



CASE STUDY

REPORT AUTOMATION USING TABLEAU FOR A HEALTHCARE LEADER

Empowered users across business functions with a business intelligence solution

Client Background

Our client is a leading global diagnostics company that manufactures and supplies blood screening and diagnostic products. The client's inventory data was stored in SAP and was exported into Access DB and excel files, which were further used for reporting. There was huge dependency on the internal analysts for report generation, and the time-consuming manual process led to frequent delays in report publishing. Also, the data management system lacked historical data visibility. The reports did not have any single version of truth to look at in terms of dataset. The client was looking for an end-to-end reporting solution to streamline their existing report generation workflow. The key objectives included:

- Build a dimensional data model for data processing and data integration
- Create reports in Tableau for effective labor management, manpower utilization, and alignment of activities across Sales and Operations business functions

Xoriant Solution | Key Contributions

Xoriant implemented the end-to-end process automation including data processing, transformation, auditing, archival, and integrated dashboards. We enhanced the reporting experience by incorporating reporting template, drill up & down, KPIs, multiple export options, alerts, and write back capabilities on the dashboard. Also, our team integrated the data hub with single version of truth across the organization.

Prepared data for processing: We designed a solution to ingest source data into excel which was then cleaned, transformed and massaged in the

KEY BENEFITS

- Achieved 80% improvement in time to market by enabling senior leaders with authenticated BI dashboards to access real-time manpower utilization data for strategic decision-making

ETL layer to create a data warehouse. Overall, 36 source data files (27 S&OP and 9 Labor) with complex structures were integrated by our team. The data consisted of inventory data, operations and planning data, budget data, and other static data. We provided 90+ Data Integration (SSIS ETL) packages. Also, there were placeholders in the data warehouse to hold the business-driven calculations/ rules as and when it is calculated within the source systems. The project involved 80+ tables (Staging + Data warehouse) following the Dimensional Model.

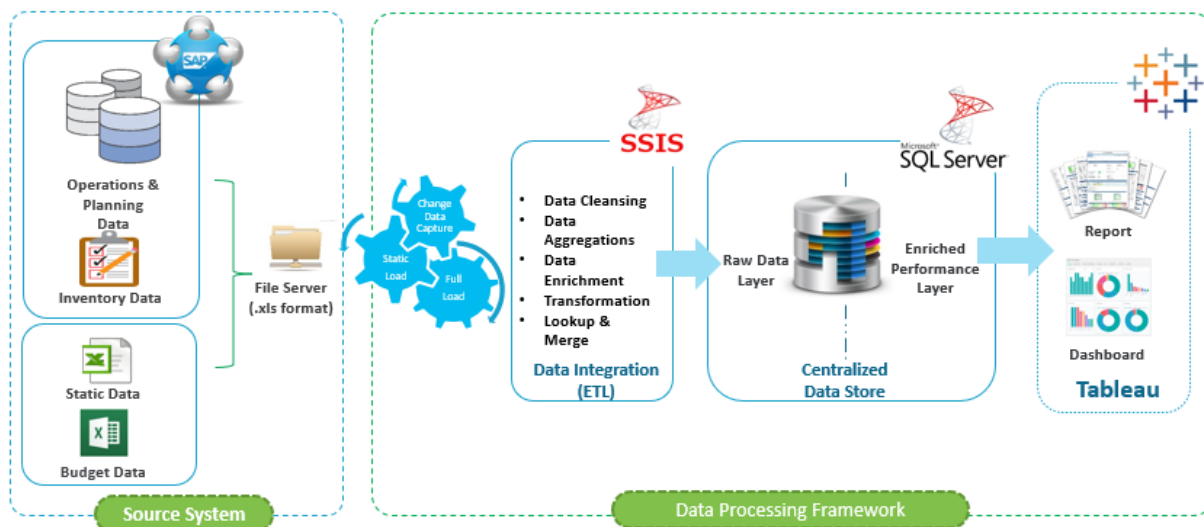
Report creation in Tableau: We created 100+ reports which were used in 12 dashboards on Tableau. Various stakeholders further used the integrated data to build customized reports as per their requirement. Our team also created alerts on the defined threshold. In addition, the business users had the ability to schedule an automated email distribution of the reports harnessing the report distribution capabilities of Tableau.

Created authentication feature in manpower utilization reports: The authentication feature was added on specific Tableau reports for limiting data access to senior executives like VP, CEO, COO, and HR Head.

KEY BENEFITS

- Enabled easy access to single point of truth with improved reporting template and KPIs on all the business dashboards
- Ensured consistent UI and easy navigation of data hierarchies in labor management with drill up and down feature in Tableau
- Empowered Sales and Operations team executives with abilities to quickly create ad-hoc reports in Tableau by providing access to synchronized data across functions

High Level Architecture



Technology Stack

Tableau Microsoft SQL Server Management Studio 14.0 | Tableau 2020.1.4



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