



WEBINAR SERIES

The Future of STRATEGY

Before we begin, a few reminders.



Submit your
questions anytime.



We'll send you
the recording.



Complete the
survey.

Meet the team.



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Our agenda.

1. Impact of moving STRATEGY CS to the web
2. Metadata Business Rule Engine
3. LIVE Demo
4. Wrap-up

Executive Summary

Installation

Push out enhancements faster, reduce installation burden on customers, no additional cost

UI

Consistent user interface with current application, requiring minimal retraining for users

UX

Allow users to be even more productive by assisting and guiding data entry for each transaction

Technology

State of the art web application using the latest technologies and development techniques

SECTION 1

Impact of moving
STRATEGY CS to the web



Impact of moving STRATEGY CS to the web

Installation

Push out enhancements faster, reduce installation burden on customers,
no additional cost

UI

UX

Technology

Updates available instantly with simple server deployment

No need for additional client software (e.g., IBM Client Access)

Upgrade of your existing system at no additional cost

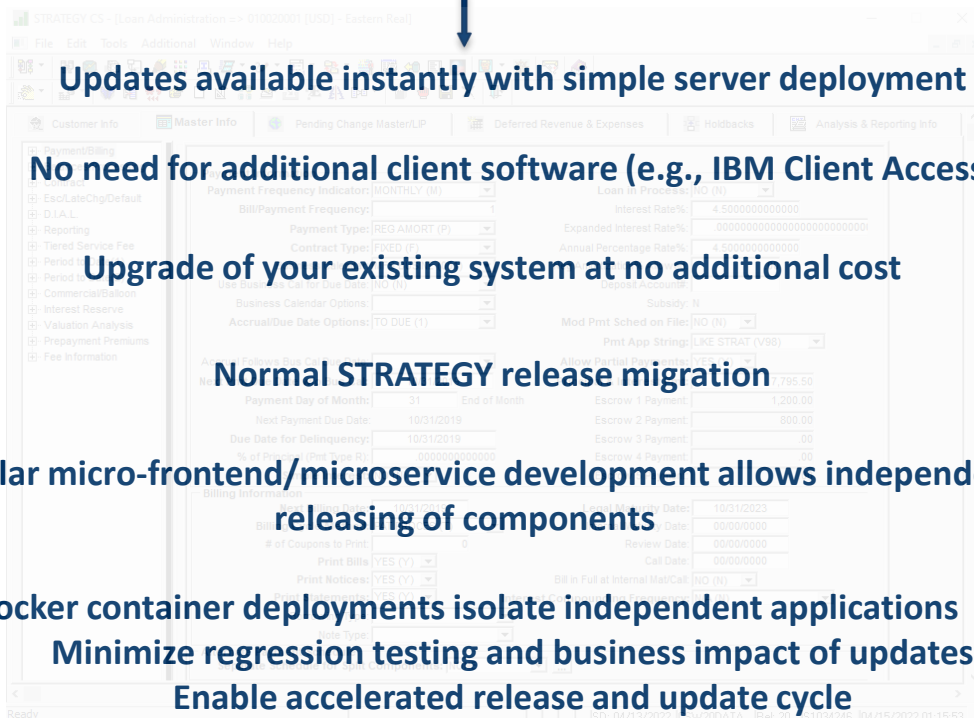
Normal STRATEGY release migration

Modular micro-frontend/microservice development allows independent releasing of components

Docker container deployments isolate independent applications

Minimize regression testing and business impact of updates

Enable accelerated release and update cycle



Impact of moving STRATEGY CS to the web

UI

Consistent user interface with current application, requiring minimal retraining for users

UX

One-for-one equivalence with current application

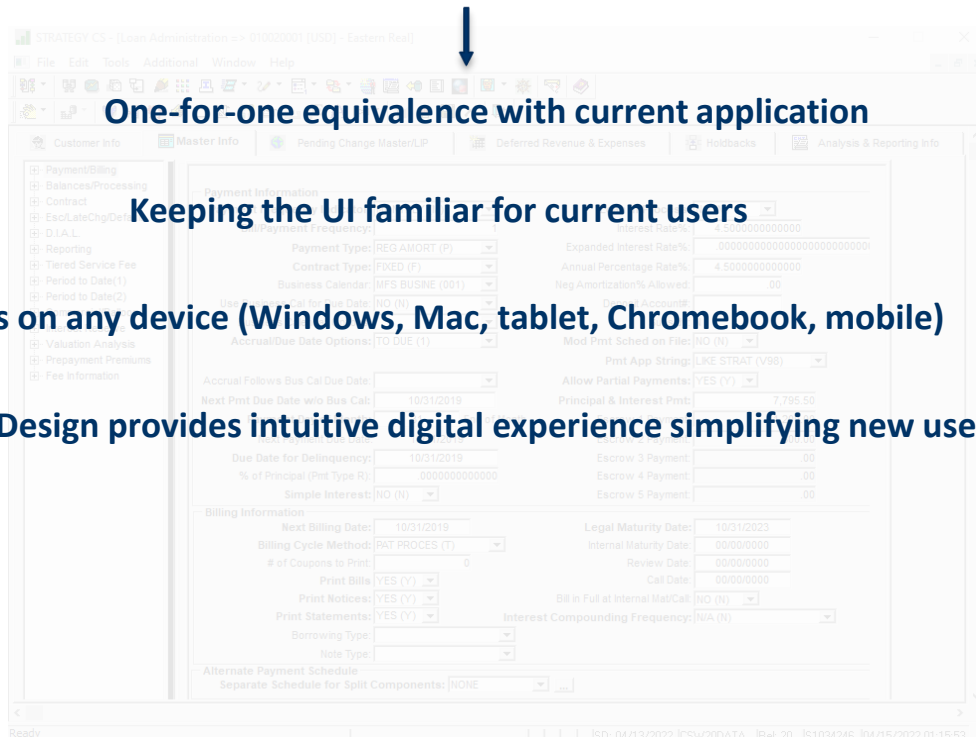
Keeping the UI familiar for current users

Runs on any device (Windows, Mac, tablet, Chromebook, mobile)

Technology

Material Design provides intuitive digital experience simplifying new user training

Installation



Impact of moving STRATEGY CS to the web

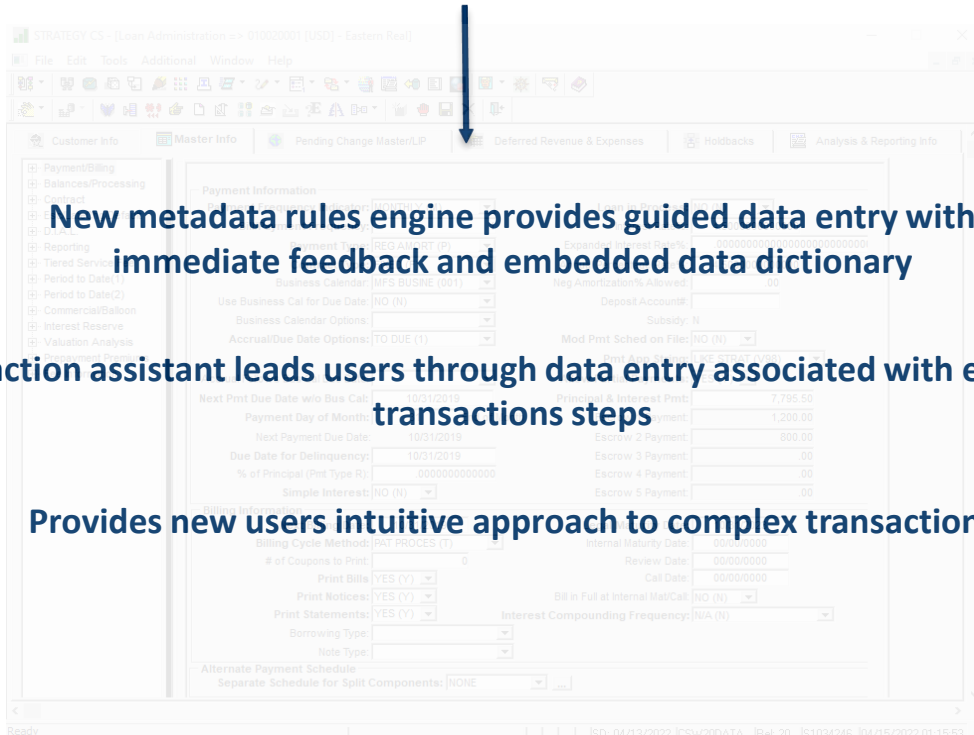
UX

Allow users to be even more productive by assisting and guiding data entry for each transaction

Technology

Installation

UI



The screenshot displays the STRATEGY CS web application interface. The title bar indicates the application is running in a web browser. The interface features a menu bar with options like File, Edit, Tools, Additional, Window, and Help. Below the menu bar is a toolbar with various icons. The main content area is divided into tabs: Customer Info, Master Info, Pending Change Master/LP, Deferred Revenue & Expenses, Holdbacks, and Analysis & Reporting Info. The 'Deferred Revenue & Expenses' tab is active, showing a form for entering transaction details. The form includes sections for Payment Information, Billing Information, and Alternate Payment Schedule. Fields include Payment Information (Payment Method, Payment Date, Payment Amount, Escrow Payments), Billing Information (Billing Cycle Method, # of Coupons to Print, Print Bills, Print Notices, Print Statements, Borrowing Type, Note Type), and Alternate Payment Schedule (Alternate Payment Schedule, Separate Schedule for Split Components). A blue arrow points from the text 'Allow users to be even more productive by assisting and guiding data entry for each transaction' to the 'Deferred Revenue & Expenses' tab.

New metadata rules engine provides guided data entry with immediate feedback and embedded data dictionary

Transaction assistant leads users through data entry associated with each work transactions steps

Provides new users intuitive approach to complex transactions

Impact of moving STRATEGY CS to the web

Technology

State of the art web application using modernized tech stack

Installation

UI

UX

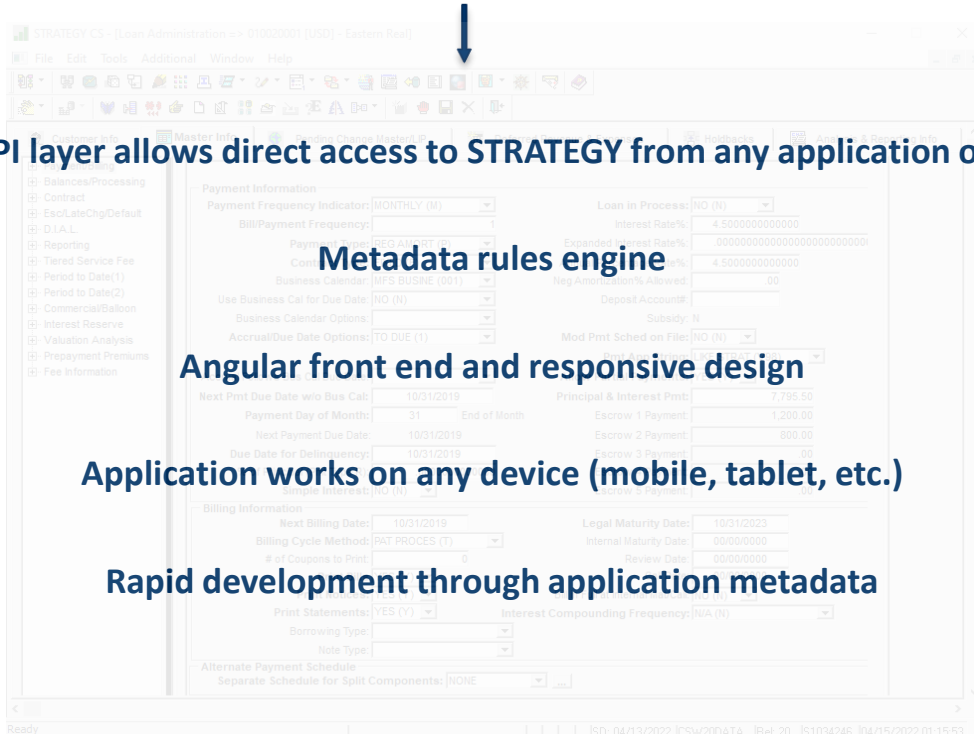
Open API layer allows direct access to STRATEGY from any application or system

Metadata rules engine

Angular front end and responsive design

Application works on any device (mobile, tablet, etc.)

Rapid development through application metadata



SECTION 2



Metadata Business Rule Engine

Metadata Business Rule Engine

- Normal flow of data validation either in front end or back end
 - In the front end application provides immediate feedback but is specific to front end technology and can't be used elsewhere (e.g., API layer)
 - In the back end but then validation doesn't occur until save time
- New Metadata Business Rule Engine
 - Run everywhere – not tied to any technology
 - Rules defined in metadata repository (database)
 - Rule actions guide users via business edits and providing business feedback as to why the edits are being applied

Rule Conditions and Actions

- Conditions define a certain data state
- Actions are what happens when a data condition occurs
- Example
 - When the Payment Frequency Indicator is Monthly or Daily
 - Then the Bill/Payment Frequency is required
- Example
 - When the Payment Frequency Indicator is not Monthly or Daily
 - Then the Bill/Payment Frequency is not applicable

Rule Conditions and Actions

Current STRATEGY

Payment Information

Payment Frequency Indicator: MONTHLY (M) ▼

Bill/Payment Frequency:

Payment Type: INT ONLY (I) ▼

Contract Type: ARM (A) ▼

Payment Information

Payment Frequency Indicator: CALENDAR (C) ▼ ...

Payment Type: INT ONLY (I) ▼

Contract Type: ARM (A) ▼

STRATEGY Web

Payment Frequency Indicator *

MONTHLY [M] ▼

Payment Frequency *

1

Payment Type *

REGULAR AMORTIZING [P] ▼

Contract Type *

FIXED RATE [F] ▼

Payment Frequency Indicator *

CALENDAR [C] ▼ ...

Payment Type *

▼

Contract Type *

FIXED RATE [F] ▼

Rule Feedback

- Whenever a rule action is applied the corresponding business description of why the rule was applied is displayed

Payment Frequency *

1

The frequency that payment is due; works in conjunction with the Payment Frequency Indicator

Payment Type *

REGULAR AMORTIZING [P]

PMASTR.CMBPF

Numeric (3, 0) *

FIXED RATE [F]

Billing frequency is required if Payment Frequency Indicator is Monthly or Daily

Business Calendar

SECTION 3



LIVE Demo of
New STRATEGY UI

“Should I use the new application when it's ready?”

- ☐ I am currently on Release 20
- ☐ I am currently on a previous, older release
- ☐ I have contacted McCracken to begin planning for the release in 2024



Thank you for attending our webinar. Don't forget to:



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your colleagues.**



**Attend our
monthly webinars.**



**Contact McCracken if
you'd like to learn more.**