

MI Corporate Card Reporting Re-design Fortune 100 Financial Services Provider

BI Technology - MicroStrategy



Blending Creativity and Technology to Deliver Better Business Solutions

New York . Toronto . Phoenix . Los Angeles . Dubai . New Delhi



Case Study - MI Corporate Card Reporting Re-design

Challenges

- Complicated product (MicroStrategy)
- Current reporting environment difficult to use; only advanced users can use the system though most users are novice
- @Work Reporting provides Management Information to Corporate clients
- eDynamic was contracted to simplify the UI of MicroStrategy



Case Study - MI Corporate Card Reporting Re-design

Solutions

- Used User Experience Models that users are familiar with to create a system that makes complicated reporting easier
 - Windows Explorer - list view
 - Mail client -view email
- Simplified the user experience
- Design implemented on a complex reporting system
- Global team of 40 people worked on the project
- Redesigned the MicroStrategy UI to cater to Basic, Intermediate and Advanced users
- User Experience team created a user experience that blended into MicroStrategy
- Used our Global Delivery Model, to reduce costs and improve quality. eDynamic resources from New York, Toronto, and New Delhi worked collaboratively



Case Study - MI Corporate Card Reporting Re-design

eDynamic's architected solution

HOME PERSONAL CARDS FINANCIAL SERVICES TRAVEL SMALL BUSINESS CORPORATIONS MERCHANTS

Site Help | Search | Contact Us Logout

@Work Home Reporting Program Tools Resources and Help Updated Feb, 8, 2007

Report List

Viewing Options Create a Report

Export List by Show All By Category By Objectives My Customized Reports Report Scheduling Find reports... GO

Report Name	Date Created
<input type="checkbox"/> Air	
<input type="checkbox"/> Top airlines carriers Monitor spending across top airlines...	3/30/2007
<input checked="" type="checkbox"/> Airline consolidation opportunities Identify opportunities to consolidate...	3/30/2007
<input type="checkbox"/> Top Airline routes Monitor spending across top airlines route...	3/30/2007
<input type="checkbox"/> Airline Ticket Details View detail airline ticket information to monitor...	3/30/2007
<input type="checkbox"/> Spend summary by Organizational Structure Identify trends in spending across your organization...	3/30/2007
<input type="checkbox"/> Spend at specific supplier View all transaction at specific suppliers	3/30/2007
<input type="checkbox"/> Hotel	
<input type="checkbox"/> Hotel Consolidation opportunity Identify opportunities to consolidate hotel...	3/30/2007
<input type="checkbox"/> Industry spend by quarter Identify trends in spending across industry	3/30/2007
<input type="checkbox"/> Supplier spend by industry Monitor spending across suppliers by industry...	3/30/2007
<input type="checkbox"/> Spend in Questionable Industries Identify cardmembers who may be in violation...	3/30/2007
<input type="checkbox"/> Spend in Questionable Suppliers Identify cardmembers who may be in violation...	3/30/2007
<input type="checkbox"/> Aging Balance Monitor past due Card accounts to manage...	3/30/2007
<input type="checkbox"/> Car	
<input type="checkbox"/> Car agency Consolidation opportunities Identify opportunity to consolidate car ...	3/30/2007
<input type="checkbox"/> Industry spend by quarter Identify trends in spending across industry...	3/30/2007
<input type="checkbox"/> Non T&E	

Easy to follow;
Reports grouped in
categories;
Aesthetically pleasing



Case Study - MI Corporate Card Reporting Re-design

eDynamic's architected solution

HOME PERSONAL CARDS FINANCIAL SERVICES TRAVEL SMALL BUSINESS CORPORATIONS MERCHANTS

Site Help | Search | Contact Us | Logout

@Work Home Reporting Program Tools Resources and Help Updated Feb, 8, 2007

Report Inbox Viewing Options Create a Report

Report List Find reports... GO

Export List by

Report Name	Date Created
<input type="checkbox"/> Air	
<input type="checkbox"/> Top airlines carriers Monitor spending across top airlines...	3/30/2007 Description
<input checked="" type="checkbox"/> Airline consolidation opportunities Identify opportunities to consolidate...	3/30/2007 Description
<input type="checkbox"/> Top Airline routes Monitor spending across top airlines route...	3/30/2007 Description
<input type="checkbox"/> Airline Ticket Details View detail airline ticket information to monitor...	3/30/2007 Description
<input type="checkbox"/> Spend summary by Organizational Structure Identify trends in spending across your organization...	3/30/2007 Description
<input type="checkbox"/> Spend at specific supplier View all transaction at specific suppliers	3/30/2007 Description
<input type="checkbox"/> Hotel	
<input type="checkbox"/> Hotel Consolidation opportunity Identify opportunities to consolidate hotel...	3/30/2007 Description
<input type="checkbox"/> Industry spend by quarter Identify trends in spending across industry	3/30/2007 Description
<input type="checkbox"/> Supplier spend by industry Monitor spending across suppliers by industry...	3/30/2007 Description
<input type="checkbox"/> Spend in Questionable Industries Identify cardmembers who may be in violation...	3/30/2007 Description
<input type="checkbox"/> Spend in Questionable Suppliers Identify cardmembers who may be in violation...	3/30/2007 Description
<input type="checkbox"/> Aging Balance Monitor past due Card accounts to manage...	3/30/2007 Description
<input type="checkbox"/> Car	
<input type="checkbox"/> Car agency Consolidation opportunities Identify opportunity to consolidate car ...	3/30/2007 Description
<input type="checkbox"/> Industry spend by quarter Identify trends in spending across industry...	3/30/2007 Description
<input type="checkbox"/> Non T&E	

Report Viewer Customize

Top Airline Routes Date Range: 3/2/2007 to 3/3/2007 Change Date

Viewing options allow users to view reports in different ways. Similar to how Windows Explorer allows users to see information



Case Study - MI Corporate Card Reporting Re-design

eDynamic's architected solution

HOME PERSONAL CARDS FINANCIAL SERVICES TRAVEL SMALL BUSINESS CORPORATIONS MERCHANTS

Site Help | Search | Contact Us Logout

@Work Home Reporting Program Tools Resources and Help Updated Feb, 8, 2007

Report List

Viewing Options Create a Report

Export List by Show All By Category By Objectives My Customized Reports Report Scheduling Find reports... GO

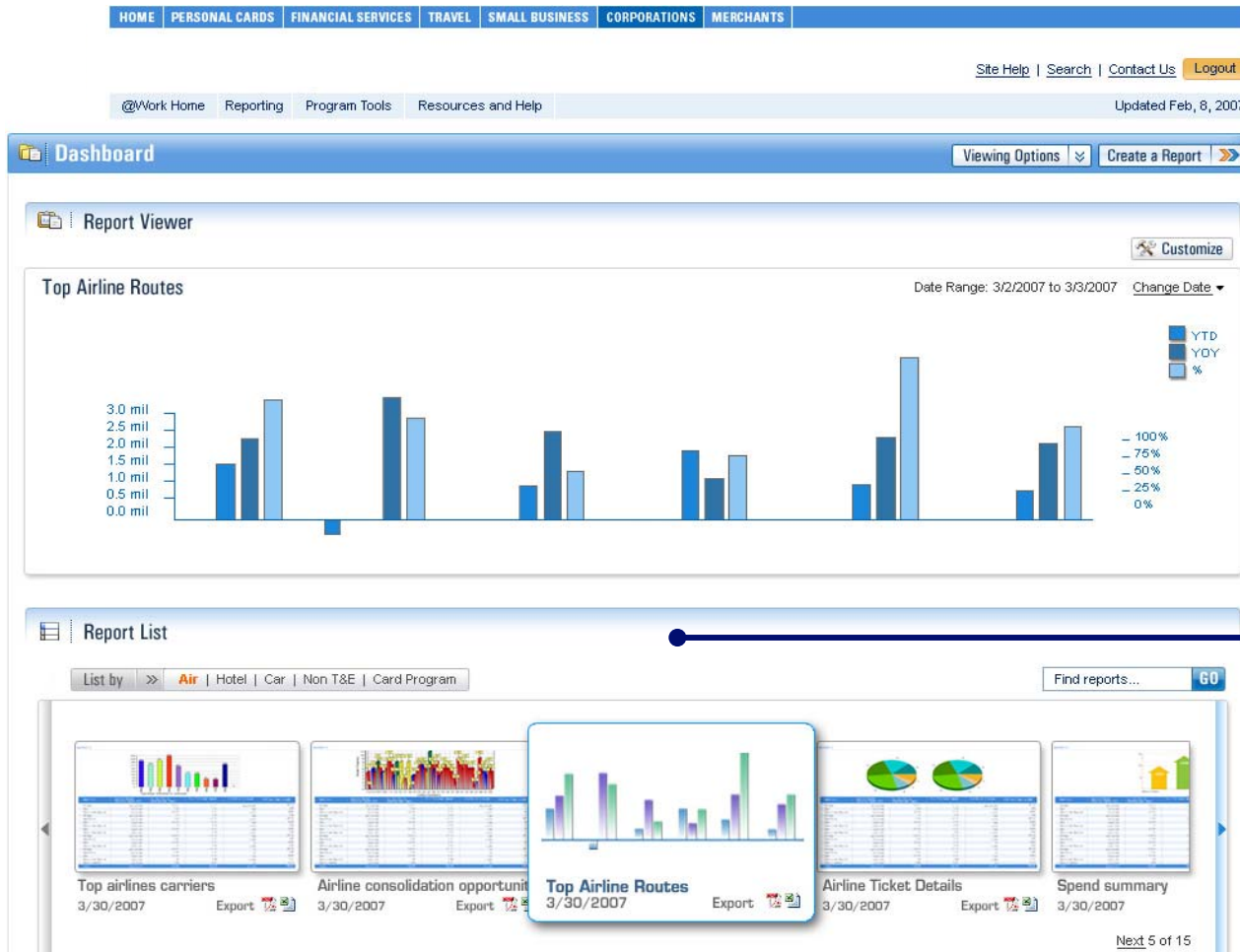
Report Name	Date Created
<input type="checkbox"/> Air	
<input type="checkbox"/> Top airlines carriers Monitor spending across top airlines...	3/30/2007
<input checked="" type="checkbox"/> Airline consolidation opportunities Identify opportunities to consolidate...	3/30/2007
<input type="checkbox"/> Top Airline routes Monitor spending across top airlines route...	3/30/2007
<input type="checkbox"/> Airline Ticket Details View detail airline ticket information to monitor...	3/30/2007
<input type="checkbox"/> Spend summary by Organizational Structure Identify trends in spending across your organization...	3/30/2007
<input type="checkbox"/> Spend at specific supplier View all transaction at specific suppliers	3/30/2007
<input type="checkbox"/> Hotel	
<input type="checkbox"/> Hotel Consolidation opportunity Identify opportunities to consolidate hotel...	3/30/2007
<input type="checkbox"/> Industry spend by quarter Identify trends in spending across industry	3/30/2007
<input type="checkbox"/> Supplier spend by industry Monitor spending across suppliers by industry...	3/30/2007
<input type="checkbox"/> Spend in Questionable Industries Identify cardmembers who may be in violation...	3/30/2007
<input type="checkbox"/> Spend in Questionable Suppliers Identify cardmembers who may be in violation...	3/30/2007
<input type="checkbox"/> Aging Balance Monitor past due Card accounts to manage...	3/30/2007
<input type="checkbox"/> Car	
<input type="checkbox"/> Car agency Consolidation opportunities Identify opportunity to consolidate car ...	3/30/2007
<input type="checkbox"/> Industry spend by quarter Identify trends in spending across industry...	3/30/2007
<input type="checkbox"/> Non T&E	

Outlook or Lotus Notes
type List-View Capability



Case Study - MI Corporate Card Reporting Re-design

eDynamic's architected solution



Familiar user experience -
Windows Document
Explorer Film Strip and
MAC user experience



Case Study - MI Corporate Card Reporting Re-design

eDynamic's architected solution

The screenshot displays the 'Create a Report' interface. At the top, there is a navigation bar with links for HOME, PERSONAL CARDS, FINANCIAL SERVICES, TRAVEL, SMALL BUSINESS, CORPORATIONS, and MERCHANTS. Below this is a secondary navigation bar with links for @Work Home, Reporting, Program Tools, Resources and Help, and a date indicator 'Updated Feb, 8, 2007'. The main content area is titled 'Create a Report' and includes a 'Report Inbox' button. The interface is divided into sections: 'Basic information', 'Data Management', and 'Format Report'. The 'Basic information' section contains three sub-sections: 'Select type of information', 'Select date period', and 'Schedule pattern'. The 'Select type of information' section has a dropdown for 'Cardmember Listing' and a list of report types: 'Cardmember Listing - Summary', 'Cardmember Listing - Details', and 'Transaction Listing by Cardmember'. The 'Select date period' section has radio buttons for 'Run reports for' and 'Custom date', with a dropdown for 'Previous month' and input fields for 'Start Date' and 'End Date'. The 'Schedule pattern' section has radio buttons for 'Reoccurrence' and a dropdown for 'Daily 1am EST'. At the bottom of the configuration section are 'Run Report' and 'Next' buttons. Below the configuration is the 'Interactive Sample Report Viewer' which displays a table with the following data:

Summary	Current Period Domestic Spend USD	Current Period International Spend	% of YTD Total Spend	YTD No. Total Charges
Airlines	341,945.58	2,416	37.12	341,945.58
Cash	18,116.27	284	1.57	284
Total	622,117.27	14,924	100.00	15,678

Simple report builder with 'Interactive Sample Viewer' that allows users to see the reports they are creating



Case Study - MI Corporate Card Reporting Re-design

Benefits

- No learning required to use the system
- Solution simpler, easier to follow, more aesthetic than most competitors identified
- Single integrated reporting platform for all user types
- Created a UI framework that can simplify usage of MicroStrategy