

INTEGRATING SYSTEMS

in the building of true Business Intelligence

THE COMPANY

Conceito started in 1982 as a service provider in outsourcing for Accounting, Taxation, Human Resources, Treasury and General Support for Management. The company is proud to provide a panel of specialised people with more than 200 highly level qualified experts to its customers.

It has facilities in Lisbon, Mafra, Porto and Funchal, and an Iberian partnership with Bové Montero y Asociados. Conceito also provides services for the Spanish market with facilities in Madrid, Barcelona, Palma del Majorca and Valencia.

It is a pioneer when it comes to using technology in its activities. An example of this is the use of DIGIUP, a unique solution in the industry that is based on Artificial Intelligence and that significantly improves the level of services provided.

The company has a strong presence on the national and international markets and seeks to stand by its professional credibility and responsibility. These values are part of its working philosophy and contribute to a strong, trust based relationship with its customers.

THE CHALLENGE

Conceito defines its work based on its strong relationship with technology that can deliver innovative operations that distinguish its service.

Creating a Business Intelligence and Analytics capability was seen as a priority in order to provide additional services to customers, so they could base their decision-making processes on concrete data

Moreover, from an internal viewpoint and because of the growing number of customers, it became crucial to create a system that would allow data analysis and the building of customised dashboards for customers in a simple, quick and accessible manner for the whole staff across different functional areas.

The challenge given to Xpand IT was to build a Business Intelligence solution that would incorporate all information systems used in the company to provide services to customers – Accounting, Management, Human Resources, Customer Relationship Management, and others – in order to streamline both the analysis and the reporting process and, at the same time, make analytics services available for Conceito's customers.

The solution had to be developed from scratch, from data modelling and implementing a Data Warehouse to the viewing component.

The goal was to implement a solution that would incorporate all of Conceito's systems, in order to streamline data analysis.

THE SOLUTION

• Pentaho Data Integration to implement processes of robust data transformation that included the necessary logic of the business – in particular concerning financial indicators.

• Implementing Tableau Server to view information through ready-made dashboards, or even for users to explore information autonomously.

• Modelling of different data marts, each one focused on a specific area. The financial data mart was the one that turned out to be the most complex, since it needed special attention. It needed all sections throughout the various months of the year to be completed in order to ensure the correctness of the financial reporting.

• Implementing rules engines to automate the building processes of both the Balance and Income Statements, using the Accounting Normalization System and taxonomies.

✓ Easier cross-linking of data between different systems.

✓ User autonomy in creating new indicators and analyses, answering to specific needs of management.

✓ Quick and easy access to existing data.

✓ A foundation for providing additional services to Conceito's customers, which enables direct access to relevant analysis or even to explore through information.

The solution was to implement a Business Intelligence Solution which included:

This solution allowed for:

TECHNOLOGY



Pentaho Data Integration (PDI), by Hitachi Vantara, is an ETL open source tool that allows users to prepare data (ingest, blend & cleanse) from any source.

PDI can also help execution in the Cloud and with the orchestration of processes, ensuring better data quality at the disposal of IT teams.



Tableau is a Business Intelligence platform that offers users complete, safe and flexible data analysis. This platform stands out for being BI self-service and for being with everyone's reach, since it is very intuitive and delivers extremely attractive dashboards.

Tableau has been the leader on Gartner's Magic Quadrant for Analytics and Business Intelligence Platforms, for the sixth year in a row.

ADVANTAGES

Quick access to information, internally and by customers

Improvement of analysis potential and information exploration

Optimisation of the time spent carrying out custom-made analyses

Improvement of the support provided for customers, helping them in the management decision-making

“Conceito and Xpand IT developed and implemented a flexible and modern information management system, using appropriate tools, allowing us to promote innovation in new services of added value not only for our clients but also within our operations.”

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