



# Microsoft Case Studies

2016

V1.6

OS  
Tools

# Risk Reporting Solution for AMC

## Overview

- Measures to check consistency in the composition of product quality which would offer market returns commensurate with the product objective
- Monitoring mechanisms for investor transactions in order to adhere to regulatory guidelines
- Notifications to appropriate levels of the management with respect to variation in the company's strategic growth related parameters

## Client

A financial services conglomerate. They have a significant presence across life insurance, asset management, NBFC, infrastructure project and structured finance, private equity, broking, wealth management and distribution, and general insurance advisory services.

## Technology Used

- SSIS/ SSRS
- MS SQL Server
- SharePoint

## Benefits

- Consolidated view of enterprise-wide risk
- Ease in decision making based on perceived risk in various areas

## Overview

- Monitoring of enterprise wide risk
- Monitoring mechanisms for different transactions in order to adhere to regulator guidelines
- Ensure adherence to operational procedures and audit commitments
- Notifications to appropriate levels of the management with respect to variation in the company's strategic growth related parameters

## Client

A leading life insurance company belonging to a global financial conglomerate. The company has an impressive list of products comprising of children's future, Health & Retirement solution etc.

## Technology Used

- SSIS/ SSRS
- MS SQL Server 2008
- SharePoint

## Benefits

- Easy monitoring
- Comprehensiveness
- Flexibility
- Structured
- Seamless information processing

**Clients**

Browsers

Office Apps

Custom Apps

Web Services

## SharePoint Server

Enterprise

Standard: Enterprise Search, ECM, Social Network & User Profile, Digital Asset, Analytics

Service Applications

Excel

Visio

Access

InfoPath

Perf Point

User Profile

Usage

## SharePoint Foundation

Object Model

Storage

Security

Admin

Deploy

Sites

Extend

SQL 2008



IIS 7

.Net 3.5.1 Framework

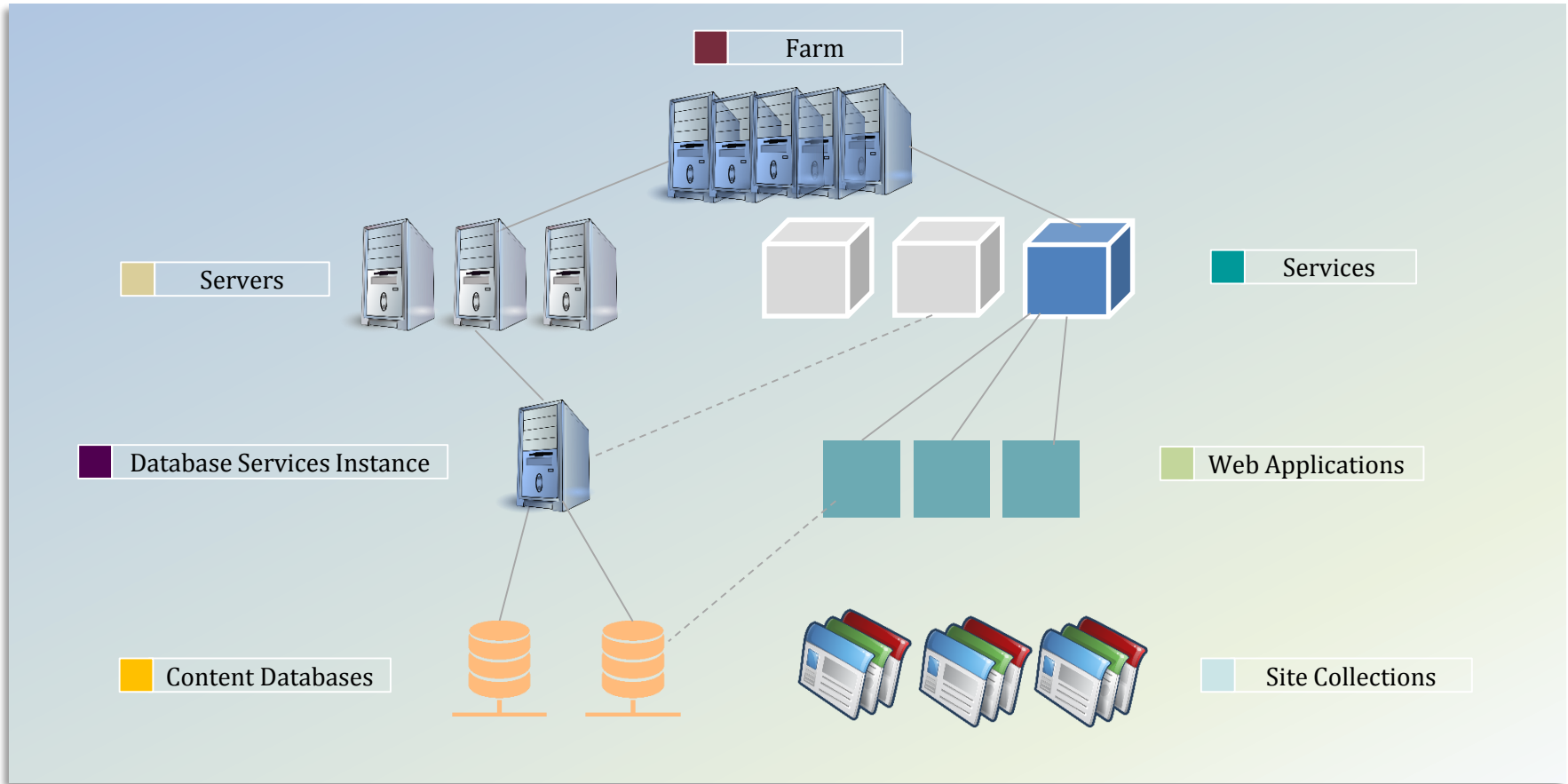
Search

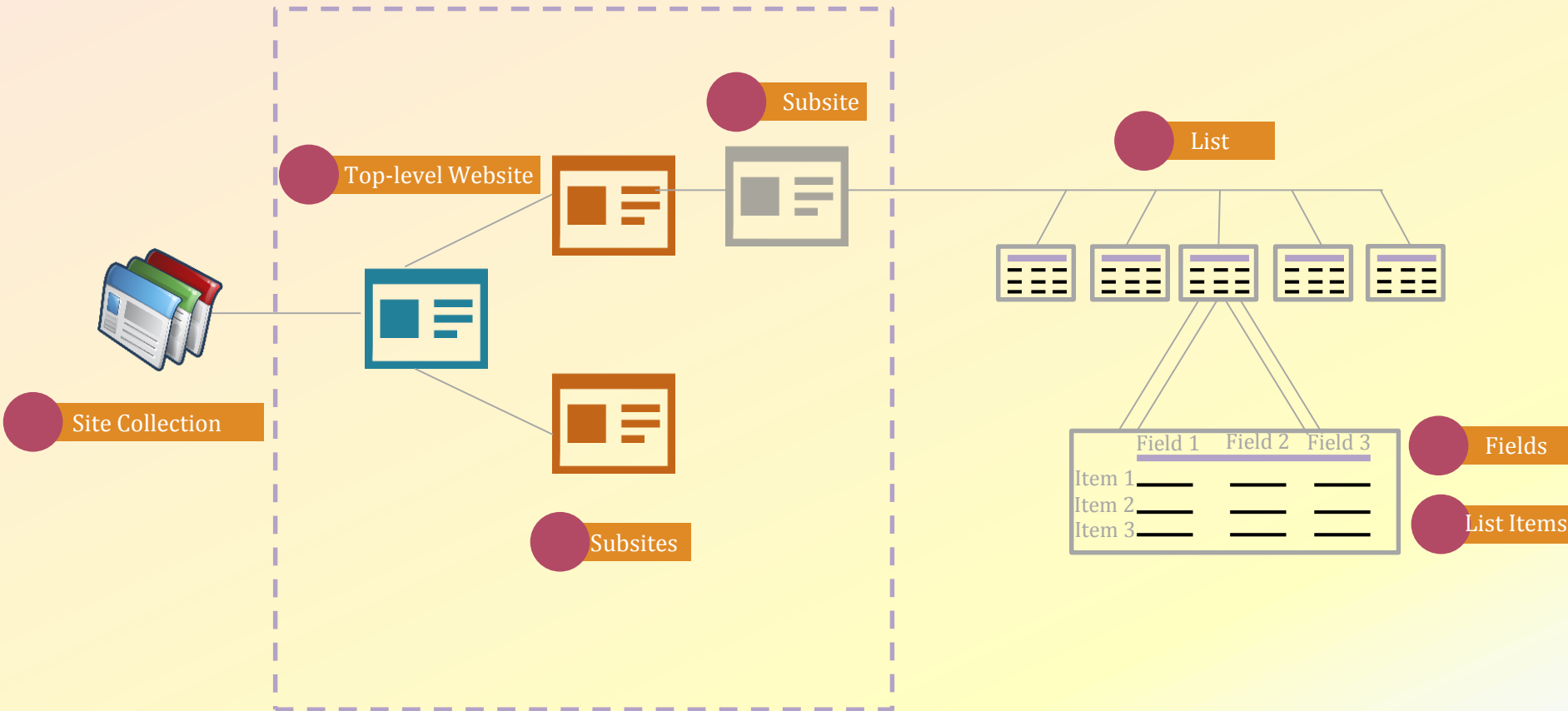
Workflow

Security

Master Pages

## Operating System Services





# SharePoint Features – Risk Reporting Portal

- DocumentLibrary
- CustomList
- PublishingTimerJobs
- GlobalWebParts
- DocumentManagement
- AssetLibrary
- RecordResources
- PortalLayouts
- MySiteNavigation
- Reporting
- SiteLists

A highly configurable reporting portal with options to extend the reports based on organization hierarchy

## Overview

- Tougher monitoring and tracking of banking transactions
- Fixed deposit placement details
- Success/ failure of transaction
- Internal communication for the fund transfer request raised
- Consolidated information gathering about daily/monthly transactions
- Notification for approvals for fund transfer

## Client

One of the leading international financial services organizations from Canada. With an experience of over a decade, Client has contributed to the growth and development of the Indian life insurance industry and currently is one of the leading life insurance companies in the country.

## Technology Used

- SharePoint

## Benefits

- Ease of use
- No manual errors
- Structured and flexible
- Ease in getting data required as per users' convenience



# Asset Tracking System: Life Insurance

## Overview

- Tracking Asset Delivery to and confirmation from employees
- Consolidated data generated as per admin needs
- Notification to Employees and Admin about the status of asset
- Ensure adherence to operational procedures and audit commitments

## Client

One of the leading international financial services organizations from Canada. With an experience of over a decade, Client has contributed to the growth and development of the Indian life insurance industry and currently is one of the leading life insurance companies in the country.

## Technology Used

- SharePoint
- MS SQL Server 2008

## Benefits

- System generates alerts. Manual Communication not needed
- Ease in Confirming the assets
- Time Saving

- CustomList
- SiteList
- SiteNavigation
- WorkFlow Components
- PortalLayout

A workflow based portal with routing capacities for approvals at different levels

# Thank You!



New Jersey, USA

Dubai, UAE

Mumbai, India

Singapore

**INDIA**  
MindCraft Software Pvt Ltd  
[www.mindcraft.in](http://www.mindcraft.in)  
[sales@mindcraft.in](mailto:sales@mindcraft.in)

**SINGAPORE**  
MindCraft Singapore Pte Ltd  
[www.mindcraft.com.sg](http://www.mindcraft.com.sg)  
[sales@mindcraft.com.sg](mailto:sales@mindcraft.com.sg)

**USA**  
MindCraft America, Inc.  
[www.mindcraftamerica.com](http://www.mindcraftamerica.com)  
[sales@mindcraftamerica.com](mailto:sales@mindcraftamerica.com)

**UAE**  
Adeptus Technologies LLC  
[www.adeptus-tech.com](http://www.adeptus-tech.com)  
[sales@adeptus-tech.com](mailto:sales@adeptus-tech.com)