Results HCA – Performance Reporting in Power BI

Information Processing Management Association

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Agenda

• Previous State of HCA’s Performance Reporting System (Tim)
• Problem & Requirements Statements (Tim)
• Overview of Power BI Pilot Project (Jibu)
• Success Factors of Power BI Pilot Project (Jibu)
• Data Flow Architecture (Aaron)
• Cloud Environment Architecture (Aaron)
• Power BI Demo (Aaron & Tim)
Previous State of Performance Reporting System

FRAMEWORK: 225 performance measures reviewed quarterly, 300 contributors, 2 staff

**CONS**
- No single operational data system
- Several large disconnected systems
- Most analysts working in Excel with poor documentation
- Lack of transparency, validity, reliability in data and analyses
- Built using Power Query and PowerPoint dynamic links

**PROS**
- Excellent executive sponsorship for performance reporting
- Existing goodwill between performance reporting and IT shops
- Performance reporting shop has intense customer focus
- Solid reporting processes and documentation
- SharePoint workflow messaging
Problem & Requirements Statements

Problem Statement:
HCA has a reporting “system” that is fragile, lacks transparency, and is unsustainable.

Requirements Statement:
HCA needs a tool that will support existing business processes with the following requirements:
- Seamless automation from raw data to presentation
- Does not negatively affect business processes
- Ability to leverage existing Power Query code for analyses
- Allow text typed in report to appear in dashboard
- Ability to send hyperlink to specific report page
Overview of Power BI Pilot Project

- Initiated project in March 2017 with trip to Microsoft HQ to discuss cloud-based security concerns (WATech, HCA IT & Performance Reporting)
- Team of 5 from HCA went to Denver in April 2017 to co-create architecture with Microsoft
- 215 licenses procured by October 2017
- Performance Reporting staff trained 150 agency staff to “Inspect, Edit, Save” cloud-based reports in October and November for quarterly meetings held in December 2017.
- Scheduled data refreshes configured in April 2018
- Currently 300 published reports that describe daily operations
- 200 users across 13 divisions routinely inspecting performance on key indicators
Success Factors of Power BI Pilot Project
Results HCA – Performance Reporting in Power BI

Results HCA Data Flow Process

Initial Publish

Power BI Pbix

Gateway Service
(Encryption, Authentication, Refresh)

CLOUD

Daily Manual Refresh

SharePoint lists

Applications

Folders / files

Power Intel gateway service (Encryption, Authentication, Refresh)

Automated Refresh Schedule

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Results HCA Cloud Environment Architecture

- **Gateways Service** (Encryption, Authentication, Refresh)
- **Ground**
  - Report 1
    - P1
    - P2
    - KPI
  - Report 1 (Copy 1, Filter)
    - P1
    - P2
    - KPI1
  - Report 1 (Copy 2, Filter)
    - P1
    - P2
    - KPI1

- **Reports (Measures)**
  - Report 1 (Master)
    - P1
    - P2
    - KPI1
  - Report 1 (Copy 1, Filter)
    - P1
    - P2
    - KPI1
  - Report 1 (Copy 2, Filter)
    - P1
    - P2
    - KPI1

- **Dashboards (Slide Deck)**
  - Team 1
    - KPI1
    - KPI2
    - KPI3
  - Team 2
    - KPI1
    - KPI2
    - KPI3

**KPI = Key Performance Indicator**

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