Implementing Power BI with Infor

Integrating Power BI with Infor ERP creates a powerful foundation for data-driven decision-making and enterprise reporting. By combining Infor ERP data with modern analytics capabilities, organizations can improve transparency, streamline reporting processes, and gain actionable insights across finance, operations, sales, purchasing, inventory, and HR.

The successful implementation of Power BI with Infor ERP requires several important considerations to ensure scalability, maintainability, performance, and long-term usability.

1. Data Governance and Quality

A robust Power BI implementation starts with clean, well-structured data. Ensuring data quality within Infor is essential. This involves defining data governance practices, maintaining data accuracy, and establishing a data model that aligns with your specific business needs.

- Assess the attributes and their criticality to cluster the issues
- Keep data quality always a separate report and never approach this topic decentralized in each report

2. Data Security

Data security and access management are critical aspects of every BI implementation. Sensitive business information from Infor ERP should only be accessible to authorized users. Power BI provides several mechanisms to ensure secure data access and governance.

- Implement role-based access concepts
- Use row-level security (RLS) where required
- Separate operational and management reporting permissions
- Limit access to sensitive financial or HR data
- Ensure compliance with internal governance and data protection policies

3. Infor ERP Data Architecture and Setup

Infor ERP systems typically consist of many interconnected tables and modules. Understanding the ERP structure and identifying the relevant business entities is essential for efficient reporting.

- Extract only the required tables and fields
- Run the Table Definitions (ttadv4520m000) session to extract all tables metadata
- Rename the cryptic ERP table and field names early in the staging process
- Use centralized master data tables instead of transactional line data for dimensions
- Establish a clear staging and transformation strategy to prepare data for Power BI

4. Data Extraction and Transformation

To ensure stable performance and scalable reporting, data transformations should be handled strategically.

- Minimize heavy transformations directly inside Power BI
- Shift complex business logic upstream into SQL views, ETL pipelines, or staging layers
- Create reusable transformation layers for common reporting logic
- Standardize calculations and KPI definitions centrally
- Reduce unnecessary data loads and unused columns

5. Customized Reporting

Power BI enables highly flexible and interactive reporting tailored to business requirements.

Successful reporting projects should focus on business value rather than purely technical implementation.

- Define business-relevant KPIs early in the project
- Build intuitive dashboards with clear navigation and usability
- Implement drill-through and filtering capabilities for detailed analysis
- Create role-specific dashboards for management, finance, operations, and other departments
- Standardize report layouts and visual design principles

6. Scalability and Performance

As data volumes and reporting requirements grow, scalability becomes increasingly important. Infor ERP data models can become highly complex due to customizations, historical data structures, and module dependencies.

- Design scalable data models from the beginning
- Use staging tables and layered architectures (Bronze / Silver / Gold)
- Optimize SQL queries and transformation logic
- Reduce unnecessary relationships and calculated columns inside Power BI
- Aggregate large transactional datasets where appropriate
- Separate operational reporting from analytical workloads when necessary

7. User Training

Technology alone does not create business value. End users must understand how to use and interpret the reports effectively.

- Provide user-specific training sessions
- Create documentation and reporting guidelines
- Align dashboards with existing business processes
- Encourage self-service analytics where appropriate
- Establish feedback loops for continuous report improvement

Conclusion

Implementing Power BI with Infor ERP enables organizations to transform ERP data into actionable business insights.

A successful implementation requires more than technical connectivity. Strong data governance, scalable architecture, standardized transformation processes, security concepts, and business-oriented reporting are essential for long-term success.

With the right strategy and implementation approach, organizations can establish a modern reporting platform that supports transparency, operational efficiency, and data-driven decision-making.