Financial Platform
Credit Management

Eclipse Banking Day
February 12, 2009
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Agenda

Solution Overview
Technology
Project Overview
Introduction to the Financial Platform

A Guided Tour on Innovation...
Banking Crisis
“A Rescue is not enough”

- A focus on retail and corporate banking will shape financial institutions’ new business models
- The risk costs in financial institutions will dramatically increase in the next few months
- A holistic customer view is required to gain transparency concerning counterparty and portfolio risks
- Procedures for the systematic assessment and quantification of risks are going to be crucial success factors
- Decreasing revenues and increasing (risk) costs will lead to a recurring reflex: cost reduction
Companies need innovation to differentiate themselves from competitors!

However, innovation goes down during a business downturn!
Value Proposition
Financial Platform/ Credit Management

- “Semantic Information Integration” leads to transparency concerning counterparty/ portfolio risks
- Consistent realization of efficiency enhancement potential along the whole value creation chain
- Constant high quality of work results due to integrated processing and decision support
- “Design for Change” principle leads to shortened “time to market"
- Open platform for innovation – Reusable business entities
Business Scope

- Application Management
- Workflow Support
- Analysis of Investment Projects
- Syndication Management
- Asset Management
- Activity Management
- Collateral Management
- Product & Contract Toolbox
- Approval Procedures
- Financial Reporting
- Credit Risk Management
- Balance Sheet Analysis
- Investment Planning
- Forecast Calculation
- Soft Facts Management
- ...and many more!
“Design for Change”
Business Solution Structure

Business Solution

Assemble and Build Your Custom Business Solution

Adapt and/or Extend

Financial Platform

Business Modules

Financial Banking Metamodel

Legacy Systems

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Logical Architecture

- **Presentation Layer**
  - Eclipse RCP
  - Equinox OSGI

- **Process Layer**

- **Controlling Layer**
  - Business-Services
  - Session-Handling
  - Security
  - ...

- **Business Logic**
  - Banking Module A
  - Banking Module B
  - Banking Module C
  - Banking Module ...

- **Data & Integration Layer**
  - OR-Mapping
  - Connectivity
  - DAO/SDO-Support
  - ...

- **Enterprise Layer**
  - Database
  - HOST
  - Documents
  - ...

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How does this fit in your (SOA) IT-Architecture Strategy?

**SOA ready!**

... is one deployment option!
It’s an Open Project

Come in, and join...
Objectives of the Financial Platform Project

- Provide a **business focused** Open Source Framework and common infrastructure for interoperable and extensible financial systems.
- Adaptable for national and international requirements.
Project Structure & Scope

Financial Platform

Financial Platform
Common
- Business Date and Calendar
- Calculation Tools
- Counterparties & Customer Relationship Management component
- Human Resource Management
- Banking specific
  - UI Framework
- Banking specific Middleware Framework (Authorization, Logging, Privileges)
- Standards (Vocabulary & Definitions, Banking Meta-Model) extensible for national Requirements & Legal Business

Financial Platform
Credit Management
- Application Management
- Capital Budgeting and Investment Planning
- Analysis and Assessment of Investment Projects
- Balance Sheet Analysis
- Interactive Scenario Analysis
- Forecast Calculation
- Asset Management
- Collateral Management
- Approval Procedures
- Risk Management
- Activity Management
- Workflow Support
- Soft Facts Management
- Syndication Management
- Financial Reporting
- Product & Account Toolbox

Financial Platform
[your project]
Why should You join?

- **Collaborative development** of common functionality
  - Saves lot’s of money
  - Allows to focus your engineering talents on real added value
- It’s an **open solution**, that means...
  - It’s freely available
  - No vendor lock-in
  - Adaptable to your needs
  - You can influence the direction
- It’s a model for **“distributed innovation”**
- **Professional Support** is available based on different SLA
Contact us

Thank you!

Questions?

Eclipse

More Information

knowis AG

http://www.knowis.de

http://www.eclipse.org/proposals/financial-platform/

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