.

We do this to leverage 'out of the box' (OOTB) solutions and reduce lifetime cost by understanding the **why** of the outcome, not only the current **how** of inputs.

This approach enables us to reimagine the current workflows in streamlined ways, more efficient to configure and maintain. And this is how we reduce lifetime costs and support complexities.

- **BDO** supports leadership teams to demystify the technology. By understanding how and why, they get to engage and lead the systems and processes we put in place.

We help them understand how they can instil the right behaviours and address challenges.

This is how we enable business leaders to “own” the solution and truly get its value.

- **BDO** engage targeted users in conversations, validations, checking and testing to create the groundswell of positivity for the new platform.

We believe it’s much better to land a change on an eager audience than not.

- For most employees in an organisation, the details of the technology are irrelevant. It is simply assumed - like our car - that we expect it to work when we start it up.

However, we reassure them of the reliability, security, compliance, and functionality of the technologies we are using.

As they are proven leaders in their field, so will their security, compliance, GDPR capabilities, integrations, lifetime costs, support, exit options, and other processes work smoothly.

BDO and Sysco Ireland, in agreement

In response to the imminent obsolescence of Oracle Discoverer, BDO collaborated closely with Sysco to tackle this challenge systematically. We focused on strategic planning, execution, and proved a clear commitment to deliver the following project milestones:

1. Report Prioritisation and Finalisation

At the beginning of the project, the team worked with Sysco Ireland to identify and prioritise the existing reports to be migrated. This step was crucial to ensure that critical reports were addressed first.

Activities

- Reviewed existing reports and assessed their importance.
- Collaborated with stakeholders to finalise the list of reports for migration.
- Documented the prioritised list of reports.

2. Data Access Mechanism Setup

Establishing a robust data access mechanism was essential to connect Power BI with CoreHR data sources. This step ensured that data could be retrieved efficiently for reporting purposes.

Activities

- Configured the necessary connections to CoreHR data systems.
- Implemented security protocols and access controls for data retrieval.
- Tested data access mechanisms for reliability and performance.

3. Migration of Critical Reports

This milestone focused on migrating the most critical reports, such as Payroll Journals and other high-priority reports, from Oracle Discoverer to Power BI.

Activities

- Extracted data and report structures from Oracle Discoverer.
- Transformed and loaded data into Power BI.
- Built or recreated report templates in Power BI.
- Verified the accuracy and functionality of migrated reports.

4. Data Model Development

Developing a comprehensive data model was essential to support the migrated reports and enable future ad-hoc reporting.

Activities

- Designed and created the data model that aligned with the reporting requirements.
- Defined relationships between data tables.
- Implemented calculations and measures as needed for reporting.

5. User Training and Upskilling

Training and upskilling of the Sysco Ireland team were crucial to ensure they could effectively use Power BI for creating ad-hoc reports and queries.

Activities

- Conducted training sessions for users on Power BI basics and advanced features.
- Provided hands-on guidance for creating and customising reports.
- Offered support and answered user questions.

6. Testing and Quality Assurance

Rigorous testing and quality assurance processes were vital to identify and rectify any issues in the migrated reports and data access mechanisms.

Activities

- Conducted thorough testing of all reports, data access, and data models.
- Addressed and resolved any discrepancies, errors, or performance issues.
- Ensured data accuracy and report consistency.

7. Full Report Migration

After successful testing and validation, proceeded to migrate the remaining reports from Oracle Discoverer to Power BI.

Activities

- Followed the same data extraction, transformation, and loading (ETL) processes for the remaining reports.
- Verified the functionality and correctness of each migrated report.

8. Post-Migration Support and Optimisation

Provided ongoing support to address any issues that may arise after the migration. Additionally, optimised report performance and ensured a smooth transition to full Power BI utilisation.

Activities

- Addressed user queries and issues promptly.
- Monitored report performance and made necessary adjustments.
- Conducted user feedback sessions to fine-tune reports and data access.

These key milestones were essential components of the project plan, ensuring a systematic and successful migration of the Sysco Ireland payroll reporting system to Power BI. Each milestone represented a critical phase of the project, contributing to the overall project's success.

BDO and Sysco Ireland, avoiding risks

1. Potential Data Compatibility Issues During Migration

Migrating data from Oracle Discoverer to Power BI can introduce compatibility issues due to differences in data structures, formats, or schemas between the two systems. These issues can lead to data inaccuracies, failed migrations, or reports not functioning as expected.

Mitigation

- **Data Assessment:** Conducted a comprehensive data assessment before migration to identify potential compatibility issues. Understood the source data's structure and format.
- **Data Transformation:** Implemented data transformation and cleansing processes to ensure data consistency and compatibility with Power BI requirements.
- **Testing:** Rigorously tested data migration processes to catch and address compatibility issues early in the project.
- **Data Validation:** Implemented data validation procedures post-migration to verify the accuracy and integrity of migrated data.

2. Timeline Constraints Due to the Impending Defunct Status of Oracle Discoverer

The project is under pressure to meet deadlines due to the looming end of support for Oracle Discoverer. Shortened timelines can lead to rushed decisions, incomplete testing, and increased stress for project teams.

Mitigation

- **Prioritisation:** Prioritise critical reports and functionality to ensure that essential payroll processes are not disrupted after Oracle Discoverer's discontinuation.
- **Phased Approach:** Consider a phased approach, migrating high-priority reports first to meet immediate needs while allowing more time for less critical reports.
- **Resource Allocation:** Allocate additional resources or manpower if necessary to meet deadlines without compromising quality.
- **Contingency Planning:** Develop contingency plans that outline actions to take if the project timeline is at risk, such as extending the use of Oracle Discoverer temporarily or identifying alternative solutions.
- **Regular Monitoring:** Continuously monitor progress and evaluate the project timeline to adjust strategies as required.

By having addressed these risks effectively, the project minimised disruptions, ensured data integrity, and increased user acceptance of Power BI, all while meeting the challenging timeline imposed by the discontinuation of Oracle Discoverer.

BDO and Sysco Ireland, achieving objectives

1. Seamless Transition to a Modern Reporting Tool (Power BI)

The migration to Power BI offers a seamless transition from the outdated Oracle Discoverer BI tool to a modern, widely used reporting platform. This transition is vital as Oracle Discoverer is becoming defunct, and Power BI represents a contemporary, well-supported solution.

Benefits

- **Continuity:** The transition to Power BI ensures that Sysco Ireland can continue its reporting operations without disruption, maintaining business continuity.
- **Futureproofing:** By adopting Power BI, the organisation is future-proofing its reporting needs, as Power BI is continually updated and supported by Microsoft.

2. Enhanced Reporting Capabilities for the Payroll Team

Power BI offers advanced reporting capabilities, including data visualisation, interactive dashboards, and the ability to create complex reports. This enhancement empowers the payroll team to generate more insightful and meaningful reports.

Benefits

- **Data Exploration:** Power BI enables users to explore data more effectively, allowing the payroll team to dive deeper into payroll data, identify trends, and make data-driven decisions.
- **Customisation:** Users can customise reports to meet specific business needs, tailoring visuals, and data representations for more impactful insights.

3. Improved Data Access and Real-Time Reporting

Power BI facilitates real-time data access and reporting, ensuring that payroll data is up-to-date and readily available for analysis and decision-making.

Benefits

- **Timeliness:** Real-time reporting means that the payroll team can access the latest data, reducing the risk of errors due to outdated information.
- **Efficiency:** Automated data refreshes and updates reduce manual data entry and reporting efforts, increasing the efficiency of reporting processes.

4. Reduced Dependency on Outdated Systems

The migration to Power BI reduces the organisation's reliance on the outdated Oracle Discoverer BI tool, which is being phased out. This reduces the risks associated with unsupported software.

Benefits

- **Security and Compliance:** Using a modern tool like Power BI ensures that security updates and compliance requirements are met, reducing potential vulnerabilities.
- **Cost Savings:** The elimination of outdated software can lead to cost savings in terms of maintenance and support while also minimising the risk of operational disruptions.

Overall, these project benefits not only address the immediate need to transition from Oracle Discoverer but also enable Sysco Ireland to leverage modern reporting capabilities and gain greater insights from their payroll data. It helps the organisation to remain competitive and agile in its reporting and analytics efforts.

BDO delivers strong outcomes

After careful consideration, strategising, and planning, BDO delivered clear and measurable outcomes.

1. Report Migration Listing and Plan

- Agreement on the listing and prioritisation of reports for migration.
- A finalised migration report listing, including the grouping of reports.
- Signed-off priority groupings.

2. Power BI Reports Migration

- Developed data model as required for the reports.
- All agreed reports successfully migrated to Power BI Desktop.
- IT support provided for accessing client-side systems.

3. Self Service Reporting

- Completed datasets and data modelling to enable user-friendly ad-hoc reporting by the Payroll Team.
- SME (Subject Matter Expert) support as needed for self-service reporting.

4. Power BI Gateway Setup

- Power BI Gateway set up for a live data connection.
- Required infrastructure and access provided for setting up the Gateway internally.

5. Reporting Suite LIVE in Client-side Power BI Online Environment

- Migration of the reporting suite from Power BI Desktop to the Online environment.
- Reports published in Power BI Online for all end users to access.
- Ongoing support provided as needed for the Online environment.

6. Training, Documentation and Support

- Completed training sessions for users.
- Supporting documentation for Power BI usage.
- Support provided to the Sysco Ireland team during the Go-Live phase.
- Handover of the project, ensuring the correct SMEs attend training or handover sessions as required.

These deliverables represent the tangible outcomes and milestones of the project, demonstrating the successful migration to Power BI, the establishment of self-service reporting capabilities, and the provision of training and support to enable Sysco Ireland to use the new reporting system effectively.

Case Study Conclusion

In the ever-evolving landscape of data-driven decision-making, the journey of Sysco Ireland towards modernising its payroll reporting has been one of transformation and empowerment.

This case study underscores the profound impact of migrating from Oracle Discoverer to Power BI. This transition has not only averted disruptions but has also elevated the organisation's reporting capabilities to new heights.

Sysco Ireland recognised the imperative need to adapt to changing times, as Oracle Discoverer faced obsolescence. In collaboration with BDO Eaton Square, this project exemplifies a meticulous approach that encompassed planning, execution, and relentless commitment to delivering superior results.

The deliverables are a testament to this commitment, from the strategic prioritisation of reports to the meticulous migration of data and the seamless transition to Power BI Desktop & Online environments.

The project has successfully equipped the payroll team with the power to wield data as a tool for strategic decision-making.

Beyond the technical facets, this case study also illuminates the human element. It showcases the importance of change management, user engagement, and ongoing support in ensuring a smooth transition. It highlights how knowledge transfer and training have been pivotal in empowering the team to harness the full potential of Power BI.

Looking forward, this change underscores Sysco Ireland's readiness to embrace a data-centric future and sets the stage for continued innovation. The journey from legacy systems to Power BI is not just a migration; it's a transformation that ensures Sysco Ireland is primed for a future where data is not just a tool but a strategic advantage.

In conclusion, this case study is a testament to resilience, adaptability, and the unwavering commitment to progress. It exemplifies how an organisation can chart its path forward, even in the face of impending change, to emerge stronger, smarter, and ready for whatever the future holds.

Sysco Ireland transformation

Donna Curley, Payroll and Benefits manager at Sysco Ireland, commented on the impact left by BDO's attention to detail:



“We cannot stress enough how much of an absolute pleasure you are to work with. Nothing is too much trouble; you are so helpful and practical and always on hand to offer advice and best practices.

We would genuinely be lost without you and very much value your contribution to the Sysco Ireland family!

I'd just like to pass on a huge thank you from myself and the team for all of your dedication and hard work; it's very much appreciated and hasn't gone unnoticed by anyone here within the payroll department.”

Is your organisation being buried in repetitive tasks and manual data entry?

Or maybe you're frustrated with intricate operations, budgetary woes, and incident tracking...

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