Case Study:
Division Portfolio Planning (DPP) System

Tools and Technology

Microsoft:

- MOSS 2007
- Microsoft office share point designer 2007
- MS Infopath 2007
- MS Visual Studio 2005 team suit

Technologies:

- Microsoft Dotnet Framework 2.0
- Telerik

Databases:

- MS SQL Server 2005

Hardware requirements:

- RAM: 1GB
- HD: 80 GB
- Processor: P4

Client Background

The customer is a US based global leader in research and development of technology for the electric power Industry. The customer offers an annual portfolio which outlines research that its scientists feel is of great importance to the direction, growth and sustainability of electric power.

Business Need

Bourntec had developed the Division Portfolio Planning (DPP) system for the customer. The old PP parses word documents and stores them in Word ML. However, this architecture was incompatible with the customer's IT architectural direction and required significant manual intervention and conversion programming to be able to port the portfolio onto the customer's web sites for delivery as well as into the customer's general ledger and financial suite.

The customer wanted to rewrite DPP using Microsoft's MOSS 2007 & InfoPath 2007 software which offers on-line and offline data entry and features like enhanced editing, rich text, dynamic UI with no dependency on code change, versioning, workflow etc.

This has been a highly challenging project from technical and functionality point of view. Some of the key challenges faced were:

- On–time delivery with aggressive timelines
- Design & implementation to handle the dynamic configurable UI without code changes
- Integration & interactions across various layers like MOSS 2007, SQL Service 2005 Reporting Services Reports etc.

The Solution

Bourntec has reworked on the DPP System and designed the solution as client desired with the following features.

- Dynamic UI - configurable offline InfoPath templates where controls/fields can be added/removed with no dependency on code changes
- Multilevel (Hierarchical) Offline InfoPath templates with display controlled on highly configurable multi-conditional rules
- Custom implementation for configurable (DB driven) multi-step workflow available through offline InfoPath templates
- Custom implementation of version maintenance with version history, version details and revert to selected version functionality
- Integrated Telerik RAD controls with MOSS web parts for implementing central navigator screen with three tree views in separate sections – provides access to most of the operations via context sensitive menu options
- Used ASPOSE control with SQL server Reporting Services for reports in MS Word format
- Integration with MOSS 2007 by using SharePoint lists for master data maintenance
- Both way data synchronization between Share Point lists and SQL tables

Client Benefit

✓ Enhanced Tracking of Order Status, Allocations and Re-allocations

✓ Automation of process of journal entry submission(JSE) and it's processing at JSE

✓ Reduced Cycle Time, facilitating Straight Through Processing for the Securities group

✓ Monitoring of journal entries and hence better control on system