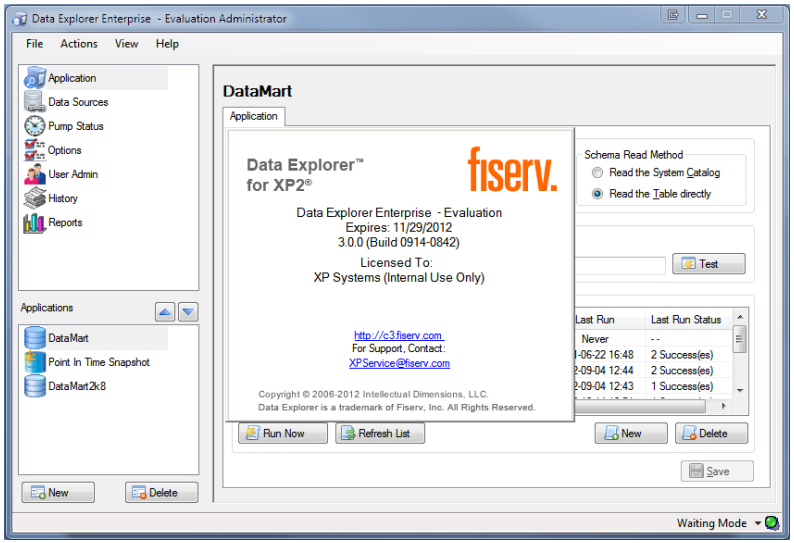
INTELLECTUAL DIMENSIONS LLC

EMPOWERING CREDIT UNIONS TO WORK SMARTER SINCE 2001

Data Explorer

Capabilities & Features Review



The Data Explorer Solution

- Moment-In-Time data access
  - Query data for any business date captured, trend and compare different days over time for trending
- Expanded data retention
  - Retain historical data far longer than is reasonable (or cost effective) on the core systems
- "Single Place of Truth"
  - All relevant data together in 1 database
- Data Models you already know

Key Features

- Dynamic detection of schema changes in the Source Database *on the fly*
- Designed from the ground up specifically to support multiple data sources, *from multiple systems*
- Easy to use
  - Administration training takes less than an hour
- End user maintainable
- Built in SQL database maintenance plans

Architecture

- Windows Server 2012
- All current versions of SQL Server
  - Can coexist with other SQL applications *
- Data Sources
  - Any ODBC Compliant or SQL Server relational database
    - Includes non-traditional data sources
      - Text/CSV
      - Excel
      - Access

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Flexible

- Integration points at load start and completion
  - Pre & Post Load Actions
- Automated file exports including FTP upload/download capability
- Easy integration with XP2 file update programs
- Large and active install base and end-user community.

Fast & Self Maintaining

- Fast
  - Most XP2 data warehouse loads complete in under an hour, even for large sites.
- Variety of load types and scheduling options
- Built in detection of Holidays and non-business days
- Several scheduling and load options
- Load notifications

Quick Deployment

- Out-of-The Box load definitions included for:
  - XP2
  - Lynxgate (CAT)
  - Digital Insight for Home Banking & Bill Pay
    - PM Systems, and Cavion are easy to setup as well
  - FICS (External Mortgages)
  - Fiserv Collections
- Plus the ability to add/customize your own without support or added professional services

Enterprise Data Source Examples

- XP2 (DB2RW)
- LynxGate® (Cat)
- Digital Insight
- PM Systems
- Corillian
- Cavion
- BDI (E- Statements)
- In-house Merger Sources
  - Galaxy® From Fiserv
  - Open Solutions Inc (OSI) (Proprietary)
  - UltraData
- Co-op ATM Switch
- Nautilus ®
- Raddon MCIF
- Fiserv EFT
- CUMA Mortgage
- FICS (Mortgage Origination/Servicing)
- CU Members Mortgage
- MeridianLink™
- Certegy (Credit Card Processor)
- FIS (Credit Card Processor)
- Equifax ™
- Wisdom™
- Prolog™
- SEG Employee Lists
- CUNA IRAs
- Harland Check Orders
- CardWizard ®
- Cisco CCX

Display Tools

- You decide how data should be presented and distributed
  - Match tools with skill, requirements, budget
  - iDashboards
  - Crystal Reports
  - ID vantEdgePoint
  - SSRS (SQL Server Reporting Services)
  - SharePoint/Performance Point
  - …and so on…

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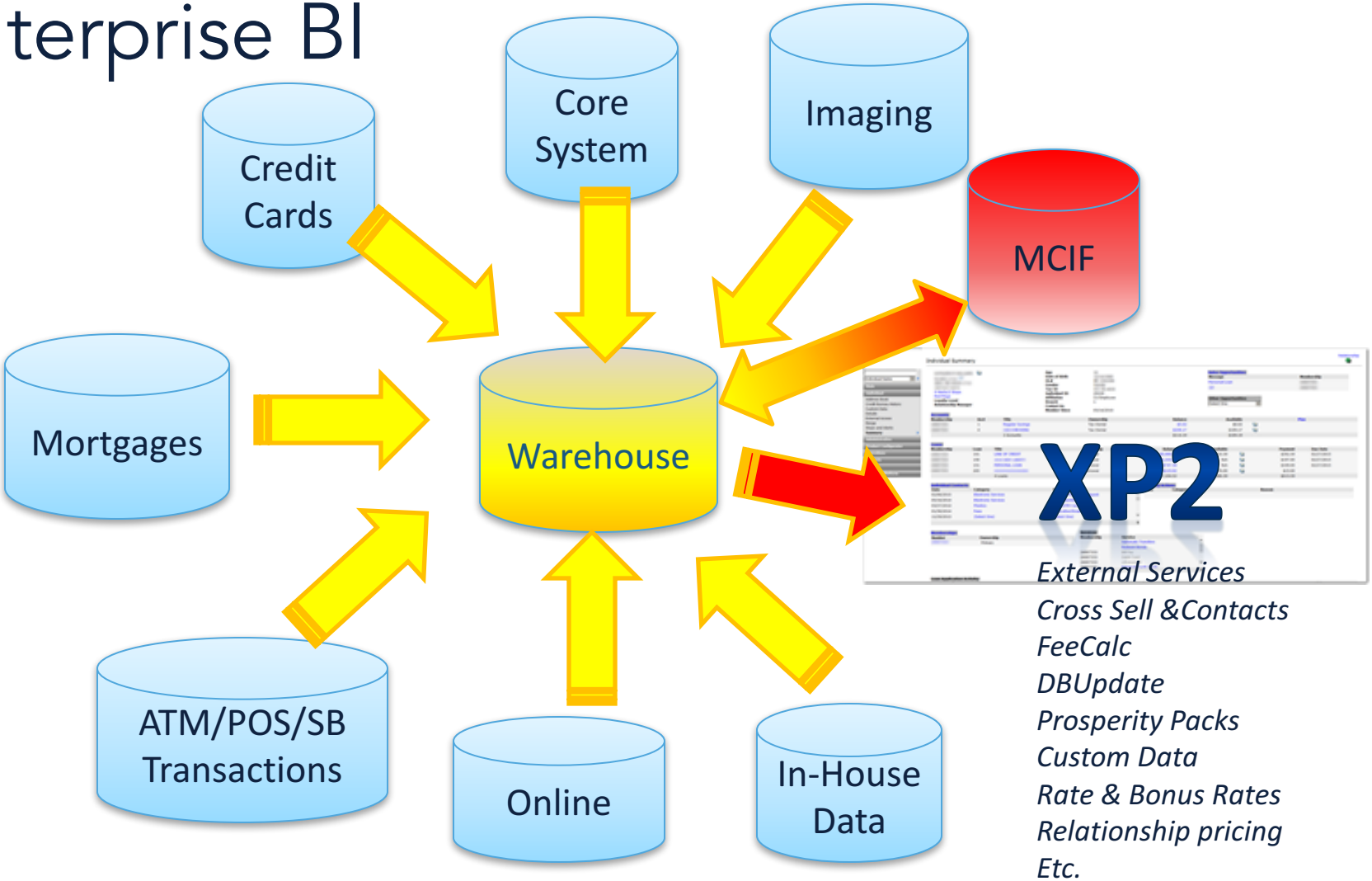
Enterprise BI



External Services
Cross Sell &Contacts
FeeCalc
DBUpdate
Prosperity Packs
Custom Data
Rate & Bonus Rates
Relationship pricing
Etc.

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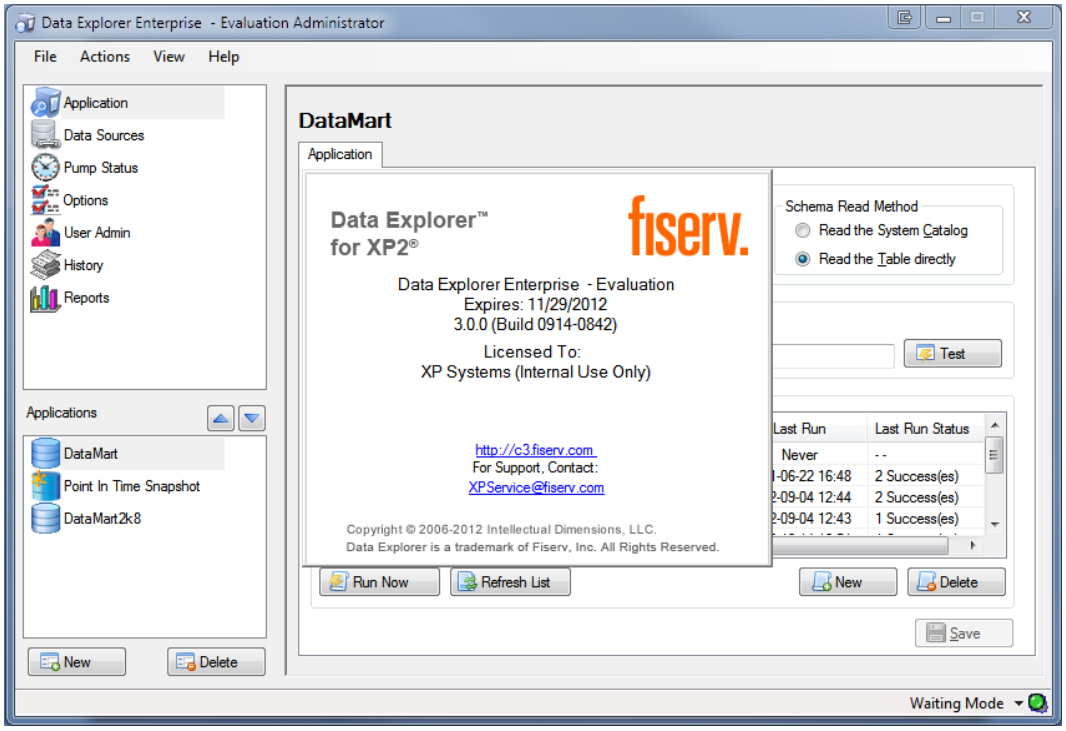
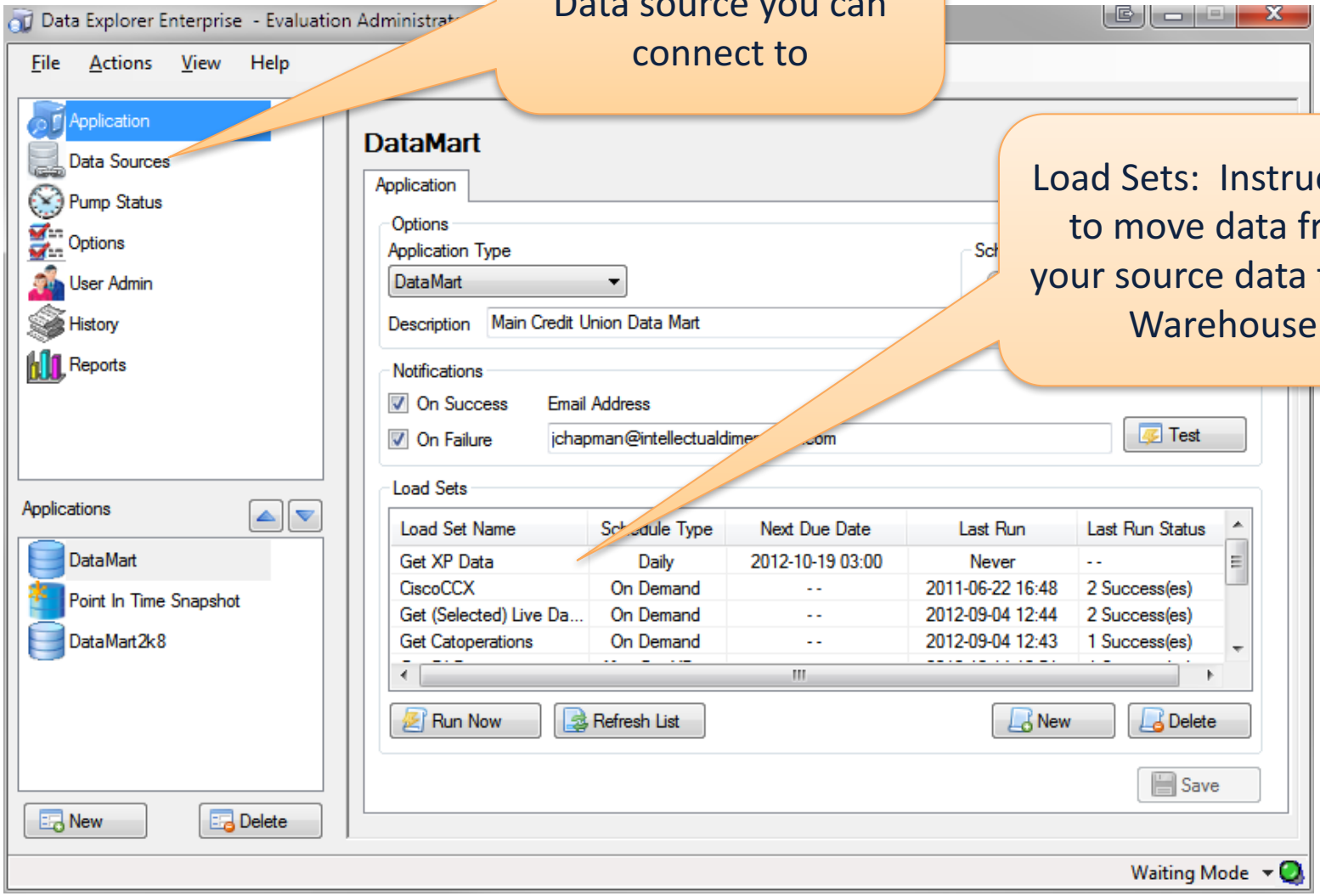
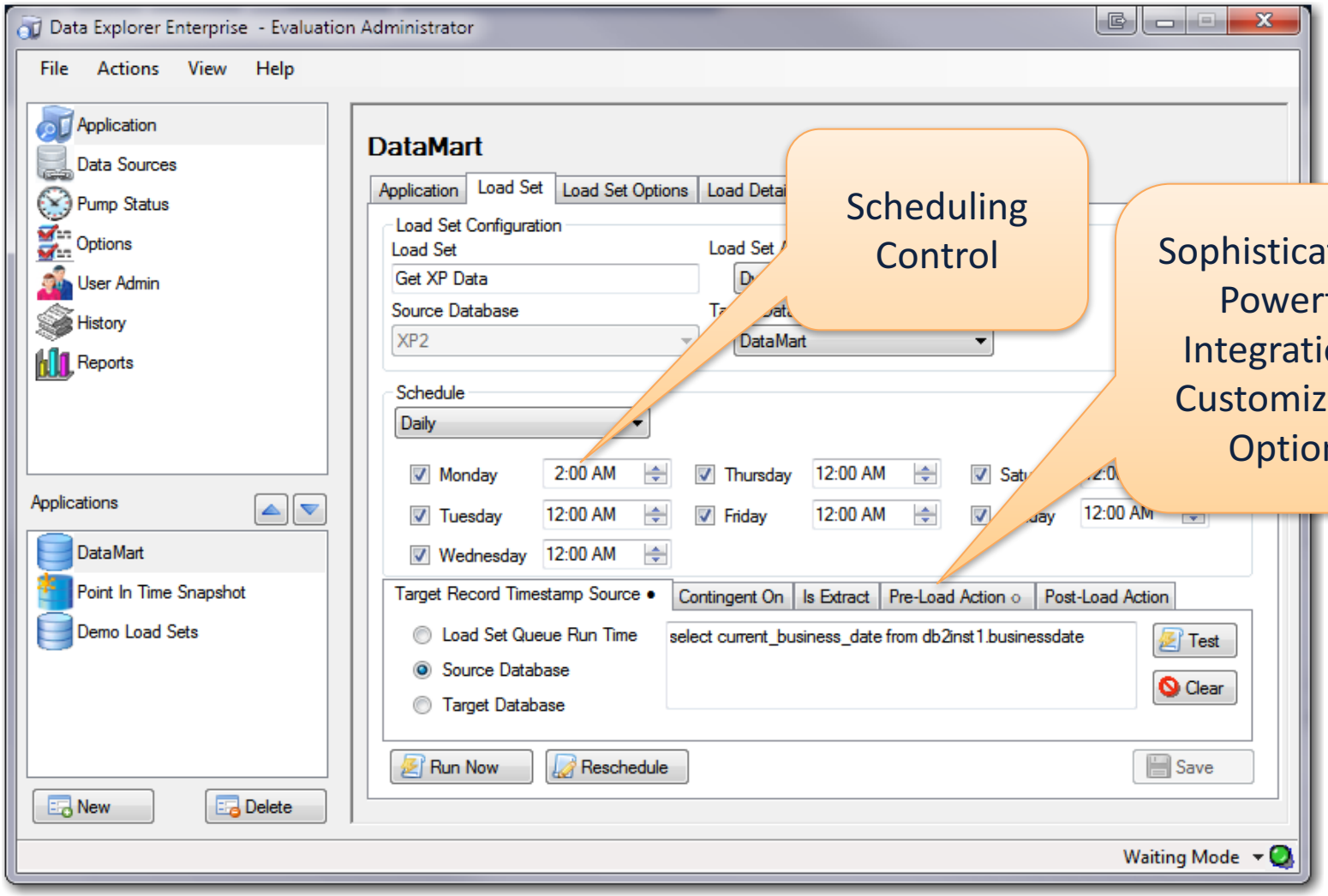
Data Explorer



Data Sources: Point Data Explorer to any Data source you can connect to

Load Sets: Instructions to move data from your source data to the Warehouse




Data Explorer Enterprise - Evaluation Administrator
File
Actions
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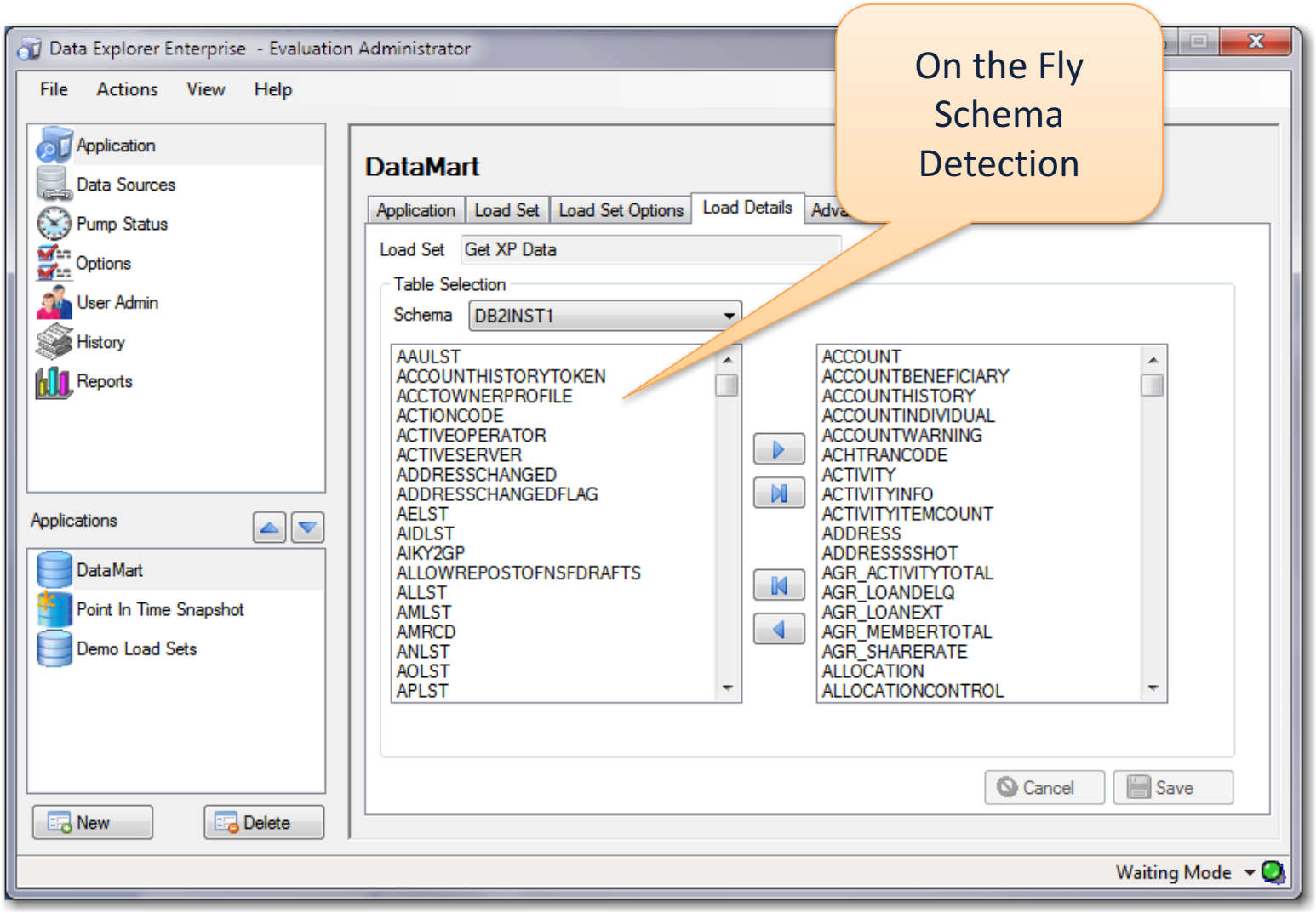
Demo Load Sets
New
Delete
DataMart
Application
Load Set
Load Set Options
Load Set Configuration
Load Set
Get XP Data
Source Database
XP2
DataMart
Schedule
Daily
Monday
2:00 AM
Tuesday
12:00 AM
Wednesday
12:00 AM
Thursday
12:00 AM
Friday
12:00 AM
Target Record Timestamp Source
Contingent On
Is Extract
Pre-Load Action
Post-Load Action
Load Set Queue Run Time
Source Database
Target Database
select current_business_date from db2inst1.businessdate
Test
Clear
Run Now
Reschedule
Save
Waiting Mode
Scheduling Control
Sophisticated & Powerful Integration & Customization Options


On the Fly Schema Detection
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ACCTOWNERPROFILE
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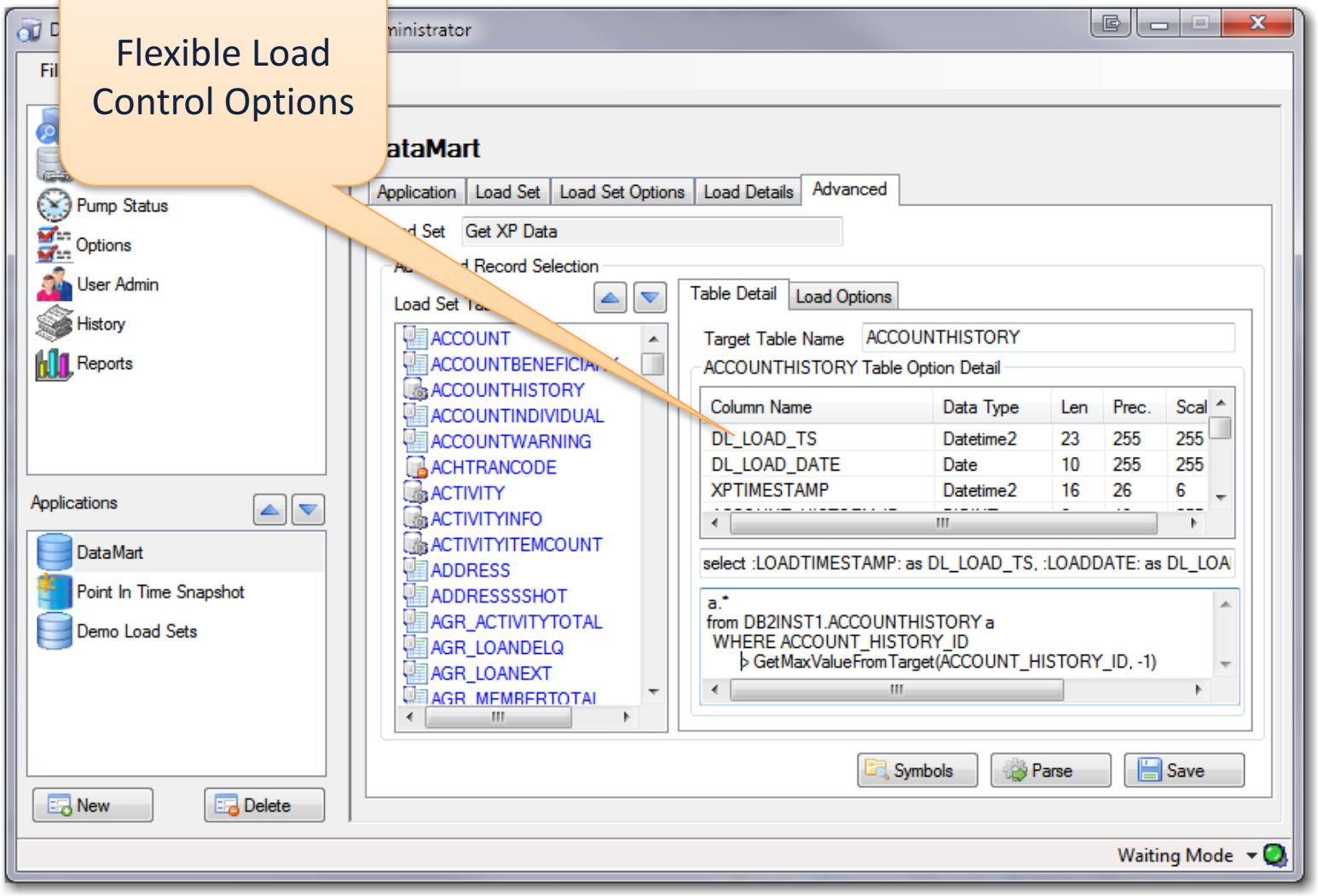
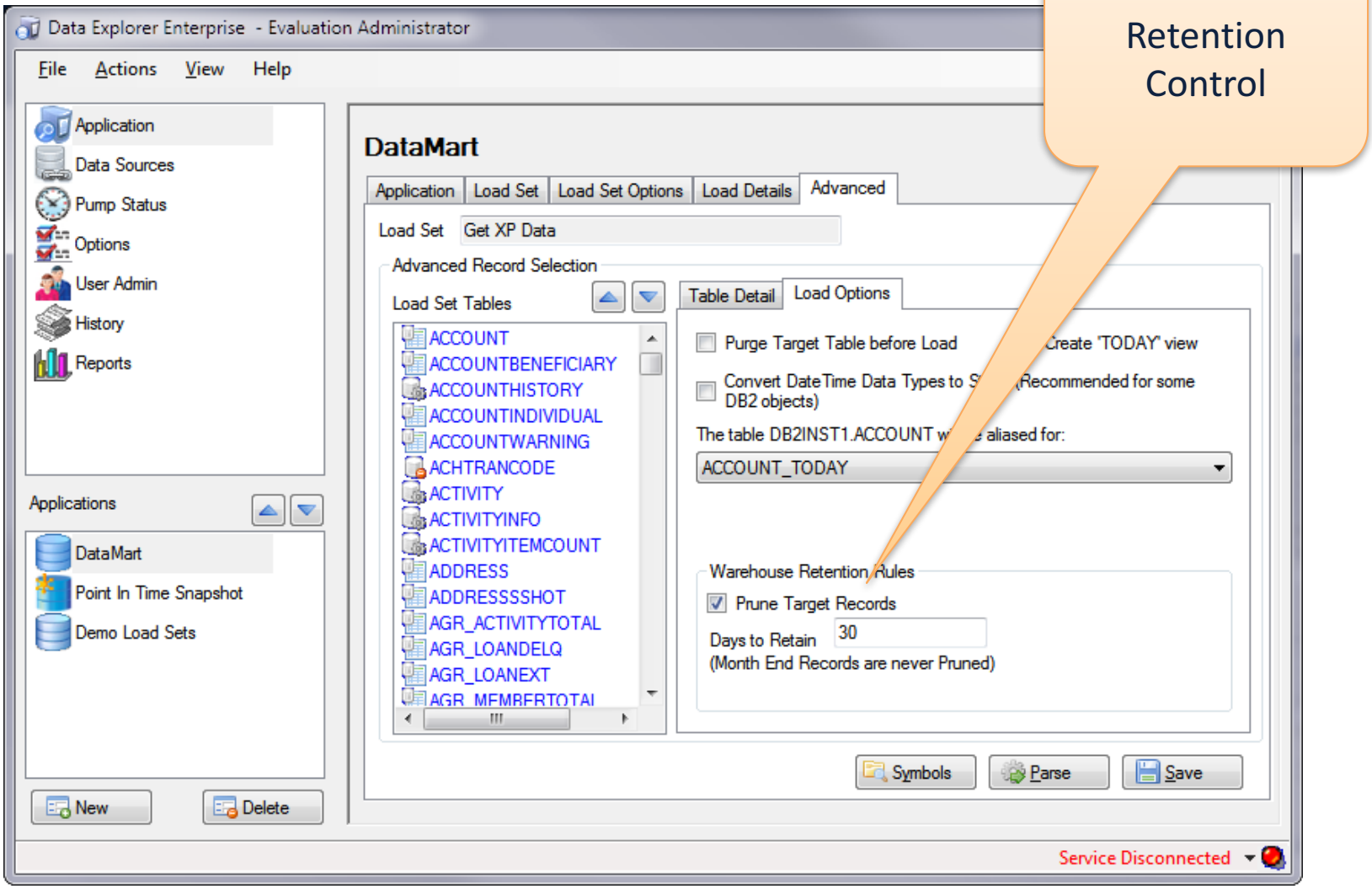
ACTIVESERVER
ADDRESSCHANGED
ADDRESSCHANGEDFLAG
AELST
AIDLST
AIKY2GP
ALLOWREPOSTOFNSFDRAFTS
ALLST
AMLST
AMRCD
ANLST
AOLST
APLST
ACCOUNT
ACCOUNTBENEFICIARY
ACCOUNTHISTORY
ACCOUNTINDIVIDUAL
ACCOUNTWARNING
ACHTRANCODE
ACTIVITY
ACTIVITYINFO
ACTIVITYITEMCOUNT
ADDRESS
ADDRESSSSHOT
AGR_ACTIVITYTOTAL
AGR_LOANDELQ
AGR_LOANEXT
AGR_MEMBERTOTAL
AGR_SHARERATE
ALLOCATION
ALLOCATIONCONTROL
Cancel
Save
Waiting Mode

Flexible Load Control Options




Retention Control
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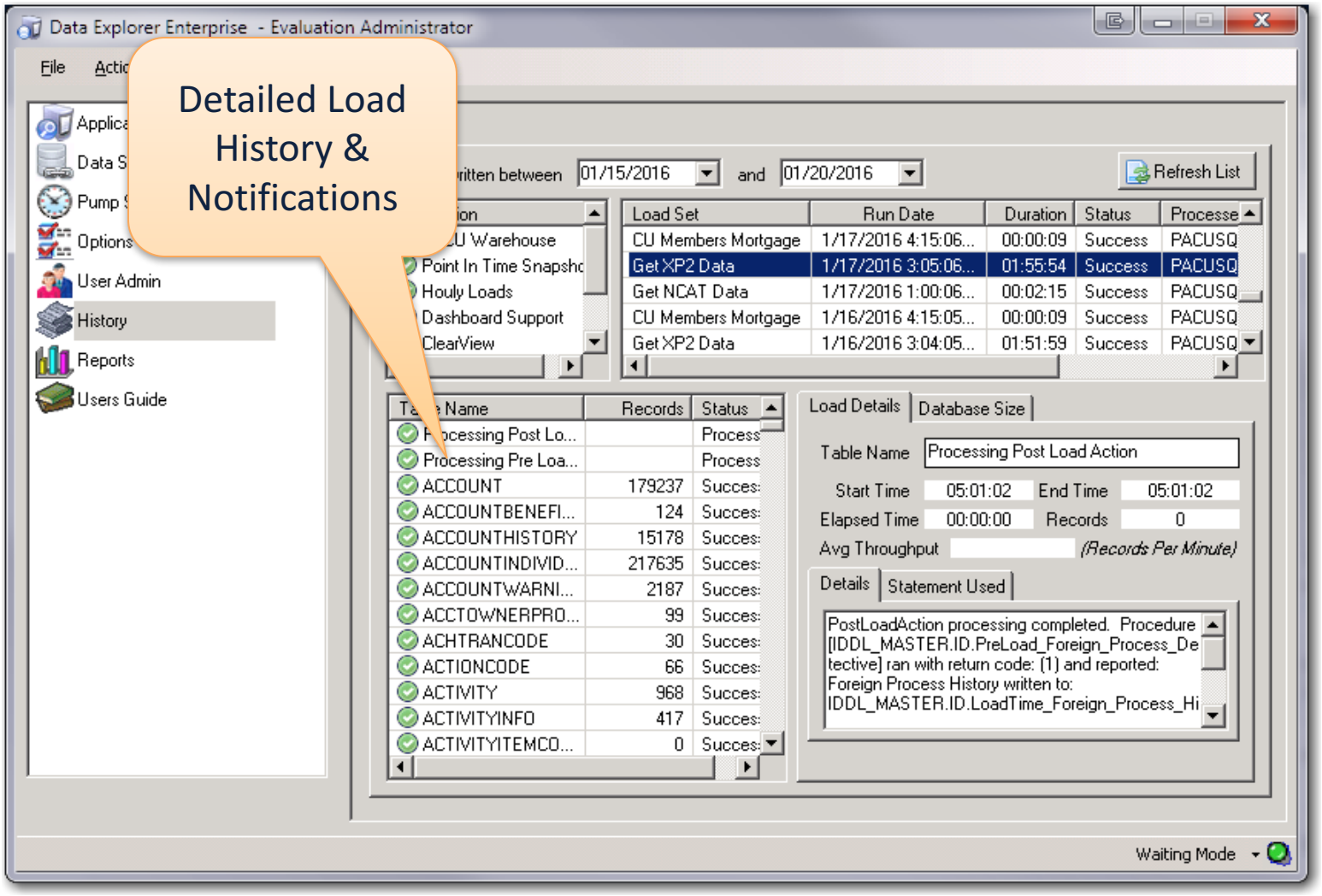
Get XP Data
Advanced Record Selection
Load Set Tables
ACCOUNT
ACCOUNTBENEFICIARY
ACCOUNTHISTORY
ACCOUNTINDIVIDUAL
ACCOUNTWARNING
ACHTRANCODE
ACTIVITY
ACTIVITYINFO
ACTIVITYITEMCOUNT
ADDRESS
ADDRESSSSHOT
AGR_ACTIVITYTOTAL
AGR_LOANDELQ
AGR_LOANEXT
Table Detail
Load Options
Purge Target Table before Load
Create 'TODAY' view
Convert DateTime Data Types to S
(Recommended for some DB2 objects)
The table DB2INST1.ACCOUNT w
aliased for:
ACCOUNT_TODAY
Warehouse Retention Rules
Prune Target Records
Days to Retain
30
(Month End Records are never Pruned)
Symbols
Parse
Save
Service Disconnected

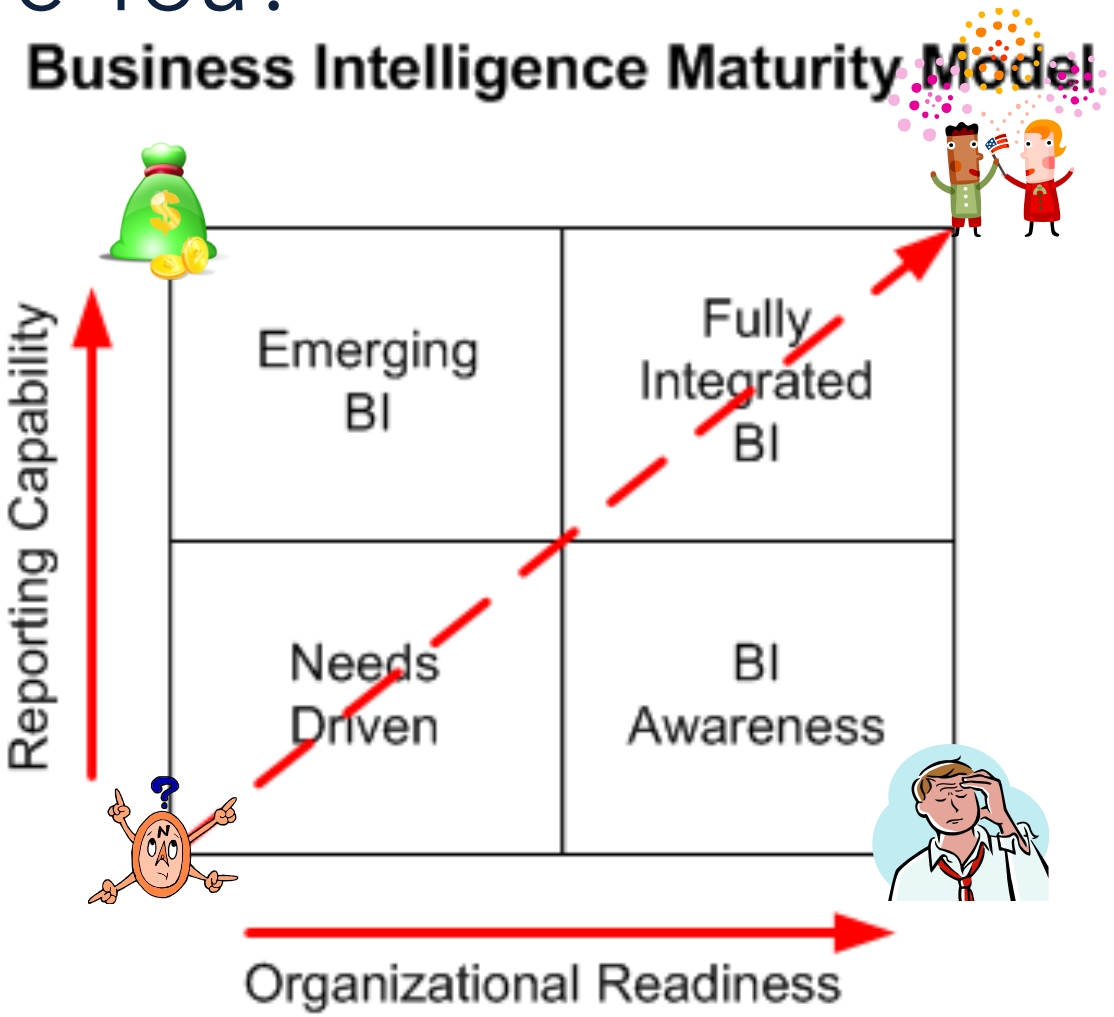

Detailed Load History & Notifications
Data Explorer Enterprise - Evaluation Administrator
File
Options
User Admin
History
Reports
Users Guide
Refresh List
Load Set
Run Date
Duration
Status
CU Members Mortgage
Get XP2 Data
Get NCAT Data
Load Details
Database Size
Table Name
Processing Post Load Action
Start Time
End Time
Elapsed Time
Records
Avg Throughput
Details
Statement Used
Waiting Mode

Implementation Assistance

- Deployment Planning
- Server Sizing & Capacity Planning
- Skill Development
- Custom BI training & project assistance
- SQL Server DBA Training
- Process Improvement Analysis & Best Practice Training & Assistance

Do You Need BI & Warehousing?

- What role does *data* play in your credit union?
  - Post Mortem Reporting
    - Reporting on where you have been and what you have done in the PAST?
  - Regulatory & Compliance "Necessary Evil"
  - "Oh, Marketing does lots of stuff"
    - *AKA Dependency on external systems and "proprietary black boxes"*
  - Drives Product Development, Process Improvement, Member Retention, Growth & Strategic Planning
  - Improves Member Service, Empowers Managers and Decision Makers.

How Ready Are You?

- Technology
- People