RUBIX SOFTWARE

DESIGN, DEVELOP, SUPPORT

Welcome to Issue 2 of the Rubix Newsletter

IN THIS ISSUE....

- Welcome
- Rubix Online
- Reporting hints and tips

A warm welcome from Rubix

August is now over, and the holiday period is coming to an end (boo, hiss!). If you managed to get away from it all then we hope you had a relaxing break, and your batteries are recharged.

In this issue we take a look at Rubix Online which is our completely dynamic web portal. We kid you not when we confidently claim you need no web skills to manage the portal and you can go live in a matter of days.

SQL Reporting comes under the microscope in this issue. We outline our recommendations to save you time and effort when providing reports to your end users. We apologise in advance if this is a bit geeky and should you need further and better explanations then do let us know.

We also take a look at accounts data and how you can get this into SQL.

We were going to include an article Rubix E Filer however this newsletter was getting a little lengthy and we are working on some fantastic new features which will be covered next month.

As we always say, we never do the hard sell, if you are interested in anything you see then contact us, we can set up a demonstration and don't worry we won't continue to hassle you because we hate that approach ourselves.

We hope you enjoy, see you next month

The team@Rubix Software

Welcome!

Rubix Online - Dynamic to the core

Customers and work introducers expect an online platform so that they can be kept updated with progress on their case and communicate with you securely 24 hours a day.

However, building a web portal to interact with your Visualfiles system is not easy; it involves building a secure web platform from the ground up; ensuring it communicates with Visualfiles and you then face the challenge of constantly changing the portal as the needs of the business change.

We set ourselves a task, could we create a complete portal solution which could be installed and configured to precisely your requirements within a couple of days without any web skills?

Rubix Online - Dynamic to the core

Rubix Online is a completely dynamic web portal that you control without any web skills whatsoever.

Any part of the portal can be changed by you, instantly.

Given it uses Visualfiles scripting, you can configure the portal to display different information based on the user; the work introducer, the matter type or even down to an individual matter if you so wish.

We provide a test/development portal and a live portal; simply make your changes in your nonproduction environment and once happy make live instantly.

Anything can be changed instantly

One portal for all work types

From install to go live in just a few days

Secure with 2FA

Rubix Online - Dynamic to the core

Out of the box features include

- Two factor authentication using SMS or email, which can be switched on or off as you require.
- Conversion of downloads to PDF built in.
- All sections can be fully configured, renamed, or hidden as required including:
  - Case Search
  - Case Details (You can add up to 5 pages!)
  - Schedule
  - History
  - Ledger
  - Messaging Case Handlers
  - Dashboards showing charts and other information.
  - Document Upload
 - Debt Payments
  - Debt Invoices
  - Recoverable Costs
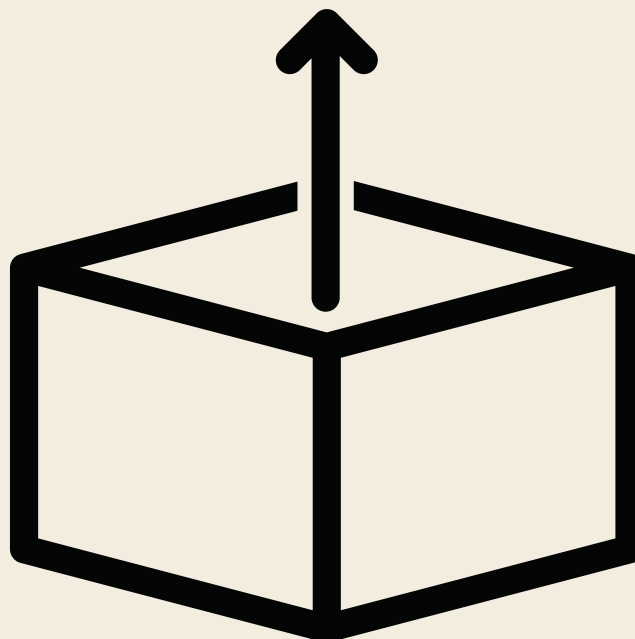
Rubix Online - Dynamic to the core

Rubix Online is ever evolving so we have optional features including:

- Payment Gateways with Barclays and NatWest meaning that you can take and process payments from your customers securely. The payment system will update your Visualfiles and accounts system seamlessly.

- Forms Creator – We have created a function to allow you to build any forms that require completion online from within Visualfiles. Once built using our simple wizard, you can publish these to the portal for the customers to complete. No web skills. Customers can save partially completed forms and once completed the data is imported automatically into Visualfiles.
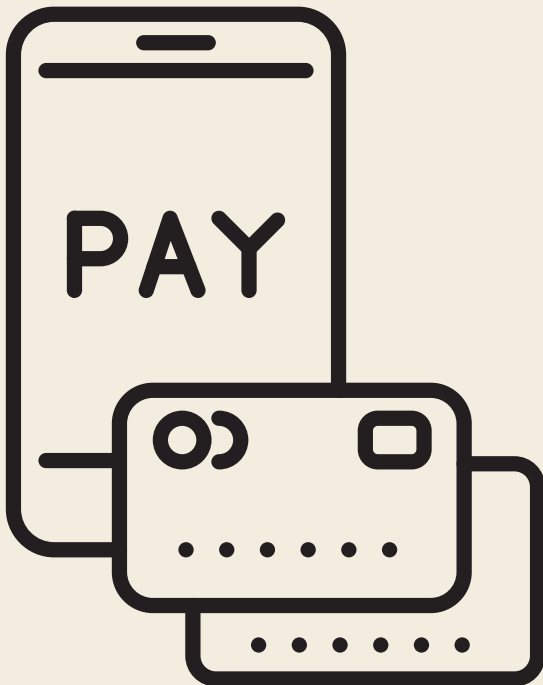
Rubix Online - What our clients say?

We recently worked with Rubix to implement a new client portal that was linked to our case management platform. The prior solution was old and clunky and not intuitive. We initially met with them to discuss their services and what they could do to help us move forward. The solutions Rubix provided and implemented was a perfect fit of both technology and efficiency for not just us, but for our clients too. From the initial contact and requirements gathering, through to managing and delivering the project, they were professional in all areas, and delivered the project on time without delays. The implementation was not only quick but without issues or need of fixes.

Due to the relationship, we formed with them while implementing the client portal, we have since engaged with Rubix about other technology improvements and services they offer, to help us achieve other ambitious plans we have

Rubix Online - Example Screenshots

SQL Reporting

As you know, Visualfiles is based on a progress database which makes getting information from the system for reporting purposes very difficult. Fortunately using either VRT or Pro2SQL the data within Visualfiles can be transformed into SQL Tables which makes it much easier to analyse.

The key difference between VRT and Pro2SQL is that VRT is an overnight extract to transform data into SQL whereas Pro2SQL provides near instant updates to your SQL Tables.

I have my data in SQL, what is the best way of dealing with this?

Both methods mentioned above will produce many tables for example User Defined Screens for each screen on your applications, system tables for example the matter information or history, roles, relations, and entity information. Essentially it contains everything from your system in SQL.

The problem is that when providing reporting for users, you then need to think carefully about where the data comes from and then link the various tables together in your query to get the information needed.

We have found that a much better way is to create a **Master Table** or a View which is either a stored procedure or a View which creates a table of all the most common information you should ever need to report upon. Once this is done, you now have one simple table to query using report builder or Power BI.

For example your Master Table could have File Code, Date Opened, Client Name, Days opened, Matter Description, Key Dates such as Date Client Care letter sent, Limitation Date, Defendant Name, the list is endless.
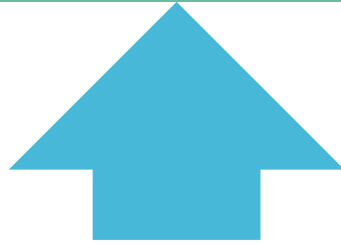
If you find that you are often having to link in other tables, then simply change the Master Table to add this item(s) and problem solved.

The amount of time this save is unbelievable when providing data for end users as you don't need the hassle of creating and linking data.
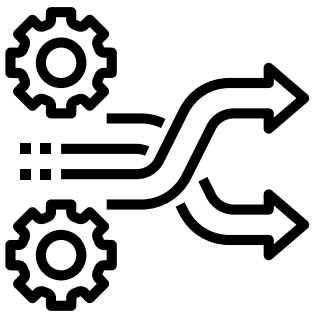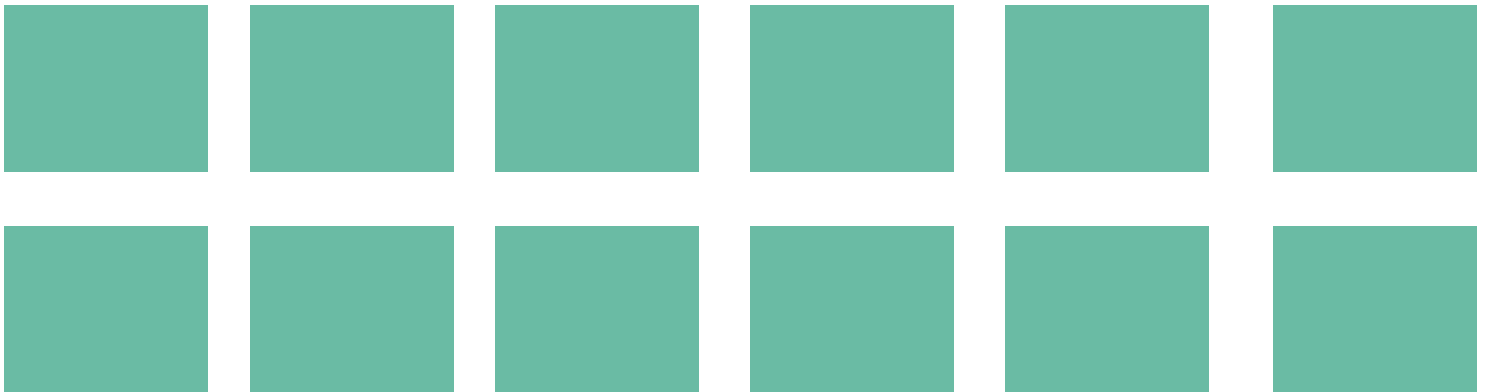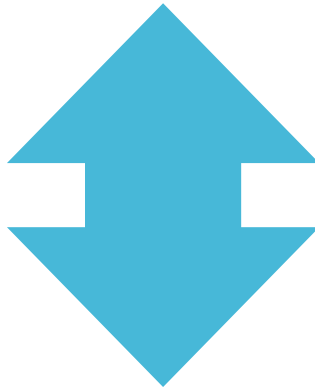
SQL Reporting – Master Table

Master Table

Stored Procedure or View to create table

Individual tables in VRT or Pro2SQL

SQL Reporting

What is the best reporting tool?

There are lots of options here, products such as Power BI, Crystal Reports and Reporting Services are great.

As you have a SQL Server (which has all of your SQL data on it) you will have access to Reporting Services which is provided free by Microsoft as part of this solution. In most instances we recommend this.

You can also download Report Builder which is free from Microsoft to build your reports either using a wizard or by adding in any SQL query you have written, once you have built your report you can publish this to Reporting Services.

Why Reporting Services?

Microsoft provides reporting services as part of SQL Server. It comes with an intranet type portal which allows users to access and run their reports as they need them. As the portal is built on windows security groups it makes allowing access to the portal easy for you to manage (your IT team will thank you).

Your users can also subscribe to a report they have access to i.e., they want a report to be sent to them every morning at 8am. Once done Reporting Services will deal with the rest and email the report.

What about Parameters?

Not all reports are static and often you will want to see a report on cases opened in each period. Using parameters is easy in reporting services. You simply add a parameter into Report Builder let's say a "Start Date" and an "End Date" and the user is prompted to enter these dates when the report is run. The report itself uses these parameters at run time and produces the information needed between these dates.

Parameters can also be many other things, for example a parameter can run its own query to show a list of Fee Earners and when selected the report will only show their cases.

SQL Reporting

I am using VRT but my server is running out of space!

This is a common issue we come across. So let us explain what is happening.

When a database is created it will also create two files; an MDF file (this is the data) and a LDF file (a Log file). This Log file is used to record all of the transactions which enables roll back to a certain date and time if it were needed.

The problem is that the Log file will continue to grow and grow unless the actual log file is backed up. Backing up a log file will truncate (shrink) it automatically.

However, if you think about it, because VRT is essentially deleting all the tables and then recreating these again each evening, you will never need a log file for this type of database because it would simply recreate again the following evening. Also due to the extensive number of transactions VRT is undertaking each evening, it quickly fills up the transaction log

There are two solutions to this problem. The first is to set the database to "Simple Recovery Mode" which means it does not create a log file which grows to this extent, or you can truncate the log via a scheduled task each day which keeps it under control.

Transaction logs for critical data

Lets say you have a system which has its own SQL backend database. Here it is important to ensure the database is in Full Recovery Mode as this will ensure you have a rollback position should you need it. The Log however will grow so it is important to back up the transaction log regularly as this will reduce the log and keep it under control.

Accounts Data

One of the areas we are often asked to look at is whether it is possible to get accounts data into your reports. Well, the answer is yes!

Structure of Accounts Data

Many Visualfiles users may have SOS as their accounts package. SOS is also a progress backend database however it is structured in a more efficient way than Visualfiles Data. There are sensible tables such as

MATDB – This is the matter data in SOS
NOMTRANS – This provides every record used for the account transactions
TRTRANS – This provides every record used for time recording

How could I get data from SOS into SQL?

Given the data is structured well it isn't that difficult to get the data from SOS into SQL. There are a couple of methods which can be used for this.

Option I

The first is what we call a complete extract. In this method, using SQL tools, you can create a connection to the SOS Database using an ODBC connection. Once you have this connection you can access the SOS Data.

The steps you would take would be to

- The SQL Tools will allow you to see the structure of the SOS Table and you can use this to create an equivalent table in SQL using the create table command.
- Once this is done you can map the data from the source table (SOS) to your SQL Table
- You then run a data flow process which will stream the information into the created SQL table which means that you have identical data from SOS now in SQL.
- You would repeat this for all the tables needed.

This process can run each evening by removing the data from the SQL SOS tables and repopulating.

A typical data set would take around 10-20 mins to create your SQL records.

Accounts Data

Option 2

This option is more complex, but the results can be stunning.

Within SOS tables there is a modified date for each row of data. Using SQL Reporting tools, instead of extracting all the records you can do this on only those records which have been modified. This would be done by either inserting a new record or updating an existing record. SQL Reporting Tools gives you the facility to merge records on this basis.

The steps you would take would be to:-

- The SQL Tools will allow you to see the structure of the SOS Table and you can use this to create an equivalent in SQL.
- Once this is done you can map the data from the source table (SOS) to your SQL Table
- You then run a data flow process which will stream the information into the created SQL table which means that you have identical data from SOS now in SQL
- Once this has been done, moving forward you would use the Merge functions to only insert, or update records based on the modified information from SOS.

This process can be run every 10 mins or so and will only take a matter of seconds to update.

Why get my accounts data into SQL?

This is where it all comes together. Now you have the accounts data in SQL you can report on anything from both the Matter and Accounts side easily. For example, I may wish to know the average billing on purchase cases which were freehold in the last 12 months. Now you have all the data into one report surface it's easy to do this.

The possibilities are endless.

Referring to our point about a Matter Master Table, you can now add in accounting data into this area. So, for each matter, for example, you could instantly see the time recording, the billing, the disbursement costs plus much more.

WE CAN HELP WITH ANY DATA ISSUES/DEVELOPMENT NEEDED

Next Month

- **New Product Release - Rubix E-Filer + Automatic E-Mail Filing with intelligence built in**
- **Rubix Sign - Documents signed legally in minutes**
- **VF Scripting -Hints and tips**

RUBIX SOFTWARE

www.rubixsoftware.co.uk

For all enquires contact us at info@rubixsoftware.co.uk

Increase productivity

Reduce expenses

Improve Service

CONTACT US:

The Warren, Croydon Road, Bromley, BR2 7AL

info@rubixsoftware.co.uk