



## visualmigration | Future proofing your software investment

### About visualmetrics

**visualmetrics** is a Business Intelligence (BI) solutions provider that develops and delivers best of breed Analytical Applications, utilising BI tools, to its focus markets. Based in Chester, with an annual turnover approaching €4 million, **visualmetrics** also offers consultancy services to construct custom applications tailored to a client's specific requirements.

**visualmetrics** has developed specialist project methodologies for the delivery of its solutions - **DRIVE** for custom Analytical Applications and an accelerated form, **@DRIVE**, for standard applications. These services span the full application life cycle from functional specification to application support and enhancement, ensuring that project risk is managed and ROI is maximised.

**visualmetrics** maintains partnerships with leading product, application and service partners in the BI market. **visualmetrics** sees its value not only in assisting its customers to exploit data as information on which to base decisions, but as intelligence to promote insight into businesses performance.

Our clients include market leaders such as DHL, Unipart, Balfour Beatty Utilities, Places for People, Travellex and CIPD

**visualmetrics** has developed a suite of Analytical Applications, based on their length and breadth of industry and technical experience.

- **visualaffinity** for contact centres
- **visualperformance** for sales
- **visuallogistics** for logistics
- **visualrevenue** for finance
- **visualintellect** for human resources
- **visualavenue** for property portfolio management
- **visualintegrator** the engine to automate the data delivery

### Executive Summary

When upgrading your Cognos Business Intelligence (BI) application to the next technology release, the **visualmigration** service will ensure that your organisation quickly benefits from its technically enhanced BI application. The **visualmigration** service we offer is critical when dealing with a wide set of variables including:

- Business Strategy
- Project Governance
- User Adoption / Change Management
- Process Automation
- Technology Alignment and
- User & Technical product enhancements

At a more technical level we will address aspects including content management, security & access rights, report distribution & scheduling, and technical infrastructure.

**visualmetrics** consultants have the skills and expertise to make your Cognos BI migration project run as efficiently and effectively as possible. We use our proven project methodology, **DRIVE**, in conjunction with the knowledge from our own consultants, and latest vendor product certification, to help your organisation de-risk the implementation, accelerate the time to full user adoption, as well as provide an improved ROI, on your BI product investment.



### Business and Operational Scenario

During the life of any BI application its functional, operational and technical scope evolves, to express the changing and evolving needs of the business, which the application supports.

At the same time, through advancements in BI technologies or recommendations for technical best practices, organisations will find the need to upgrade & migrate their existing BI software and report investment to the latest product release. This may be in order to maintain a level of integration, as a result of changes to operational applications, business and

operational process change, or to retain BI product support.

It is vitally important to stay up to date with the most recent version of the BI technology you use throughout your organisation, to ensure the investment that you have made into this technology is providing you with the optimal functionality that the business needs today, and also into the future.



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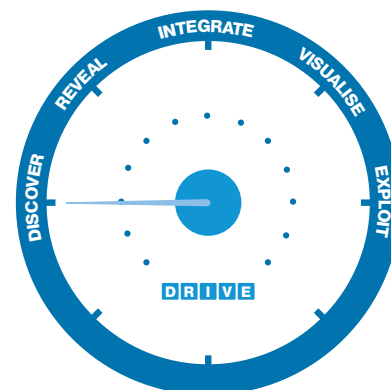
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## Service Overview

**visualmetrics** consultants will work with your organisations own technical team and key business users to provide value through a logical 5 phase process referred to as **DRIVE**:

- **Discover** - Audit / Analyse / Assess
- **Reveal** - Align
- **Integrate** - Amend
- **Visualise** - Launch
- **Exploit** – Business Acceptance



### 1. Audit / Analyse / Assess Service

The **Discover** phase of the **visualmigration** service assesses the current usage of the Cognos application, using a series of key user interviews with administrative staff and a system auditing report. This exercise should be used to gauge how the current BI application is being used. The outcome of this phase will answer the following questions:

- What is the current system architecture, in terms of hardware and software server licenses?
- How many users are actually logging on and using the Cognos application, how frequently, and what is their intensity of usage?
- Which reports are being used, how are they being used, and how frequently?
- Is scheduling used? If so, how? And by what methods are reports distributed?
- What is the current content management policy, including the security model of the Cognos application, in terms of application security, report security and column & row level security, and control rights?

### 2. Align Service

The **Reveal** phase of the **visualmigration** service delivers a document and recommends a migration path based on the findings of the Discover phase. The **visualmigration** service will make recommendations on:

- Whether all reports should be migrated and maintained, or whether some reports are actually redundant. If some reports could be re-written to incorporate the requirements of other reports, and therefore minimise ongoing application maintenance system.
- A content management policy, that provides the most effective and manageable security, across the report and user community, with the least maintenance and administrative effort.
- If scheduling should be used, and if so, how, when and where it should be used to ensure that users have the information they need, when they need it, where they need it and in the format they need it making best use of system resources.
- A Hardware configuration to support the new deployment, including the distribution of components required in order to service the user community (load balancing), and make provision for fail-over.
- An assessment of the current license configuration, and any recommended changes to licenses, taking into account the level and type of usage of the existing system.

### 3. Amend Service

The **Integrate** phase of the **visualmigration** service is to provide technical consultancy to implement the agreed migration tasks, once the migration path has been agreed. **visualmetrics** will then proceed to implement the migration, including:

- Installing the latest relevant releases of the Cognos product suite
- Migrate user security impromptu catalogues and powerplay cubes and reports
- Implement Content Management Policy
- Setup Report Scheduling
- Test

### 4. Launch Service

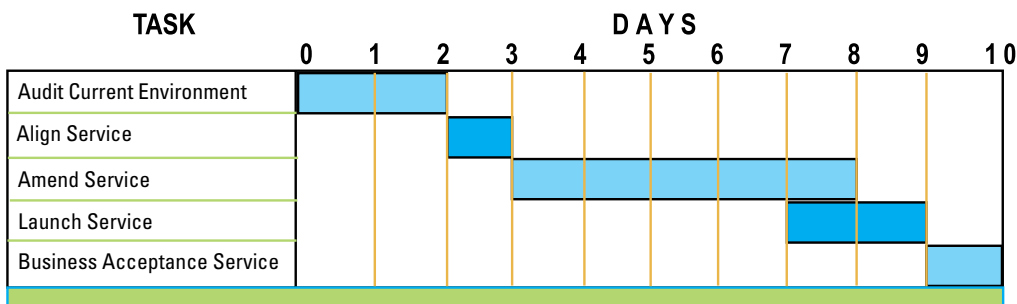
Once the **Integrate** service has completed the upgrade & migration of the Cognos BI application, the **Visualise** phase of the **visualmigration** service will validate and test to ensure that it meets the originally documented requirements:

- All elements of Cognos software are working correctly.
- Cognos configuration settings are tuned to offer best possible performance.
- All impromptu and powerplay reports have migrated successfully, and render correctly in terms of data and formatting.
- All migrated security is applied correctly in the new environment.
- All newly implemented security is behaving in the way agreed.
- Scheduling has been set-up to utilise the system resources in the most efficient way.

Note: **visualmetrics** can also offer a full 'end-to-end' service to convert reports created in your Cognos product suite.

### 5. Business Acceptance Service

Once all the phases of the **visualmigration** service have been completed, within the **DRIVE** project methodology, the senior consultant from **visualmetrics**, will undertake a full project review with the client, to sign-off the work, and ensure the project has been completed to a satisfactory level.

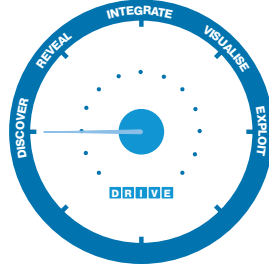


### Summary

To maintain the optimal value from the licence and support costs which you have incurred into your Cognos application, and to ensure you continue to exploit this to greatest effect within the business & IT, the **visualmigration** service is the most cost effective and proven approach to making sure that your business continues to gain an ROI from this critical Cognos application investment.

## DRIVE Implementation Methodology

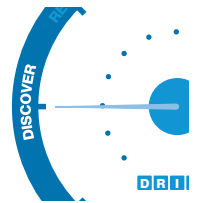
A customer chooses a standard application because it brings the benefit of a tried and tested solution, reduced project risk, and a lower product and implementation cost. This results in faster exploitation of value and stronger ROI to the business.



While a standard Analytical Application removes the traditional need for highly detailed functional analysis, it does not take away the key need of ensuring that the solution is implemented in such a way that it properly supports the business process. As the standard Analytical Application may not exactly fit the detailed needs of the customer, there may be a need to modify functionality to meet individual businesses' operational needs.

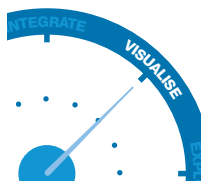
With this in mind **visualmetrics** developed an accelerated form of its **DRIVE** project methodology to implement standard Analytical Applications. We call this **@DRIVE** (Discover Reveal Integrate Visualise Exploit).

The objective of the **Discover** phase is to uncover the changes needed to achieve a full alignment of the Analytical Application with the customers' Methods. This includes any organisational and process changes the customer needs to consider as well as functional and technical modifications needed to the standard Analytical Application. The analysis will include functions across the business which contribute to, or benefit from the solution. This is a customer dependant process, driven by **visualmetrics** with assistance from the client.



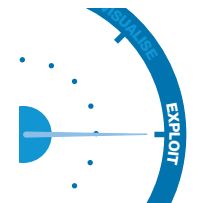
In the **Reveal** phase, documented functional and technical modifications are fed back to the customer. Through this, an optimum solution is identified, and a list of organisational, functional and technical application changes are defined and agreed. Responsibilities, sponsorship and commitments are understood, and the project is launched from feasibility into execution. This activity is jointly carried out by the customer and **visualmetrics**.

Having understood fully how the organisation can make best use of the technology investment, the next task is to Integrate the Analytical Application with the existing operational applications and configure it for best use. This work, which includes engineering any programming modifications, is delivered almost exclusively by **visualmetrics**. Through this we automate the delivery of information into the Analytical Application from the operational applications, a process we call the Information Supply Chain



Training and roll-out of the Analytical Application to the users takes place during the **Visualise** phase. It is now that the information delivered by the solution becomes visible to the broad base of users for the first time. **visualmetrics** assists the customer's internal project team during this phase to ensure maximum knowledge transfer.

**Exploit** is the post implementation phase where benefit and value is driven out of the solution. It is a process primarily run by the customer's project team as it seeks to ensure that the targets set, which have been set, are achieved, and ROI realised. **visualmetrics** acts in a secondary reference and support role as the Analytical Application beds in, and familiarity with it grows.



To derive benefit from the investment, the focus of the implementation must be on ensuring full alignment of the application to the improved business process. **DRIVE** is first and foremost about business process improvement. It is more than solely a technical implementation. While the scope of **DRIVE** is focused on fast and cost effective support from project initiation to implementation, at **visualmetrics** we recognise that Methods inevitably change over time as market conditions and internal procedures change. As new methods diverge from the initial configuration of the application, degradation of benefits takes place. We therefore complement the **DRIVE** service with the **visualsupport** service which maintains the maximum business benefit over the lifetime of the application.