

INTRODUCTION from Ian Evans: Services Director - Visual Metrics



Welcome to the second edition of the Visual Metrics technical update. This is produced to inform our supported clients about latest technical developments in the world of Business Intelligence (BI) products & support for Analytical Applications, which are developed for business use from these BI products. At Visual Metrics, we are dedicated to the continuum of application development, delivery & enhancement throughout the life of these applications.

Analytical Applications reflect the current and changing state of business performance, across all business areas including Financial, Sales and Customer Service. It is important that these Analytical Applications continually keep pace, with appropriate modifications, to reflect how the business has moved over time. This can typically be through:

- Internal business restructure; people, products or processes
- Financial growth; organic or acquisitive
- Company rationalisation; divestment of non-core divisions or business functions (outsourcing)

Behind all of this, the key message from Visual Metrics is **“it is not just about technology, for the sake of technology”**, but **“the application of technology for the business value which is derived from the technology”**. We look forward to continually supporting your applications and bringing value to your organisations, for the overall benefit of enhanced business performance through better information insight.

Windows XP Service pack 2 support

Both Business Objects and Cognos are yet to certify that this service pack is compatible with any of their products. It is recommended that you do not apply this patch on Windows XP systems running Business Objects or Cognos products until further notice.

If you are thinking of upgrading your operating system, contact visualmetrics first to check whether the upgrade is supported by your software vendor. You can do this by emailing support@visualmetrics.co.uk



PARTNERING TO ENSURE PERFORMANCE SUPPORT

Analytical Applications are becoming a more dependant component of business management's daily operational activities, and as such are critical to ensuring that informed business decisions are backed up by accurate, relevant and timely information, which is held within these Analytical Applications.

As the product vendors, specifically Business Objects, Cognos & Microsoft bring new and enhanced products to market, customers (& integrators like Visual Metrics) need to ensure they are conversant with latest technical enhancements and that there are business & operational advantages from upgrading versions of software to the latest releases. Additionally, it is equally important not to drop too far behind the latest version of vendor software, due to the risk of falling into a non-supported scenario.



As we operate in a world of “Open Systems” and published standards for interfaces between products which co-exist and cooperate within our IT systems environment, it is important to ensure that there is version compatibility between the various co-existing software products which work in your IT systems architecture. Software product upgrades are not a trivial task when we look at our IT environment of Intranets, Extranets, Firewalls and multi-vendor software products, which need to effectively and seamlessly interface, to ensure we provide performant operational applications for our end user clients.

This is why a “One Stop Shop” for software support from Visual Metrics enhances the ability for our clients to feel a greater degree of comfort in knowing

Visual Metrics has a clear contractual role and the technical competency to support these multi-vendor software environments reactively, should problems arise. Visual Metrics also assist in structured and controlled planning for software upgrades, ensuring all aspects and impacts of the upgrades are proactively considered prior to the scheduled software upgrade.

The underlying goal of Application Support is not only to react to problems which occur, and have them resolved in a timely manner, backed up by contractual SLAs, but to assist in planned pro-active management of the software environment, to maintain the status of the software, in support of the overall business operations.

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Technical Case Study - AMG

Ashworth Mairs Group (AMG) is one of the most successful firms of international Loss Adjusters, Surveyors and Engineers to emerge in the UK in the last 50 years. Having enjoyed rapid expansion, AMG saw that future growth was dependent on being able to bring additional value to its clients, particularly through the supply of management information on client business. Achievement of this key competitive advantage demanded a Business Intelligence system that offered each client its own self service, analytical and on demand view of the status of all its claims business.

AMG have a large number of clients to whom they must report insurance claim information to. Each Client has differing information requirements in terms of report content and presentation. These information requests put huge pressure on a small IT department.

AMG previously used Brio as their reporting tool. The Brio solution worked against a number of SQL Server 'Views' of the Phoenix Underwriting System. Unfortunately this system was not performant enough to meet the bespoke reporting needs of AMG and its clients i.e. in busy periods, Brio queries hung and returned no data.

The proposed Visual Metrics solution was to provide AMG with a Data Warehouse populated from the Phoenix system. Business Objects Web Intelligence software was chosen to act as the web based reporting tool giving both internal users and external clients quick and easy access to relevant Claims data.

The Phoenix Underwriting system is the data source for the AMG Data Warehouse. This system uses Microsoft SQL Server 2000 as its back end database. The system captures information on all Insurance Claims dealt with by AMG including details on the insured party and the nature of the claim.

Given that Phoenix has a Microsoft SQL Server back end, and the Data Warehouse has been built in Microsoft SQL Server 2000, it made sense to use Microsoft DTS as the ETL Tool.

The Data Warehouse has a centralised Fact Table containing information on approximately 200,000 claims. Approximately 12 Dimension Tables link to the Fact Table to provide descriptive analysis of the Facts e.g. Insurer Information, The Insured Party information etc.

Data is extracted from the Phoenix system and loaded into the Data Warehouse every morning at 6am via DTS Packages scheduled using Microsoft SQL Server Agent. Approximately 1 million rows of data flow through the ETL process.

The Business Objects Web Intelligence software allows client and internal users (via the InfoView Web Portal) to access AMG claims data. External users are routed through AMG's De-Militarized Zone (DMZ), thus keeping the Claims information within AMG's secure internal network while making the data available for reporting in the outside world.



Business Objects Designer allowed Visual Metrics to create an easy to use Reporting Universe that allows both internal and external users to create reports that can be run on demand.

Business Objects Supervisor allowed Visual Metrics to set up security to automatically filter data based on the user's login, so that clients can only see claims data that is relevant to their organisation.

There are 4 Standard Views/Reports that have been created:

- Claims Received
- Claims Settled
- Claims Outstanding
- General MI

All Reports are available through the InfoView Portal in Business Objects Enhanced Document Format. Reports are run on demand for certain time periods and Perils and Postcode areas.

There are numerous benefits attached to the implementation of this application at AMG, including;

- Better utilisation of Systems Infrastructure
- Increased quality and relevance of information
- Reduced strain on IT department
- User self service
- Automation of report delivery

jargon jungle

"REPORTING" - A broadly generic word which encapsulates BI, AAs, CPM and KPIs.

"BI" - Business Intelligence.

"AAs" - Analytical Applications.

"CPM" - Corporate Performance Management.

"KPI" - Key Performance Indicators.

"The Data Pump"

- The consolidation and restructuring of operational data in a packaged way, that can be interpreted (consumed) by the user.

"The Information Supply Chain"

- When all levels of Operations and Management reporting are connected, allowing business users in the organisational hierarchy to become more business effective.

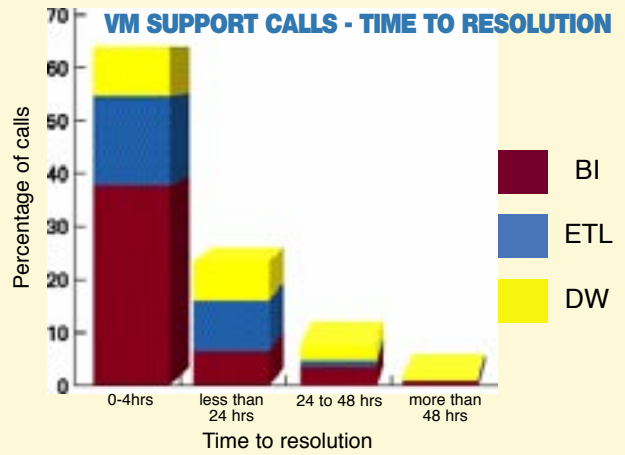
Analytical Applications - a pre-built application using a BI toolset, based on a Visual Metrics "domain of data" which allows businesses to track, monitor and effect business performance through the analysis of their Metrics (aka KPIs).

Data Warehouse - an off-line database which retains all the aggregated and restructured data relating to the delivery of a BPM solution through an Analytical Application.

Data Mart - a single subject-based off-line database which retains all the aggregated and restructured data relating to the delivery of a BPM solution through an Analytical Application.

scores on the doors

The performance of Visual Metrics in call handling and problem resolution is a corner stone to the Support Services which we offer to our clients. Measuring this against our contracted Service Level Agreements (SLAs) is an important element of this Service. We continually track these measures to ensure we are fulfilling and exceeding the contracted SLAs and expectations of our clients.-



1

Tips & Techniques

2

Simple and repetitive tasks often consume resources unnecessarily, as well as tying up important IT personnel. Often, these procedures can be automated, by implementing a simple VB Macro. Macros can perform a wide variety of tasks, from automatically answering warning messages to converting batches of reports to PDF format, ready for distribution. With your AMS provide by Visual Metrics, you are given access to your software vendor's knowledge base, where you have the ability to download the code for many useful Macros.

If your users are scheduling their own reports to run at dates and times of their choice, it makes good practice to allocate staggered time slots at intervals after the Data Warehouse has been updated for users to use. This will minimise network traffic and reduce bottlenecks at busy periods, as well as ensuring that essential reports are not stuck in queues when they are expected to be made available e.g. Mondays at 9am.

Visual Metrics Customer Support Process

1. A support registered ser logs query with IT contact registered with Visual Metrics
2. IT contact registers the query with Visual Metrics, by phone, fax or email
3. Visual Metrics Support department log and validate the problem to screen for a resolution
4. Visual Metrics Support communicate all actions to the client
5. Visual Metrics Support will look to resolve the problem or escalate it internally
6. If the problem cannot be solved internally, it will be escalated to Vendor support
7. Visual Metrics support is the point of liaison and communication throughout

End User

1

Help Desk

2

VM Support

3

VM Escalation

4

Vendor Escalation

5

Call Closure

6

Product Partners



Service Partners



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If you have any other comments relating to the Technical Update, please address them to the Editor at technicalupdate@visualmetrics.co.uk.