

Investment Management Web Application

Need

A high profile multi-national banking client needed to build a robust banking and investment/trust management web application to maintain a strong industry presence, appease demands of well established clients and appeal to new customers. Clients wanted to see a current financial summary of their assets and liabilities as well as account specific information and a summary of daily/monthly transactions. The primary performance and service requirements needed to allow authorized clients and employees to examine financial summaries of all deposit, loan and Mutual Funds data on a '24-7' basis including all account profile and activity level data. Clients also needed the ability to transfer funds between intra-bank accounts, including transfers between deposit accounts, loan payments and advances, and mutual fund transactions on funds held at the institutions. They also wanted aggregate financial data from accounts held outside the institution, including updating asset accounts with real-time market values and receive automated alerts based on client-selected conditions regarding transactions and account balances

Solution

RiverPoint maintained overall delivery responsibility from project inception through implementation of the 'back-end' live data interface with an external service bureau and the bank for all deposit and loan data. RiverPoint also maintained all application Sybase stored procedures and developed a real-time MS-Access interface into client user volumetrics. For implementation of the second release, RiverPoint was involved in preparing project requirements, developing testing methodologies and coordinating all phases of testing, while continuing to provide production support for the product's initial version. RiverPoint also administered application Stress Testing using various software products. In addition RiverPoint created a reporting system utilizing Web.PB to enter and display Help Desk status messages and user statistics. A significant amount of coordination with external resources and user groups was required in order to complete the project's objectives in a timely manner.

