

Case Studies

For

Office Add-ins

## **Office App for Excel 2016**

Version – Excel 2016 online and above

Client based in - USA

### **The Challenge**

A well known Medical practitioner from USA wanted to build a simple yet powerful tool that predicts complexities that a patient may face post operation. And this was mainly related to the probability of post operation nausea & vomiting. Their existing process was purely manual, involving going through the prediction data sheet and matching it with the patients information. This was a very lengthy and hectic process and was involving human errors. Hence, they required something which would make his work really very easy and remove the scope of manual errors.

### **The Solution**

After understanding clients problem we suggested him to go for Office App for excel. The client also liked this Office App concept. And we developed this application for them. This Office App provides sign in provision for registered users and sign up provision for un-registered/demo users.

The registered users are given a provision to fetch their patients data into Microsoft Excel 2016 online from their medical records and on the other hand the demo users are given some demo data to play with pre-filled in the excel file.

After the data is listed in excel, the user are allowed to select the required data & hit the predict button to get the prediction about the complexities that a patient may face after being operated. The doctors are also given with a facility to modify the data in the excel & re-run the prediction.

This tool has proved to be very useful for the Doctors and has got 100% accuracy in it's prediction.

## **Excel add-in to fetch data from Dynamics CRM**

Version – Excel 2007 and above

Client based in - Australia

### **The Challenge**

The Client wanted to fetch their MS Dynamics CRM data from the Excel itself and then perform some Pivoting, Charting & Transformations. Their current practice was to export the data as excel

from CRM & then get their work done; which was cumbersome & time consuming and hence became the reason to get a practical solution for the approach.

### **The Solution**

Keeping in mind their requirements, we suggested them to go for Excel VSTO Addin. We added a new tab to excel ribbon and added a button in that tab. On click of this button, the user gets prompted for the CRM instance selection & login credentials in a custom task pane. We also provided them an option for “Keep me signed in”.

Once logged in, the user is allowed to define some filter criteria & then fetch the data into the excel sheets directly from MS Dynamics CRM. Once the data is fetched, the user is given different data cleansing & transformation options. It was made so simple that in just few selections & clicks, the fetched data is transformed in the required format. Additionally, some commonly used charts and Pivot Tables were generated automatically.

This made the life of the users working on this data a lot simpler and helped them to become more productive.