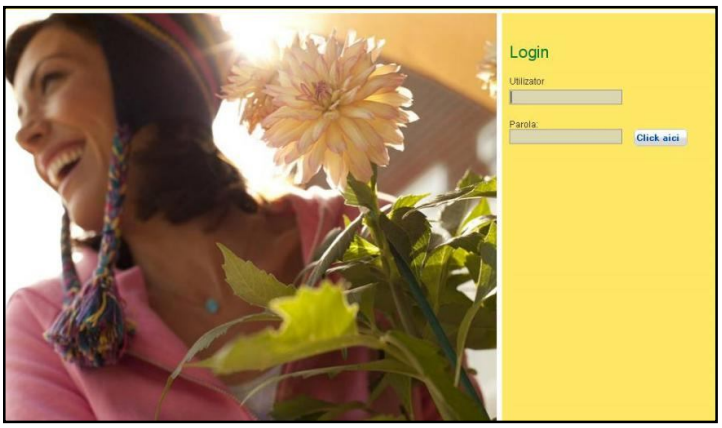
Report Management System

A solution for Insurance Agents.

Executive Summary

The insurance based client firm had a vision of possible application which could help meet the requirements of a largely ignored user base, i.e., the sales and marketing people, who are the primary responsible people for actual content in much significant documents. The fundamental requirement was to give the sales people a much easier and user friendly and quick access application, which will effectively reduce the time and drudge to get the information.



To achieve what they aimed, the client firm approached Mindfire Solutions. Mindfire took the responsibility to provide the best solution. The client was very much impressed with Mindfire's experience in insurance based product and awarded the project. Mindfire responded well and stood up to the client's expectations by delivering them with a feasible and robust application.

About our Client

Client Leading Insurance Company | **Location** Bucharest, Romania | **Industry** Insurance

Business Situation

Client approached Mindfire and shared it's thoughts for building an application for their agents. They were looking for someone to explore the thought and come up with a more advanced and with a better solution for the requirement. Mindfire's application development experience along with rich technical expertise and various software project experiences helped the Client firm in building viable system architecture and design for their prerequisite.

The Client Company had different type of business engines on variety of insurance policies. The engines were all built with Excel applications, which were driving the complete business logic. The entire business logic was present in the Excel application. These engines have their own interface (worksheet) to take the input parameters. Once these Engines get the data, the business logic transforms the information to a series of processes and shows up the vast and variety mass result as output sheet.

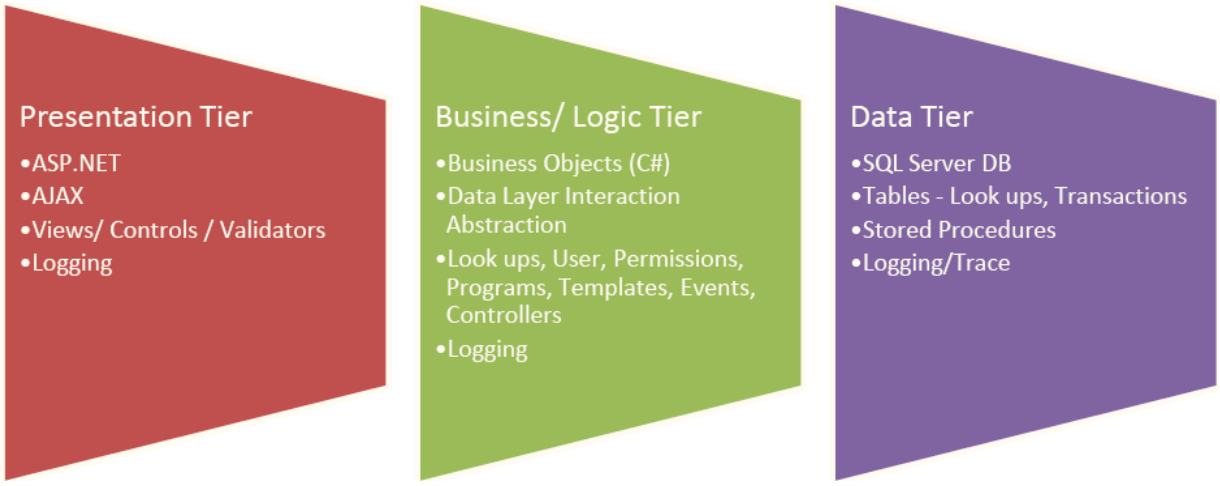
The primary challenge for Mindfire was to create an application which can bring required interfaces for their engines dynamically according to the Client firm's choice at any point of time and also that the application gives the output results from their Excel Engines in report format.

Solution Details

The Mindfire Solution

Mindfire created a web application, which can give different options to build dynamic interfaces for client, according to their own choice of Excel engines. The web application connects to Excel applications and put the information. After saving the data in the engine, the application takes out the result from the engine and saved the information into database which is later shown as a report in HTML / PDF formats.

Multi-tier architecture was created, separating the presentation, business/application logic and data management into different layers.



Achievements

As the application needs to be used by Romanian agents, so it has been developed to show the entire web application with either English or Romanian language texts

The robust feature encouraged the client to give Mindfire more scope to add new features to the application like exporting a set of results of many Excel Engines to user's machine, as well as showing to other marketing in formations according to the type of agents present.

Technologies

Presentation tier

- ASP.NET web application developed in C#.NET
- Ajax used to show the progress of uploading files into the application.

Business tier

- Business objects implementation – validations, "Dial class" implemented to handle the data in object format, transaction processing, excel application work out.
- Source developed in C#, garbage collected, implementation.
- Excel Applications, Powupload.

Data tier

- SQL Server 2005 used in the data-tier, which can be easily replaced by another database server, given the generic interface created for data layer abstraction.
- Stored procedures, views, relationships, administrative and user data

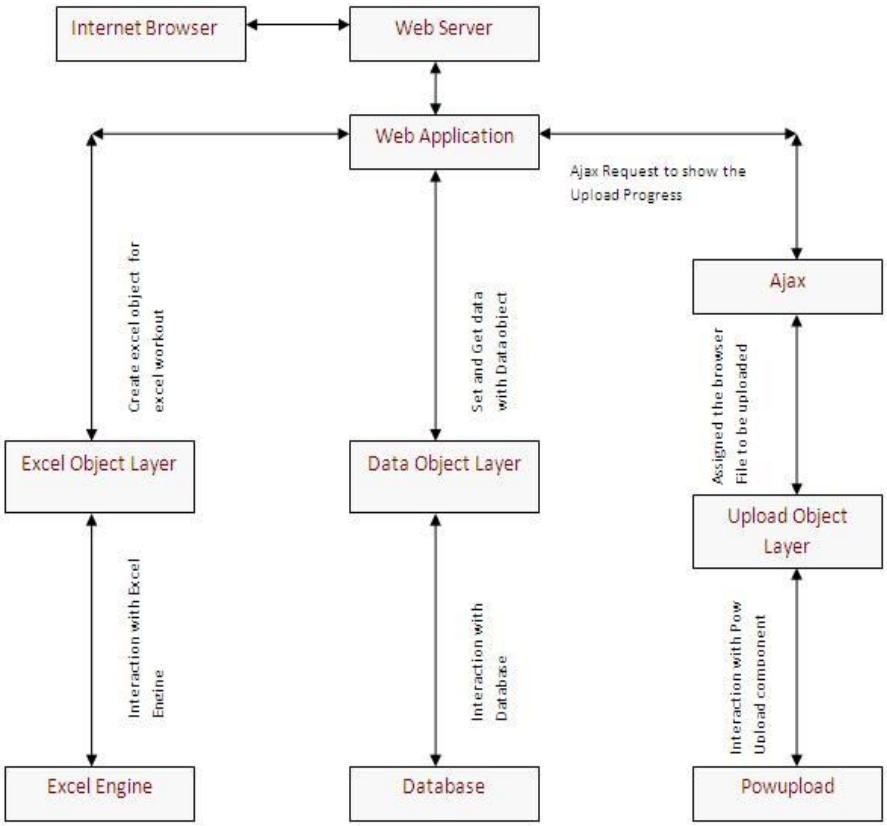
Server side

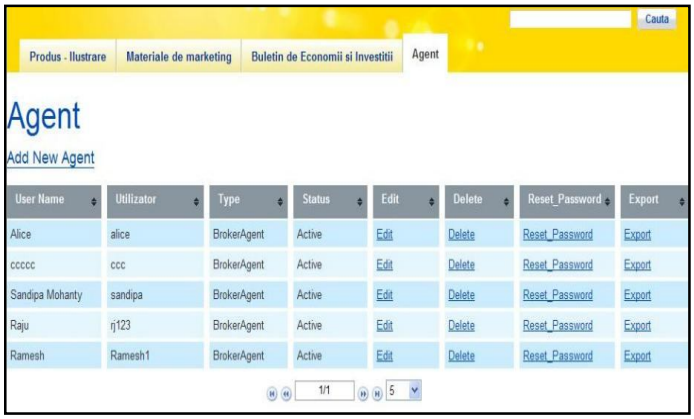
- Windows Server 2003, IIS 6.0, .NET Framework 2.0, Powupload component.

Client side

- IE7, Safari, Firefox browser support on any windows machine.

Final Results
Software System





Customer Benefits

The client firm hugely benefited from the product development experience of Mindfire's engineering team. Firstly they got a robust application for their firm as they wanted and secondly, their insurance agents could easily extract information about different insurance schemes.

Future relationship

Mindfire has already had a strong relationship with the client. Mindfire continues to be a primary software provider for the client firm, handling product and project development from its broad portfolio, involving various different technology and trends.