# FINANCIAL SERVICES: TIBCO™ SPOTFIRE

## ORGANIZATION

Our client is one of the most recognized multinational conglomerates and financial services brand, specializing in commercial lending and leasing. The company manages millions of dollars every day serving thousands of business units, collecting money from customers and paying vendors internationally.

The operations require thorough audit checks and reporting due to the nature of transactions involving foreign exchange and intercompany fund transfers. The timely execution and delivery of the mission critical operational reports is as important as the accuracy of the transactions.

XTIVIA delivered a reporting solution using TIBCO® Spotfire® that enabled scheduled report updates, reporting from multiple data sources, and seamless integration of the reports into operational web application.

## KEY COMPONENTS

### TECHNOLOGIES USED

Spotfire® Professional **4.0**

Spotfire Web Player **4.0**

Spotfire Server **4.0**

Oracle® **11**g

## CHALLENGE

The client required a reporting solution for operational reporting with varying data volumes. The data is scattered across different Oracle® instances and there were governance restrictions on creating database links between application databases and master data. SQLs are manually run to extract the data from different instances and merge the outputs using MS Excel.

Multiple versions of the reports needed to be run as different groups in the company had different privileges to look at the data. Due to the manual process of running the reports, the end users would not get to see the latest data on some of the critical reports, whenever they need to.

The client was experiencing poor response times from some of the reports built on the existing BI platform. The SQL impacted operational system performance and erroneous data was reported due to wrong mappings. The semantic layer used by the existing reporting solution could not deliver complex data manipulation requirements.

## SOLUTION

The reporting solution was automated using TIBCO Spotfire®. Information links were created for each data source for data coming from different database instances. The data sources were linked using an "insert columns from external data" feature. Oracle Stored Procedures and Views were used as the source to information links. Personalized information links were used to restrict the data each user is authorized to view based on user ID and their roles.

XTIVIA used Spotfire®'s "scheduled updates" feature to automatically update in-memory copies of the reports with large volumes of data overnight. Features such as drill downs, on-demand tables, and alternate row-colors were used. The "insert column from external data" feature was used to join the data sources in Spotfire, instead of joining at the database level. Redesign of the existing reports involved rewriting the SQLs and tuning them for performance. Highly complex information requirements were delivered using string, date, numeric, and analytic functions. These SQLs were used in Spotfire information links that provide data to Spotfire client. Client specific application fonts were used in the reporting solution for consistent look and feel.
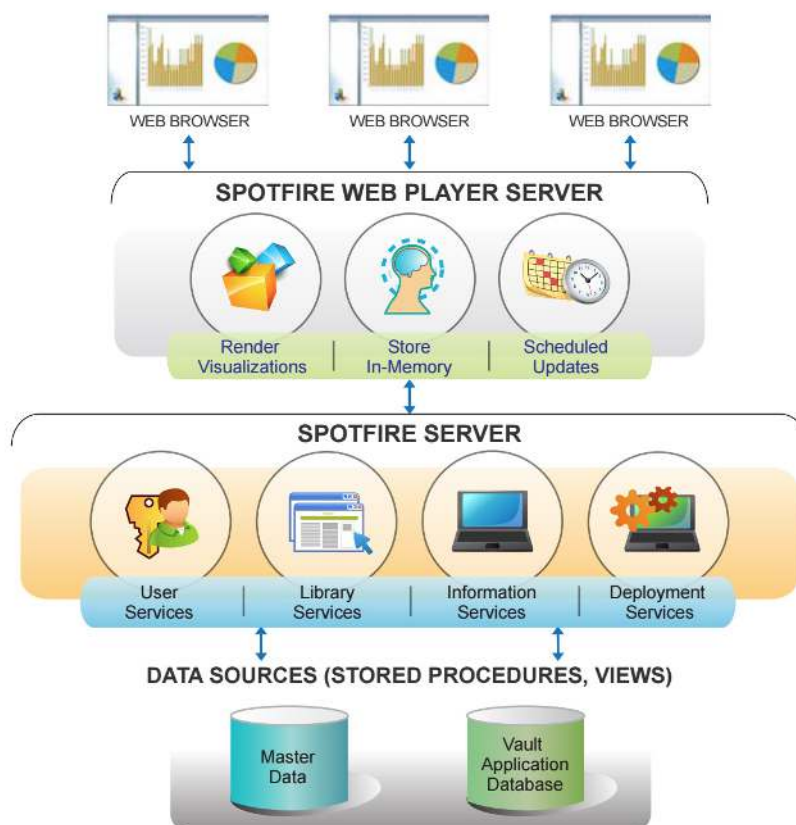
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## RESULTS

- Automated reporting solution improved user productivity and data accuracy so business users can focus on their business instead of worrying about technical aspects.
- Improved information availability to make timely decisions.
- Single sign-on to operational application and reporting solution.
- Consistent look and feel between different reports and web application.
- Users can export to the report as PDF, CSV, or Image.
- End users can bookmark their frequently used report criteria and corresponding results.
- No impact to operational system due to efficient data manipulation using SQL.
- High user concurrency: multiple users could view the report at the same time without manually sending the data through email.
- Role-based security: users are allowed to see the data they are authorized to view without having to manually separate out the data.

## XTIVIA OVERVIEW

XTIVIA is a proven technology integration and innovation company known for delivering leading-edge technology solutions to our clients' specific requirements, regardless of project complexity. We bring next-level business operations to reality through Application Development, Business Intelligence, Data Warehousing, Database Support & Management, Enterprise Information Management, Digital Experience Solutions and Enterprise Resource Planning. Our success stems from a demonstrated ability to deliver deep expertise via professional services, empowering clients to leverage their chosen technology successfully, competitively and profitably. XTIVIA has offices in Colorado, New York, New Jersey, Missouri, Texas, Virginia, and India. **www.xtivia.com**