



elinvar

Embedding Tableau Into A Multi-Tenant Fintech Application

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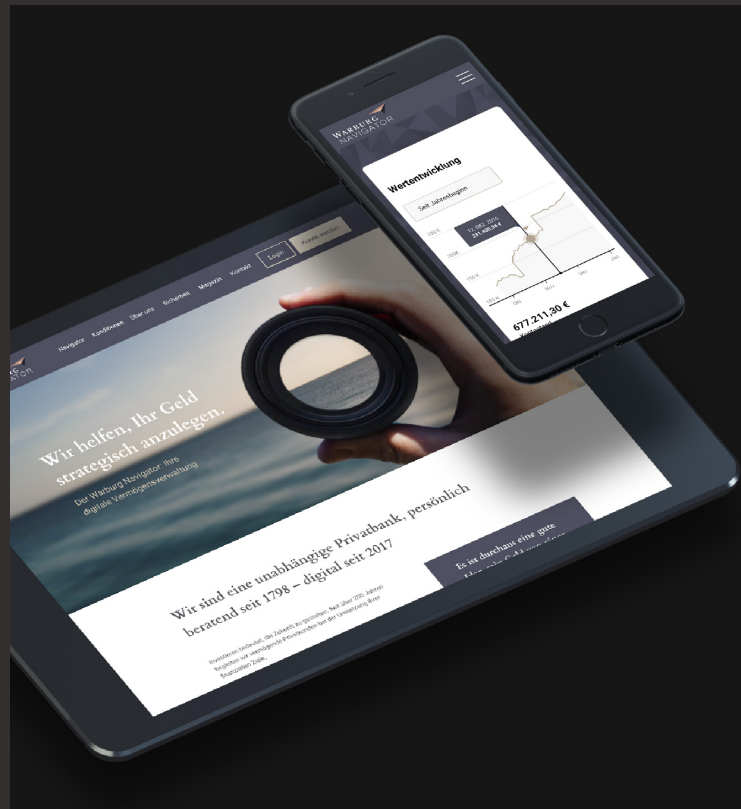
Elinvar GmbH

- Platform as a Service for asset & wealth managers
- B2B2C business model
- BaFin licensed

- **Our clients:** Established wealth managers in the European market
- **Our offering:** Complete digitalization of the wealth management process

The Elinvar Platform – Different Use Cases

Online / direct client access



Onsite / advisor & client



Client & business management





Data Analytics at Elinvar

Data Analytics Team

- Dedicated Data Analytics Team established 2018
- Cross-functional team
 - Product Management
 - Engineering
 - Analytics
 - Front-End
- Some of our work areas
 - Analysis: customer acquisition, product features
 - Data pipeline & architecture
 - Bespoke tools: data monitoring, data configuration
 - Business intelligence

Generating and utilizing organizational knowledge to create value for our clients

It's about:

1. Understanding data
2. Making data accessible
3. Delivering value to customers based on data



What we're interested in

- Which customer segments deposited money last quarter?
 - Which asset classes contributed to our recent outperformance?
 - How have customer acquisition patterns changed over time?
- Making insights from complex and varied information instantly available



Tableau at Elinvar

The Vision

- Maximize customer value by empowering business clients to answer questions effortlessly using our integrated data set
 - Initially, the platform will provide a more curated analytics experience
 - Pre-prepared Tableau Dashboards (*our expertise*)
 - Integrated and validated data (*our data-pipeline*)
 - Security, compliance and tech taken care of (*our license*)
- Embed high quality Tableau dashboards into the Elinvar Portal

Project Specification

- Embed Tableau dashboards into the Elinvar Portal, maintaining high product standards
- Minimize necessary engineering resources after initial integration
- Remain aligned with Elinvar's agile development and deployment practices
- Leverage team expertise in data, finance and design



Implementation

General Embedding Technical Requirements

- **Single sign-on**

Users signed in to our application must not be required to perform another sign-on with Tableau → Tableau trusted authentication

- **Permissioning**

Users should only be able to access dashboards that they have the permission to view → Tableau permission system

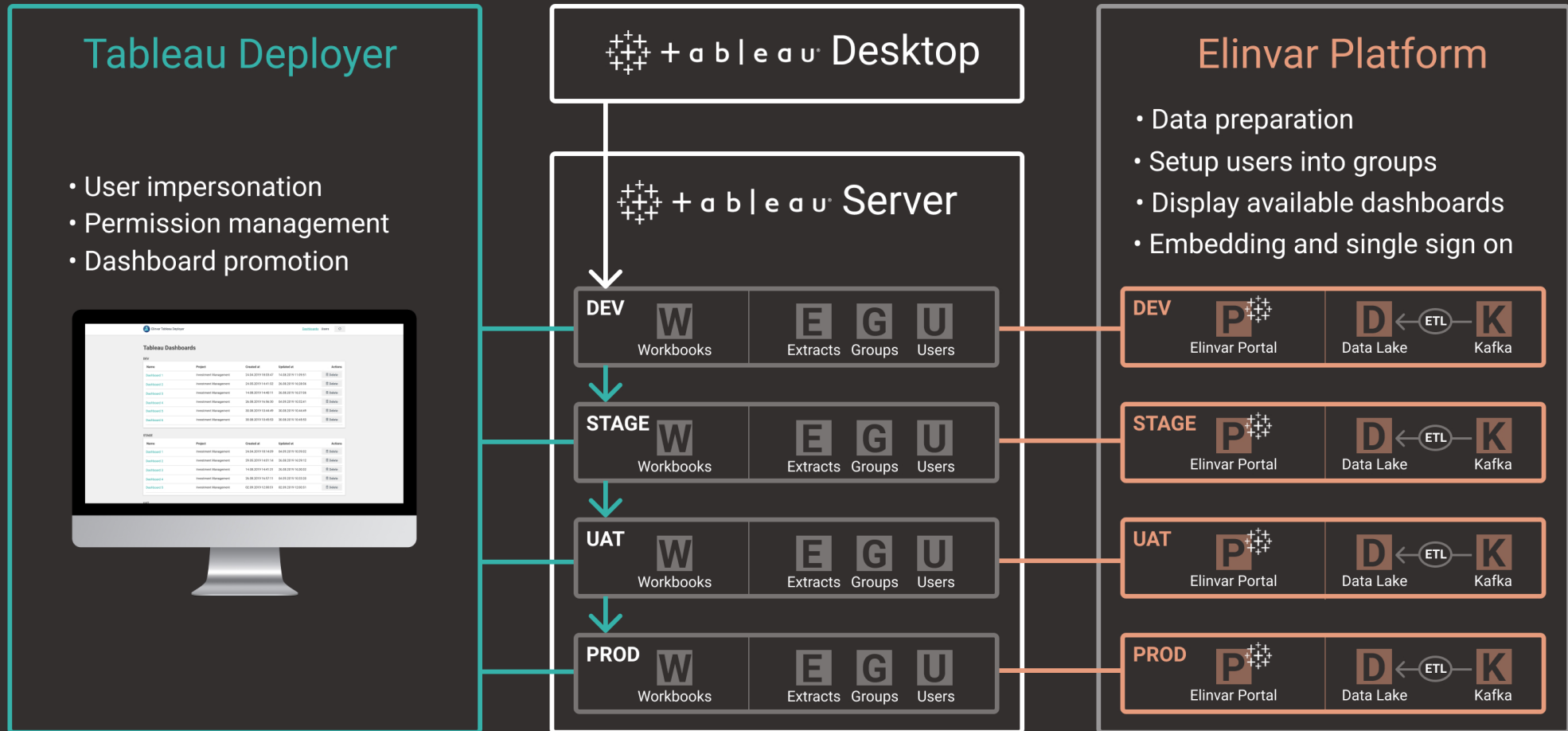
- **Row-level security**

Users shall never see data from another business client → Tableau groups for row-level security

- **Web fonts**

Dashboards should be styled consistently with the Elinvar Portal → Roboto web font installed on the Tableau Server

High Level Architecture



A vertical ruler is positioned on the left side of the page, extending from the top to the bottom. A horizontal line extends from the ruler to the right, pointing to the word "Demo".

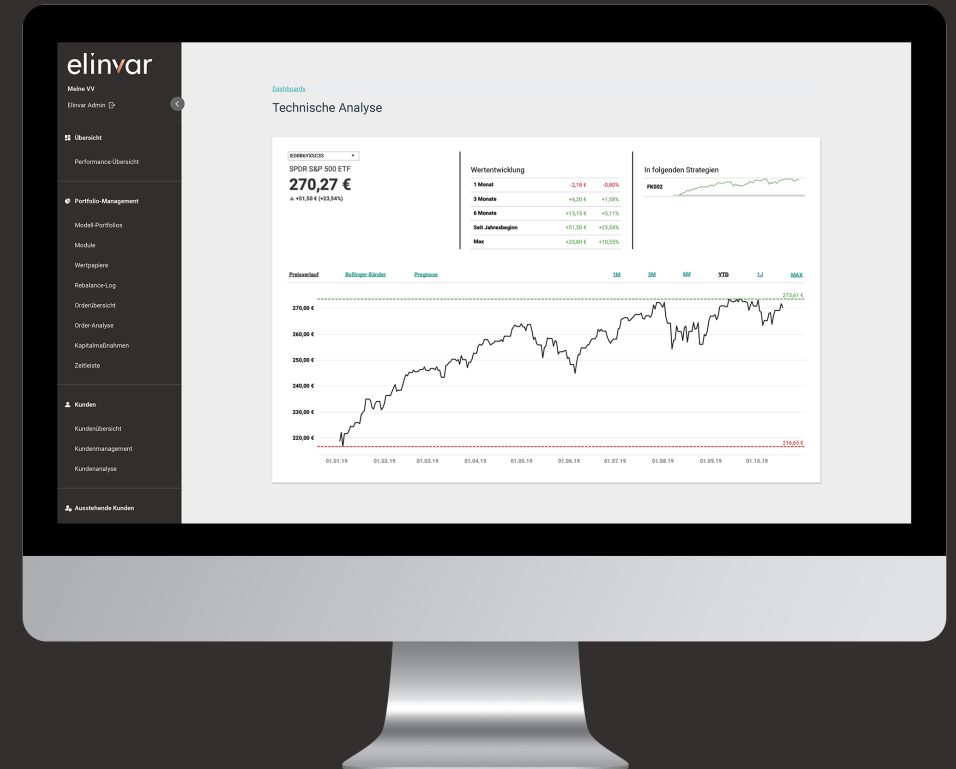
Demo



Conclusion

Embedded Tableau Analytics in the Elinvar Portal

- Requirements specified in Q4 2018
- Delivered first 4 Tableau Dashboards into the Elinvar Portal within 6 months of project inception
- Very positive initial feedback from our business clients



Dashboard Example – Portfolio Management

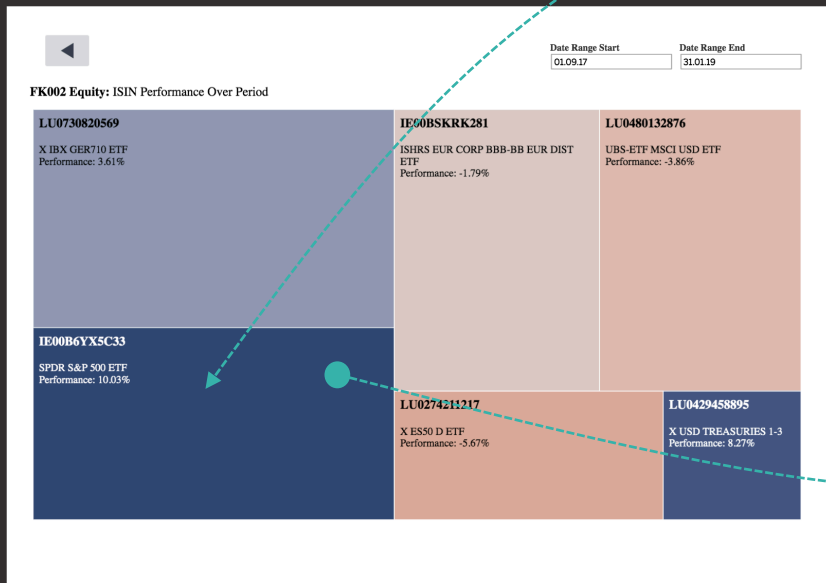
1



2



3



4



Dashboard Example – Investors

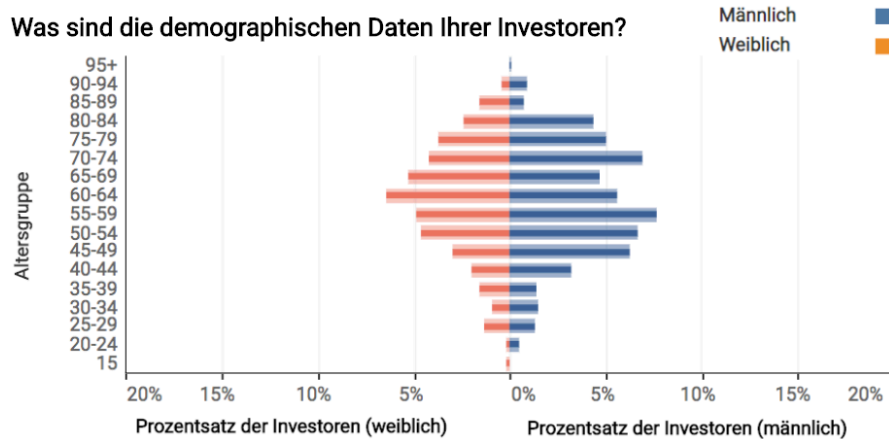
Anzahl der ausgewählten Investoren:
1,000

Durchschnittsalter der ausgewählten Investoren:
60 Jahre alt

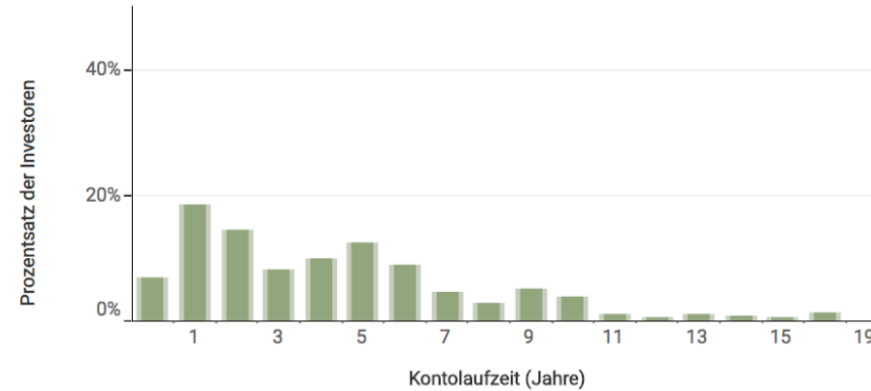
Geschlechtsspezifische Aufteilung der ausgewählten Investoren:
43% Frauen

Durchschnittliche Kontolaufzeit der ausgewählten Investoren:
4 Jahre

Was sind die demographischen Daten Ihrer Investoren?



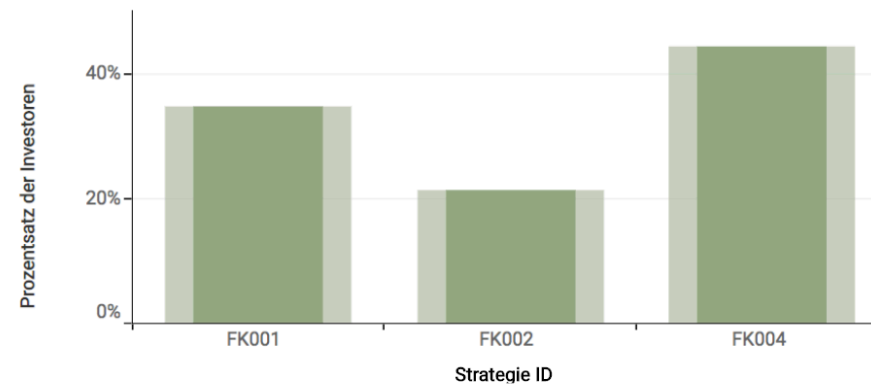
Wie lange sind Ihre Investoren bereits aktiv?



Wo wohnen Ihre Investoren?

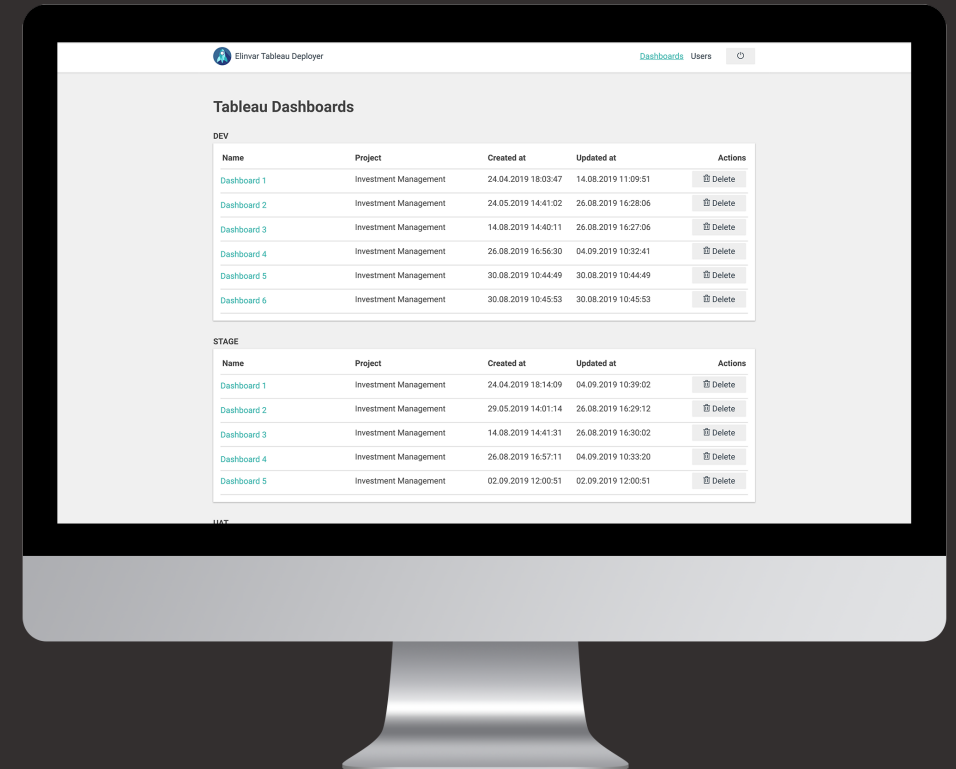


Welche Anlagestrategien haben Ihre Investoren?



Management of Tableau Dashboards with the Elinvar Tableau Deployer

- Enables management of Tableau dashboards across Tableau sites / Elinvar environments
- Allows thorough review of potential permissioning and row level security issues
- Data Analytics Team empowered to ship analytics content into the Elinvar Portal independently and safely



Next Steps

- Finer permissions and row-level security
- Localization
- Responsiveness
- Customize embedding behavior



Appendix: References

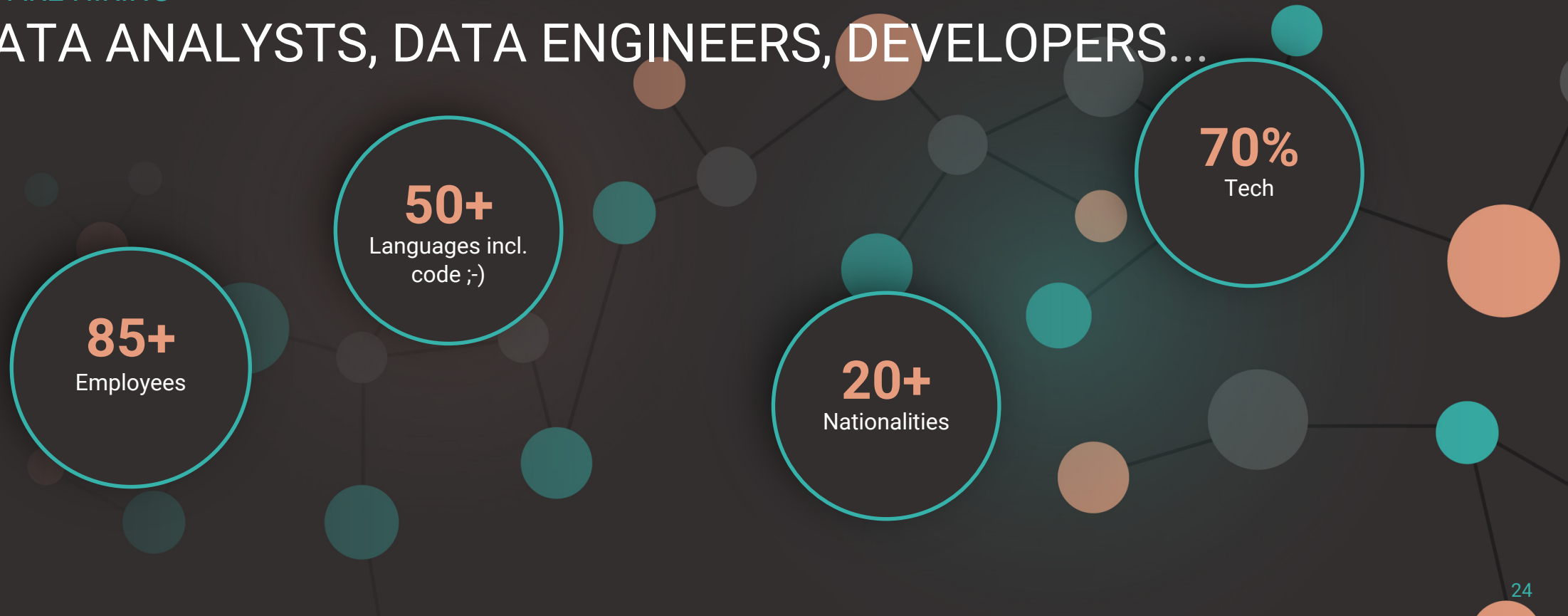
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- Tableau REST API
 - https://help.tableau.com/current/api/rest_api/en-us/REST/rest_api.htm
 - <https://tableau.github.io/server-client-python>

Elinvar – The team

WE ARE HIRING

DATA ANALYSTS, DATA ENGINEERS, DEVELOPERS...



The logo for elinvar, with 'elin' in white and 'var' in orange.

Thank you!

Happy to discuss and
answer questions.



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