

DIB Case Tracking System SharePoint

PositiveEdge enables a leading bank in the MEA region to leverage their SharePoint investment as a platform for optimizing their business applications. PositiveEdge designed the SharePoint Farm and developed the Case Tracking System – the first SharePoint business process automation site to go live for bank's regulatory and compliance consulting department.

CUSTOMER

Dubai Islamic Bank (DIB) is a leading bank in the MEA region and is headquartered in Dubai, UAE. The IT department of the bank provides technology and application services to the various departments of the bank. The IT department also manages the IT assets and software licenses. Dar Al Sharia (DAS) is a key department that provides financial regulatory and compliance services to both the internal departments of the bank and external clients.

BUSINESS SITUATION

The DAS department receives hundreds of requests called Cases every month for regulatory compliance and consulting services. Each request has to be filed, serviced using an approval workflow, tracked against strict Service Levels and reported to management. DAS was managing the process using manual files and excel sheets; the manual nature of this process didn't scale with the growth in the number of cases serviced and hindered the overall tracking resulting in regular SLA overdue. DAS wanted to address this problem and approached DIB IT to provide an automated system to streamline the overall Case Tracking Process.

SOLUTION

PositiveEdge recommended leveraging the SharePoint assets with the IT and building a platform to host business applications. The solution seemed as a major winning factor for the IT:

- ✓ Leverage the unused SharePoint assets
- ✓ Build Case Tracking System on SharePoint and leverage the platform benefits
- ✓ Build a scalable platform to host more business applications and cater to the growing apps optimization needs of the business departments

BENEFITS

The SharePoint Platform has been designed primarily to evolve as the business apps platform and to also transform the corporate intranet:

- ✓ Department level Site Collection – Focused apps, content and collaboration, Sub branding
- ✓ Application consolidation using SharePoint roadmap – efficient IT governance around assets such as Capacity control, Security, Digital Assets, branding etc.

Case Tracking System is a SharePoint web site accessible to the DAS users on the corporate Intranet and provides the following key benefits:

- ✓ Online management of cases
- ✓ Case Dashboard with multiple grouping to enhance information reach
- ✓ Automated case approval workflow
- ✓ Automated SLA tracking supported with notification alerts for adherence
- ✓ Correlation to the actual case files (physical files)
- ✓ Search cases by multiple filter conditions
- ✓ Generate reports and download in major formats such as PDF, Excel, CSV, TIFF and MSHTML.
- ✓ Email notifications on case assignment, status change and SLA overdue alerts to users working on the case.
- ✓ Configurable system parameters
- ✓ Seamless accessibility using the Org Active Directory
- ✓ Configurable and Granular Security using SharePoint Groups



Region: Middle East Asia

Industry: Banking

Engagement Highlights:

- ✓ PositiveEdge designed and implemented the SharePoint Platform
- ✓ First business site to go live on DIB SharePoint

Platform:

- ✓ Microsoft SharePoint 2010
- ✓ Microsoft Windows 2008 R2

Tools and Technology used

- ✓ SharePoint 2010
- ✓ .NET 3.5
- ✓ C# 3.0
- ✓ SQL Server 2008 Reporting Services
- ✓ Microsoft Visual Studio 2010

Results

SharePoint Platform:

- ✓ Major milestone in IT Assets leverage (SharePoint licenses)
- ✓ Increased Adoption
- ✓ Governance of IT Assets and Usage
- ✓ More departments interested to streamline applications on SharePoint

Case Tracking System

- ✓ Streamlined Case management
- ✓ Full Case Lifecycle tracking
- ✓ Improved adherence to SLAs
- ✓ Accurate and Faster Reporting
- ✓ Reports in standard formats