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300 Spectrum Center Drive
Suite 400, Irvine, CA 92618



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Business Intelligence



eCommerce

Spotlight on Client Success

CLIENT PROFILE

Name:

Top 25 US Insurance Company

Description:

A premier retirement, investment and insurance company serving the financial needs of approximately 13 million individual and institutional customers in the United States.

Industry:

Retirement, Investment, Insurance

Need:

Transition client facing reporting from Actuate to SAP/Business Objects

Results:

- Successful Migration
- Convert 50 reports to SAP
- Create Custom SAP Portal
- Integration with Corporate IT infrastructure

"Innovent brought a level of expertise and foresight to our conversion process that would have been impossible to replicate with internal IT resources. Their knowledge and commitment enabled us to swiftly deliver an elegant, customized solutions that was tailored to the needs of both our internal and external customers."

- Business Sponsor

BACKGROUND

The Employee Benefits (EB) division at a major insurance firm was the largest consumer of Actuate reporting services within the company. After seven years, it was time for EB to upgrade Actuate. At the same time, Corporate IT wanted EB to migrate to SAP BusinessObjects which had become the business intelligence standard.

The business was reluctant to fund either an upgrade or a migration if it did not provide direct return on investment through either improved end-user experience, reduced cost, or an improved ability to create new reports.

EB's reporting solution was highly customized and complex. The previous upgrade had been costly with issues in both the web interface and the report designs. The reports were riddled with custom code that addressed both data issues and complex presentation rules. The report portal was a customized version of the Actuate portal that allowed EB to integrate reporting with the look and security of EB's other web applications.

Analysis of the cost to upgrade Actuate indicated that a migration to SAP may provide better long term return, primarily through reduced maintenance and support costs.

BUSINESS CHALLENGE - IS IT POSSIBLE?

EB had tried several small scope efforts to migrate existing reports to SAP, but all of these efforts had been abandoned due to the complexity of the challenge. For this effort EB turned to Innovent Solutions to assist with a feasibility study. Innovent was chosen based on its experience with SAP, Actuate and conversions between the products.

During its successful feasibility study, Innovent identified three primary migration issues:

- Technical differences between Actuate and SAP/BOE reporting products
- Report Delivery to external clients
- Conformance to Corporate IT Standards

Technical differences between Actuate and Business Objects

EB developers took full advantage of Actuate's rich programming interface. Each report used libraries, inheritance, dynamic layouts, and data manipulation. Even the simplest reports were quite complex. In many cases, SAP did not have matching functionality.

SAP uses different features to build and deliver reports and Innovent was able to demonstrate these features while converting several key EB reports. The key to Innovent's approach was to re-think each report in terms of SAP best practices.

Report Delivery to External Clients

EB wanted a solution with a natural, user-focused interface that was customized on a per client basis. InfoView, SAP's client facing solution, did not provide this function out of box. Rather than trying to customize InfoView, the decision was made to create a custom web app that embedded SAP reporting. Innovent was able to create a prototype web app that served as a SAP portal using the same technologies employed by EB's existing web applications.

Conformance to Corporate IT Standards

The corporate SAP service had a specific delivery model that did not match EB's business requirements. Corporate IT did not support many of the server features, such as scheduling or row level security that were required by the EB team.

BUSINESS SOLUTION - MIGRATION TO SAP BUSINESSOBJECTS

The solutions to the business challenges were implemented using a team made up of Client and Innovent staff. Innovent's staff used its SAP product experience to address the Client's unique business challenges. Acting as both team leaders and technology mentors, Innovent's team helped to design, build, and deploy a successful system migration.

Conversion Cost and Return on Investment - Generating ROI was contingent on two factors: first reducing the cost of the development effort and second on delivering more value from the reports. Adopting agile development practices with the migration team was key to the success of both of these factors. Through early and meaningful engagement with the business team, the developers were able to focus on features that were most important to the business. In addition, many features from the original reports were dropped because "we never use that".

Innovent was also able to add features to the reporting solution that added value to the business and its clients. Core to this was a focus on customers goals. Where the legacy reports delivered the information that was required, they did not always deliver what the customer wanted. The new system was focused on delivering the information that customers needed to make better decisions. Upon completion of the project the EB reports become a feature that was included as part of the sales cycle, rather than just an a compliance checkbox.

Technical Conversion Differences

The legacy reports used a tremendous amount of data processing and business logic within each report design. Innovent used SAP's features to process the data in a fundamentally different way. Complex data processing and business logic was moved from the report and into the SAP Universes, which could then be shared among multiple reports. This approach allowed IT to focus on data performance and security in the Universe while the business power users were empowered to generate their own reports from those Universes.

A key aspect of the SAP/BOE universes was the adoption of row level security. End user exposure to data was controlled in the universe, making the WEBI reports simple and secure. Row level security was tied to SAP security through users membership and roles in an EB controlled database which was in turn integrated with the corporate SAP system through an automated LDAP interface. Corporate IT embraced the new service model as a way to improve its service model for other lines of business.

Embracing WEBI reporting helped in a number of other ways. User Input controls removed the need for many of the filter parameters that were required in Actuate. WEBI's tabbed report interface allowed a single design to replace multiple Actuate reports. Finally WEBI's export features allowed end users to transform their reporting data into usable Excel files.

Report Delivery to External Clients - The EB web team uses Struts2 as their standard web framework. The Innovent consultants built a custom SAP/BOE portal using Struts2 technology. Fully integrated with the EB security, it uses SAP/BOE API calls to allow users to quickly run reports, save results, and schedule new reports. A simple interface, based on the products that the client had enrolled in, allowed clients to quickly navigate to the information that they needed.

Embedding SAP as a service within EB's standard web delivery model has paid dividends in terms of maintenance and upgrade costs of the EB Reporting Portal. Since initial roll out, the company has successfully re-branded the web site and performed numerous updates within the EB web stack.

THE RESULTS

Successful Report Migration: The EB development team has deployed fifteen WEBI reports to its production environment that deliver the same content as approximately 60 Actuate reports.

Successful Portal Migration: EB successfully rolled out the client portal and shut down access to the Actuate system. The new reporting interface has become a part of the Sales cycle as a feature that differentiates Client's product from its competitors. At a technical level, EB IT staff has been able to upgrade the portal adding new features and upgrading the technology stack with no significant issues.

Successful Corporate Adoption: Innovent worked with the EB and corporate IT staff to identify and add functionality to the corporate delivery model to insure that EB could deliver reports direct to external clients, while maintaining the rigorous corporate security and IT standards.

Successful Customer Adoption: Over three thousand external clients have been given access to the system, where they can run, view and schedule reports that deliver the information they want at the times they need the reports.



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Innovent Solutions
300 Spectrum Center Drive, Suite 400
Irvine, CA 92618

Phone: 866.466.6868
Fax: 562.262.2835
Email: info@innoventsolutions.com

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Find out more:
www.innoventsolutions.com

Innovent Solutions provides consulting, training and support services and solutions for Search, Business Intelligence and eCommerce technologies. We build systems that enable our clients to:

- Find the information they want and need
- Understand the context and meaning of information
- Trust the information to be accurate and timely

Our focus on customer goals and objectives combined with deep technical depth and experience, allow us to build successful, high visibility solutions that deliver immediate value to our clients.

Innovent Solutions is a privately held company headquartered in Irvine, California with offices in Minneapolis.

HOW CAN WE HELP YOU?

Innovent Solutions provides consulting, support and training services to organizations that use Business Objects. Innovent's experience with Business Objects covers the full BI product scope including:

- Requirements Scoping and Analysis
- System Architecture
- Installation and Configuration
- Universe Design and Development
- WEBI and Crystal reports development
- Security Design and Integration
- SDK/API Development
- Web Integration with existing or new systems