UPSTREAM USA

Upstream Streamlines Financial Reporting and Optimizes Budget with CData Connect Cloud

cdata

Fast and easy setup

Upstream started their free trial of CData Connect Cloud and less than 15 minutes later, they were deploying the connection to their production environment.

7+ hours of work saved weekly

Upstream's data team no longer spends hours every week manipulating general ledger data from Sage to create and share reports with decision-makers.

Democratized data

Connect Cloud enables Upstream's leadership to accurately compare budgets and actuals for health centers in each region, supporting informed financial planning and operational success.

upstream USA

Company
Upstream USA

Industry
Non-profit

Healthcare

Product
CData Connect Cloud

Snapshot
CData Connect Cloud enhances Upstream's financial reporting processes, allowing access to live general ledger data from Sage Intacct in widely viewed Power BI dashboards.

Cloud-based data connectivity helps the non-profit healthcare organization share live financial reports with regional leadership, allowing them to finetune budgets and grow operations.

Upstream USA is a nonprofit healthcare organization that partners with more than 130 locations across the country to ensure that contraceptive care is affordable and accessible.

Nonprofits like Upstream depend on accurate and efficient financial reporting to manage tight budget constraints. But regularly sharing insights with regional budget managers was a time-consuming challenge for Upstream's data team. It involved regularly pulling general ledger (GL) data from Sage Intacct to Excel, then 'slicing and dicing' the data to create a static report on budget vs. actuals. The result was slow and burdensome financial reporting.

CData Connect Cloud helped Upstream relieve that burden and automate the reporting process. The cloud-based data virtualization platform allowed Upstream Senior Data, Analytics, and Technology Analyst John Hatch to directly connect live Sage Intacct data in Power BI, removing the need to download, move, or manually manipulate the data to visualize and share it.

Now, John saves multiple hours every week, and financial leadership can simply hit 'refresh' in Power BI to get the accurate financial information they need to make informed decisions on where to focus funding.

The challenge: Wrangling financial data for visualization

> "We would pull in our general ledger into Power BI with CData, and it worked on the very first try. It was much easier and simpler and refreshed faster than all the other solutions that we were looking into."
>
> – John Hatch, Senior Data, Analytics, and Technology Analyst, Upstream USA

Hatch needed to ditch the old financial reporting process, which often ate into his workday productivity.

"We used to spend upwards of an hour every single day having to export to an Excel file and then do a bunch of manual work to get that sliced and diced in the way that each one of our different budgeting functions needed."

As Upstream began to experience organizational growth, Hatch's team increasingly fielded requests from leadership to visualize growing volumes of data. The organization adopted Power BI as their data warehouse and visualization tool to uplevel their reporting capabilities – but one piece was missing. Power BI doesn't connect natively with Sage Intacct, which means Hatch was still spending hours every week manually pulling GL data out of Sage and using custom scripts to transform and visualize it in Power BI.

Upstream needed an automated connectivity solution to provide timely access to financial data for regional budget managers and save Hatch's team from the burden of building manual integrations.

The solution: Working proof of concept in a few clicks

In the search for a Sage-to-Power BI connector, Hatch sought out recommendations from online forums, Sage, and Microsoft, and found CData to be the best solution for straightforward, live connectivity between the tools.

After signing up for a trial of CData Connect Cloud, it took Hatch a few minutes to set up his connection. Just days later, Upstream regional budget managers were delving into general ledger reports in Power BI on a daily basis, slicing and dicing the data for their specific needs.

"We were setting up that proof of concept and then deploying it to a production environment in more or less a couple clicks, so it was just easy," said Hatch. "It was just much simpler than all the other solutions that we were looking into, so it was really a no-brainer for us."

> "There were very few obstacles to us trying it and getting a working connection before we had to pay for anything. So, having a working proof of concept on the first day was by far the defining decision point for us."
>
> – John Hatch, Senior Data, Analytics, and Technology Analyst, Upstream USA

Connect Cloud provided an out-of-the-box connection to live Sage Intacct data in Power BI dashboards, saving Upstream's data team upwards of seven hours of work per week and providing budget managers with accurate, up-to-date information to inform precise budget management. These decisions are helping Upstream's dollars stretch further as they scale their operations across the U.S.

The outcome: Enhanced reporting supports operational growth

Upstream USA has realized significant improvement in financial planning and reporting since adopting CData Connect Cloud.

"[The General Ledger report] gives regional leadership a really easy way to see at a high level how we are doing against budget across in specific areas," said Hatch. "For example, regional directors can now see what percentage of the numerous health agencies we work with in the Midwest are on budget – and they can see that in a matter of moments, whereas before that we just could not answer that question."

Enhanced visibility into financial data enables Upstream leadership to make informed decisions on where to allocate budget and allows them to accurately predict financial trends further in advance. This means they can confidently invest in serving more communities, knowing their budget is grounded in reliable data. The non-profit has grown beyond cautious short-term planning to a more ambitious, long-term approach, maximizing its ability to reach more people than ever before.

> "It works great for us, and if there are more ways that we can make our lives easier and spend less time doing the mundane day-to-day stuff, that is a huge win."

> – John Hatch, Senior Data, Analytics, and Technology Analyst, Upstream USA

Streamlined connectivity from Sage to Power BI with CData

CData Connect Cloud provides powerful, real-time data connectivity between any data source, application, or database in just a few clicks. Gain insights faster for quick, informed decision-making. Easy set-up and deployment with no-hassle reliability allows IT teams to work on more critical tasks.

Ready to get started? Download a 30-day free trial.