



SELF SERVICE BI

ORGANIZATION

A multinational financial services conglomerates operating in 56 countries specializing in commercial lending and leasing. The company manages millions of dollars every day serving thousands of business units, guaranteeing business unit commitments to their customers, collecting money from Business Units, and paying banks internationally for letters of credit.

CHALLENGE

Global Business Units had little visibility into the costs associated with the Letters of Credit (LOC) for their projects. The visibility of LOCs across multiple Business Units was nonexistent. This lack of visibility across the organization resulted in localized deals for LOCs that were not in the best interest of the overall company. Similarly, the Business Units could not take advantage of financial institutions around the world to get the best deal terms for the LOC. A reporting solution for an Automated Letter of Credit web application that facilitates the request, review, bid and issuance of Bank Guarantees and Letter of Credits by third party banks was required to service these requests by different Business Units.

This reporting solution required complex filtering criteria and the ability to export report data to Excel and zip files depending on user roles. Reports were also required to be available through the BI Dashboard and other delivery channels without compromising the consistency of the information. Additionally, users needed the capability to create new reports in the BI Dashboard that should be available through the Web Application to different users.

Consistency across all reporting channels is critical as multi-million dollar business decisions were made based on the information presented in these reports. It is important to present the macro and micro level information with enterprise data governance to ensure the security of the information.

The existing reporting system is a manual adhoc reporting system that involved writing SQL to retrieve data from heterogeneous data sources and merging them together in Excel for additional manipulations. This reporting system was prone to data accuracy and consistency errors.

All the data required for effective use of the reports was not available due to data ownership and governance concerns. The data was scattered across multiple Oracle databases and access to the databases was restricted due to data security concerns. Data was distributed as flat files resulting in several import and export routines. The end solution was unreliable and could not scale to meet the 1400 hundred concurrent user requirement.

SOLUTION

XTIVIA used Self-Service BI (SSBI) framework for quick turnaround on this adhoc reporting solution. The TIBCO™ Spotfire® based self-service BI solution delivered information through Business BI Dashboards as well as through BPM Web Application. The solution ensured that the reports and analytics are driven from real-time Enterprise Data Warehouse as well as transactional databases that were not integrated with EDW. XTIVIA implemented real-time Data Warehousing by integrating the BPM Solution and other Enterprise Systems with EDW in real-time. The self-service BI was embedded in the BPM solution through mash-up technology to facilitate consistent reporting inside and outside the transactional system. XTIVIA framework allows the user to select required columns to be displayed in the reports along with report filter criteria. The data from heterogeneous data sources are joined at the reporting layer and a data model is presented to the users for selecting columns to be displayed along with the report filter criteria.

KEY COMPONENTS

TECHNOLOGIES USED:

- XTIVIA SSBI (Self-Service BI)
- Spotfire® Professional 4.5
- Spotfire Web Player 4.5
- Spotfire Server 4.5
- Spotfire JavaScript API
- Apache POI API
- Oracle® 11g





SELF SERVICE BI

SOLUTION (CONTINUED)

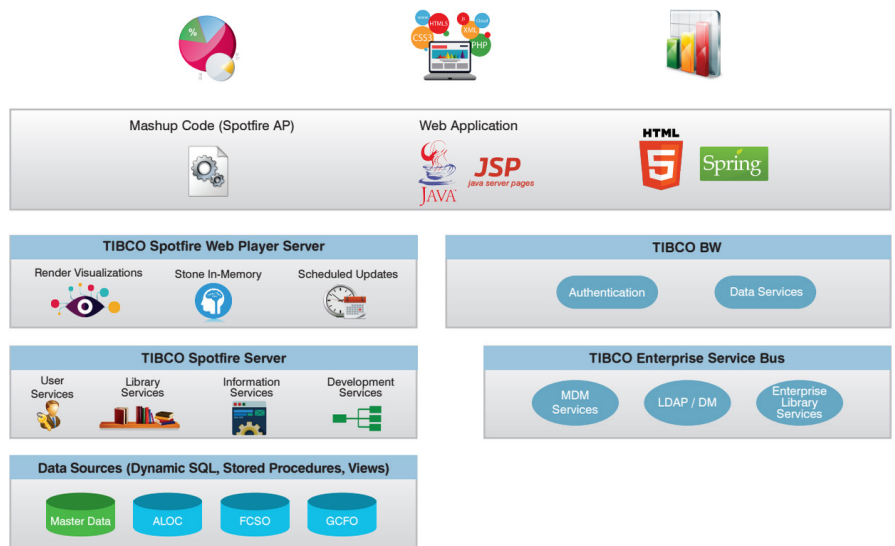
TIBCO™ Spotfire® Information links were created for each of the data source for data coming from different data sources. . ‘User Experience’ features such as drill downs, on-demand tables and alternative row-colors were used to improve the effectiveness and usability of the information. “Insert column from external data” feature was used to join the data sources in Spotfire, instead of joining at the database level. Spotfire is integrated with XTIVIA SSBI Framework to keep the adhoc reporting look and feel consistent with other canned reports.

On the transaction web application, the user is presented with the list of reports that she is authorized to view. The same filter criteria available through the BI platform are available through the Web Application. The SSBI mashup code (JavaScript API) embeds the Spotfire report into web application main view and provides the consistency of data and look and feel across all channels.

This solution also provided the feature to share data through Excel. SSBI uses Apache POI API export the data to Excel. The reports were embedded in Java application using Spotfire Web Player JavaScript API. Client specific application fonts, color scheme, layout, etc. were used in the reporting solution for consistent look and feel.

RESULTS

- Visibility of deals across all Business Units resulting in bundling of deals and multi-million dollar savings globally
- Multi-Million dollar savings due to reliable and consistent data resulting in avoiding bank penalties and compliance penalties.
- Security and data governance enforced across all channels integrating with single signon Consistent look and feel between web application and reporting solution
- Reduced IT costs and involvement due to self-service adhoc reporting capability for end users
- Automated reporting solution helped business users focus on their business instead of spending their valuable time manipulating data in spread-sheets



XTIVIA OVERVIEW

Since 1992, XTIVIA has established a proven, global reputation as a company delivering cutting-edge professional solutions to our clients’ specific requirements, regardless of the complexity of the projects. XTIVIA’s success has stemmed from a proven ability to deliver quality professional services, allowing the client to leverage technology successfully, competitively, and profitably. XTIVIA has received additional awards this year from Liferay, CIO Review and Inc. 5000. XTIVIA has offices in Colorado, New York, New Jersey, Missouri and Texas.