

PROJECT BRIEF



Business Problems
Challenges
Deliverables
Outcomes
Data Sources
Technology

CREDIT REPORTING

CUSTOMER:

Equipment Leasing
– Midwest USA

PROJECT:

Credit Reporting

BUSINESS PROBLEM

A national equipment leasing enterprise had reached the limits of using Excel spreadsheets to provide information about the status and risk characteristics of its loan and lease portfolio. Large spreadsheets required significant amounts of time to retrieve and calculate. Manual processes for handling the spreadsheets increased the potential for errors. As the firm's portfolio grew, the effort required to close the books after month-end required increased resources.

CHALLENGES

- An existing loan information data mart needed to be modified

DELIVERABLES

- Update legacy loan information data mart with new data to support credit reporting requirements
- Allow reporting in various currencies
- Create web-based interface to allow modifications to existing contracts
- Enable role-level security
- Create an object-oriented reporting interface enabling business users to create, view, and print reports
- Provide audit tables to keep track of the date and owner changes to data

OUTCOMES

- Greater data accuracy
- Improved decision making by spending less time on report preparation and more time on analysis of the data
- Fewer resources needed to meet month-end close deadline

DATA SOURCES

- Legacy application on SQL Server 2005 database

TECHNOLOGY USED

- Microsoft SQL Server 2005
- Microsoft SQL Server 2005 Analysis Services
- Business Objects OLAPi

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