

ENTERPRISE GUIDE – FIRST IMPRESSIONS

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BACKGROUND.

Over the last 5 years OCS has been providing a Helpdesk service to the Credit Risk Team of a large UK Bank. At the beginning of year, as part of this service, OCS were to extend the systems support provided by reviewing an existing application that provided a series of standard reports and to suggest improvements. The main benefits sought were a reduction in resources, increased flexibility in the generation and presentation of the reports and to have a broader dissemination option.

EXISTING SYSTEM.

The existing system was made up of approximately 100 reports created using Excel Spreadsheets and distributed to staff within the Bank via Email. The reports were generated monthly and a considerable amount of man time was expended to prepare and distribute them. The majority of the reports could be grouped into 8 territories and for each territory there were two sets of reports relating to the 10+ areas within the territory. The layout of the reports was identical, with only the data changing.

REQUIREMENT.

OCS rapidly realised that an easier way to produce these reports should be feasible; AS the data used within the reports was extracted from a SAS Data Warehouse the most logical initial assessment was to use the reporting capabilities within the SAS Software. During an initial meeting with the main Client User and Sponsor it was made clear that any alternative tool OCS Proposed had to:

- be easy to use
- have a fast development time
- have the same quality of reports as Excel
- be flexible to support ad-hoc and further scheduled reports
- allow reports to be created as groups.

The Client also stipulated a desire to be able to:

- filter the data
- use data from various sources (including Excel)
- export the report data to excel
- email the reports.

SOLUTION.

The existing SAS Software the client had would have met all the criteria though the skill set and learning curve may have been greater than considered acceptable for the medium to long term. A number of staff were moving to different roles or taking leave so a quick skills pick-up was sought. OCS determined that an additional module, Enterprise Guide would provide the low skills pick-up requirement, yet still enable all SAS Software functionality to be available. A demonstration of Enterprise Guide was organized for the Client and it was agreed that the tool could successfully be used to replace the spreadsheet reports and more importantly, help reduce the amount of time required to create the reports.

As the data structures and the exact layout of the reports were reviewed by OCS it became apparent that:

- the data needed to be transposed before it could be used to create the reports.
- all reports followed a standard layout with only the variable names and actual data subset being different, therefore a macro was deemed appropriate.

A standard base SAS program was created to manipulate the extract from the Data Warehouse and provide the data required by the report system. This was set up as an ICON on the Administrator's PC.

OCS subsequently began to consider the set up of the reporting application within Enterprise Guide. Firstly, using the administrator functions, the customised SAS autoexec program that was to be executed as part of the start-up of Enterprise Guide was defined. As the Client felt that that security was not required within the application at this time, this part of Enterprise Guide was not used.

Once the administration functions were complete, OCS set up the reporting system. This was defined as a series of projects where each one referred to one territory and within this a series of reports would be created each representing an area within the territory. At this point OCS came across a key challenge.

The Client wanted a specific layout for the tables, which although very straightforward when using the options within PROC TABULATE, was difficult to accomplish in Enterprise Guide as these options are not available. These included using:

- Noseps
- Order = data,

and only using the All statistic for some of the numeric columns.

OCS therefore used Enterprise Guide to create skeleton code and modified this code and set it up as a SAS macro for ease of producing the standard reports. Once the basic report was created, OCS was able to quickly create each project and load the data and code, modify the code appropriately and hence create the series of reports for the project.

On completion of all the reports OCS used the process flow to set up standard jobs so that with “one click of the mouse” the Client could request that all of the reports within one territory were created, or the various groups of reports required for a particular user. Similarly documents were set up so that the groups of reports required for each user could be easily emailed to them.

CONCLUSION:

As the demonstration shows, by using Enterprise Guide OCS were able to rapidly set up a series of standard reports that could be refreshed either, for a complete territory, a specific area or individually. Similarly these reports could also be sent to the users as a group or individually. The effort and time to create and distribute the standard reports has been reduced considerably. Indeed, now the users can quickly and easily add to the standard reports including the development of graphical and further tabular examples.

This use of Enterprise Guide has been successful and it is now hoped that it can be used for further reporting requirements within the bank, making use of more of the features including MDDB creation.