

*Before using Windward, I spent half my time designing and scripting reports. Now we can lay out a report in Microsoft® Word and get immediate approval from the client.*

*— Santhi Swaroop Mohanty, Associate Project Manager*

# Nucleus Software Banks on Windward Studios

## The Company

Nucleus Software provides complete IT solutions to the banking and financial services industries. A member of the prestigious “Hall of Fame” of the Institute of Chartered Accountants of India, it has won numerous awards including the Asian Banker award for best lending platform implementation, World Finance best corporate governance award, and financial and investor relations award from the World CSR Congress.

Founded in 1986 and headquartered in India, the company has more than 800 employees in branches throughout the world.

## The Challenge

FinnOne™ is Nucleus’ flagship product. This integrated suite of applications supports the typical business offerings of banks and financial solutions companies. FinnOne incorporates loan origination, lending, collections, finance against securities, LiquiDeposits, and general ledger systems. It is bilingual and can support both retail and corporate lending applications.



A prestigious Japanese bank asked Nucleus to implement FinnOne. The Nucleus team studied the bank's business practices and identified reporting requirements for automated and detailed month-end customer balance statements. They planned to generate these reports using a standard reporting tool.

When the group began to implement this program, however, it became clear the tool was not up to the task. The tool could not be easily customized to automatically generate customer reports, and it took an unacceptably long time to generate reports.



## About Nucleus Software

Nucleus Software is a leading global IT products and solutions company that delivers consistent value to mission-critical business processes in the banking and financial services sectors. Nucleus Software is a pioneer that has successfully taken the India IT product story to the world map.

## The Solution

The team decided to investigate other reporting alternatives. After an extensive search, both online and with colleagues onsite and offshore, they found a powerful and flexible tool called Windward.

Windward's primary benefit is that it is both quick and simple to design report templates. Users design report templates in Microsoft® Word, Excel®, or PowerPoint®, where they control layout, font and formatting. Windward allows the user to create a wide variety of reports simply by choosing what data to include and when to run the report.

Users can generate reports in a wide range of formats, including PDF, Word, HTML, Excel spreadsheet, and PowerPoint presentation, and a powerful reporting engine backs the ease-of-use of the template design process.

The Nucleus team downloaded the trial version of Windward and found they could quickly generate detailed customer reports. Based on the successful trial results, Nucleus presented this solution to the client. The bank gave Nucleus the green light to move forward, and it was an easy implementation.

“Anybody who reads the Windward documentation can implement it,” said Santhi Swaroop Mohanty, Associate Project Manager for the Nucleus Development Group. “The documentation was clear and easy to follow.”

Mohanty said the ease-of-use continued throughout the implementation process, and much of that is due to Windward’s Office-based template design. Mohanty found that this feature helped him dramatically reduce development time.

## The Achievements

**The use of Windward helped Nucleus meet the bank’s FinnOne implementation timeline with a successful launch.**

Mohanty noted that when faced with the complexities of using the original reporting tool to develop templates, insert data, and provide timely reporting, Nucleus would not have been able to meet the bank’s expectations. Windward enabled Nucleus to do so.

Another key feature of Windward is its scalability, and that also led to successful results for Nucleus.

When Nucleus began using the tool within FinnOne, the bank numbered 13,000 FinnOne customers, all of whom received monthly reports. But that number soon nearly doubled to 25,000, and FinnOne was able to easily handle the increase.

### About Windward

For businesses in document-intensive industries, Windward Studios is the document generation and reporting software company that empowers business professionals to create beautiful, professional reports. Create custom reports with Microsoft Office as your design tool and a Java or .NET engine that connects to virtually any data source. Windward has been delighting customers since 2004.

“Before using Windward, I spent half my time designing and scripting reports to meet the bank’s requirements,” Mohanty said. “With Windward, we can lay out a report in Word and get immediate approval from the client.”

Add Reporting and Document Generation to Your Software Application

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