

CASE STUDY

Excel Reporting Automation Case study

Background

A medium sized organisation had an internal business operation system which handled timesheets, project management, financials and reporting.

Problem

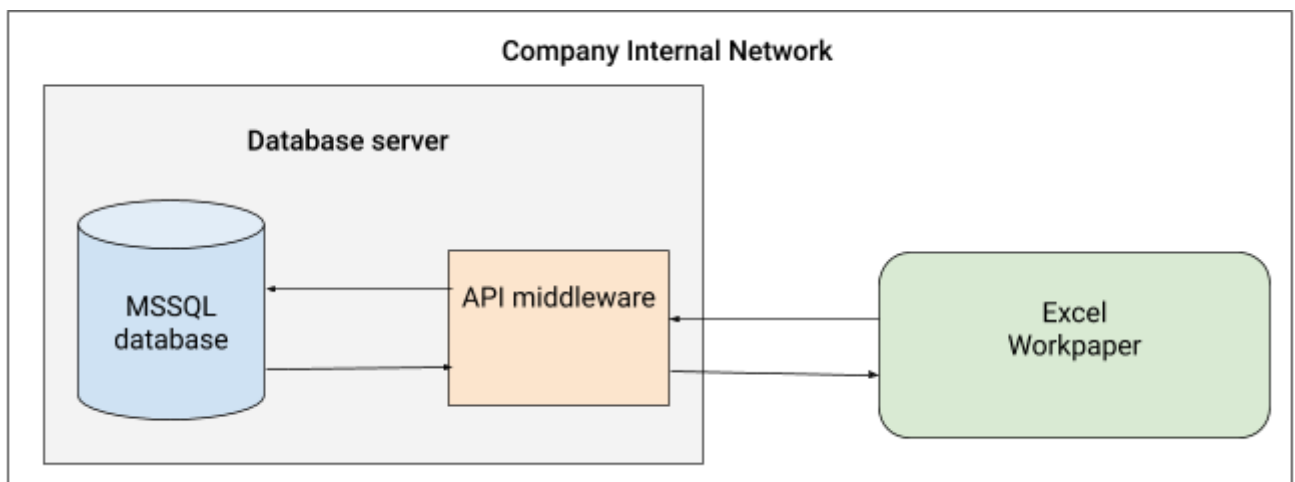
Collecting and analysing data was performed by exporting data from the reporting interface and then copying to Excel for further analysis. For new reports custom SQL queries were run and the exported data was analysed in Excel.

The reporting operation was difficult to maintain as getting the data to Excel was a manual process.

Solution

Team Brookvale offered to automate the process by extending the Excel reporting spreadsheet with the capability of importing reports.

We developed an API server which acted as a gateway between the Database and the Excel Spreadsheet.



The Excel spreadsheet was extended with custom buttons which allowed the spreadsheet to connect to the API server.

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When the user activated a report button in the Excel spreadsheet, an API call was made to the API server which connected to the database and ran the report query. The reporting data was then populated in the Excel spreadsheet automatically.

Outcome

Importing directly in Excel eliminated the manual steps of generating and exporting reports on business operations system user interface.

The manual process inevitably would have introduced human errors that were completely eliminated in the automated process.

Once the initial API middleware and the custom Excel spreadsheet was built we were able to extend it easily to automate further manual steps when generating reports.

In summary the Excel automation approach is faster, more accurate and repeatable compared to manually exporting the reports on the user interface and then interesting to Excel.