CASE STUDY:
MODERNIZED DATA WAREHOUSE SOLUTION
PHASE I

:ID DATASOURCE
CONSULTING

an EXL company

INTRODUCTION

Datasource was chosen, by the fourth largest credit union in the US, to build a modernized Data Warehouse with an independent integration layer to replace a legacy BI solution.

BUSINESS FOCUS

This client provides a full range of consumer and business banking services, managing assets of over $14B. Headquartered in Washington state, the credit union's membership extends across the U.S. and worldwide.

FOURTH
LARGEST
Credit Union
IN THE US

CLIENT CHALLENGE

The client had a legacy data warehouse in place for many years, but leadership realized it was no longer sufficient to support analytics needs and the business going forward. They also needed to quickly implement a replacement for one of their largest data integration platforms (Sagent, a Pitney Bowes extract, transform, and load (ETL) and business intelligence (BI) tool) that was set to be retired and would no longer be supported.

The client turned to Datasource to modernize their data warehouse architecture and enhance the contents with additional information in a central repository. After weeks of hosting multiple Proofs of Concept (PoCs) with numerous vendors, the company selected Informatica Developer for data integration, and Informatica Data Quality (IDQ) to enhance data quality within the solution.

THE DATASOURCE SOLUTION

In phase one of this project, the Datasource team focused on an "analyze and architect" effort for the first release (1.0). We started with installation, configuration, setting standards, roles, and processes, and establishing ETL design templates, and conducted a holistic conceptual model to ensure that each release is interoperable with previous and subsequent releases. For the Data Warehouse release, Datasource worked with the credit union team to:

- Perform conceptual data modeling

- Develop business and technical requirements and establish development standards

- Analyze the source system and profile the data

- Design server and ETL architecture

- Install and configure the Informatica platform

- Perform logical and physical data modeling

- Design, develop, and test the ETL mappings, sessions, and workflows

- Create a data dictionary

SOLUTION ROADMAP

To enhance the client's data quality, Datasource worked with the internal data governance and BI teams to:

Install and configure the Informatica Data Quality software

Define, implement, and test 20 initial data quality rules.

Identify data sources and perform data profiling to define the scope of data to be cleansed

Perform documentation and other activities to support the knowledge transfer to the client's resources

Design the database and data quality solution

THE RESULTS:

The Datasource team successfully completed the following project deliverables:

① **Development, test, and production -** Installation and configuration of multiple Informatica products across three different platforms

② **Three-layer architecture** Implementation to facilitate data acquisition, integration and presentation layers

③ **Encryption of PCI data elements -** Datasource applied reliable encryption of the Payment Card Industry (PCI) to ensure it meets the security standards designed for all companies that accept, process, store, or transmit credit card information to maintain a secure environment

④ **Refine logic -** Improvement of party, branch, organization, and person logic to facilitate data integration among multiple vendor source systems

THE RESULTS CONTINUED:

(5) **Faster processing time -** Creation of month-end snapshots to facilitate quicker processing times on analytics queries

(6) **Put it into effect -** Implementation of process audit balance control, error management, and restartability

(7) **Development** of a high degree of ETL component consistency and re-usability to improve maintainability new developer onboarding

(8) **Incorporation** of Informatica address cleaning, as well as assimilation of a new change data capture process

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WE ARE PASSIONATE ABOUT DATA

We are a consulting company that focuses exclusively on enterprise data management, including both strategic and implementation services. We are experts in data architecture, data integration, data quality, data governance, MDM, reporting & analytics, and program management.

We employ the best and brightest experts in the industry. Datasource Consulting not only remains close to the latest technology and industry trends, but we also help move the needle with thought leadership in areas such as BI in the Cloud, Agile BI, and Big Data.

Empowered with a proven methodology that embraces Agile and Lean principles, Datasource Consulting knows how to make your project and program successful.

PARTNER WITH US

Contact us to learn more about how our data integration solutions can help your organization run more efficient operations.

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