

Synopsis

BTC developed a web services based highly secure Financial Data Dashboard for its client's customers. The iPhone app enhanced decision making by allowing users to drill down reports to get more details whenever and wherever required, in real time.

Business Need

The client wanted a web solution that would allow their customers to have access to key financial information in real time on the iPhone. The information was to be presented in an organized and easy-to-read format, allowing users to drill down for further details.

Challenges and Requirements

Business Challenges

- Accessing financial details from the client's data warehouse for each customer
- Presenting the information retrieved to each customer
- Developing a format for reports to present key information on the iPhone display in an organized, precise, and uncluttered manner.
- Building security into every step of development and functioning of the solution.
- Making detailed financial information available via web for mobile accessibility.
- Providing drill-down capabilities to break down the financial report data further.

Technical Challenges

- Making all the information available via web services to allow disparate technology stacks to interact with the dashboard application seamlessly.
- Providing customers access to their accounting books via the mobile interface.
- Providing customers secure access to detailed reports.

Solution

BTC got together a team of accounting and financial domain experts to understand the client's needs precisely and identify the nature of information that was to be presented to customers. The team followed this up by drawing out a visual design and homed in on a solution that involved collating and distributing key information via an online dashboard developed for the iPhone interface.

The Financial Data Dashboard application was made to interface with the client's financial data warehouse via web services over an SSL connection, ensuring proper authentication and authorization before any information was displayed to the user. The customer's setup data was configuration driven, making it easy to add customers without any code changes. The Dashboard was then linked with the reports repository for detailed financial reporting.

The app also allowed users to interface with their accounting software remotely.

Result

The client added value to their business by providing customers a means to view real time financial data, in detail, from their iPhones, at any time and place.