

Personal banking dashboard

Full visibility into mortgage and credit products through self-service dashboards.

Industry: **Banking**

*Image for illustrative purposes only

Summary

Creation of personal banking dashboards (mortgages, auto loans, depreciation, channels, payroll loans) to give the business visibility based on information extracted from the core banking system.

Key challenges

- Extract information from the IBMi Core Banking DB2 database into a staging database on SQL Server 2008.
- Create data transformation processes as required by business logic and store them in a Data Warehouse repository.
- Deliver data transformation and cleansing processes.
- Build the dashboard using the Data Warehouse as its data source to provide visibility to the business area.

Approach

Decision-support tools were created to display updated, reliable, and accurate information. The tool was designed to be easy for business users and able to incorporate new perspectives as needed.

Results

- Enables business management to identify areas of opportunity for implementing new products.
- Enables active control and monitoring of products.
- Monitoring and identification of risks in product implementation.
- Summarized data and information management for decision-making.

Technologies used

.Net (4.5)	Power BI	SQL Server 2018
WCF	ASP.NET (4.0)	SAML 2.0
Analysis Services	iLevel Solutions	Integration Services
Data Warehouse	Master Data Management	
SQL Server Agent	Tableau	jQuery



Conclusion

Use of cutting-edge technology for information visualization and data analysis, giving the bank a reliable, scalable tool for decision-making.