

CASE STUDY

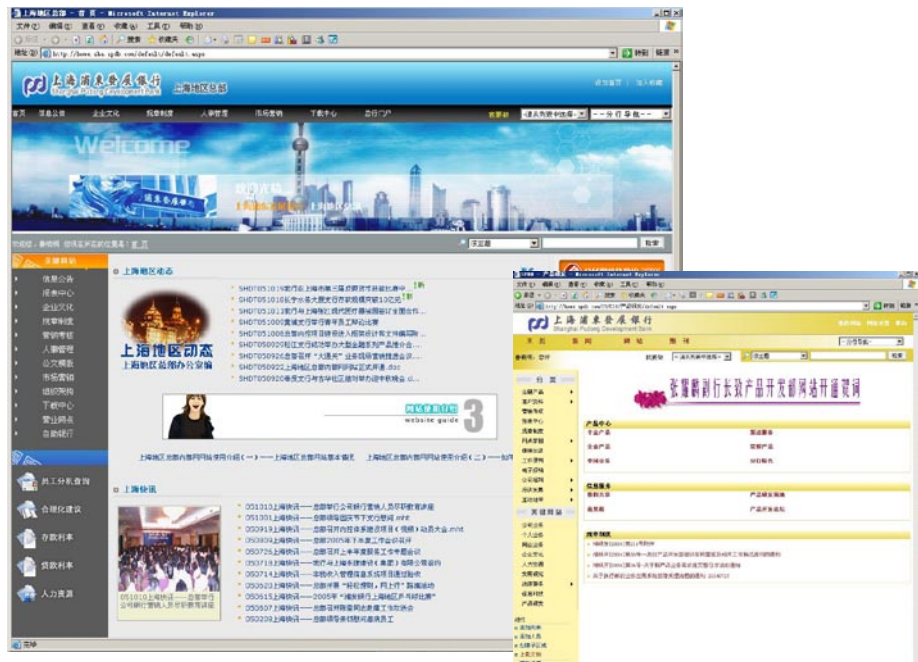


Shanghai Pudong Development Bank (SPDB) is a well-known state-owned bank in China and is headquartered in Shanghai. The bank has 15 main branches and many sub-branches in Shanghai, Beijing, Tianjing, Chongqing, Hangzhou, Nanjing and other cities. Before the SharePoint Server (SPS Portal) Project, SPDB did not have a unified internal website.

SPDB wanted the solution to include two portals – an internal portal, to be created for SPDB staff and based on SharePoint Server, and an external portal, to be created for visitors and based on Content Management Server. This case study focuses on the internal portal project.



SPDB turned to GrapeCity because we are a Microsoft Gold Certified Partner and also because of our expertise in the development of business solutions. Since SharePoint Server was a new product at the time, SPDB had confidence in GrapeCity, a Gold Certified Partner with over 15 years of experience in rolling out solutions based on Microsoft technologies. Further, GrapeCity also had experience in developing portals.



Key Challenges

- Work at SPDB involved a lot of paperwork. Searching for documents was very cumbersome due to data being scattered among various teams. The solution needed to have an efficient document management system that would also be a centralized repository of information.
- Communication between divisions was difficult as each department had their own solution based on different development environments and standards. The challenge was to integrate and streamline operations of the various divisions in the bank.

- The solution needed to incorporate functionalities such as a powerful search engine and an online library system for the SPDB staff to get desired information fast.
- The SPDB portal needed to be integrated with third-party applications, so security was of primary concern.
- All the Shanghai HQ staff was to log on to the portal daily, and hundreds of staff members in the branch offices were to use the portal daily through VPN. The challenge was to devise an optimal deployment mechanism to accommodate the load volume.
- The technology to be used was new, and all the embedded components were to be developed using a new tool called WebPart. The development team had to attain rapid proficiency in the technology and tools.
- Since some of the content being released on the external and internal portals was common, SPDB wanted data entered on one server to be replicated on the other

## Solution by GrapeCity

GrapeCity followed its best-practices to understand the business and technical needs in detail, which helped them in implementing the whole solution. Several web servers and a back office database server were deployed. The web servers were to share the heavy traffic load and increase access speed. The implementation team gained expertise in WebPart in a short time and rolled out the solution, which had the following modules:

**Document Center:** Using this module, the SPDB staff can add, modify, delete and search documents SharePoint Portal Server 2003 enables users to search the full document for text and properties for the keywords that they enter. This module provides users with a fast way to search for documents, people, teams, and other sites on the portal.

**Business Introduction:** Using this module, the SPDB staff and customers can list all of SPDB's financial products and allow potential customers and new members of staff to understand information about SPDB's business lines. SharePoint Server Portal Solution for Shanghai Pudong Development Bank (SPDB)

**Permission Management:** Using this module, division managers can assign appropriate access rights to team members for various areas of the system.

**Customer Information:** Using this module, sales and business executives are able to get details about customers. Details are available to only executives authorized to log in by team leaders or administrators.

**Customization:** Using this module, SPDB customers can customize their home page. This module helps SPDB customize an experience for customers based on their role, hierarchy or interests. Customers can also sign up for alerts to find out when information has been created or updated anywhere in the portal.

**Download Center:** Using this module, SPDB employees can download software to their computers after authorization. This centralized place for all software downloads ensures that software applications in use on computers across the organization are in sync.

**Staff Convenience:** This module consists of several sub-modules:

- **Integration with Outlook:** Using this sub-module, SPDB executives can check email from anywhere at any time. This is very convenient for sales and senior executives who are constantly on the move.
- **Online Library:** Using this sub-module, SPDB employees can search, borrow and return library books. They can also set up email reminders. The complete management of the library is done using this submodule.
- **Online Reimbursement:** Using this sub-module, SPDB employees can submit bills for reimbursement, which are approved by their managers and routed to the Accounts division.
- **Training:** Using this sub-module, users can access a centralized knowledge base for business training and management, and retrieve the training material they need.
- **Company Organization:** Using this sub-module, the staff of SPDB can know more about their organization.

## Benefits to the Client

- The centralized knowledge base of information ensures that there is no duplication of data, resulting in lower overheads for SPDB.
- SPDB employees are able to quickly locate and access documents, and provide quick service to customers, resulting in optimized services and customer delight.
- Minimized paper work ensures optimized operations and saves on inventory costs for SPDB.
- The self-service customizable portal for partners and customers has simplified work for all, resulting in customer and partner delight.
- Rapid deployment of the system was possible as the solution was based on the SharePoint Server. This reduced development time and costs for SPDB.
- Using out-of-the-box portal services, such as the online library, reduces the development time and effort, resulting in savings for SPDB. Creating an online library usually takes about one month, but with SharePoint, it was created using WebPart and was up and running in a single day.
- Applications such as Internet Explorer, Outlook and Excel are well integrated with the SharePoint Server platform, resulting in seamless working for SPDB employees.

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- The portal is well integrated with other third party applications, and extensive roles and responsibilities have been designed and deployed to ensure security of operations at all times.
- Data replication feature between the external and internal portals ensures savings on time for the SPDB team.
- The maintenance of the portal is easy and is done by SPDB employees, resulting in savings in maintenance for SPDB.
- Using the SharePoint solution, SPDB employees can easily share knowledge across the organization, making it an ideal platform to collaborate on documents and proposals, resulting in better documentation and more business for the bank.

### Best Practices

Our implementation is based on best practices derived from our experiences in helping manage client communications, expectations, decision-making and schedules. Our best practices include:

- Capturing client requirements - we gain a thorough understanding of the business goals of your organization. This way we often end up with a better understanding about client requirements.
- Documenting current processes and requirements so that the client can ratify our perceptions.
- Helping you define new processes that would re-orient you towards success.
- Helping you prioritize requirements so that you are better geared towards an early success.
- Providing implementation, development, customization, integration, testing, training and support services.

### About GrapeCity

Since 1988, GrapeCity China has developed, sold and supported software solutions for mid- to large-sized companies in select industries in China. Our areas of expertise include: Customer Relationship Management (CRM); Enterprise Resource Planning (ERP); software development; custom application development; technical support; enterprise cooperation; and Knowledge Management.

For more than fifteen years, GrapeCity has continually advanced its knowledge and expertise, and we are proud of our customers' success with our solutions. GrapeCity is a Microsoft Gold Certified Partner and we have collaborated with Microsoft for more than ten years.



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