Application Servers
G22.3033-011

Session 1 - Sub-Topic 3
Detailed Project Development Methodology

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Computer Science Department
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Mapping Vision to Solution

Fulfilling the Objectives to Support the Vision
Current State Business Process Hierarchy

Future State Drivers

Preliminary Capabilities Matrix
(Customer-driven)

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### Preliminary Capabilities Matrix (Competition-driven)

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### Preliminary Capabilities Matrix (Technology-driven)

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### Identifying Capabilities

- Web Portal
- e-Procurement Capabilities
- Personalization and Customer Relationship Management (CRM) Capabilities
- Data Warehousing and Business Intelligence
- Documentation Management
- Other Global and General Requirements
Future State Processes

Future State Trading Business Model

Future State Business Process Hierarchy
Mutual Fund Trading Process

Client (e.g. MX, AR, Br)
Mutual Fund Clearing (MX, AR, BR)

Client logs in
"Personalized" Web Page
Submits Order

Account validated
Validate Order
Valid

"Not a valid order"
NO
Manual Review Needed
Yes
No

Is the mutual fund a BSCH fund or a listed fund
No
Yes
Route to local affiliate
Yes
No

Is it Domestic yes
Trigger FX No
FX Process BSCH Affiliate/Partner (MX, AR, BR)

BSCHOnline Front/Back Office (e.g. MX, AR, BR)
Clearing and Custodial Agreements

Electronic Execution? Yes
No

Solution Architecture

Sample Conceptual Technology Vision

Supplier's Virtual Catalog
Business Intelligence
Auctioning/Reverse-Auctioning
Customer Management
E-Procurement
Core Engine
Customization
Documentation Management
Web Portal
EDI Gateway
Electronic Documents
RFQs
Web Suppliers Interface
Orders Receipts
Procurement Interface
Electronic Catalogs (OBI, XML, EDI 832, etc.)
Legacy Applications
Source and Procure
Parts Management
Document Management
Financial Applications
Operations & Technology Support Vision

Technology support should migrate towards a vision that will guarantee a unique experience for BSCH’s e-Trading customers anywhere in the world.

-- Functions --

1. Marketing/Sales
   - Global Front-End System
   - Customization / CRM
   - Database
   - Web / IVR / Faxback

2. Retail Clients/Financial Advisors
   - BSCH Country Offices
   - Web / VPN / Phone

3. Order Management
   - Trading
   - Web / VPN / Phone

4. Customer Support
   - Web / VPN / Phone

5. Technical Support
   - Customer Support
   - Technical Support

6. Business Processes and Components at Work
   - (Domestic South Trade)

   BSCH LAO Country Office Staff
   - www.bschlao.com
   - eTrading software update management
   - Analytics and research compilation

   BSCH Brazil Office Staff
   - www.bschlao.com site support
   - www.bschlao.com.br site support
   - Back-office support

   BSCH LAO US Affiliated Broker/Dealer Office Staff
   - Analytics and research compilation
   - Back-office support

   www.bschlao.com or www.bschlao.com.br
   - Retail Clients/Financial Advisors (Brazil)

Legend:
- Gobal Front End System
- Integrated Value Chain Support System
- Local Back-Office System
- Third Party Services
- Order Placement

Internet

Order placement gets routed locally
Business processes and components at work
(North to South)

Using an Architecture Framework

Logical Architecture Diagram
Evaluating Alternatives

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<th>Criteria</th>
<th>Vendor 1</th>
<th>Vendor 2</th>
<th>Vendor 3</th>
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<td>Alignment with Vision</td>
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<td>Business Risk</td>
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<tr>
<td>Overall Rating</td>
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Proposed Solution

Technology Infrastructure
Development Methodology

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<tr>
<th>Stages</th>
<th>Discover</th>
<th>Design</th>
<th>Develop</th>
<th>Deploy</th>
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<td>Testing</td>
<td>Performance Engineering</td>
<td>Project Management</td>
<td>Configuration Management</td>
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**Identifying Domains of Change**

- Implementation team
- Training team
- Projects creation and update
- Projects approval
- KPI creation
- Project information retrieval
- System administration

**Requirements Analysis**

- Hardware
- Standard system software
- Reporting software
- Ad-hoc spreadsheet functions
- Security and performance

**Business Process**

- Site navigation design
- Site content design
- Reusable components
- Security workflow

**Technology**

- Data conversion
- Supplied volume data

**Organization**

- New York office

Development is an iterative process, where for each subset of requirements, components must be analyzed, designed, developed and deployed.

**Adding Iterations**

Proposed Project Lifecycle