

Project Note

Web Application for Managing Fund Portfolios

An extensive investment management solution for global investors of a major Swiss bank. The customer team learned about aspects of XML transformation and PDF generation that were new to them.

Task

To design and implement a modern web-based asset management system for selling and managing fund portfolios. The bank wanted a system capable of suggesting an investment program (fund portfolio) to a client based on his/her risk profile. The software had to be able to trigger all necessary systems at the bank and to generate personalised PDF offers, which once signed, would constitute a contract between client and bank. The application also had to be capable of managing and monitoring contracts and the fund portfolios associated with them.

Implementation

In the initial phase, the architecture was defined and verified with a prototype. Then an expanded project team implemented the time-consuming presentation level in record time using an iterative approach. At the same time, the business components, i.e. the interface with various external applications, persistence and business logic were implemented. Dummies were used in the presentation level until the business components were available. A clear separation of the two levels was achieved through the consistent use of component modeling.



Technical Data

Architecture: J2EE (Servlet/JSP), JMS
Programming language: Java
Front-end: HTML/JavaScript
Back-end: Websphere application server
Presentation level: Struts
Document generation: XSL-FO, XSLT, FOP
Data maintenance: Oracle
Platform: Sun Solaris

Customer Benefits

- Architecture prototype: The controlled use of different technologies to implement an architectural prototype gave the customer self confidence.
- Key customer deadlines met: An experienced team of software developers was deployed at short notice to complete the presentation level, allowing work to proceed in parallel without any time loss for orientation (regarding procedures, etc.).
- Know-how transfer: The team learned about aspects of XML transformation and PDF generation that were new to him.

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