



Industry: Banking and Finance

Technology: SharePoint 2013, SQL, SSR

Country: South Africa

Client Profile:

The client is a leading investment banking group operating in Africa. It provides local and on-the-ground investment banking services across the African continent.

Challenges:

The client's nature of business needs to store a lot of data. The previous system had a lot of glitches along with this, it was becoming difficult to store and process the data for valuable insights. The client wanted to replace the legacy software while upgrading its infrastructure and changing reporting services. When the client approached us, we found the following challenges in the project.

- The previous system lacked efficiency and automation.
- Calculations in the previous system were different with no reporting system.
- As there were multiple data insertion processes which also raised the issue of data accuracy.
- There was no common platform for data processing, storage, and insertion.
- It was a challenge to extract historic report or data.
- There was no unified method for calculations in the process for product owners.

Solution:

We developed an automatic reporting system for the client based on the requirement. Using technologies like SharePoint, SQL, and server-based reporting system SSRS, we provided these solutions to the client.

- The migration of data from their legacy system into the new system was critical. It meant that the data needed to be collected, translated, and loaded into the current reporting system.
- We moved the legacy system into Microsoft's SQL Reporting Services (SSRS) on an SQL database.
- Over the years they had developed limitless tailored reports that their business relied on. This investment banking company needed these reports to satisfy both business and client requirements.
- We worked to extract data from the existing system along with the assistance of the client as which reports need to migrate. We then programmatically cleaned the data to eliminate duplication and improve data quality.
- After the data was cleaned, we imported the clean data into the new system. We tested the data to ensure the transfer was successful.

KCS Approach

We automated the previously existing reporting system with SSRS. This helped the client in increasing the data accuracy which thus resulted in increased business outcomes with many folds. We used Microsoft Share-Point for seamless file and data sharing, and SQL for much efficiency in the process. Our on-site manager helped organize activities and evaluate client reports while ensuring that the back-end team was effective in generating and reviewing reports. This distribution model has helped the consumer by increasing speed while retaining high-quality standards.

Outcome

- The reporting system developed with SSRS helped the client in maintaining high data accuracy.
- The client could now use the original and previously ignored data for business purposes.
- Analytic databases increased business efficiency.
- The client is now heading towards automatic forecasting with SSRS technology.

Tech Stack



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