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Building simplicity and compliance into managing master data

Company Background

A leading commodity trading house approached Xoomworks Technology to build a new solution for managing their trading partners. Within one week, Xoomworks Technology had a dedicated team in place and was working with the business, IT and another third party team to create a user-friendly solution to meet the firm's needs.

The firm wanted to use its existing best practice solutions for user authentication, document management and compliance screening within the end product.

The Challenge

The business required a single system to manage all master data for its trading partners. They insisted that this solution was simple for the end users but offered tight compliance around the creation and ongoing management of every new and existing record.

This system would then feed all other systems that required this data. The firm also wanted to use its existing best practice solutions for user authentication, document management and compliance screening within the end product.

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The Solution

Working to a fixed budget with business users, IT and a third-party screening solution, the dedicated team created the solution that offered a simple user experience, rigorous workflow and integration to all other systems.

"The Xoomworks team has an eye for design and expert developers. They worked hand in hand with us to deliver a great result"

A highlight of the deliverables included:

- ✓ Working as one team to get the job done

- ✓ Role based visibility of certain records and fields

- ✓ Screens to show users what outstanding actions are required

- ✓ Working under a fixed price approach. Role based workflow for approval and subsequent history of changes

- ✓ Integration to SharePoint document management system, to all internal trading systems and to 3rd party screening solution

- ✓ Delivering a modern browser-based user interface supported on all browsers with intuitive layout

- ✓ Searching capabilities for everyone to find what they need.

The Results

Working as a single team to deliver the solution:
One thing that Xoomworks Technology prides itself on is integrating seamlessly with other parties. But this approach needs the support of the client. This customer proved very responsive, both from the business teams and IT which enabled efficient delivery of the solution.

Being experts in technology:
Xoomworks developers are obsessed with technology and as such, are always aware of the latest solutions to deliver clients' needs. With this knowledge coupled with a recognition of this client's needs, technology standards for the back-end development were adhered to whilst taking advantage of the latest front end technologies to deliver a very modern user experience.

Agile approach to create greater buy-in:
Xoomworks Technology delivers results faster by operating a more iterative approach to project delivery. While more demanding to manage, this agile approach requires closer involvement with our customers and therefore creates greater buy-in.

Being experts in technology:
Through an agile approach, the business was involved from the start in the design and the functionality of the system. There were no surprises in the final solution and very quickly after go live the team embarked on the next phase of development. The end users to this system are busy people and don't appreciate additional work when no benefit is seen. With this solution the end users quickly understood what the compliance team wanted to achieve and there was instant uptake to the solution.

The workflow managed the compliance process, leaving the business to focus on what it does best.

Working with Xoomworks Technology

"The solution has been well received and feedback extremely positive. The simplicity of the user interface has made this a success"
Compliance Director

"It is always great when dealing with a company who knows what they want, can make quick decisions and all parties seem genuinely interested in delivering success. This client consistently showed these characteristics throughout the project"
Project Manager - Xoomworks

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