

**Client:**

Bristlecone

**Industry:**

Supply Chain Solutions

**Headquarters:**

USA

**Project:**

Office 365. SharePoint 2013 Online, Custom Web-Parts Solutions

## Automating a manual CSAT reporting process

### Challenge

The client had been using a manual process for handling data and generating CSAT reports.

Once the data was collected and placed within Excel sheets, it required some clean up, clubbing up and filtering of the data. Then, all the data in the fields needed to be verified manually to generate specific reports. This operation was challenging and labor intensive.

The client also needed a more efficient way to integrate calculations, send email notifications, schedule report generation and handle dissemination to stakeholders.

### Platform

After gaining an understanding of the challenges faced by Bristlecone when it came to automating the CSAT, Miri performed a critical analysis and feasibility study of all the alternative platforms and tools which could potentially fulfill their requirements. The resulting, best-suited platforms included:

- Office 365
- SharePoint 2013 Online
- SharePoint Designer
- Custom Web Parts
- Designer Workflows

### Solution

An automated CSAT reporting application was developed to incorporate project management and reporting features based on extensive measurements. It provides different permission levels for Project Managers, Customers, and Management Users and utilizes a "Roll-Up" feature where reports roll up on different levels depending on who the information is entered by.

All the Programs, Projects, Releases and Work Streams have "One-to-Many" and "Many-to-One" relationships with each other to suit different scenarios. All the Data is displayed in different views based on what is most relevant and useful for the client. Email alerts and notifications are also generated automatically.

**Key Features:**

**Responsive Web Design:** The application is responsive and suitable for all available devices and platforms, providing a user-friendly experience with minimal resizing and scrolling.

**Cross Browser Functionality:** The website is consistent when viewed across multiple browsers, providing the same look and feel no matter which browser is being utilized.

**Complex Reporting:** The application calls on complex, multi-level reporting-functionality and displays the data on an easy-to-use Dashboard using Nested Data Lists.

**Roll Up:** Roll up functionality on all forms shows the information entered previously by others.

### Results

This automation of the CSAT reporting process was a huge success for the client, resulting in increased efficiency and accuracy.