



IC Reports Framework

Presented By

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A decorative graphic on the left side of the slide. It features a large circle with a multi-colored border (green, blue, orange) and a smaller grey circle to its upper left. The word 'Agenda' is centered within the large circle. A thin grey arc and a small orange dot are also present in the graphic.

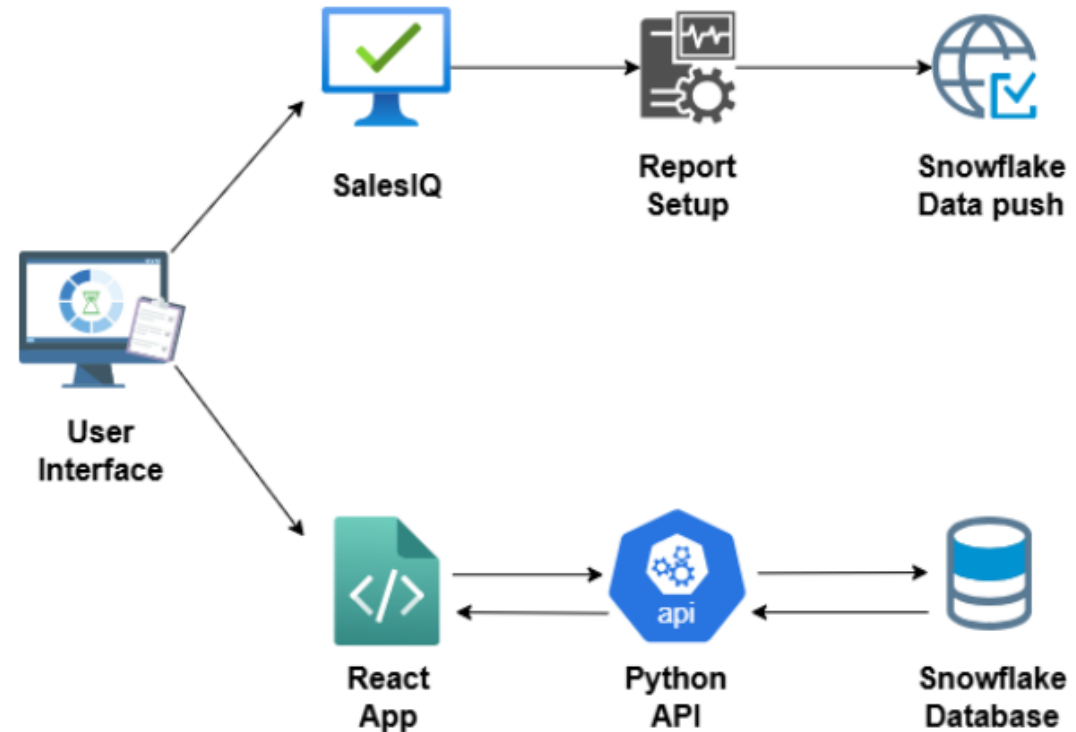
Agenda

- ✓ Framework Overview
- ✓ Components
- ✓ Rollout Strategy
- ✓ Flexibility and Ongoing Maintenance
- ✓ Skillset Required and Pre-requisite
- ✓ Benefits, Effort Estimation and Cost
- ✓ Compare and Contrast with Power BI
- ✓ Transition Plan from PBI to ReactJS

Framework Overview

- **The Framework** is built on the powerful **React.js** framework and leverages **Highcharts** for data visualization. This approach ensures high performance, interactive reports, and seamless user experience.
- React.js is a JavaScript library for building user interfaces, while Highcharts is a charting library that provides a wide variety of interactive charts and graphs

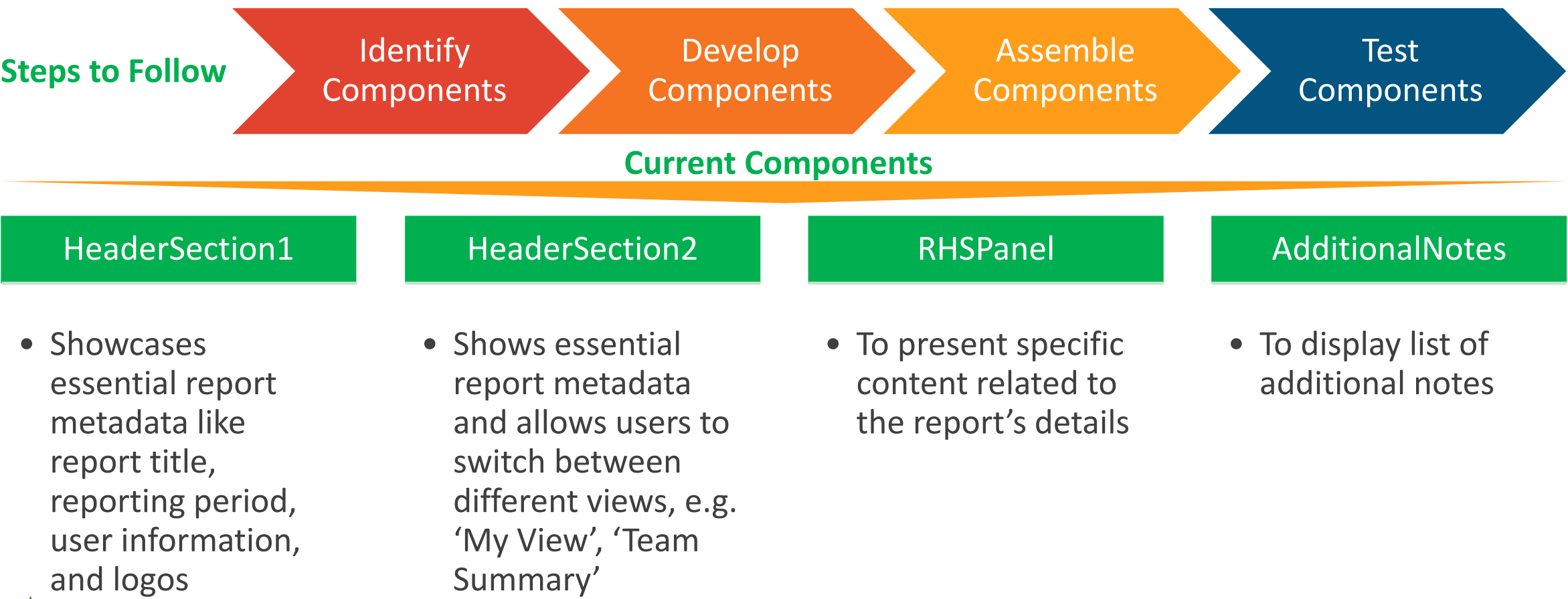
Architecture



Remarks: It integrates seamlessly with the existing IC configuration and report setup. There is no need for additional configuration or changes to the current setup of 'Report Setup' in SalesIQ.

Components

The framework uses a component-based architecture for efficient report creation. Reports are broken into reusable React Components, simplifying management and updates. This modular approach enhances maintainability and scalability, with components applicable to both SalesIQ web and UFE.



DataTable

- For rendering tables with various interactive features, allowing users to view and manage data efficiently

Insights

- Provides a dynamic and interactive way to display key insights related to the report

Chart

- To display various charts using Highcharts, allowing users to visualize data in an interactive way

Example

HeaderSection

Insights

Chart

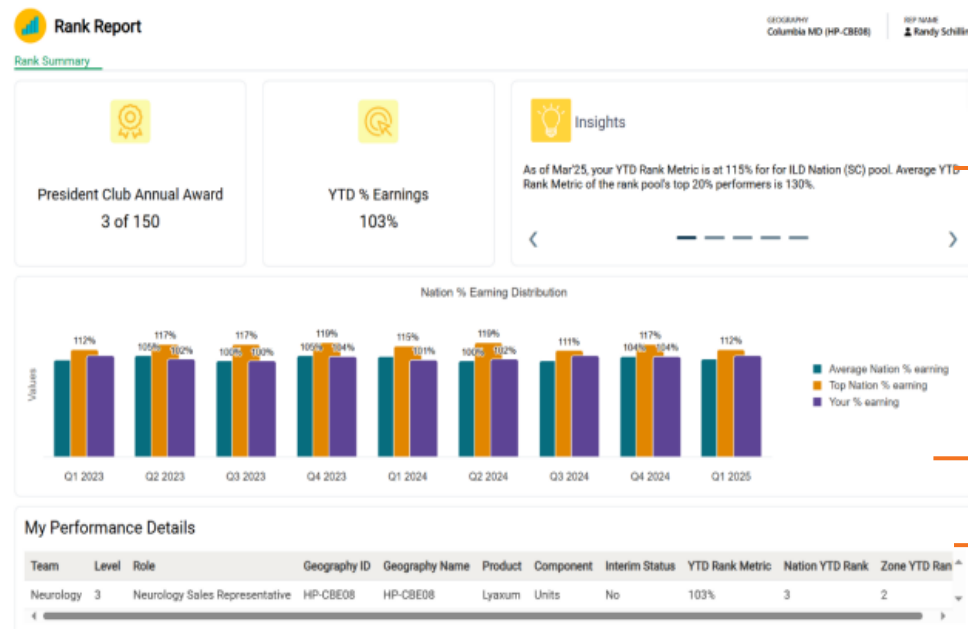
▶ DataTable

RHSPanel

AdditionalNotes

Additional Notes

6 months baseline (September 2024 to February 2025) has been considered for ordering account calculation and 3 months baseline (December 2024 to February 2025) has been considered for historical contribution.



Rollout Strategy



Identify
Data Sources



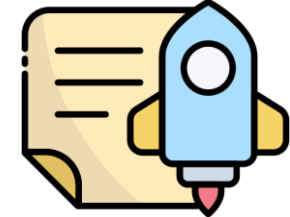
Develop Report
Components



Integrate with
IC Configuration



Test
the Report



Deploy
the Report

Examples of Current Implementations



BI-US Pilot: A pilot report for the Business Intelligence team in the US. The following React reports have been developed:

- Weekly Performance Report
- Scorecard
- Goalcard
- Rank Report
- HCO HCP Report
- What If Calculator



Ferring SIQ Implementation: A report for the Ferring SIQ project. The following React reports have been developed:

- Scorecard
- Goalcard

Flexibility and Ongoing Maintenance

If there are changes to the plan, such as new requirements or updates to the existing reports, follow these steps:



Assess Impact



Update Component



Test Updates



Inform all stakeholders about change

Ongoing maintenance involves regular updates to the framework and reports to ensure they remain efficient and accurate. This includes:



Monitor Performance of Reports



Address Issues



Update Framework



Provide Training

Skillset Required and Pre-requisites

Associates working on these reports must have the following skills:

Knowledge of IC Reports

React.js Skills

Highcharts Skills

Snowflake Knowledge

Python for APIs

Problem Solving

Communication Skill

Before starting the development of new reports, ensure the following prerequisites are in place:

iPad (For Testing)

Salesforce Org Details

Server Details

IIS Server Enabled

Report Data Published

Node.js Installed on Server

SMFT Credentials

Snowflake Credentials

Domain to Host Python API and React App

Benefits, Effort Estimation and Cost



High
Performance



Cost-Effective



Look and Feel



Easy to
Customize and
Reuse

Implementation Effort (when all Reports are in Legacy Setup):

Task	Effort
Initial Setup (IT Tasks)	5
Type (Per Report Effort)	Effort
React Report with DTR report setup (as per the components present in Library)	5
React Report with Non DTR report setup (as per the components present in Library)	6
React Report with small changes	7
React Report with medium changes	10
React Report with complex changes	On Demand
Changes	Category
Font and color changes	Small
New chart configuration (time for POC)	Medium
Calculation logic change (IC Calculator)	Complex

Implementation Effort (when Reports are migrated from Golden Image with no Changes)

Task	Effort
Initial Setup (IT Tasks)	5
Type (Per Report Effort)	Effort
React Report with DTR report setup (as per the components present in Library)	6
React Report with Non DTR report setup (as per the components present in Library)	6

Maintenance Effort	Cost Implications
Any changes or enhancements will be managed and implemented by React Development team	<ul style="list-style-type: none">Requires two dedicated resources- front-end (React) and back-end developmentsInfrastructure access, server access, snowflake access, IIS admin access

Compare and Contrast with Power BI

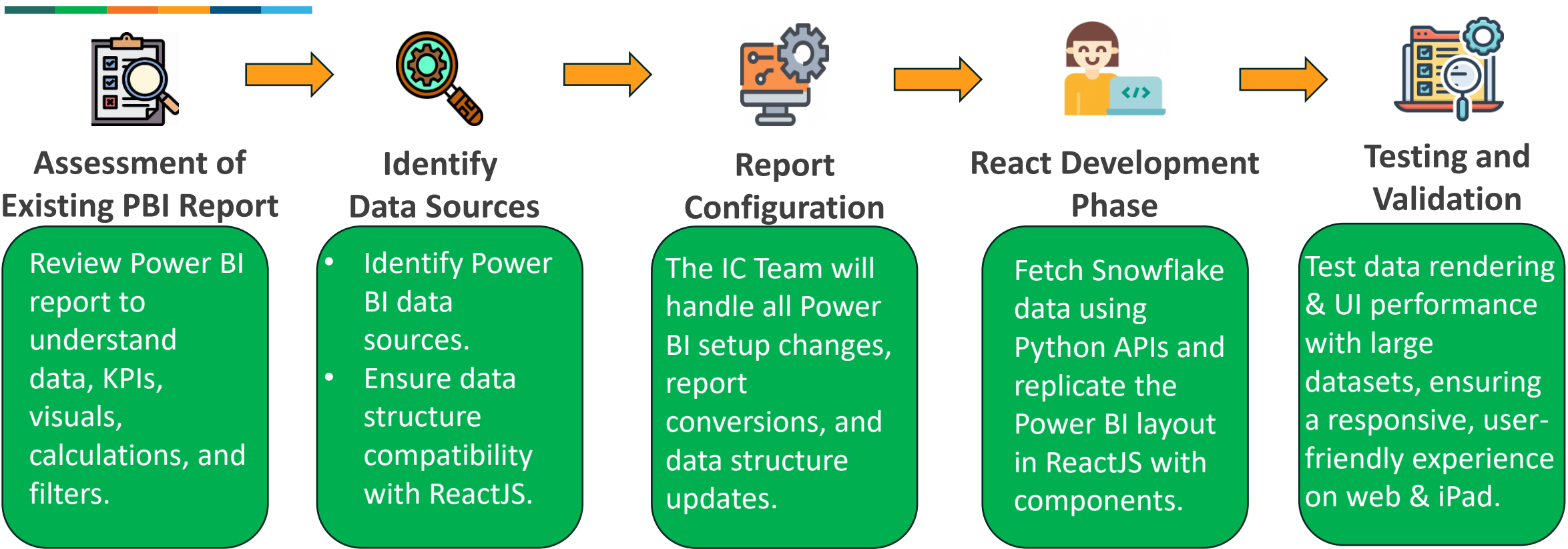


Feature	React (With Components)	Power BI Embedded
Export to PDF/Excel	✓ Included in Datatable component	✓ Native
Print Views	✗ Currently not supported.	✓ Available out-of-box
Custom Format Downloads	✓ Advanced filter functionality to the Datatable component	⚠ Limited to standard formats
Chart Variety	✓ Chart component	✓ Wide but predefined
Custom Design	✓ Full freedom (branding, interactions)	⚠ Customization limited to themes
Dynamic/Interactive UIs	✓ 100% possible	✓ Built-in for standard interactions
Hover Details	✓ Fully customizable	✓ Native tooltips
Drill-down Navigation	✓ You control logic (e.g., via router/state)	✓ Built-in
Cross-chart Filtering	✓ If implemented across components	✓ Ready-made
Row-Level Security	✓ Possible via backend logic	✓ Native RLS support
User-Specific Filters	✓ We're receiving user-specific filtered data in React from Snowflake.	✓ Supported

Compare and Contrast with Power BI (cont.)

Feature	React (With Components)	Power BI Embedded
Whitelisting/IP Controls	✓ We can handle it in salesforce	✓ Controlled via Azure
Custom UX & Layout	✓ Pixel-perfect freedom	⚠ Limited to PBI visual framework
Dev Time	🚧 Relatively high	🧩 Low, mostly configuration
Reusability	✓ Each component is reusable.	⚠ Limited reusability/custom visuals
Embedded Analytics Flow	✓ Seamless with React routing/state	✓ Via iframe or API
Filter Panels	✓ Custom design, can save state	✓ Slicers available
Bookmarks/Views	✓ Can build via user config saving	✓ Native support
Cross-Filtering	✓ Possible with state sync logic	✓ Native
Per-user config (e.g., column select)	✓ Easy via JSON configs/state mgmt.	⚠ Complex via bookmarks/APIs
White-labeling	✓ Fully skinnable	⚠ Limited
Multi-tenant Custom Logic	✓ Possible with smart component design	⚠ Needs complex Power BI setups

Transition Plan from PBI to ReactJS



Report Deployment Strategy	Follows the existing process
Multi-Tenancy Considerations	Follows the existing process
Customer Customization Capability	Includes business team-driven data configurations, these changes can be easily managed based on business requirements



Do you have a question for us?

