

Portima

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—Claude Rapoport, IT Manager, Portima

INDUSTRY

- Insurance

KEY BENEFITS

- Increases functional inventiveness
- Enables an ASP software model
- Facilitates management of remote servers
- Lowers total cost of ownership
- Increases productivity

SYBASE TECHNOLOGY

- Adaptive Server® Enterprise (ASE)
- EAServer
- PowerBuilder®
- Replication Server®

Portima is a cooperative organization established in 1986 by several major Belgian insurance companies. In order to fulfill its role acting as a point of contact between 3,500 brokerage offices and 14 insurers, Portima needed to update their electronic communication systems. Portima turned to Sybase technology to prioritize the needs of brokers to manage, simplify and provide consistency for the many IT products available to them, and to become an IT partner for brokers and insurance companies.

A COMPLEX SITUATION

In 1986 Belgium, before the age of the Internet, several major insurance companies and thousands of their brokers needed a better way to share information. They required a reliable, shared and secure telecommunications network that would allow brokers to submit insurance transactions electronically to their companies. Portima's predecessor, Assurnet, offered the solution in the form of a network that operated under the technical language called “Telebib” (AS/1). AS/1 and its successor, AS/2, were adequate for the time, but were also limited for future needs because of their single fluency.

The need for a more versatile office management software became apparent in the wake of a survey into the IT status of the brokerages at the end of the 1990s. This review reflected the need to standardize and integrate office management software in order to increase efficiency and to sustain competitiveness.

At the time of the assessment, the IT solutions used by brokers included a wide variety of components. In addition to specific hardware and configurations, brokers generally used a range of programs that enabled them to communicate with insurance companies, as well as to assist them in the administrative and sales management side of their business. The overlapping systems resulted in a work environment that was extremely heterogeneous and challenging to manage. The combination of numerous different operating systems, languages, broker software and hardware created numerous support and integration problems. It became apparent that a complete revamping of office software was necessary in order to standardize and streamline the way brokerages did their business.

Assurnet negotiated the purchase of the main management software and changed its name to Portima, releasing a new solution called BRIO (Broker Remote Insurance Office). BRIO is an office management program that provides advanced functionalities that specifically cater to the productivity needs of brokerages, and it enhances communications with their insurance companies.

SUCCEEDING WITH BRIO

Until BRIO, brokers typically had their own servers in their offices. This proved to be a costly and cluttered solution, especially in terms of updating software and creating back-ups. To address this, Portima developed BRIO as a hosted application to provide brokers with the required functionality and with central server and database management. With this solution, Portima quickly identified the need to manage the 2,200 separate databases efficiently from a central location, without sacrificing the ability for future upgrades. The system also had to be capable of handling 6,000 concurrent users, 2 million+ transactions a day and 150 tables of complex data (customers, events, policies, claims, accounting, liaison with the insurance companies, etc.).

To address the data management issues, Portima called on two different consultants to test out various solutions. The assignment was to define the architecture and tools required and produce a prototype. The prototype with the best solution was based on Sybase tools, demonstrating all of the expected qualities. Claude Rapoport, IT Manager at Portima, explains: "The team of developers at Portima was already familiar with Sybase products. The fact that Sybase enabled us to reuse part of the existing solution while putting 2,200 independent databases alongside one another was a truly decisive benefit. So, after producing an extremely convincing prototype, we agreed to work with Sybase. We have been satisfied with its performance in every respect for the past 5 years."

REMARKABLE SOFTWARE

Because many of its technicians were already familiar with Sybase solutions, Portima did not require much in terms of technical consulting during the development phase. The software also had the added benefit of being straight-forward to use. Following a phased production roll-out, 860 brokers were using BRIO during mid-migration and 1,500 were using it twelve months later. Continued roll-outs will bring the number of users to 2,000. With this broad adoption, the needs for standardization for brokers are clearly being met.

"As you can see, roll-out was spread across a number of years," states Mr. Rapoport. "This gradual process has enabled us to make sure that our systems are able to manage the load, and I am impressed by the stability of the Sybase solution, which currently handles over a million transactions a day with a response time of less than one second in 90% of cases."

Migrating a broker to BRIO requires effort from both Portima and the broker. Once the broker is convinced of the benefits of migration—ease and security benefits, users are then trained in the new protocols. Simultaneously, the broker's data is converted in order to comply with standards defined for the insurance industry. Finally, the specialists at Portima visit the broker and the office manager validates the data in order to make any specific modifications. When the system goes into production, data is transferred centrally and a new database is added to BRIO.

The implementation of BRIO benefits Portima's customers—brokers and insurance companies. By using BRIO, brokers have improved their productivity as a result of the new integration and improved functionalities of the application via the hosted solution. Brokers no longer have to worry about configuring servers, creating back-ups or installing updates, allowing them to focus more on their core business. The databases are more reliable and secure due to the Sybase ongoing replication. This enables Portima to have an exact copy of the data at the back-up site at any time. Access to data is kept secure by an electronic certificate management system, allowing managers of brokerages to have sole authority for granting employees access to sensitive data.

"As a result of the ASP model and the power of the Sybase solutions, we now have a central point of contact for assistance and advice to brokers," concludes Mr. Rapoport. "We are able to implement new functionalities much faster than before because the servers are managed centrally. During the process of migrating to the Euro, we had to visit 2,200 brokerage offices to update the servers. This was a gigantic task that we are now able to accomplish centrally in a single weekend."