



Financial Platform Credit Management

Eclipse Banking Day

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Gerald Gassner

knowis^{AG}

Hermann-Koehl-Str. 2a
93049 Regensburg
Germany

T +49 941 | 409 249 0
F +49 941 | 409 249 19
M info@knowis.de

www.knowis.de



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Agenda

A wide banner image spans the width of the slide. It features a white door on the left side, slightly ajar, revealing a bright blue sky with fluffy white clouds. The foreground is a lush green field of grass. A semi-transparent white box with a thin black border is positioned on the right side of the banner, containing the agenda items.

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!

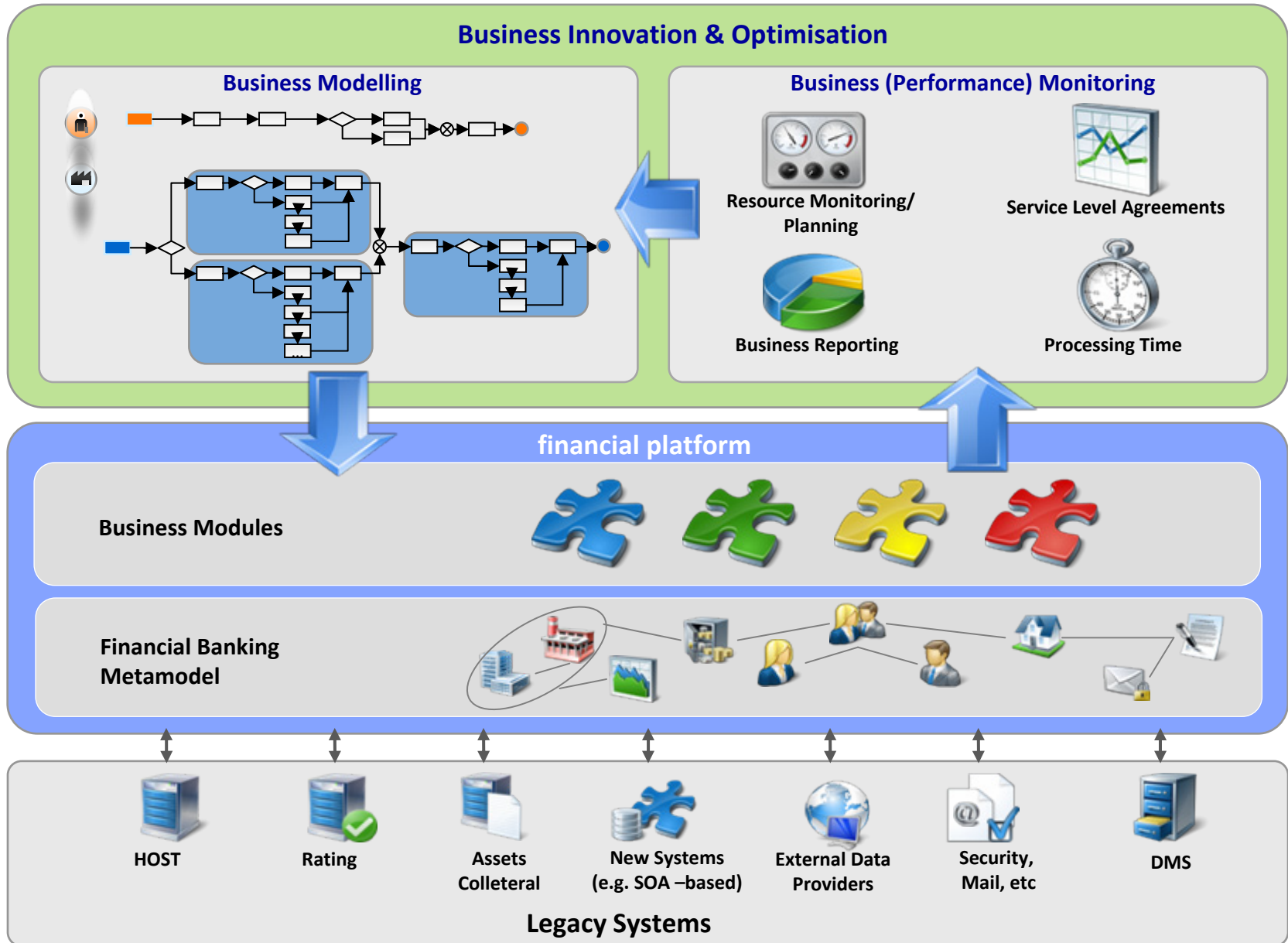
Value Proposition

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 Innovation Cycle



Business Scope





“Design for Change”

Business Solution Structure

Business Solution

Assemble and Build Your Custom Business Solution



Adapt and/ or Extend

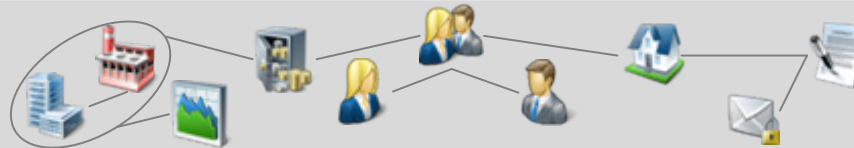


Financial Platform

Business Modules



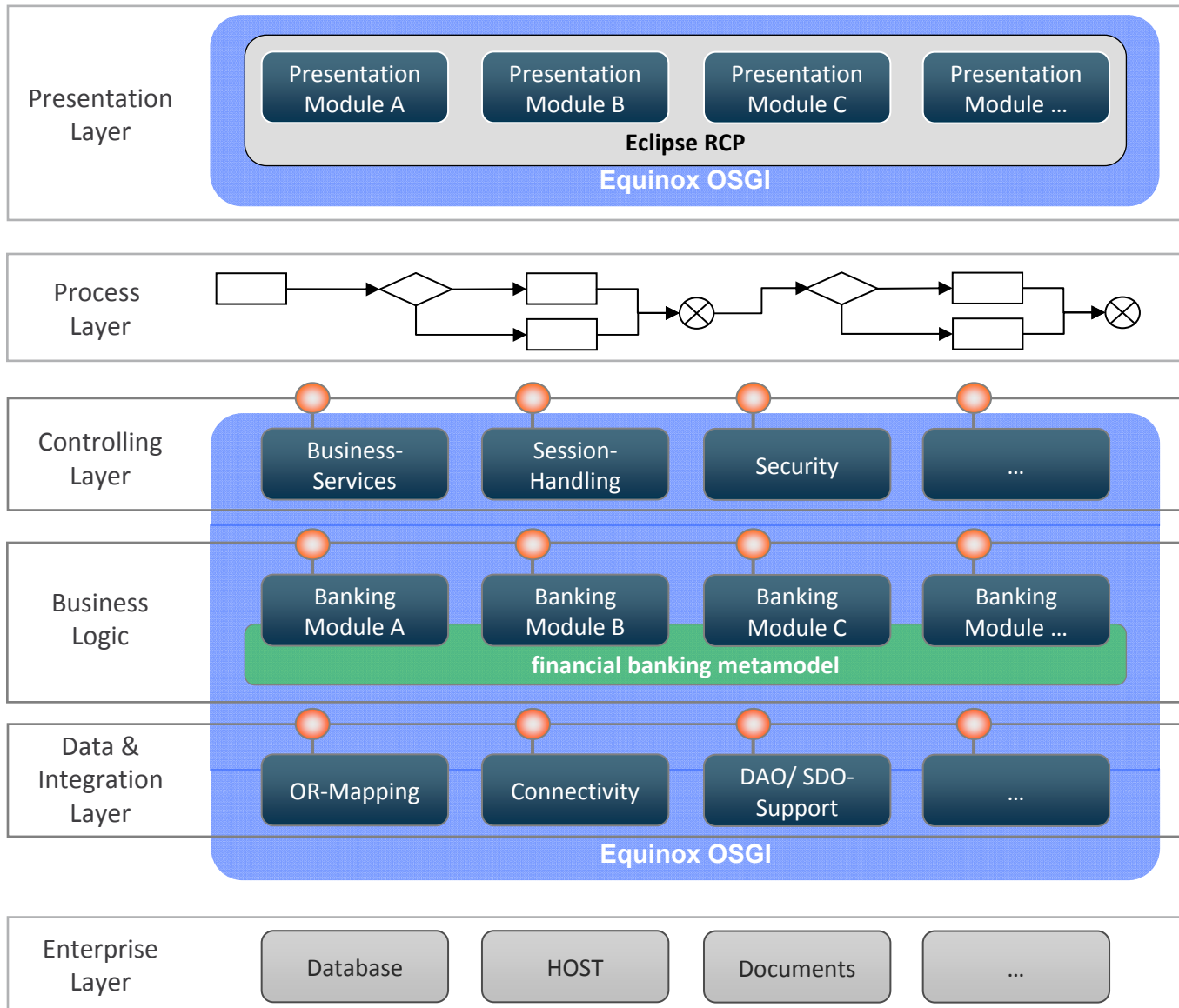
Financial Banking Metamodel



Legacy Systems



Logical Architecture

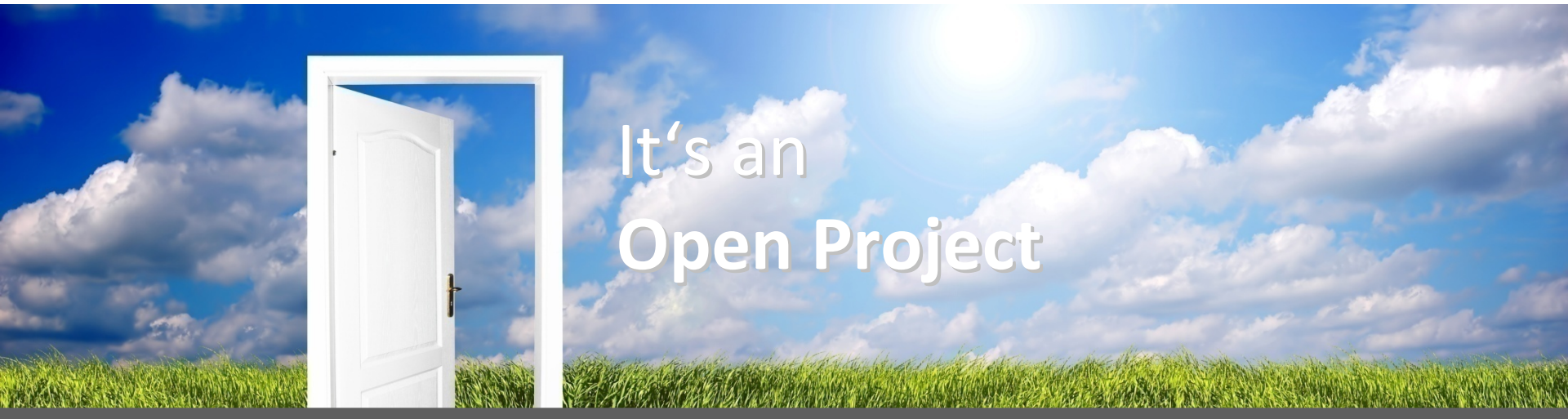


How does this fit in your (SOA) IT-Architecture Strategy?



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.
- Establishment of a **Industry Working Group** in the Financial Industry.

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

info@knowis.de

Thank you!

Eclipse

<http://www.knowis.de>

Questions?

More Information

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