

## Challenge BI migration to a new platform

A Midwest marketing firm in the process of breaking off from its parent company had a decision on its hands regarding its business intelligence platform. In order to continue using the third-party solution it had been leveraging under the former company, it would need to take on all of the licensing fees that had previously been shouldered by the parent organization. The alternative was finding a technology partner to develop a custom solution.

After making the financial decision to save money with a custom Microsoft solution, the client engaged Magenic. Because the third-party solution and Microsoft technologies weren't a 1:1 match, the embedded code was not compatible for transfer. Beyond that, the client's data was not stored in a Microsoft database, but rather an Oracle database.

## Solution Microsoft on top of Oracle database

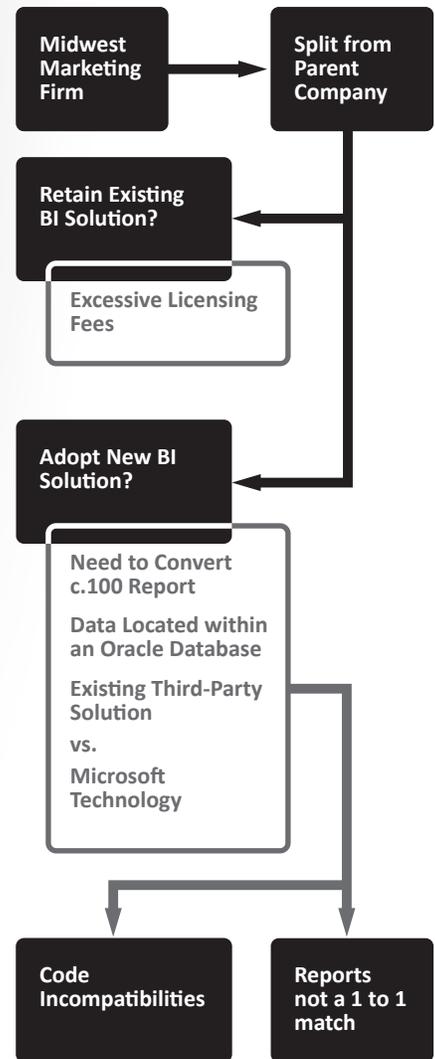
Magenic built a Microsoft SQL Server Reporting Services (SSRS) portal on top of an Oracle database to access the data within. Our principal consultant re-wrote the underlying code of each report and redesigned the report structure, shifting from a banded format to free form. The solution offered dynamic column generation, meaning users can specify desired parameters which are subsequently returned in a custom report. Magenic's solution manages large amounts of data, with some reports exceeding hundreds of columns. Visualizations were added to enhance the user experience and expand the client's reporting capabilities.

Due to the sensitivity of some data, multiple security levels were defined based on user roles. For example, lowest security settings saw social security and credit card numbers completely blocked out, while the middle level saw the last four digits and the top level saw the entire number. Internal users and external users had different access levels as well. The security settings were intricate enough that they could be tailored to specific users on a per report or per data basis.

Following deployment, Magenic assisted in training the client's team on using the new solution to accelerate its adoption into organizational workflows.

## Financial Decision Following Split

After splitting from its parent company, a marketing firm had two choices: keep their out-of-box business intelligence solution but pay licensing fees that had been previously shouldered by the parent company, or find a technology partner to develop a custom Microsoft solution. A custom solution carried its own risks, such as report conversion and code incompatibilities, making an experienced technology partner critical.



**Result**

**Faster data access, better user experience**

Magenic’s Microsoft solution provided a reporting solution built for business rather than IT and saved the client millions in licensing fees. The SSRS solution improved the user experience thanks to a short learning curve from its similar look and feel to other Microsoft applications. As a more flexible and web-friendly application than the previous out-of-box solution, SSRS provided users with easier, faster access to the data they needed. The added visualizations served as an extra element to extend reporting capabilities beyond what the old system could offer. Magenics assistance in training accelerated what was already a smooth transition to the new technology. Magenic went above and beyond the client’s expectations by not only converting legacy reports and re-writing their code; our principal consultant created new reports for the client. The solution proved to be so successful that other divisions of the company expressed a desire to move over to the same platform.

**Summary**

After detaching from its parent company, a Midwest marketing firm made the financial decision to switch from a third-party business intelligence solution to a custom Microsoft solution. They engaged Magenic to convert nearly 100 reports and rewrite the underlying code, as the third-party software and Microsoft SSRS weren’t a one-to-one match. Despite needing to build on top of an Oracle database, Magenic delivered a business intelligence solution that saved the client money and improved user experience through easier data access.

**Technology Used**

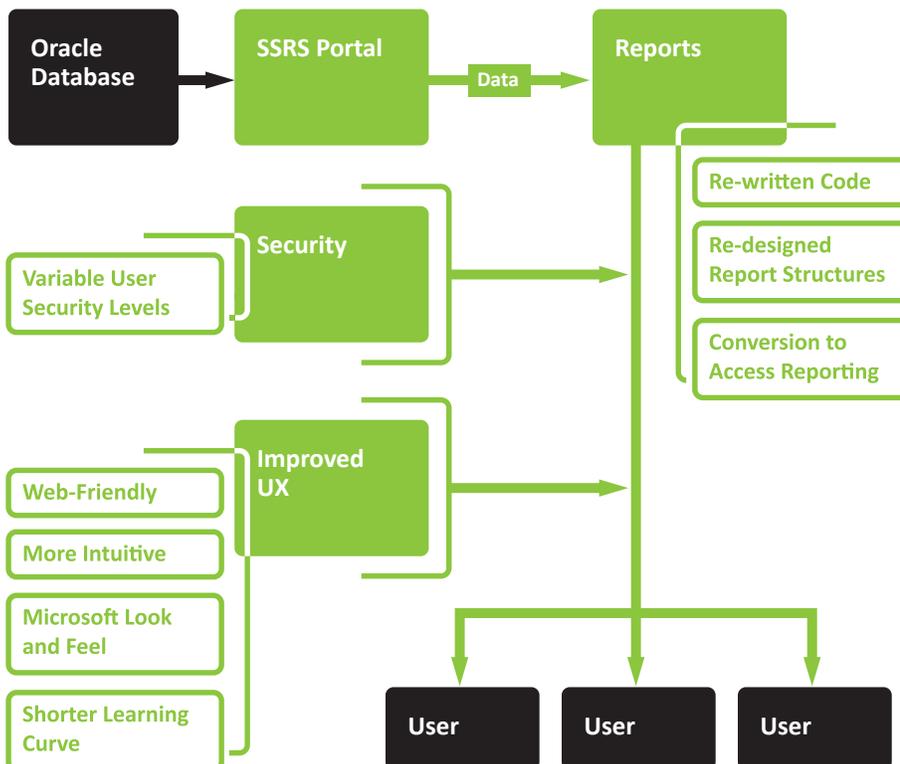
- Microsoft SQL Server Reporting Services
- Microsoft Excel
- Oracle Database

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