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Executive project brief

Budget One: Connected Excel Budgeting with a Single Source of Truth

Keep Excel as the planning interface while ERP information, budget data, dashboards, and formal reports work from the same governed financial foundation.



BUSINESS PROBLEM

Finance teams often need to keep Excel because it is where planning work happens, but disconnected spreadsheets, ERP information, dashboards, and formal reports can create competing versions of the same budget. The need was to connect these layers without forcing finance users to abandon Excel.

THE SOLUTION

Budget One connects macro-enabled Excel planning with SQL-backed ERP and budget information, then reuses that governed financial foundation for Tableau dashboards and SSRS reporting.

WHAT CHANGED

This gives finance and management one consistent version of the budget across planning, analysis, and formal reporting. It reduces the need to reconcile separate files, makes changes easier to trace across the reporting cycle, and lets teams keep the flexibility of Excel without giving up centralized control over the numbers.

How it works

- ERP and budget information feed a shared SQL-backed...
- Excel remains the planning interface for budgeting.
- VBA and macros automate the connected Excel workflow.
- Tableau uses the same governed information for...
- SSRS delivers formal reports from the same financial...