DataFactZ Case Study

Solving the Multitool Dilema for a Health Insurer: A Unified BI Portal for Enhanced User Experience and Scalable Support

In the last decade, there has been an explosion of BI and reporting technologies that cater to every type of business and all types of user preferences. With numerous options available, most businesses have chosen the path of using a variety of reporting tools within their organizations. This is a more common occurrence among medium to large scaled businesses that have to accommodate a larger number of team types. These scenarios pave way for big challenges for business owners: supportability.
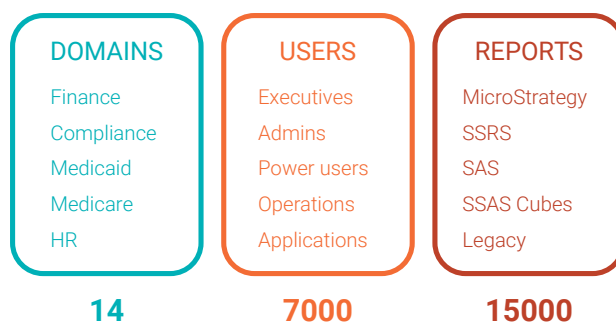
Here we learn how DataFactZ helped a large Midwestern Healthcare Insurance client manage its various BI and reporting platforms. DataFactZ provided a solution that focused on seamless cross-platform navigation, enhanced user experience, single point support, and scalability.

Below, you will find details on the client's technical landscape, and DataFactZ's approach in unifying various BI and reporting platforms.

BI Landscape

Businesses serving the Insurance Industry have some of the most complex tasks at hand. The variety of BI and reporting technologies needed to support daily operations are huge. These same problems affected the client, as well. They had around 1,500 reports across 14 business domains serving a total of 7,000 users. The reporting methods used ranged from static, self-serviced, automated, to event driven. To accommodate these, a multitude of tools were put into place. SSRS, SAS and MicroStrategy were the

biggest ones used.

DOMAINS	USERS	REPORTS
Finance	Executives	MicroStrategy
Compliance	Admins	SSRS
Medicaid	Power users	SAS
Medicare	Operations	SSAS Cubes
HR	Applications	Legacy
14	**7000**	**15000**

Challenges

As new technologies were on-boarded, it became apparent that supporting them was a nightmare. Some common challenges were:

- Maintenance of disparate reporting systems
- Maintenance of user profiles for disparate reporting systems
- Forcing users for multiple logins
- Inconsistent user experience between different reporting systems
- Inefficient reconciliation between reports of disparate systems
- Redundant reports
- Inefficient and painstaking process to review reports

DataFactZ's Implementation Strategy

DataFactZ's take on handling the aforementioned challenges was to implement a two-phased solution.

The first phase of the solution was to perform an assessment study, and then prepare documentation around a GAP analysis.

The second phase of the solution was to design an interface that provided seamless user experience to everyone who used the reports, based on their privileges. This was eventually built out as a portal for all Business Intelligence and reporting activities.

Some novel feature include:

• Seamless cross platform navigation
• Selection of a portal that would support Scalable Architecture
• Thoughtfully designed Portal with well-organized UI with fluid UX
• SSO experience across the portal
• Streamlined Support through an Admin Portal
• Organization standards for brand and styling

Architecture

Based on the findings from the initial assessment studies and GAP analysis, it was noted that as

technologies were on-boarded, supporting them was an increasing headache. Our team's end goal was to give users a seamless experience with access to the reports from multiple platforms, and reduce that headache. In this respect, DataFactZ modeled a framework for a unified portal. Below is a high-level architecture diagram of the framework.. *See diagram at the bottom of the page.

Solution

To implement that framework, DataFactZ's design and development teams worked closely with the client to create a portal that was compatible with the organization's other portals. A unanimous decision was made to use SharePoint 2013 as the underlying technology to build this portal.

The choice to use SharePoint was made considering its provision for popular security policies like LDAP and NTLM, and support for custom development. This allowed for easy integration with reporting and BI technologies, along with making the UI/UX components as desired by the users.

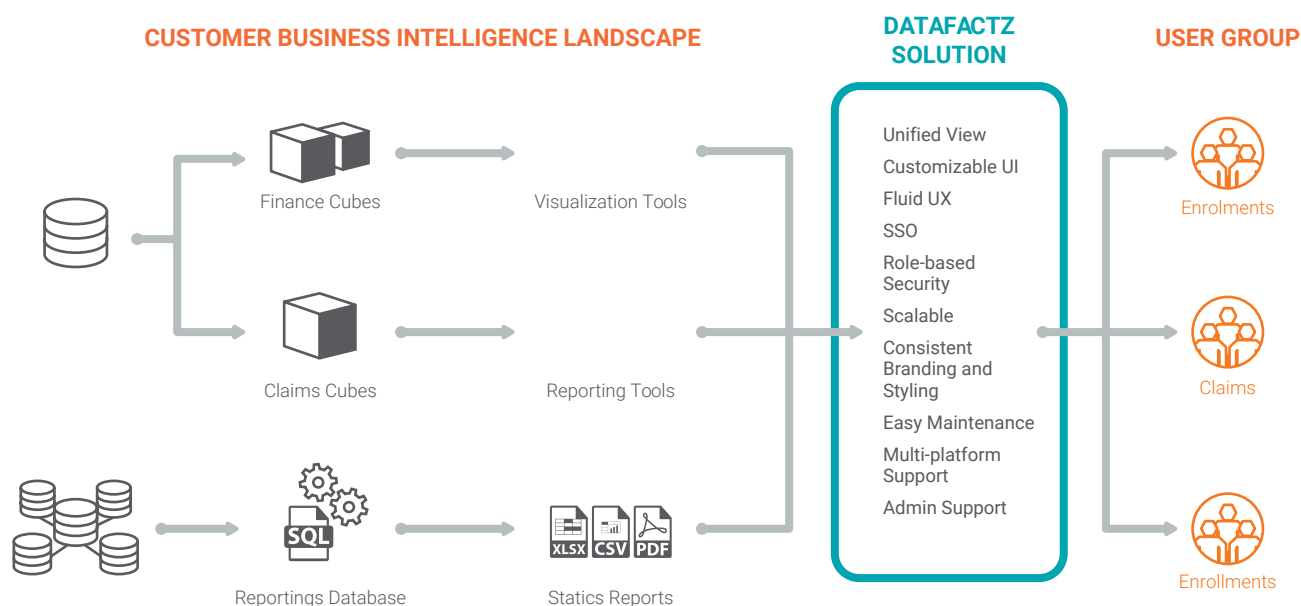The portal had unique features, including: a user

Figure 1: DatafactZ Solution Overview

specific welcome page, notifications menu, alerts widget, the ability to use 'drawers with handles' for quick access to important areas, and session maintenance for reverse navigation, among other things.

A key design feature was to have a stationary reporting area that was responsive to the selections made on the drawers. For instance, the left drawer featured department names, and the right drawer showed report titles grouped by technologies for the selected business domain. Once a user clicked on a particular report title, the report was displayed in the background.

technologies, among other things. This solution proved to be an instant hit with users across various levels of the client's organization.

An Integrated BI Portal by DataFactZ

Conclusion

DataFactZ's unique solution offered a custom-built, unified portal for cross-platform business intelligence and reporting experience. It also addressed many issues ranging from a single sign-on, to presenting data with role-based security, and implementing a scalable architecture to support future

The Next Step

Request a 1 on 1 solution demo:
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