Tableau Reports Development

Customer Case Study – A medical center

Business Need

The company needed to move all its clinical data reports from SSRS to Tableau Dashboards.

Customer Challenges

- Data had to be fetched manually from different sources and then a screenshot of different SSRS reports would be mailed to different groups of doctors daily.
- More complex calculations were required to filter down the data to get specific results for different groups of doctors.
- No Live connection to data sources was available and SSRS reports were complex to handle for non-IT professionals like doctors.

Solution Provided

- Syntelli gathered and integrated the data necessary from SSRS reports for Tableau dashboard development.
- Provided prototypes of each report/dashboard to Flagler Hospital leadership.
- Provided guidance on Tableau standard visual guidelines, best practices and methodology.
- A live connection to different data sources was built to handle millions of rows of data with ease. Different types of visualizations were created with a large amount of data without impacting the performance of the dashboards.
- Row level security was implemented, and user groups were created for access control instead of directly providing access to users.
- Created SSRS reports in Tableau format reports/dashboards.
- Created documentation for knowledge transfer of each report, dashboard and visualizations.
- Hosted Data Strategy & Roadmap workshops, and shared recommendations based on discussions with IT and Data leadership on strategic goals for the organization.
- Some Reports which were built using Tableau included MedRec Daily, Pain Med Variance, Rx Document Completion, Incomplete OMR, Foley Daily, ED OMR and cDiff Daily.

A Sample MedRecDaily Report

Impact of Solution

- By presenting reporting metrics using visual, interactive dashboards that pull directly from data sources, Syntelli provided the customer with a fresh, visually compelling report daily, weekly or monthly, with just the click of a button.
- Users had statistics at their fingertips, and could access their data anywhere, anytime using Tableau Server and a mobile/tablet app which supported full functionality that Desktop and Online versions had, and
- The customer gained credibility by communicating patient's data insights clearly.
- A user-friendly interface allowed non-technical users (doctors) to utilize the dashboard functionality to the fullest.

Technology Used

- SSRS
- Tableau
- SQL Server 2012
- MS excel