

WebFOCUS Pays Steady Dividends at

U.S. Bank

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Commercial Banking Giant Cashes In on Enterprise Business Intelligence

Whether it's creating custom reports for external users or measuring the profitability associated with its financial products and services, U.S. Bank depends on Information Builders' business intelligence (BI) software to manage many aspects of its business. The bank is the sixth largest commercial bank in the United States. It operates more than 2,500 banking offices and provides a comprehensive line of banking, brokerage, insurance, investment, mortgage, trust, and payment services to consumers, businesses, and institutions. To supply information and insight to this information-intensive enterprise, U.S. Bank has been working with Information Builders for almost 25 years and has promoted WebFOCUS as its BI standard since 2004.

"WebFOCUS handles internal reporting throughout the bank and is deeply integrated into our core business processes," says Joyce Halford of U.S. Bank's WebFOCUS Center of Excellence in Portland. "We rely on the software because it streamlines access to all types of information and enables us to give our external clients exactly what they need as well."

Since signing an enterprise license to use WebFOCUS throughout the company, U.S. Bank has used the BI platform as its "go-to" BI environment for all its reporting needs. "WebFOCUS is popular from coast to coast because it is so effective for so many different types of users," adds Halford. "Businesspeople can point and click to get answers to their questions. Some

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Mark Snoeyenbos
Manager of Client Access and Reporting
U.S. Bank

Snapshot

Organization

With assets in excess of \$221 billion, U.S. Bancorp is the sixth largest commercial bank in the United States.

Challenge

Deploy a comprehensive BI environment that can serve the reporting needs of dozens of divisions, hundreds of developers, and hundreds of thousands of users.

Strategy

Use WebFOCUS to streamline access to corporate data; establish a BI competency center to train users; make Information Builders' BI software readily available to both users and developers.

Results

A secure and pervasive reporting environment that is integrated into the core activities and business processes at the bank, positively impacting both employees and customers.

Information Builders Solution

WebFOCUS, Mainframe FOCUS, and Professional Services.

reports are used by a few people, others by thousands. Just about everybody who needs to generate reports relies on WebFOCUS in some fashion. It's a great asset for our customers as well."

For example, some of the bank's corporate customers use a WebFOCUS application called AccessOnline to access pertinent information and manage employee expenditures. The self-service program-management and reporting tool helps clients



streamline their administrative processes and boost control over their spending. Internal bank personnel also rely on AccessOnline to analyze spending patterns and trends for the bank's clients.

According to Trisha Anderson, WebFOCUS manager for AccessOnline, these clients enjoy direct, real-time access to information. Additionally, through an integrated BI dashboard, they can access about 60 standard reports, which are parameter driven and very flexible. "We have a dashboard environment set up for external customers and WebFOCUS MRE for our internal users," she says. "We are planning to enable scheduling with WebFOCUS ReportCaster."

AccessOnline delivers data in multiple formats. Clients often use the Excel format to load data into spreadsheets for additional analysis. The bank is getting ready to release custom reporting options that will allow clients to pick unique fields and simplify reporting and analytical activities.

Earning High Yields on Web-Based Reporting

U.S. Bank first started using WebFOCUS in the 1990s. At the time, Information Builders had the only Web-based reporting solution

"WebFOCUS is popular from coast to coast

available that would work on the mainframe. WebFOCUS usage has grown steadily at the bank ever since, along with the capabilities of the WebFOCUS environment.

Today, most WebFOCUS developers use its Developer Studio, Managed Reporting, and the Business Intelligence Dashboard to create new reporting applications. Currently the bank has approximately 300 active users of WebFOCUS Developer Studio. Mainframe FOCUS is also widely used for many types of ad hoc reporting from existing databases.

"Information Builders continues to enhance the end user environment so that anything you could formerly do with FOCUS code you can now do with a few clicks in the GUI tool," says Halford. "People often tell us how quickly they can obtain the data that they need with these tools."

Accessibility, Security, and Scalability

According to Mark Snoeyenbos, U.S. Bank's manager of client access and reporting, as well as the manager of the WebFOCUS Center of Excellence, one of the reasons WebFOCUS is deployed so broadly is because it can access many different data sources and be deployed readily on many computing platforms. The bank has established several WebFOCUS servers on z/OS, Unix, and Windows to access data structures on those platforms as well as SQL

Server, Oracle, and FOCUS. "It is easy to create and share reports with WebFOCUS," says Snoeyenbos. "Thanks to the way we have set up the reporting servers, we can connect people with just about any data source in the organization."

Another major reason the bank has standardized on WebFOCUS is because of its superb scalability, especially in a mainframe context. At a recent user convention, Information Builders honored one of U.S. Bank's external applications with the "Most Scalable Application" award for its ability to support the needs of hundreds of thousands of users. Thanks to its multi-threaded, server-based reporting architecture, WebFOCUS can cost effectively handle these heavy workloads. "We continue to look for better ways to leverage our mainframe systems," says Snoeyenbos. "WebFOCUS is a logical extension of our mainframe

roots since it can be flexibly deployed there.” For example, IBM DB2 is the bank’s primary relational database for external reporting applications. WebFOCUS has native connections to this relational database, which ensures optimal performance.

The third major reason the bank favors WebFOCUS is because it can take advantage of the bank’s mainframe security architecture.

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data related to their business equipment leases.

According to John Kutasz, a former developer for the commercial leasing group who now works as a WebFOCUS applications consultant in the Center of Excellence, WebFOCUS helps the bank and its business clients manage myriad details associated with servicing leases, including summarizing financial transactions and supplying information about the state of the leasing business day to day.

reports monitor user activity on our CRM application,” explains John Hanson, development group manager of Delivery Channel Services at the bank. “WebFOCUS combines the CRM information with data from other systems to produce performance reports, such as various incentive scorecards.”

Bankers, line managers, support groups, and call center managers all access these reports to manage employee goals, reward achievements, and coach bankers. “These reports motivate salespeople

because it is so effective for so many different types of users.”

Joyce Halford
Center of Excellence
U.S. Bank

self-service, dashboard, ad hoc – you name it, we do it,” Snoeyenbos confirms. “WebFOCUS leverages our core strengths: mainframe systems, security, scalability, and support for very large databases, especially on the mainframe. It made a lot of sense within our organization to adopt WebFOCUS as an enterprise standard, and we save money by having one tool handling virtually all of our reporting.”

Compounding Interest From the User Base

Now that U.S. Bank has integrated WebFOCUS within the fabric of the IT infrastructure, hundreds of developers rely on the software for structured, ad hoc, and standardized reporting. For example, one prominent WebFOCUS application supplies leasing information to the bank’s business equipment finance group. Dubbed BEFG Leasing, the application enables bank personnel and external vendors to access

About 20 external BEFG Leasing reports are available, some with parameters. The internal application offers more than 100 reports to help bank employees service leasing vendors. “We’re constantly refining the reports to give people exactly what they need,” Kutasz explains, adding that he found the transition to WebFOCUS relatively painless. “I could do pretty much the same types of things I had been doing all along with Mainframe FOCUS, but this time through a GUI.”

A Valuable Return on BI Investments

WebFOCUS is also the tool of choice for corporate performance management. A prime example involves the bank’s call centers, where an application called “Sales and Service Management” (SSM) depends on the WebFOCUS BI Dashboard to report on the performance of sales and marketing personnel. “Most of the SSM

to perform while helping managers with goals and expectations,” Hanson adds. “We have received numerous compliments on the appearance of the reports and the ease with which they can be designed, developed, and deployed.”

The BI applications profiled here are just some of the ways U.S. Bank uses WebFOCUS. There are dozens of critical applications, hundreds of WebFOCUS developers, and hundreds of thousands of users from coast to coast. The bank’s BI applications run the gamut from treasury management to credit card expense reporting, merchant transactions to procurement. “We are very pleased with the technology and we have a very good working relationship with Information Builders,” concludes Snoeyenbos. “WebFOCUS is definitely our strategic direction for reporting going forward.”