

AUTOMATE SAGENT LOANSERV DATA EXTRACTION AND TRANSFORMATION

The [Sagent LoanServ Platform](#) provides a range of valuable capabilities for banks and credit unions that offer consumer loans, including loan servicing, compliance, escrow management, investor reporting, customer communications, default management, movement servicing, and payment handling. Lenders and loan servicing firms use [Altair® Monarch®](#) and [Altair® Monarch Server™](#) to automate the storage, extraction, and transformation of data from LoanServ report outputs for storage in data warehouses and for business intelligence (BI) reporting applications.

Challenge: Make Efficient Use of LoanServ Reports and Other Data Sources

Sagent LoanServ is the system of record for many financial institutions and generates thousands of semi-structured reports that help institutions profitably manage their loan portfolios. In many instances, the firm's data analytics team must combine LoanServ-generated data with data from multiple additional sources, including PDFs, spreadsheets, and other software systems. Extracting, transforming, and combining data from such disparate sources is time-consuming and error-prone using only spreadsheets and similar manual or semi-manual processes.

Monarch's intuitive wizard-driven interface enables administrators and managers at banks and credit unions to transform data extracted from Sagent LoanServ systems into useable datasets for further analytics applications, including machine learning, reporting, and BI.

Ab	Emp_ID	Salary	Bonus
1	1592784	62900	1800
2	1587390	58480	1800
3	1596792	56480	1800
4	1593309	62360	1800
5	1601562	70050	2400
6	1598264	42750	900

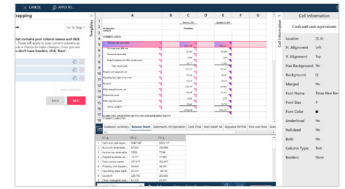
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Solution: Use Monarch Software as Middleware

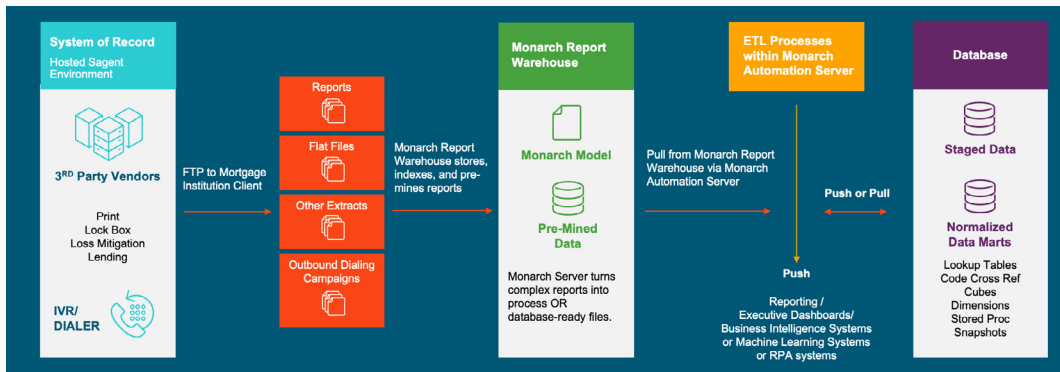
Lenders can implement Monarch and Monarch Server as a middleware system that automatically captures report content from LoanServ, performs data cleansing and [transformation](#) operations, combines LoanServ data with data from other sources – including databases, PDFs, and external data – and delivers it to their BI system for executive reporting purposes. The resulting system is extremely accurate, highly automated, and easy to update and maintain as requirements evolve.

The combination of Monarch and Monarch Server provides financial institutions with a desktop-based development tool that enables business users and analysts to build and test complex [data preparation](#) workflows in a sandbox environment, as well as a production system running on servers for automated, daily use.

Altair provides all Monarch users with access to a [comprehensive library of pre-built templates](#) configured to support data extraction from the most popular third-party financial systems, including Sagent LoanServ. This simplifies and accelerates the implementation process.



The Monarch Model Library is available to all users at no additional cost. It includes models to support ETL operations from Sagent LoanServ, as well as Federal Home Loan Bank (FHLB), Federal Reserve Services FedLine, ICE Mortgage MSP, Fiserv DNA, Fiserv EFT, Fiserv Optis, Fiserv Premier, Fiserv VisionPlus, Jack Henry Symitar Episys, and other popular financial services applications. Users download pre-built models from the library and modify them to match the requirements of their specific implementations.



Monarch and Monarch Server provide highly accurate, multi-layered pattern recognition, data extraction, and data preparation capabilities in a versatile, no-code development environment. The software is agnostic about data formats and sources and can capture data from virtually any source, including PDF, text, and XML files, along with any SQL database and the most common big data sources.

Fewer Errors, More Efficient Operations, Faster Problem Resolution

Monarch and Monarch Server support enhanced extract-transform-load (ETL) functionality that allows business users to create data automation pipelines using the software's visual process designer – without help from IT. The software's enhanced verification capabilities provide trigger warnings when unexpected results occur that help users troubleshoot and resolve problems quickly. Its file bursting capabilities dynamically segment files into small pieces, supporting much faster processing speeds than other systems can provide.

Robotic processing automation (RPA) tools enable financial institutions to easily configure software robots that automate repetitive and time-intensive processes across on-site and/or cloud-based applications.

Monarch and Monarch Server provide banks, credit unions, lenders and servicers with:

- Lower total cost of ownership (TCO) compared to using a vendor to manage data and/or content management solutions
- Integrated content report content management and data automation
- Expansion capabilities in data science, AI/machine learning, data visualization, and RPA via the patented Altair Units licensing model
- Centralized data preparation and transformation model management, including comprehensive revision histories and the ability to restore old versions
- Elimination of time-consuming and error-prone manual processes
- Easy management and segmentation of reports
- Complete search capabilities