

# Analytical Data Mart for Symitar Episys

Powerful, Visual Analytics and Data Quality Monitoring

## Highlights

- Quick-start capability
- Pre-built content and automation
- Business-user self-service empowerment
- Frees up report writers to spend time analyzing data, not preparing data and reports
- No additional IT or technical staff required to implement and maintain
- Accessible via online, mobile, or disconnected environments



**Analytical Data Mart for Symitar Episys: Powerful, self-service analytics across finance, operations, lending, and marketing.**

The **Analytical Data Mart for Symitar Episys (ADMS)** is designed exclusively for credit unions and their staff, providing access to powerful, visual analysis through dashboards, reports, charts, and scorecards that can generate actionable business information across all departments and branches. Data load automation for Symitar Episys keeps the data current and complete. No additional IT staff are required to implement or maintain the solution, making it ideal for small to medium-sized credit unions.

The ADMS provides a rich set of insights, information, and analysis derived from the Symitar Episys core system, including executive key performance indicators (KPIs), branch performance, and lending metrics. To identify, measure, and monitor the quality and health of your data, the Data Quality Workbench is included.

**Information Builders provides the industry's most scalable software solutions for data management and analytics. With one smart platform for integration, data quality, and analytics, we help companies manage their data, generate insights, take action, and deliver impact.**

Subject areas and business use cases are itemized below.

**Executive Insights**

- KPIs at a Glance: Share Growth, Loan Growth, Accounts, High-Level Trends and Analysis
- Card Metrics: Delinquency, Card Stats, Quality, Digital Transaction Trends
- Investment Schedules for CD, Share, Loan Maturity
- Courtesy Pay/NSF Reports
- Negative Shares
- Non-U.S. Persons Report

**Branch Metrics**

- Loans, Shares
- Regions, Shared Branching
- Resource Management, Production and Productivity, Scheduling Optimization
- Branch Transformation, Planned vs. Actual
- Transaction Information

**Lending Metrics**

- Delinquency Analysis, Recent Bookings
- Loan Prepayment Speeds, Maturity
- Payment Protection

**Data Quality Profiler Workbench**

- Identify and repair incorrect, missing, or inconsistent data

**Benefits of the Solution**

The ADMS is designed for near maintenance-free implementation and operation, suitable for all credit unions, regardless of size and IT staff. Its easy-to-use analytics, dashboards, reports, and charts are accessible to all authorized users within the organization, with minimal or no training required. The solution is backed by Information Builders' world-class Technical Support, Customer Education, and Professional Services, when needed.

**Quick-Start**

- Pre-built content and automation facilitates implementation within two to three days
- No training required to use the solution

**Business-User Self-Service – Minimal Dependence on IT**

- Report writers spend more time analyzing data, less time preparing data and reports
- Simple one-click operation, interactive dashboards, powerful report generator
- Eliminate manual integration required to generate reports and charts. Less time to prepare – more time to analyze

**Current Core System Data**

- Near real time, not monthly batch
- No impact on production transactional systems

**Industry-Leading User Adoption – Fewest Clicks to Find Your Answer**

- Visual and interactive
- Personalized user experience

**Full-Service Support**

- Deep credit union and analytics expertise
- Industry-leading analytics and data management platform

**No Additional IT or Technical Staff Required to Implement and Maintain**

- With professional services, extend the solution in increments aligned with your strategies
  - Integrate all data for analytics

**Accommodates All Major Operating Environments**

- On-premise or cloud
- Online, mobile, or disconnected

**Solution Software Components****Analytical Data Mart for Symitar**

- ADMS Analytics System
- Industry-leading WebFOCUS data and analytics platform

**Automated Data Extraction and Load**

- Core extract utility
- ATM dialog

**System Requirements**

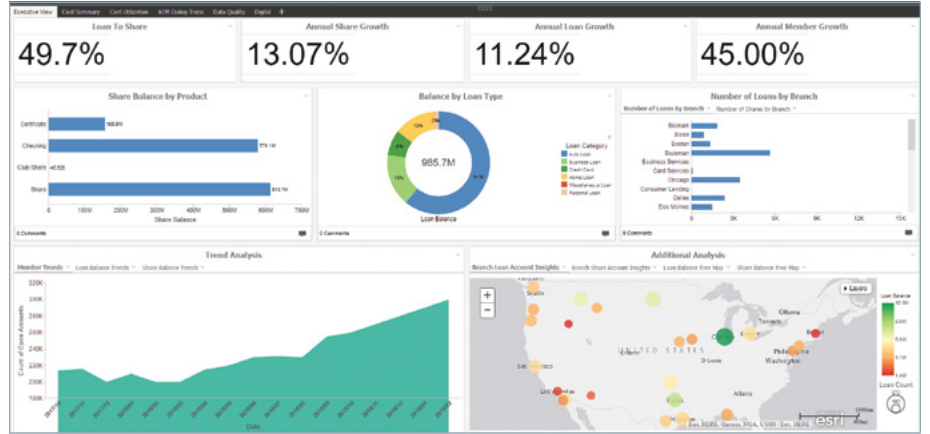
- Symitar Episys
- SQL Server

**Examples of ADMS in Action**

The following screenshots illustrate a representative sample of the powerful business insights available within the ADMS solution, designed for ease of use and self-service.

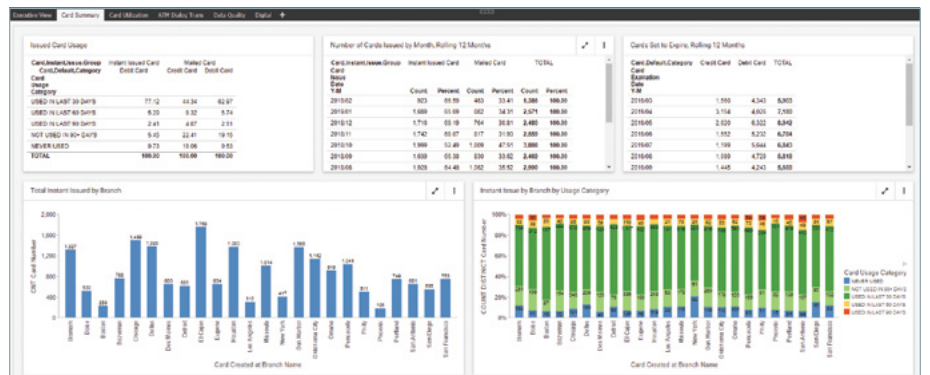
**KPIs at a Glance**

- Loan to Share
- Share, Loan, Member Growth
- Share Balance by Product
- Balance by Loan Type
- Number of Accounts by Branch



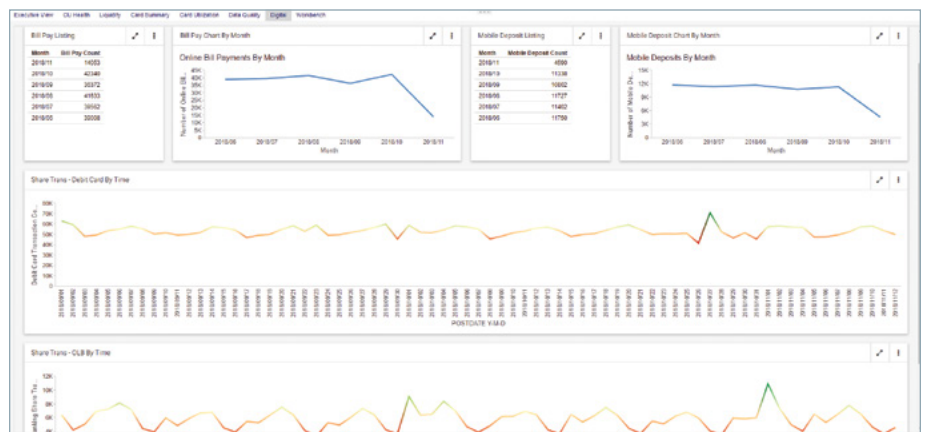
**Card Summary**

- Issued Card Usage
- Instant Issue by Branch, by Usage Category
- No. of Cards Issued by Month
- Cards Set to Expire
- Instant Issue by Branch
- Cards Issued by Month, Chart



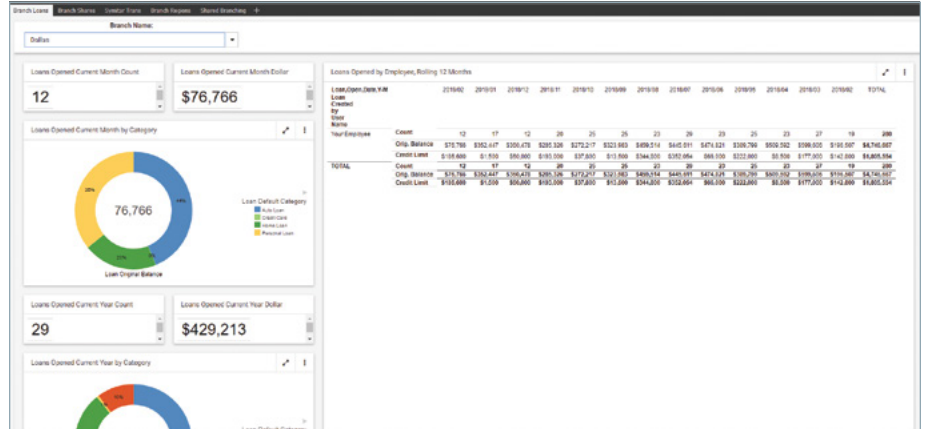
**Digital Banking Analysis**

- Bill Pay Listing
- Bill Pay Chart by Month
- Mobile Deposit Listing
- Mobile Deposit Chart by Month
- Share Trans – Debit Card by Time
- Share Trans – OLB by Time



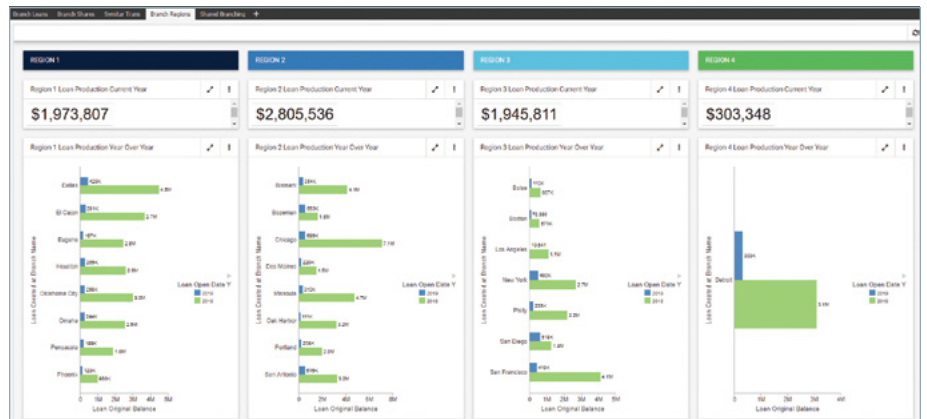
**Branch Loans**

- Loans Opened # Current Month or Year
- Loans Opened \$ Current Month or Year
- Loans Opened Original Balance, by Employees



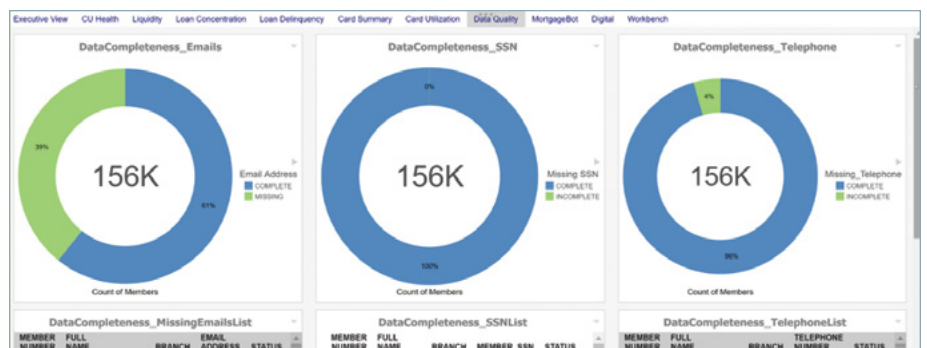
**Regional Production**

- Loan Production Current Year
- North Region Loan Production Year Over Year
- Account Retention



**Data Quality Profiler and Remediation Workbench**

- Data Completeness – SSN, E-mails, Telephone
- Remediation dashboard and reports



**Loans**

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**Loan Delinquency**

- Delinquent Loans Charts, Reports
- Delinquent Loans by Origination Year
- Loan Type by Origination Year
- Delinquency by Loan Type, by Origination Year
- Charge-Off Matrix

**Loans Booked Recently**

- Loans Booked Yesterday
- Loans Booked Last Week
- Loans Booked Last Week – Visa

**Loan Prepayment Speeds**

- Loan Types by Average Term, Average Time Open, and Prepaid
- Loans Closed Previous Six Months
- Loans Closed Previous Six Months, Matured vs. Prepaid
- Loans Closed Previous Six Months, Matured vs. Prepaid With Six-Month Window

**Loan Maturity**

- Maturing Loans Next Six Months
- Maturing Loans Next 12 Months – Chart
- Maturing Loans Schedule

**Branch Shares**

- Shares Opened # Current Month
- Shares Opened \$ Current Month
- Shares Opened Original Balance
- Shares Opened # Current Year
- Shares Opened \$ Current Year
- Shares Opened Original Balance
- Shares Opened by Employees

**Shared Branching**

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- Branch Tree Map
- CU Branches Tree Map
- Calendar Chart by Shared Branch
- Shared Branch Transaction Totals
- By Branch and Date Last 21 Days

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