

# Case Study



## CUSTOMER

Sircon - A Vertafore Company , USA

## Title

Consulting, Services and Migration for BI

## CUSTOMER SPEAK

*“We were able to offer complete Analytical solutions to our Insurance Clients who can generate their own reports and perform various analysis using Pentaho BI tool. Also the Multi-tenant architecture enabled them to support users across different organizations with a single instance of Pentaho integrated with complementary technology from Oracle and Sun Microsystems. All the above was made possible by the innovation and expertise deployed by the GrayMatter team really”*

## Consulting, Services and End-to-End Migration for BI

### Company Overview:

Sircon Corporation is the leading provider of software for insurance, offering a full line of award-winning solutions that boost productivity, lower costs, and help grow your business. Sircon's Producer Lifecycle Management compliance software empowers insurance carriers, agencies, education providers, state regulators and individual producers to improve business efficiency by simplifying and accelerating producer sales authorization.

### Key Challenges:

SIRCON wanted to address "multiple user scenarios" for their customers, to deliver metrics-focused reports with a graphical view of overall transaction activity at the monthly or weekly level, and let users create and publish their own reports "side by side with Sircon's packaged reports."

Sircon wanted to enable power users to create and publish their own reports, so that custom reports could be managed and delivered side-by-side with Sircon's packaged reports in a unified web application. They wanted users to quickly download tabular reports in Adobe PDF or Microsoft Excel format.

Sircon has provided a home-grown security solution used in conjunction with basic legacy reporting security. Each product has 2 system-level user accounts in reporting system, a user for viewing reports online and a user to submit and view background jobs. Each user is only restricted to viewing reports for the specified product folder. There were report level permission differences between the online and background users. They wanted to maintain the extent of security within Pentaho reporting framework

### Other Challenges

#### Migration from the existing reporting system.

- Each of the reports that have to be migrated comprises of queries which contain either a single query, dual query or more.
- Selection of reports that can be designed and migrated to Pentaho
- The original report queries contain pre-defined parameter names and do not allow the user to execute, unless a valid value is assigned to each of them. These values were picked from the Actuate interface and substituted in the queries for design purpose.
- Certain reports were required to display the column values based on certain conditions. This was accomplished using BeanShell Expression functionality. Design of complex expressions was involved during the process, to display the report data in the required format.
- The reports were designed to accommodate all the data and to display it with clarity. All the reports were designed to adhere to a common template, common color scheme, consistent font size, font family etc...
- Integration of existing security model to Pentaho

## **Solution:**

Pentaho's multi-tenant architecture allows them to support thousands of users across different organizations with a single instance of Pentaho integrated with complementary technology from Oracle and Sun. Pentaho Reporting Enterprise Edition is deployed with a JBoss Application Server running on a Sun UltraSPARC server using the Solaris operating system. The DWH was exposed to the users for Analysis using the Pentaho Analyzer tool, as a demonstration of the capabilities of Pentaho's slice-and-dice analysis to the end users.

## **Summary of Report Migration:**

- Analysis of report queries for designing purpose and the identification of reports for migration.
- Identifying the adhoc parameter values that need to be substituted in the queries, by picking them from the Actuate interface.
- Accessing the required report in the Actuate report designer and making appropriate decisions based on the Page/Report/Group header and footer, item details etc.
- Designing the report using the Pentaho Report designer, by specifying the working query (analyzed), and by following the template design required.
- Editing the reports using the Pentaho Design Studio , to accept parameters from the user, Jndi name, etc. These parameters are handled and served as input to the query and are also displayed in the report as the input value changes (dynamic).
- Verifying the accuracy of the queries, design layout, displayed data, handling of the input values etc.
- Providing the user with the designed reports (xaction and xml files) and providing the user with the access URL's to view the reports in a compatible browser.

## **Results:**

- Sircon was able to offer complete Analytical solutions to their Insurance Clients who can generate their own reports and perform various analysis using Pentaho BI tool.
- Multi-tenant architecture allows them to support users across different organizations with a single instance of Pentaho integrated with complementary technology from Oracle and Sun Microsystems.
- Pentaho Reporting Enterprise Edition addressed all of these needs and allowed Sircon to upgrade their functional capabilities while reducing their costs for embedded reporting.
- Using the Pentaho Reporting system, Sircon could migrate all their 600 operational reports within very quick time.
- The application serves users across 16 client states, accessing a total data volume over half a terabyte in size using the Oracle database.
- The deployment provides Sircon with rich functionality and cost-effective flexibility.

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