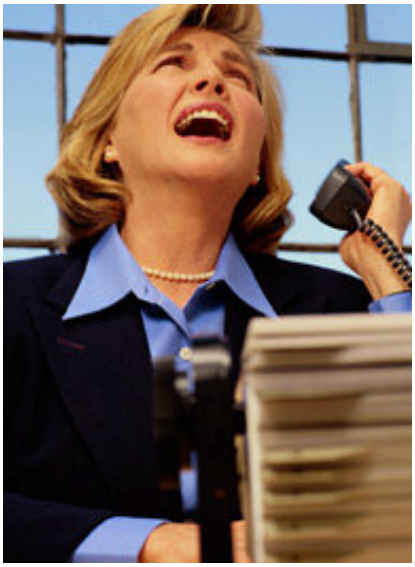
Streamlining back office operations via an intranet

Client Brief: J. Rothschild Assurance

J. Rothschild Assurance plc (JRA) is a major financial services company based in Cirencester. The company has a strong brand image, synonymous with quality and integrity, which differentiates it from much of its competition.



BUSINESS OBJECTIVE

J. Rothschild Assurance (JRA) has a number of sales offices around the UK to support its field sales force. One key function performed by the staff at these offices is the production of regular daily and monthly reports analysing the proposals submitted by the sales force. These reports are used by the sales offices, and head office, to audit the proposals being submitted, and to monitor the volume of business being generated.

In the past, staff at each office had developed separate, often manual, ways of producing the reports, supplemented by standard office applications to improve their presentation. This individual approach was time-consuming, and could mean that vital data was either being lost, or recorded wrongly or inconsistently. As the company grew and the volume of business increased, JRA had to hire disproportionately more staff to cope with the load, and train them individually to produce the reports.

JRA wanted a new system to automate as many administrative tasks as possible in order to provide a fast and effective service, as well as establishing common working practices to eliminate inconsistencies between offices.

The new system also had to prevent users at one office from viewing or changing the data belonging to another office.

IPL FINANCE'S SOLUTION

JRA's challenge was to rationalise and simplify its growing administrative work.

IPL's response was to propose a web-based system.

Each sales office had an existing PC network and a corporate network was to be introduced to link all the offices. JRA had standardised on Microsoft products, with Internet Explorer (IE) as the web browser installed on all PCs, running under Windows 95. This made it possible to have an Intranet based on web browser/web server technology.

IPL developed a three-tier application using Active Server Pages (ASP) technology. The ASP pages were developed using Microsoft's Visual InterDev, a fully integrated development environment for Web-based applications.

As the application was entirely browser-based, software on individual PCs could remain unchanged, greatly simplifying roll-out for both IT staff and users. The ASP pages were installed/published on the web server (Microsoft IIS) running under Windows NT, and could be invoked using IE from any PC.

Server side VB Script was used in conjunction with ActiveX Data Objects (ADO) technology to access the database and to generate the HTML pages sent to the browser. Client side VB Script, 'embedded' in the HTML pages, was used for data input validation and client side processing. The reports were standard HTML pages that could be printed by the browser.

Frames were used to divide the browser window into independent, logical sections. The top section always showed the user what options were available, while the bottom section displayed data entry forms, results and reports. Cascading Style Sheets were used to give a consistent look and feel throughout.

MANAGING THE PROCESS

IPL staff worked closely with a JRA team throughout the project. During the requirements gathering and definition phase, management and users met regularly to ensure that a complete picture of the required system was formed and agreed. Early in the development phase, the team demonstrated a prototype to management and users. This resolved various presentation issues, such as: how frequently performed tasks would be carried out, the grouping and display of related data, and the navigation routes between screens.

Before the corporate network became available, JRA decided to deploy the system at each office on a local web server with data held in a local Microsoft Access database. After development and testing, this system configuration was piloted at two of the sales offices and the head office. The system was then rolled out to all sales offices. A subsequent phase of the project will be to deploy the system on a corporate Web Server (IIS) with a centralised Oracle database, as originally planned. IPL has already successfully tested this configuration.

IPL also trained the JRA system support organisation so that they could provide rapid first line support to all users.

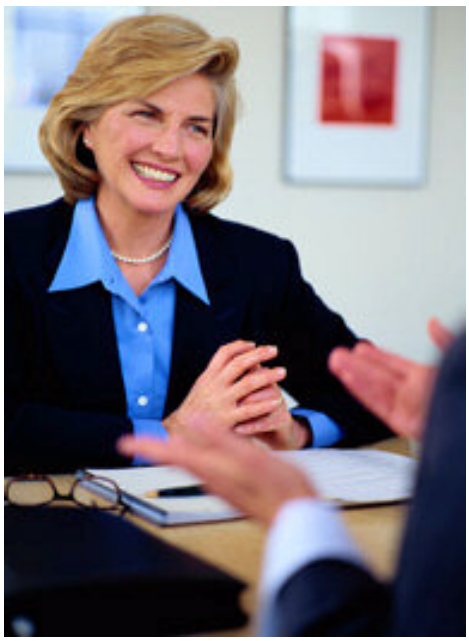
THE OUTCOME

The system is now in operational use at around twenty sales offices. As always, the success of the system rested with the users and the feedback was extremely favourable. Staff soon discovered that the system could provide useful output for other business areas and a number of enhancements have been carried out by IPL. IPL continues to work with JRA on further enhancements.

Following deployment of the system and its acceptance by users, the JRA team organised a presentation to JRA's directors to demonstrate the disproportionate business benefits of investing a small amount of time and money in these new technologies.

'On every count, this development has been a success. The problem we faced was one caused by our growing success. We wanted a solution that was simple, and used the technology we already had in place or planned to use. Moreover, we needed a system that would be easy to roll out, which our staff could use with the minimum of training, and which we could then support by ourselves. IPL provided just that. We are delighted and, much more importantly, so are our staff.'

Beverly Baylis, Area Administration Manager, J. Rothschild Assurance



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