



WHAT'S FAST, ACCURATE, AND ALWAYS ON TIME? AUTOMATED REPORTING!

Abstract

Leonard Parks, Lead Analyst for a data modelling team at a multinational manufacturing corporation was saddled with manually intensive reporting processes. With reports not being ready in time for stakeholder meetings, Leonard began looking out for a more effective reporting solution and turned to long-time partner Infosys BPM for help. This case details how Infosys BPM's shifting of Leonard's reporting system to Power BI and integration of automation, saved over 1,000 hours of manual effort monthly and provided stakeholders with near real-time access to actionable insights.



Manually mining data for reports

Leonard Parks is Lead Analyst at a multinational manufacturing corporation. He oversees the modelling, analysis, and visualisation of the company's business data, across its global footprint which spans six geographies, more than 20 business units, and over 100 plant locations. This involves understanding stakeholder requirements and communicating them to his operations team which then delivers, relevant, interactive reports.

Leonard's team's reporting activities are spread across the procure-to-pay (P2P) and master data management (MDM) streams, with multiple reports for inventory management (IM), key performance indicators (KPI), and data integrity (DI). In total, the team would handle 70 reports,

sending them out over daily, monthly, and quarterly intervals. However, each of these massive reports needed data to be manually extracted from Excel files, with the manually intensive process involving 10 personnel expending 1760 hours of effort every month. The exhaustive system, high volumes, and variety of reports made it challenging for the team to extract, process, and deliver visualised reports in time for stakeholder meetings, or for when they needed quick updates. This created roadblocks when it came to the stakeholder's data analysis, leading to difficulties in evaluation and progress monitoring.

Looking for a solution, Leonard stepped into discussions with the stakeholders to understand their concerns. They suggested

shifting the KPI, DI, and other critical reports to Power BI, where they would easily be able to access daily updates upon login. Over 55 project reports in the company were already deployed over the platform, as part of a reporting and analytics journey with their long-term partner, Infosys BPM. During the course of this, an Infosys BPM team had not only transitioned these reports to Power BI, but had also developed a digital command centre to showcase insights, with a primary aim of improving the end-user experience. Deciding to leverage the team's expertise, Leonard reached out to Vaidehi Singh, the Infosys BPM lead, explaining the issues his team faced while displaying Excel reports in stakeholder meetings and requesting assistance.

Migrating to an automation paradigm

Taking on the mission to automate Leonard's critical reports, Vaidehi briefed

her team about the requirements in detail. Being already familiar with the company's

reporting processes, the team was quick to understand and start with the project.

Approach summary

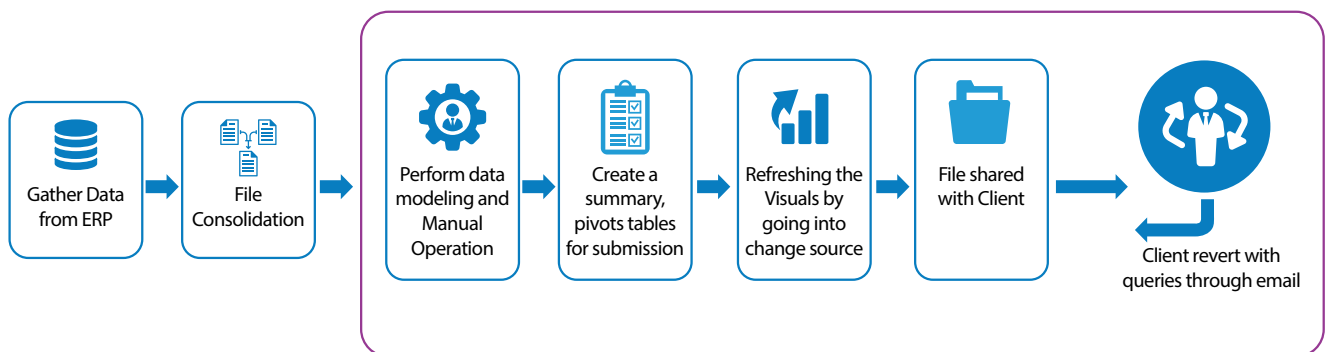


Vaidehi and her team began with a careful analysis of the data sets in question, concluding that all manual reports were suitable for migration. They then worked closely with Leonard's team, guiding them

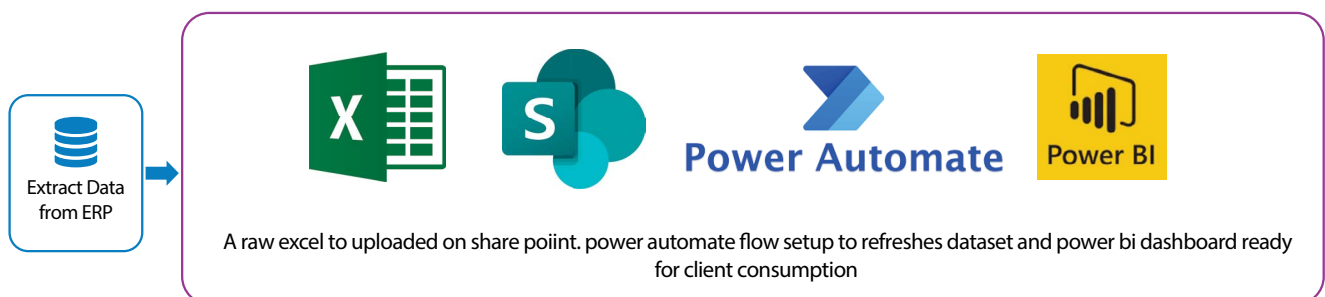
to set up a cloud-based data warehouse and helping identify the necessary data to be migrated. They also built access restrictions in the data store to prevent any possible data breaches. After this, they

developed the logic for the Power BI report to pull data from the cloud and visualise it for display.

Process map covering the possible automation areas



Process map covering the areas which were automated



Building the complex logic for the automated reporting and navigating through additional requirements, all of which was in the Excel files, and was challenging and initially slow. However, the team was able to utilise all their experience already gained working on the earlier reports and eventually deliver all the reporting logic to the platform. The

team then applied the logic to successfully derive the KPI, IM, DI and other metrics as per Leonard's requirements.

Lastly, the team integrated the Power BI reports with Power Automate, a software that enabled the files to refresh automatically upon upload, allowing stakeholders to access near real-time

updates. Also, recognising that the stakeholders were facing difficulties in adjusting to the Power BI reports, Vaidehi and her team set up dedicated training sessions with several types of drill-downs to familiarise all the impacted stakeholders with the new reporting platform and its tools, thus boosting their confidence levels.

Striking gold, in style

Leonard and Vaidehi's collaboration towards Power BI-led reporting process automation that catered to over 140 reports, enabled business stakeholders to

easily and efficiently access and analyse the reports they needed. The new platform's superior visualisation capabilities also delivered actionable insights on critical

business metrics, when it was most useful, or in other words in real-time.

Key benefits



Further, shifting to Power BI significantly helped Leonard's operations team to cut out many of their repetitive tasks and work with greater productivity. Eventually, the solution helped Leonard reduce the

substantial manual workload to the tune of 1,000 hours' worth of monthly efforts.

Happy with the outcomes, Leonard also received great appreciation from the stakeholders for the success of the

project, and for mining the experience and expertise that Vaidehi and her team had built through their long-standing partnership with the company.

**Names have been altered to preserve the identities of the people involved.*

For more information, contact infosysbpm@infosys.com



© 2024 Infosys Limited, Bengaluru, India. All Rights Reserved. Infosys believes the information in this document is accurate as of its publication date; such information is subject to change without notice. Infosys acknowledges the proprietary rights of other companies to the trademarks, product names and such other intellectual property rights mentioned in this document. Except as expressly permitted, neither this documentation nor any part of it may be reproduced, stored in a retrieval system, or transmitted in any form or by any means, electronic, mechanical, printing, photocopying, recording or otherwise, without the prior permission of Infosys Limited and/ or any named intellectual property rights holders under this document.