

Success Story



ER/Studio
Enterprise Portal

ORGANIZATION

Fortune 500 Company'
Financial Services

INDUSTRY

Financial Services

APPLICATION

Metadata Search & Reporting

TOOLS

Embarcadero® ER/Studio®
Enterprise Portal

CHALLENGES

In launching a new business unit, executives wanted a tool that would enable them to access the metadata stored in the company's data models output into a flexible, easy-to-use format that would not create inconsistencies or redundancy in the data, and that could be shared across business and data analysts.

RESULTS

As a result of having centralized and controlled access to corporate metadata, both the business and IT users are able to access the information they need, when they need it in order to make strategic decisions based on timely and accurate information to launch the business unit more quickly.

Reducing Time to Market with Real-time Business Intelligence and Metadata Reporting

Through its implementation of ER/Studio Enterprise Portal, a leading Fortune 500 financial services company has replaced a time-consuming, manual metadata reporting process and is realizing improved collaboration, better control over data assets and faster response to the company's changing business needs.

As a provider of federal and private student loans in the United States, , data management is a critical component to this company's success. The company, listed on both the Fortune 500 and Forbes Global 2000, manages billions in debt for millions of borrowers across the nation.

Recognizing the importance of enterprise data management, this Embarcadero customer employs a team of eight people that are responsible for the company's data governance and data quality initiatives, and supports more than 175 systems. The team resides within IT under the Enterprise Technologies Group. The Enterprise Data Management group has been an Embarcadero ER/Studio client for the past three years, using the data modeling software and enterprise metadata repository to solve the company's complex data management challenges.

CHALLENGE

With the growing turbulence in the financial services market, the company made the decision to diversify its offering and launched a new business unit. A finance group created to support this new line of business required access to the corporate metadata to create financial models.

The models were used to profile customers and analyze their risk in order to determine which customers qualified for the new service. The team needed a centralized and flexible tool that would enable employees to extract and manipulate the metadata applicable to their area of focus.

In addition to providing access to the applicable metadata, the Enterprise Data Management group generated daily impact analysis reports for the finance group showing where a field was used across the corporate system. The team had been meeting its internal reporting requirements by using ER/Studio's "Where-Used" and "Impact Analysis" functionality. In addition, the team also created customized macros that were run nightly and shared in a read-only access across the LAN.

Executives overseeing the new line of business wanted a tool that would enable them to access the metadata output in a flexible, easy-to-use format that would not create inconsistencies or redundancy in the data.

"We had new power users who wanted to do ad hoc drill-downs on the metadata and wanted to track data lineage across systems. The standard metadata reports were no longer robust enough. We needed a more powerful metadata tool to support the business," said the manager of the Enterprise Data Management group.

The Enterprise Data Management team needed a centralized tool that would allow them to easily share data and generate metadata reports while also maintaining control and consistency of the data.

SOLUTION

In August 2008, Embarcadero introduced a search and reporting engine for data, ER/Studio Enterprise Portal, transforming the way metadata, business rules and models are located and accessed. By providing greater visibility into corporate data assets, both business and IT users can achieve an unprecedented understanding of the information in their enterprise and facilitate company-wide collaboration.

Understanding this client's challenges, Embarcadero introduced its latest innovation to the Enterprise Data Management team who quickly obtained executive approval to purchase the new product due to the fast return on investment it offered.

"With ER/Studio Enterprise Portal, the team can instantly access enterprise data assets for use in systems development, integration, data governance and regulatory compliance. The powerful reporting and search technology makes it easier for the

"The powerful reporting and search technology makes it easier for the team to share data stored in the ER/Studio repository."

– Manager, Enterprise Data Management Group

team to share data stored in the ER/Studio repository," said the manager of the Enterprise Data Management group. "And, its web-based nature enables the Enterprise Data Management team and users company-wide to effortlessly browse, search and report on metadata quickly and accurately."

RESULTS

The small investment has provided the Enterprise Data Management team with major productivity gains. The team implemented ER/Studio Enterprise Portal in a matter of days and has received positive feedback from the company's users. The Portal provides a centralized tool that allows the team to easily share data, set user policies and generate metadata reports.

In fact, ER/Studio Enterprise Portal is now used across the organization for all metadata reporting.

"The standard reports, drill-down capabilities and the friendly search engine make reporting easy enough for users to generate their own unique reports on demand. This saves our team considerable time which translates into greater productivity," the manager of the Enterprise Data Management group said.

As a result of having centralized and controlled access to corporate metadata, both the business and IT users are able to access the information they need, when they need it in order to make strategic decisions based on timely and accurate information to launch the business unit more quickly.

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