

Financial Services

Data Warehousing and Business Intelligence

Case Study

Solution Overview

Industry

Legal Financial Services

Business Solution

Data Warehousing and Business Intelligence

Architecture

Microsoft Windows 2000
Microsoft SQL Server

Products Used

Microsoft Windows 2000
Microsoft SQL Server
Bizflow 2000
HTML
XML
J2EE

Development Resources

Encore Consulting Services, Inc.

Development Time and Cost

Six months, two-person team

Benefits

Provided a data warehouse that corporate and branch offices can use to make educated business decisions. The data warehouse provides important historical trending and financial information in order to run the business.

A legal financial services company was faced with the management of corporate and office standard reporting, along with ad-hoc analysis. The company did not have a data warehouse in place and they were pursuing an active, aggressive initiative to implement a corporate data warehouse within its business units.

Solution Challenge

The mission of the project was to design, develop and implement a data warehouse and create standard reports for corporate along with branch offices to accomplish the following:

1. Fulfill the requirements defined in the company business plan
2. Provide a data warehouse architecture which is loaded from current and legacy operational systems. As a result, reporting would not degrade the performance of the online operational system
3. Provide reports and graphs for corporate executives
4. Provide scalability for expansion in functionality
5. Allow the data warehouse to be accessed using a PDA for business executives
6. Allow the data warehouse reports to be retrieved using the company intranet web site

The Solution

Encore's approach provided scalable data warehouse architecture to handle a high number of transactions. The tool set used for the Windows 2000 platform includes Microsoft SQL Server, HTML, XML, J2EE, and Bizflow 2000 developed with a common menu, login, and standard reports corporate or branch office personnel can use. The web pages, menus and applications that an authorized site visitor sees are database-driven through the login function.

Users can login to retrieve the following trending information:

- Year-To-Date Referrals
- Referrals by Client
- Gainers/Losers by Client
- Referrals by Office
- Gainers/Losers by Office

- Changes by Office
- Referrals by Client Type
- Gainers/Losers by Client Type

Using Microsoft SQL Server, the data architecture queries information upon the users' requests. The following set of dynamic parameters is used to configure reports based on business needs:

- Date Ranges
- Offices and clients
- Case Types

A dynamic SQL query extracts the necessary information and displays the results in a graphical manner for executives or business users.

This approach is scalable, flexible and extensible allowing user interface that isn't directly connected to the data that can easily be changed allowing customized reporting through the web. This framework can ultimately run on wireless devices.

The Benefit

The project achieved the business goals and objectives specified in the company business plan. The completed site includes the following components:

- Secured logon and authentication
- User maintained menus and navigation
- Date Warehouse Architecture
- Web Based Business Reports
- PDA Access to Reports
- Loading Algorithms from Current and Legacy Systems
- Order Entry applications