



## Results HCA – Performance Reporting in Power BI

# Information Processing Management Association

## Results HCA – Performance Reporting in Power BI

# 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)

## Results HCA – Performance Reporting in Power BI

# 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

## Results HCA – Performance Reporting in Power BI

# 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

## Results HCA – Performance Reporting in Power BI

# Overview of Power BI Pilot Project

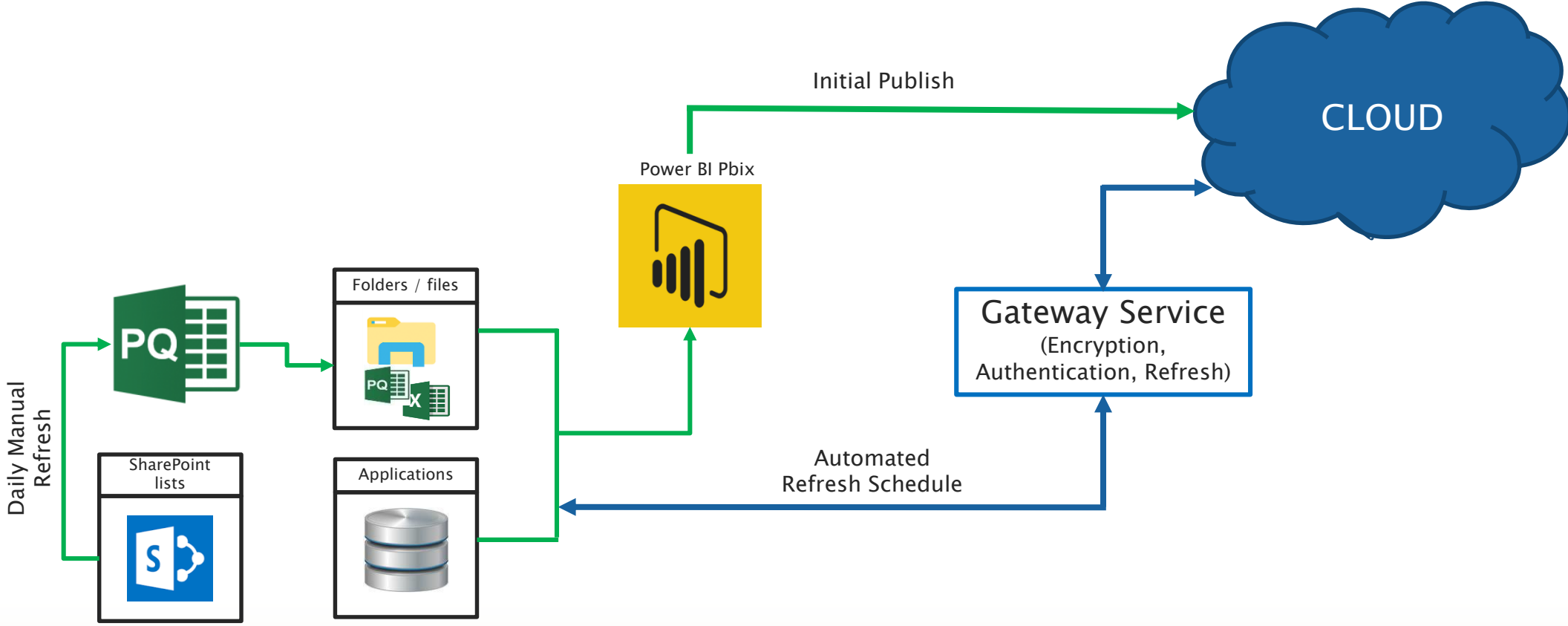
- Initiated project in March 2017 with trip to Microsoft HQ to discuss cloud-based security concerns (WATech, HCA IT & Performance Reporting)
- Team of 5 from HCA went to Denver in April 2017 to co-create architecture with Microsoft
- 215 licenses procured by October 2017
- Performance Reporting staff 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

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# Success Factors of Power BI Pilot Project

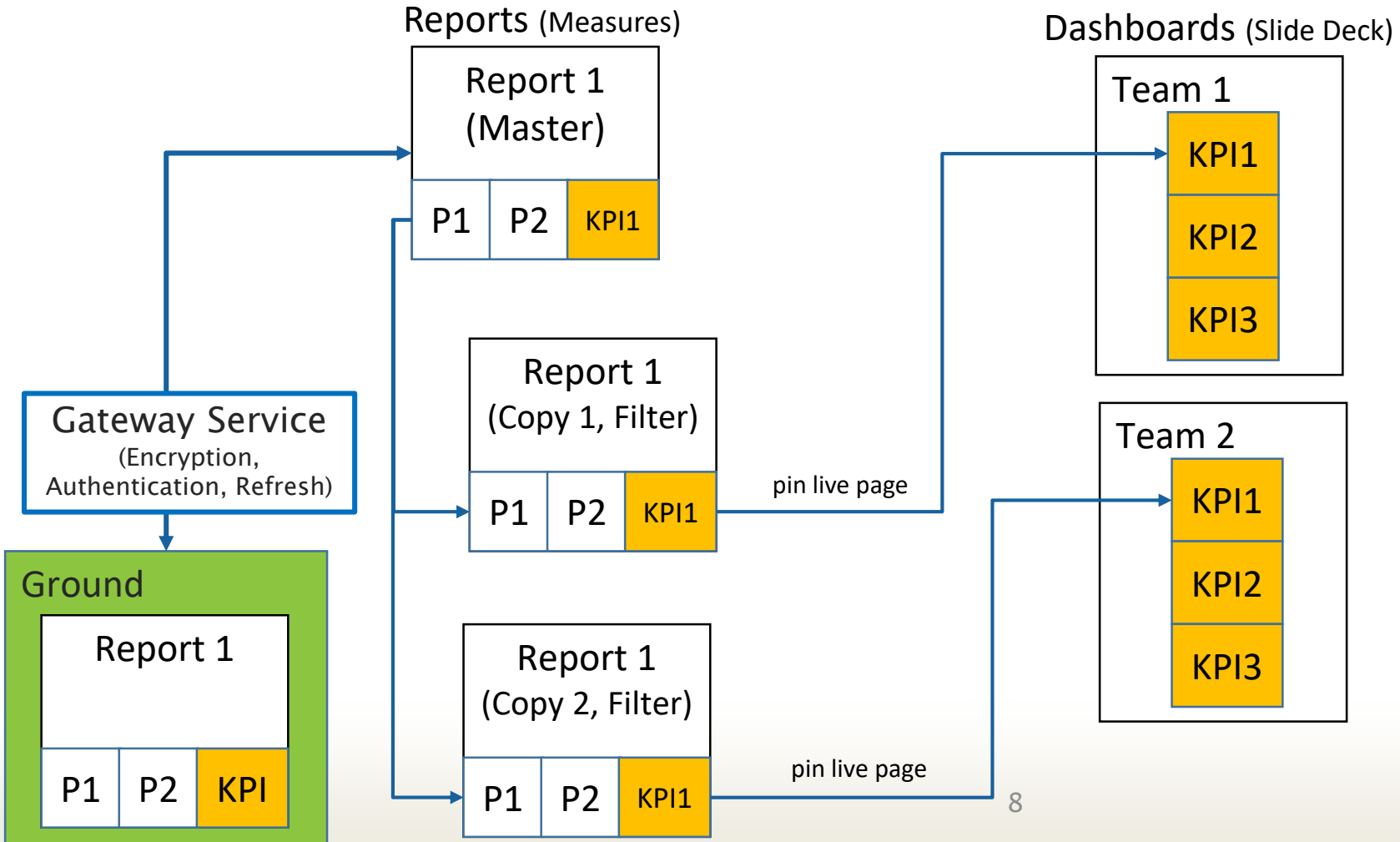
# Results HCA – Performance Reporting in Power BI

## Results HCA Data Flow Process



# Results HCA – Performance Reporting in Power BI

## Results HCA Cloud Environment Architecture



**DEMO**

KPI = Key Performance Indicator