

REPORTING SYSTEM FOR FINANCIAL DATA ANALYSIS



OBJECTIVE

Develop a flexible reporting system to improve the efficiency of managing and controlling financial data

CHALLENGE

The client, a middle-size insurance and financial planning company based in New-York, faced the challenge of the inability of the current client's packaged web-based application to track the performance of their business efficiently. Before we started working together, the system had been in production usage for 2-3 years and contained a huge amount of data. System functionality, however, couldn't serve the specific character of the financial industry and didn't allow performing required data analysis and building reports. One of the challenges was the migration to another system in the condition of no technical documentation for data export available.

SOLUTION

To solve the problem, the client turned to Intetics, a cutting-edge technologies provider for the financial industry. The first step

was to investigate the architecture and data structure of the existing application, design and implement a flexible reporting framework, and integrate it into the application for data analysis. The second step included creating custom reports based on the earlier designed framework for various business scenarios. It was done to improve obtaining actual financial and insurance information with due time.

The flexible reporting framework based on the latest Microsoft technologies – Microsoft Reporting Service (MSRS) and .NET framework 3.5 – was developed for the corporate data visualization and analysis. Using it, dozens of reports were created which possessed enhanced filtering features, functionality for exporting to different formats like Excel/PDF/HTML/etc., and elaborate UI design. Data-driven subscriptions were used to deliver reports in necessary time and to view them in various email clients. Also, a web portal was developed to enable users to visualize and enter information into the corporate database.

Technologies Utilized

- Microsoft Reporting Service 2000/2005
- Sybase DBMS
- .NET Framework 3.5,

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- ASP.NET,
- C#

RESULTS

The developed system makes it easier and more efficient to process and control the financial and insurance data. When new

business requirements are received or additional data analysis is required, the team performs data processing and develops new reports integrated into the reporting solution.