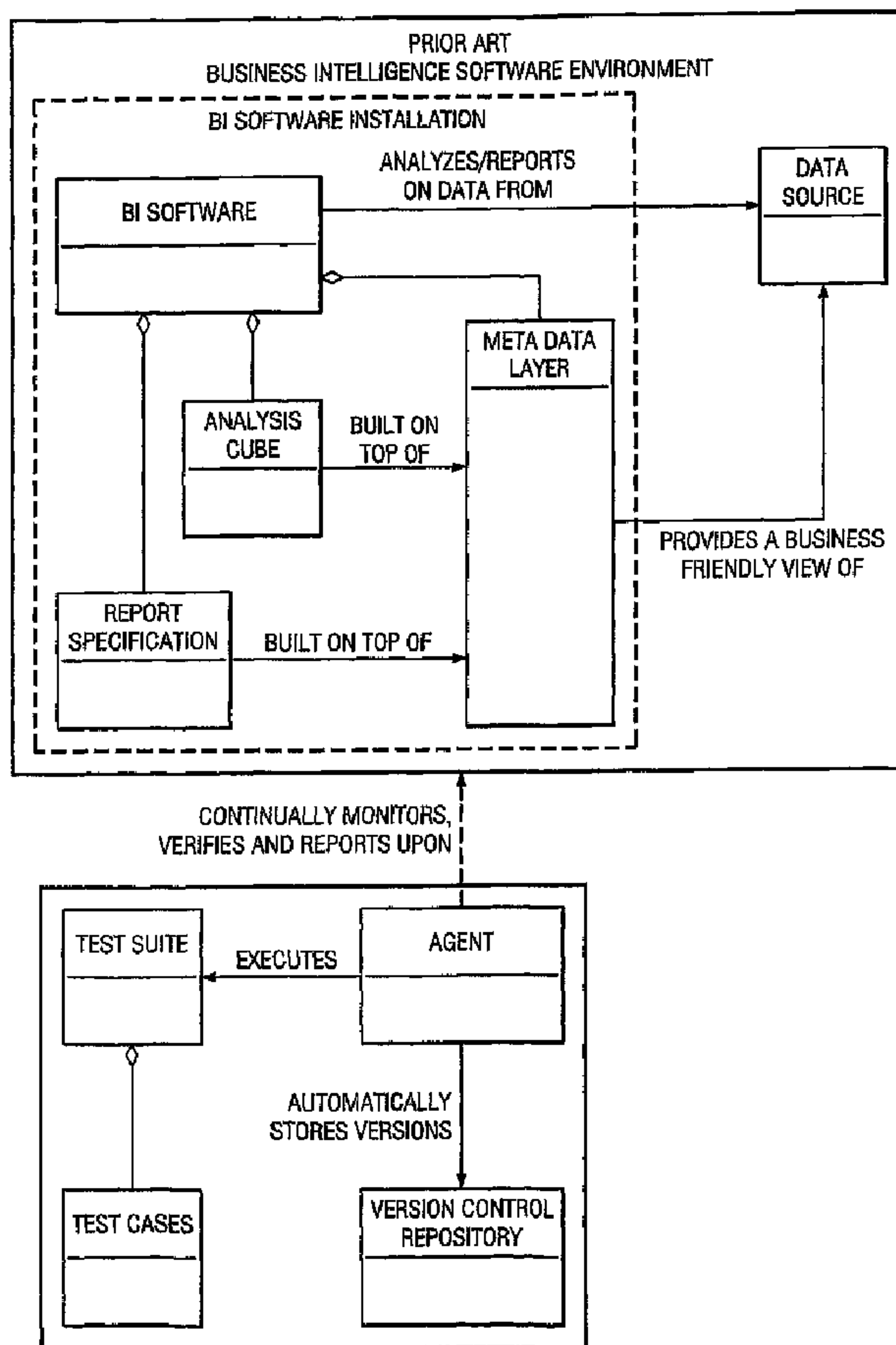




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 (72) Inventeurs/Inventors:
MOORE, J. LYNN, JR., US;
HANKINS, LANCE W., US
 (73) Propriétaire/Owner:
MOTIO, INC., US
 (74) Agent: KIRBY EADES GALE BAKER

(54) Titre : INTEGRATION CONTINUE D'UN LOGICIEL DE VEILLE STRATEGIQUE
 (54) Title: CONTINUOUS INTEGRATION OF BUSINESS INTELLIGENCE SOFTWARE



(57) Abrégé/Abstract:

A system of developing and monitoring a business intelligence environment that utilizes automatic version control and continuous integration techniques to produce tested reliable business intelligence. Errors are detected and corrected continuously to reduce

(57) **Abrégé(suite)/Abstract(continued):**

the time needed by report authors to locate and correct errors in report specifications, metadata models, analysis cubes, and other business intelligence artifacts. Further, by storing previous versions of the artifacts in the source control system, the artifacts can be updated to accommodate revisions needed by the customers, and if revisions damage other parts of the artifacts the revisions can be undone.

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(71) Applicant (for all designated States except US): **FOCUS TECHNOLOGIES, LLC** [US/US]; 18333 Preston Road, Suite 475, Dallax, TX 75252 (US).

(72) Inventors; and

(75) Inventors/Applicants (for US only): **MOORE, J., Lynn, Jr.** [US/US]; 205 Bowie Court, Lucas, TX 75002 (US). **HANKINS, Lance, W.** [US/US]; 916 Tyler Court, Allen TX 75013 (US).

(74) Agent: **O'NEIL, Michael, A.**; Michael A. O'Neil, P.C., 5949 Sherry Lane, Suite 820, Dallas, TX 75225 (US).

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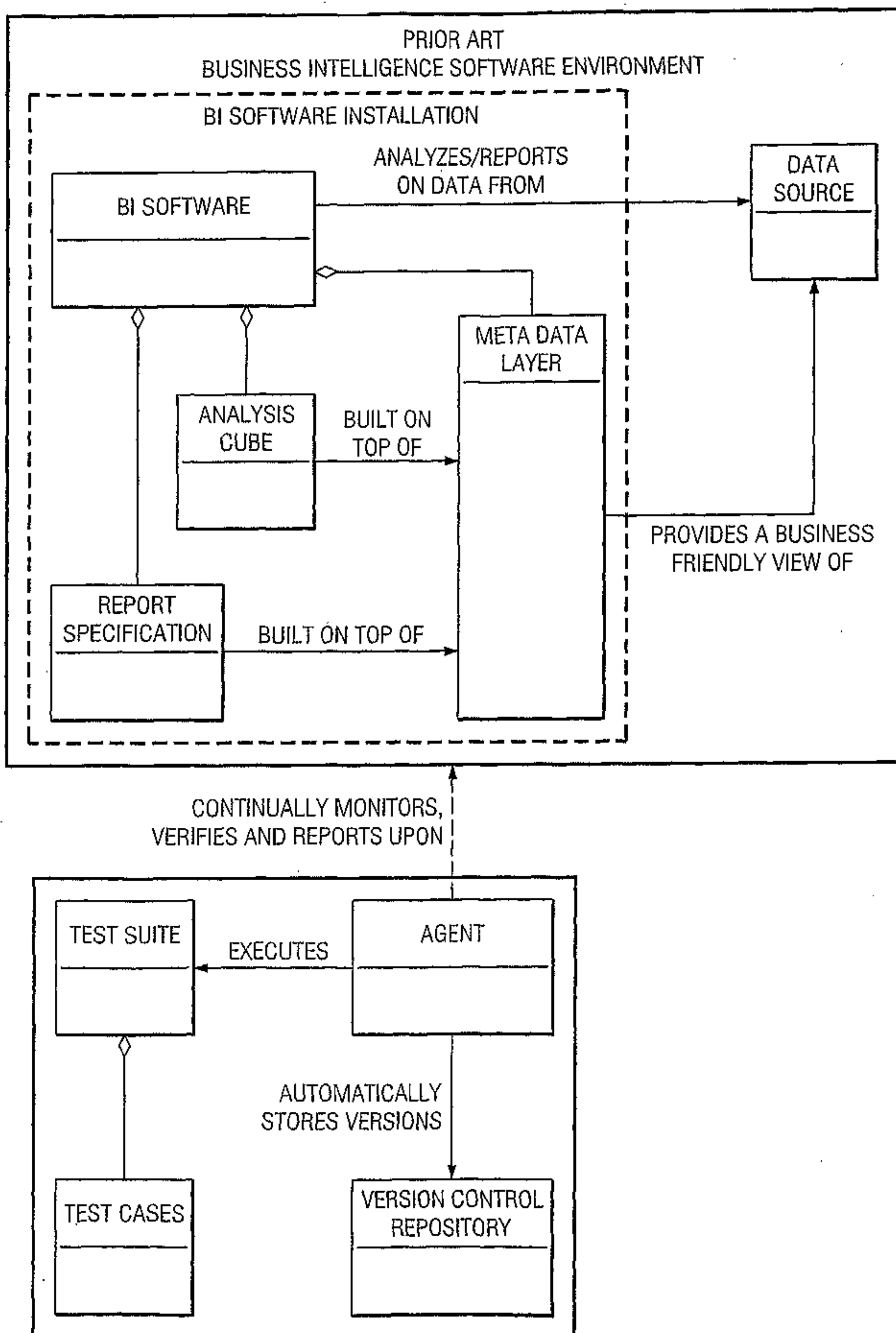
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(54) Title: CONTINUOUS INTEGRATION OF BUSINESS INTELLIGENCE SOFTWARE



(57) Abstract: A system of developing and monitoring a business intelligence environment that utilizes automatic version control and continuous integration techniques to produce tested reliable business intelligence. Errors are detected and corrected continuously to reduce the time needed by report authors to locate and correct errors in report specifications, metadata models, analysis cubes, and other business intelligence artifacts. Further, by storing previous versions of the artifacts in the source control system, the artifacts can be updated to accommodate revisions needed by the customers, and if revisions damage other parts of the artifacts the revisions can be undone.

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CONTINUOUS INTEGRATION OF BUSINESS INTELLIGENCE SOFTWARE**TECHNICAL FIELD**

[1] This invention relates to continuous integration of business intelligence software, and more particularly to establishing an automated agent that continuously monitors changes to, and the health and consistency of, a business intelligence software installation and its corresponding metadata models, report specifications, and analysis cubes, as well as the corresponding data sources that the business intelligence software analyzes.

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BACKGROUND AND SUMMARY

[2] Business intelligence systems are used in substantially all industries to gather, store, analyze, and report on business data or business intelligence. For example, manufacturing facilities use business intelligence systems to evaluate and report on factory production and personnel productivity as well as other critical metrics. Retailers use business intelligence systems to analyze trends in sales and to prepare reports for upper management.

[3] Traditional business intelligence systems are not well-defined, predictable, or testable. For example, using traditional business intelligence systems to develop a report specification might be done as follows.

[4] First, a business consumer requests a new report specification, and the task of creating the report specification is assigned to a report author skilled in the use of the report-authoring tool provided by the business intelligence software suite. While creating this report the report author might, for example, discover that the metadata model contained within the business intelligence software suite does not provide the information required for the report. The report

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author would in that case request that a change be made to the metadata model, and finish developing the report specification after the change is made.

[5] Once the report author finishes the report specification it is sent to a quality inspector or directly to the business customer for testing. Whoever is testing the report must manually execute the report, visually inspect the report for defects, make notes about any defects found, and generate an error report that is returned to the report author for correction. The report author will attempt to make corrections to the report according to the new requirements provided in the notes. Once the report author corrects the report it is submitted for testing all over again, and this process continues until there are no errors found.

[6] This process leads to numerous problems. First, if the metadata model is changed pursuant to the author's request, one or more previously created report specifications may fail to execute or produce incorrect results. Second, once a report specification is edited the previous version no longer exists and cannot be accessed for reference, or the previous version is stored in a content repository and is lost if the

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repository is lost or corrupted. Third, information stored in a repository cannot be accessed to convert an updated version having new errors back to a previous working version without errors. Last, there is no way to see the changes that have been made to the report specification, or to view recent outputs without manually running every report.

[7] The present invention comprises a method and a system for applying continuous integration to business intelligence environments, including the business intelligence software installations, metadata models, report specifications, and analysis cubes, that overcomes the foregoing and other difficulties that have characterized the prior art. Continuous integration is a technique that has been practiced in the field of software development and is well known in the art. However, continuous integration has never been applied to business intelligence systems. The invention also employs version control, which is used to automatically record versions of business intelligence artifacts, including report specifications, metadata models, and analysis cubes.

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[7a] Certain exemplary embodiments can provide a method for automatically and continuously testing the performance, accuracy and consistency of a business intelligence artifact comprising the steps of: a. determining output required from the business intelligence artifact, where the business intelligence artifact is from a business intelligence system, and the output is generated by the successful execution of the business intelligence artifact in the business intelligence system; b. providing a version of the business intelligence artifact; c. creating at least one pre-execution assertion having requirements to verify the structure of the business intelligence artifact prior to execution of the business intelligence artifact in the business intelligence system; d. providing a source control system; e. providing an automated agent which interfaces with the business intelligence system to version and test the business intelligence artifact; f. utilizing the automated agent and the source control system to automatically record current and previous versions of the business intelligence artifact when

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modifications to the business intelligence artifact are detected by the automated agent; g. using the automated agent to test the business intelligence artifact for errors at a predetermined interval by determining whether the current version of the business intelligence artifact satisfies the requirements of the at least one pre-execution assertion before execution of the business intelligence artifact; and h. if the business intelligence artifact satisfies the requirements of the at least one pre-execution assertion, utilizing the automated agent to execute the current version of the business intelligence artifact to produce output.

[7b] Certain exemplary embodiments can provide a system for automatically versioning and testing business intelligence artifacts, comprising: a business intelligence software installation for creating and revising business intelligence artifacts for stakeholders; a version control repository for storing current and historical versions of the business intelligence artifacts; an automated agent for monitoring the business intelligence software installation,

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detecting modifications to the business intelligence artifacts, and recording the modified business intelligence artifacts as current versions of the business intelligence artifacts in the version control repository; said automated agent interfacing with the business intelligence software installation, for testing the business intelligence artifacts at a second predetermined interval against pre-execution assertions and post-execution assertions to determine whether the business intelligence artifacts are functioning properly; and said automated agent for reporting results of the testing to the stakeholders.

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[8] The present invention applies continuous integration and automatic version control to improve the efficiency of developing, deploying, and altering business intelligence artifacts. In accordance with broader aspects of the invention, test cases can be defined for business intelligence artifacts. The test cases contain one or more assertions of characteristics that should be true of the business intelligence artifacts at a predetermined time. The assertions are used to verify that the business intelligence artifacts are working properly. There may be pre-execution assertions of characteristics that the business intelligence artifacts should possess before being executed, and post-execution assertions regarding characteristics of the outputs produced by execution of the business intelligence artifact. The test cases can be grouped into test suites and further into projects.

[9] At a predetermined time interval, an automated agent executes any pre-execution assertions, executes the business intelligence artifact, stores the output of the execution of the business intelligence artifact and associates it with a version number, and executes any post-execution assertions. Any failures, or errors, are

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reported to the registered stakeholders, who are any persons with vested interests in the business intelligence artifacts, including business consumers, authors, etc. Thus, stakeholders are always assured that the system operates correctly and they are always aware of what has changed in the system.

[10] By practicing the method of the present invention, business intelligence environments are better managed and more stable and predictable. Further, business intelligence artifact developers are able to better serve customers' ongoing needs by having the ability to update existing artifacts or revert to previously used artifacts without causing errors to or losing existing artifacts.

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BRIEF DESCRIPTION OF THE DRAWINGS

[11] A more complete understanding of the present invention may be had by reference to the following Detailed Description when taken in connection with the accompanying Drawings, wherein:

[12] FIGURE 1 is a flowchart illustrating one embodiment of the steps of the method of the present invention; and

[13] FIGURE 2 is an analysis class diagram showing the system of the invention in conjunction with the business intelligence software that is known in the art.

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DETAILED DESCRIPTION

[14] Referring now to the Drawings, and in particular to FIGURE 1, there is shown a flowchart illustrating the steps of one embodiment of the invention. The method of continuous integration and automatic version control can be used in conjunction with any business intelligence artifacts, including report specifications, analysis cubes, metadata models, etc.

[15] When a business intelligence artifact is requested by a stakeholder, typically a business consumer, the first step of the invention is determining the output required from the business intelligence artifact by the stakeholder. This output may be a new business intelligence artifact or the revision of an existing one. Thus, the next step is providing a version of the business intelligence artifact, either by developing an original version of the artifact or creating a revised version. The project of developing or revising a business intelligence artifact may be assigned to one or more authors.

[16] An author may then create a test case for the business intelligence artifact comprising at least one assertion having requirements that should be satisfied

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by the business intelligence artifact at a predetermined time. A test case may comprise numerous assertions that are defined by the author, and multiple test cases may be created and grouped into test suites.

[17] The assertions are used in the practice of the method to determine whether the business intelligence artifact is functioning properly. Examples of assertions are that the artifact is valid, has a specified name, has specified headers or footers, has specified colors, executes in a specified amount of time, produces a specified number of lines when executed, etc. The assertions may be requirements of the report specification before it is run or executed, i.e., pre-execution assertions, and requirements of the report specification after it is executed, i.e., post-execution assertions.

[18] The creation of test suites, test cases, and assertions is subject to the needs and desires of the stakeholders, and can be varied in terms of the number of assertions created, the requirements established, and the time at which they are created during the process. In fact, assertions can be defined before the report authors begin building the business intelligence

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artifact as well as during the building of the artifact as the report authors prepare the artifact.

[19] The method utilizes a source control system to record and maintain current and historical versions of the business intelligence artifacts during the development or revision of the business intelligence artifacts. The source control system records and saves the artifacts at a predetermined time interval that may be established to run every thirty (30) minutes, every hour, or at any other interval determined by the stakeholders of the business intelligence environment.

[20] The method also utilizes an automated agent to test the business intelligence artifact at another predetermined time interval. This time interval may be set as frequently as every four (4) hours, as infrequently as once per day, or other time intervals as determined by the stakeholders of the business intelligence environment. Generally this predetermined time interval is longer than the predetermined time interval for the source control system.

[21] The automated agent executes the most current version of the business intelligence artifact and all of the assertions to determine whether everything within

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the business intelligence artifact is working as expected. In one embodiment the automated agent may test the business intelligence artifact against pre-execution assertions to determine whether the artifact is valid, then execute the artifact, and finally test the results or output of the execution of the artifact against post-execution assertions to verify the results. This step of testing the business intelligence artifact is repeated for every test case that is created by an author.

[22] The method of defining and running assertions is well known in the art of software development but has never been applied to business intelligence systems.

[23] It is through testing of the artifact via the automated agent that the invention allows the artifact to be continuously integrated by the changes that are made thereto while monitoring and testing the artifact for errors that may result from those changes.

[24] After the assertions and/or the business intelligence artifact are executed, a summary report of the results of the testing is created and made available to registered stakeholders. Then the authors that are responsible for the artifact can review any errors

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included within the report and make the necessary corrections. The authors may recognize additional assertions needed while making corrections and cause them to be executed during the next testing interval. The testing via the automated agent and the version control continues throughout the time that the business intelligence artifacts are corrected.

[25] In FIGURE 2 there is shown an analysis class diagram showing the system of the invention. A typical business intelligence installation comprises software that typically employs at least one metadata layer that allows the software user to understand a data source. The business intelligence software will also often employ report specifications and/or analysis cubes that are built on top of and use the metadata layer to understand the data source.

[26] FIGURE 2 illustrates the system of the invention working in conjunction with the business intelligence software installation. The purpose of the invention is to continuously monitor, verify, and report on the business intelligence software. This is done via an automated agent that executes one or more test cases that are comprised within a test suite. The invention

also automatically stores versions of the work done by the business intelligence software user.

[27] Although preferred embodiments of the invention have been illustrated in the accompanying Drawings and described in the foregoing Summary and Detailed Description, it will be understood that the invention is not limited to the embodiments disclosed, but is capable of numerous rearrangements, modifications, and substitutions of parts and elements.

Claims

1. A method for automatically and continuously testing the performance, accuracy and consistency of a business intelligence artifact comprising the steps of:

a. determining output required from the business intelligence artifact, where the business intelligence artifact is from a business intelligence system, and the output is generated by the successful execution of the business intelligence artifact in the business intelligence system;

b. providing a version of the business intelligence artifact;

c. creating at least one pre-execution assertion having requirements to verify the structure of the business intelligence artifact prior to execution of the business intelligence artifact in the business intelligence system;

d. providing a source control system;

e. providing an automated agent which interfaces with the business intelligence system to version and test the business intelligence artifact;

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f. utilizing the automated agent and the source control system to automatically record current and previous versions of the business intelligence artifact when modifications to the business intelligence artifact are detected by the automated agent;

g. using the automated agent to test the business intelligence artifact for errors at a predetermined interval by determining whether the current version of the business intelligence artifact satisfies the requirements of the at least one pre-execution assertion before execution of the business intelligence artifact; and

h. if the business intelligence artifact satisfies the requirements of the at least one pre-execution assertion, utilizing the automated agent to execute the current version of the business intelligence artifact to produce output.

2. The method according to claim 1, further comprising:

i. defining post-execution assertions having additional requirements; and

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j. utilizing the automated agent to determine whether the execution of the business intelligence artifact in the business intelligence system and the resultant output produced by the execution satisfies the additional requirements of the post-execution assertions.

3. The method according to claim 1 wherein the predetermined interval is four hours.

4. The method according to claim 1 wherein the predetermined interval is twenty-four hours.

5. The method according to claim 1 wherein the business intelligence artifact is a report specification.

6. The method according to claim 1 wherein the business intelligence artifact is a metadata model.

7. The method according to claim 1 wherein the business intelligence artifact is an analysis cube.

8. The method according to claim 1 wherein the requirements of the at least one pre-execution assertion comprises expectations pertaining to one or more of: the name of the business intelligence artifact, the headers of the business intelligence artifact, the footers of the business intelligence artifact, and the colors of the business intelligence artifact.

9. The method according to claim 2 wherein the additional requirements of the at least one post-execution assertion comprises expectations pertaining to one or more of: the amount of time required by the business intelligence system to successfully execute the business intelligence artifact to produce output, the amount of data in the output, or specific data values present in the output.

10. A system for automatically versioning and testing business intelligence artifacts, comprising:

a business intelligence software installation for creating and revising business intelligence artifacts for stakeholders;

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a version control repository for storing current and historical versions of the business intelligence artifacts;

an automated agent for monitoring the business intelligence software installation, detecting modifications to the business intelligence artifacts, and recording the modified business intelligence artifacts as current versions of the business intelligence artifacts in the version control repository;

said automated agent interfacing with the business intelligence software installation, for testing the business intelligence artifacts at a second predetermined interval against pre-execution assertions and post-execution assertions to determine whether the business intelligence artifacts are functioning properly; and

said automated agent for reporting results of the testing to the stakeholders.

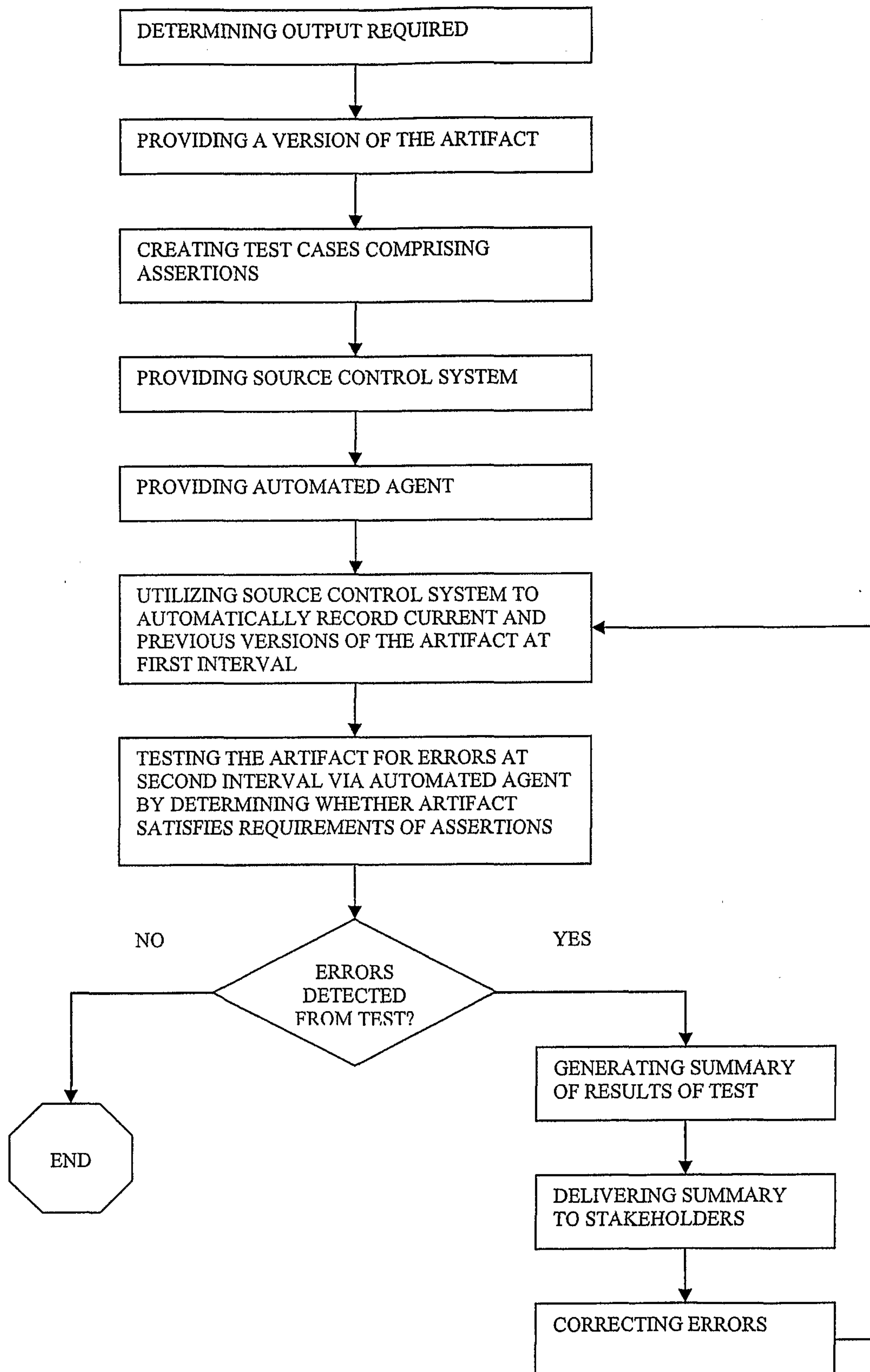
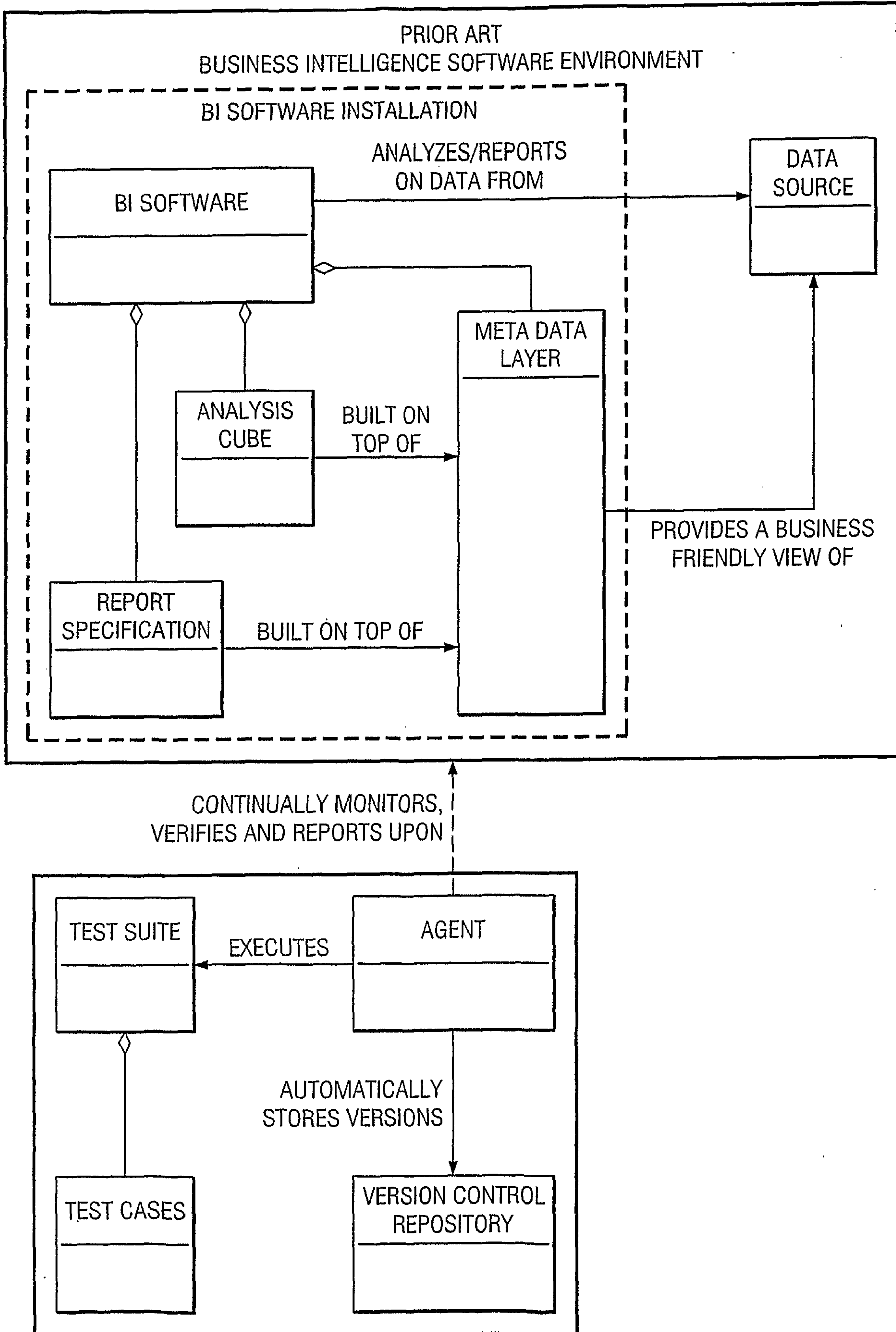


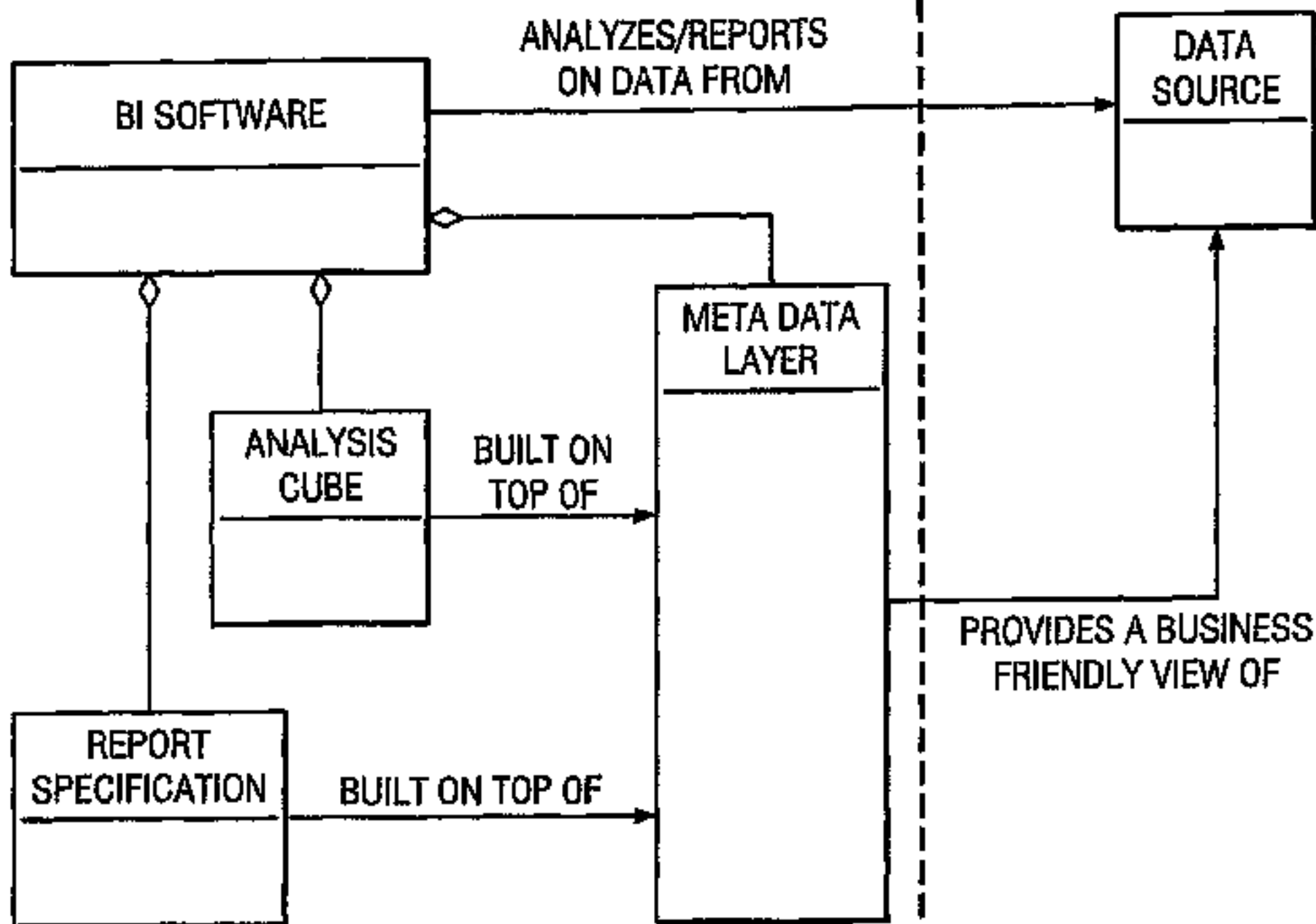
Figure 1

FIG. 2



PRIOR ART
BUSINESS INTELLIGENCE SOFTWARE ENVIRONMENT

BI SOFTWARE INSTALLATION



CONTINUALLY MONITORS,
VERIFIES AND REPORTS UPON

