DATA ANALYTICS

INFOSMART'S SOLUTION ENABLED A 25% TIME-SAVING FOR 350 USERS AT OREGON STATE TREASURY

CUSTOMER

The Oregon State Treasury is the state's financial services hub and manages an array of responsibilities including the investment of public funds and trust funds, issuance of all state bonds, financial and banking services for state agencies, and protection of public fund deposits. The agency also administers the Oregon 529 Savings Network and Oregon Retirement Savings Plan. Treasury also provides staffing services to the Oregon Investment Council.

Treasury strives to save taxpayers money and earn strong and sustainable risk-adjusted returns on investments. Treasury seeks to provide the highest value by improving the financial health of the state and Oregonians - and by being an efficient, transparent and accountable organization.

350 users interconnected from different areas of the state:

Reports viewers

Report creators

Report consumers

PROJECT SCOPE

The primary requirement for the Treasury was a robust data analysis tool that could enable effective analysis of their data across all business functions. They were looking to procure a business intelligence (i.e., analysis) tool and required implementation support to review existing data sources, convert existing data analysis, and provide initial user training. The initial deployment was planned as an on-premises solution with the capability to move to a public cloud or SaaS solution in the future. The team developed initial and long-term roadmaps to enhance data analysis capabilities across all Treasury functions.

CHALLENGE

The need to share human resources, inventory and financial reports with Oregon's Health Department had dramatically increased the number of users of the reports created by Treasury. Also, many of these users could not generate these reports by themselves. These two factors created a problem Treasury needed to solve, urgently.

SOLUTION

Reproduction and Migration

After studying the client's infrastructures, data connectivity, and existing systems, InfoSmart Technologies proposed a solution that addressed their needs for data security and compliance. Tableau was selected as the best tool for the job, as it provided superior capabilities for connecting databases and capturing all necessary information. Our approach was broken down into several steps, carefully designed to ensure a successful implementation.

1 We gathered and prepared the data. This includes cleaning, transforming, and merging the data into a format that is suitable for Tableau.

2 We connected Tableau to the data source they wanted to work with, such as a database, spreadsheet or cloud storage.

3 Set up hardware and infrastructure for Tableau Desktop and Server: selected infrastructure and type of hardware for the Tableau Server on a Single node, on a cluster with a high availability mode, and Tableau Online for a cloud environment.

4 Build Visualizations: Reproduced the reports and Dashboards on the new system and developed new workbooks and Dashboards as per the client's requirements

5 Migration: We migrated the existing reports and dashboards along with the 350 users to the new Tableau environment on-premises as well as on Tableau Online.

6 Maintenance and updating. We regularly check and update the data source and workbook to ensure that their visualizations remain accurate and up-to-date.

7 Provided training on Tableau products to the users and did knowledge transfer to them.

BENEFITS

Better data visualization

Fast and efficient analysis

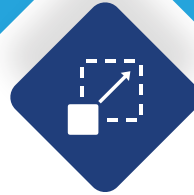Integration with other tools

Customizability

User-friendly interface

Collaboration

Scalability

Mobile accesibility

After our implementation, the time required for creating reports was reduced by 25%.