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CU I&E Submission: Microsoft Dataverse for Department Data Storage [1]

Category

Finance & Accounting
Technology

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Project Description

An ongoing multi-year project to get our department databases into a cloud-based environment. This data previously lived in various spreadsheets, documents, or websites across numerous locations in the department. Additionally, other data tables that did not previously exist were created as the project expanded. The main purpose of this project was to get everything in one place, create a single “source of truth” for consistency, and allow easy and reliable access. Having everything in the environment allows our staff to connect directly to the data in Excel, and can retrieve newly-added data with the click of a button. This also creates a reliable connection for all of our department PowerBI dashboards. This environment also includes our data-cleaning processes that automatically run each day, ensuring the critical information is always current. This includes direct connections to external data sources (through web API) and automated pickup of files dropped into shared folders.

Project Efficiency

Data requests can now be completed in minutes instead of days.
• Leadership has “self service” reports, and can manipulate data on demand. They no longer need to request a refresh on the items they view regularly.
• Our PowerBI Reports can refresh automatically each day, and deliver current information.
• Data gathering and cleaning processes are streamlined. Instead of repeating the same steps for each report, the data is prepared in one place, and can be refreshed automatically.
• Increased provider satisfaction. We have been able to utilize this data to publish dashboards

and workflow tools that have made their lives easier.

Project Inspiration

The inspiration came from a need to have daily data refreshes from our clinical scheduling software. I had been manually retrieving a report, merging with other data, and delivering that to leadership. Initially that was done monthly. Then I was asked to refresh it weekly. When the request came in to refresh it daily, I knew I needed to find a better way! The most “user friendly” solution I found was a combination of Microsoft Dataflows (gets the information) and Dataverse (stores the information). After seeing the advantages this created, we began moving all department data.

What Makes You Happiest about this Project?

It makes people’s lives easier! The project began with a workflow tool that was meant to make it easier for people to make daily decisions. And that has remained as one of the core elements. With everything prepared in advance, we can now spend more time on the actual analysis and decisions, as we’ve removed the time spent gathering and cleaning the data. This also provided me with an opportunity to learn multiple new skills and software applications. Every step in the process was new to me, and involved a lot of learning and growth along the way.

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