

Customer Profile

Information Builders enables agile information solutions with the WebFOCUS business intelligence (BI) platform and integration technologies from iWay Software.

BC Housing

Snapshot

Organization

BC Housing, a provincial crown agency that develops, manages, and administers a wide range of subsidized housing services throughout British Columbia.

The Challenge

Determine the levels of support for housing providers and develop comparative benchmarks for monitoring financial compliance and performance.

The Strategy

Develop a BI environment that handles everything from financial reporting to business performance monitoring, accessing live production data as well as a data warehouse.

The Results

Better methods for calculating housing subsidies, assessing risk, and reviewing the activities of more than 600 housing providers across the province.

Information Builders Solution

WebFOCUS, iWay Software, Consulting.



Eileen Tiessen, manager of program operations, Vanessa Siew, business analysis manager, and Michelle Merkley, program auditor, BC Housing.

BC Housing Deploys Self-Service BI

WebFOCUS Helps Improve Monitoring of \$100 Million In Subsidies

Government agencies at the local, regional, and national levels are using business intelligence (BI) technology to improve operational efficiencies and present information online. For example, BC Housing, the provincial crown agency that develops, manages, and administers a wide range of subsidized housing services throughout British Columbia, is using technology from Information Builders to calculate housing subsidies and review the activities of more than 600 housing providers across the province.

"We now have an automated mechanism for monitoring more than \$100 million in subsidies each year," says Eileen Tiessen, manager of program operations at BC Housing. "We're using technology from Information Builders to determine the levels of support for our housing providers and develop comparative benchmarks for monitoring financial compliance and performance."

“Thanks to the point-and-click interface we created with WebFOCUS, our staff has quickly learned to use the new application. The application supports highly parameterized input, with different features for different skill levels – everything from canned reports to advanced online analytical processing (OLAP).”

With help from its not-for-profit partners, BC Housing provides publicly funded social housing to about 30,000 residents. Tiessen heads a staff of 13 people responsible for managing subsidy payments and reviewing financial statements. A big part of her job is ensuring that public money is being spent prudently and responsibly. All housing providers are expected to adhere to the financial terms of the operating agreements and the subsidies they receive must be used only for designated purposes.

Hitting a Wall

BC Housing’s BI and reporting initiatives began in early 2001 when users hit a plateau with their Cognos reporting software. “We needed to evolve to the next level of enterprise reporting,” says Vanessa Siew, an IT professional who manages BI reporting initiatives at BC Housing. “We weren’t sure we could accomplish this with the Cognos Impromptu platform, which is primarily used to supplement the lack of reports from our legacy financial system. This started us on a search for more robust BI tools with greater dynamics and scope. We wanted capabilities for multidimensional analysis, enterprise reporting, and enhanced Web delivery.”

BC Housing tendered proposals from Cognos, Crystal Reports, and Information Builders. Information Builders’ WebFOCUS software was valued for its mature Web architecture and advanced Web-delivery capabilities. “We also liked the integration technology embodied in the iWay platform since we see reporting and ETL as complementary functions,” Siew says. “With WebFOCUS and iWay, Information Builders had the integrated tool set we were looking for.”

Launching New Applications

The WebFOCUS Housing Provider Profile application, leveraging the architecture and data warehouse delivered by the proof of concept, was completed in less than three months.

“We needed to create a profile of each housing provider from a financial and an agreements-compliance perspective,” explains Siew. “With 600-plus housing providers, how do we know which ones need the most help and support, not to mention which ones pose the biggest financial exposure?”

In the past, the information necessary for answering these questions was distributed among several different sources, including hardcopy files, Excel spreadsheets, and a Microsoft Access database. Reentering the information into spreadsheets and compiling it with hardcopy information was a laborious process, and the results were only available on a local level to small groups of people. “Assessing financial data was a painful process of manually extracting data into spreadsheets and sharing the results with users,” Siew recalls. “People came up with their own methods, and used some of their own assumptions. With the new reporting architecture, the data is refreshed according to a consistent schedule that everyone understands.”

Extract, transform, and load (ETL) processes are handled automatically by iWay. Once in the warehouse, WebFOCUS accesses the information and delivers it to users as part of an online assessment process.

“WebFOCUS has become the standard reporting platform for the organization. Ultimately, Cognos will be phased out entirely, along with our legacy financial system. We have new capabilities that we did not have before.”

“WebFOCUS allows us to consolidate the information so we can obtain instant snapshots of each housing provider at any given point in time,” says Tiessen. “We applied a risk-management model, then we used the BI software to devise financial measures to determine how well each housing provider is doing.”

Information Builders’ Consulting supplied development and support services during the creation of the Housing Provider Profile application, including writing reports and assisting with the self-service architecture. “Without the consultants, we could not have delivered the project,” says Siew. “They spent a lot of time listening to our needs and researching the technology, which resulted in a very useful system.”

Move-In Condition

Currently, both internal and remote users use the Housing Provider Profile application. This includes property managers and other employees in the field via the BC Housing network. All users have access to standard, parameterized reports, while power users can use the data in the warehouse to do ad hoc reporting.

“Thanks to the point-and-click interface we created with WebFOCUS, our staff has quickly learned to use the new application,” says Michelle Merkley, a business analyst in BC Housing’s Program Audit department. “The application supports highly parameterized input, with different features for different skill levels – everything from canned reports to advanced online analytical processing (OLAP).”

The Housing Providers Assessment committee routinely examines the data to identify housing providers who are experiencing challenges in maintaining the standards of management required under the terms of their operating agreements. “Before we had WebFOCUS and iWay, we could not have accomplished this as easily,” says Tiessen. “This system provides the insight we need to assist Housing Providers while continuing to respect and support the expertise and autonomy of the nonprofit and co-op housing sector.”

Surmounting Development Hurdles

Despite their quick success, Siew admits the BI projects have not been without challenges. For example, on two occasions, upgrading the WebFOCUS software took longer than expected. Additionally, they were unable to get the Developer Studio working to their satisfaction in their previous Linux-based reporting environment, forcing developers to hand-code reports. “Migrating the Developer Studio to the Microsoft Windows platform solved the problem,” says Siew. “We currently have an excellent technical resource from Information Builders’ Consulting who is helping us resolve any lingering issues.” All in all, Siew says the positive results outweigh the challenges.

Adding On

BC Housing is also using WebFOCUS to examine work orders and purchase orders related to capital maintenance and improvements at each housing facility. The BI software pulls data from a range of disciplines – such as financial, contracting, and repair systems – then rolls it all together to summarize the work that is taking place at the project, building, or company level. “Users can drill

Find Out More

To find out how our solutions can help your company succeed, talk to an Information Builders representative today. Contact your local Information Builders office, visit us at informationbuilders.com, or in the U.S. and Canada, call **(800) 969-4636**.

down into various places, such as the GL system to identify expense categories," explains Merkley. "WebFOCUS supports links to all of our production systems, so we're not unnecessarily pulling details into the warehouse, but drilling directly into the transactional systems."

Enterprise financial reporting is another emerging domain. Before Information Builders came on the scene, it took three to five person-days each month to distribute financial reports from the legacy accounting system, and the reports did not include transaction-level detail. Now, WebFOCUS ReportCaster delivers financial reports automatically, and managers can drill down to the minute details as necessary. "WebFOCUS makes the financial reporting process more timely, useful, and efficient," says Siew. In the future, BC Housing plans to implement the WebFOCUS Business Intelligence Dashboard to add visual appeal to some aspects of the report-development process. They also want to deploy single sign-on capabilities, and use the WebFOCUS Financial Reporting application to deliver self-service analytics to the accounting department. Finally, BC Housing is using WebFOCUS to boost its business performance monitoring (BPM) initiatives.

"We are working on operational metrics associated with the preventative maintenance data to enable standardized comparisons across regions," Siew explains. "WebFOCUS has become the standard reporting platform for the organization. Ultimately, Cognos will be phased out entirely, along with our legacy financial system. We have new capabilities that we did not have before."

Boosting Worker Productivity

The process of calculating subsidies is made easier with WebFOCUS and iWay in the picture. Before releasing its monthly subsidies, BC Housing used to run three different financial reports, manually combine the results into Excel worksheets, and then convey the data to the accounting department. Now, WebFOCUS and iWay consolidate the legacy information and generate reports that can be sent to the pertinent individuals by e-mail.

Tiessen's team formerly had only circumstantial or anecdotal evidence indicating a problem with a housing provider, such as a letter from the provider's accountant. Now they have a balanced assessment that considers many factors and applies them consistently to everyone. This allows her staff to utilize in-house resources to monitor performance and build and maintain strong external stakeholder relations.

By lowering the administrative requirements imposed on its staff, BC Housing can provide support to more housing providers. "Our new business intelligence environment makes our staff more efficient all around," concludes Tiessen. "WebFOCUS and iWay help automate cumbersome manual processes so we can work more efficiently. We have reduced the amount of time we spent reviewing financial statements and we are handling a 15 percent greater load in subsidy payments with the same staff. Best of all, we can allocate our resources in a more efficient manner based on the knowledge we gain through this system."