



Intelligent Management of Proposal Template



Smart Document Technology - Case Study

The Summary

Client wanted Proposal Template and SPR Reports which are currently on MS Word file and MS Excel file respectively to be created into a smart document. AG Technologies created the above two document into smart documents which enabled better performance and expedited Data Entry.

The Client

Client is a global software solutions and integration services provider which designs, develops, integrates and maintains business applications that enable enterprises to solve complex, mission-critical business problems. Client offers a full suite of IT solutions and services, including custom application development, application management outsourcing (AMO), consulting, legacy modernization and migration, and system integration. Currently operates in six world-class delivery centers in India and Malaysia. Our IT development and delivery processes have been certified at ISO 9001:2000 and assessed at SEI-CMM Level 5 and P-CMM Level 3.

The Business Requirement

The Procurement department of client generates report based on data from SAP as well as other applications where data resides in SQL Server. The data for these reports resides in a SQL Server DB that is maintained through an in-house intranet application. Currently an excel sheet with some macro is available that pulls in all the data within the sheet. This takes a lot of time as it gets all records from the database. This data is then manually cleaned by the team and the report is prepared from the same. Client was looking for a solution that can generate two reports namely, SPR reports by timeline and SPR reports by servicing using Smart Documents. Also they wanted their existing Proposal Template which was in word document to be in smart document.

Project Summary

Industry: IT

Client Profile:

Global software solution and integration services provider

Business Requirement:

Client wanted Proposal Template and SPR Reports to be created into smart document.

Solution:

Created the proposal Template and SPR Reports into smart documents

Solution Benefits

- Saved cost and Time
- Expedited Data Entry
- Enabled Users to Share Data Across an Organization
- Streamlined Business Practices
- Provided a Bigger Return on Investments



The Solution

AG Technologies met both the requirements by showing capabilities using Smart document Technology. With smart documents, employees could now create files that followed standard formats and ensured that the layout of information is consistent with predefined rules. With smart document, users could now automatically retrieve and enter related data in the correct places. With smart Document, client produced easy-to-create Microsoft Word templates for Proposal Template and Microsoft excel report for Reports that simplify Smart document enabled employees to enter vital information into files faster and more consistently.

AG Technologies created the following two smart documents. Following is the solution offered:

1. Smart Document Technology for Proposal Template:

Based on the cursor within the Master Proposal document, a context sensitive help / direction was provided to a user in the document action pane. When the cursor is on one of the sections identified above, the user gets a selection on the right panel providing options of data that can pull from the central repository.

2. Smart Document Technology for SPR Reports

Generate base data for SPR Report by Timeline: "Action Pane" was provided that supplied the user with parameters to enter/select to get the desired data from the SQL DB. Based on selection of filtering data from the Action pane, the worksheet was populated with data from the SQL server.

Generate SPR report by Servicing: As user opened a workbook, on the right hand side of the workbook, "Action Pane" was provided that allowed the user to select parameters for the report. The user needed to select Month and Year from the two different dropdown boxes in the right pane. Based on the input the worksheet was populated with SPR summary report for the selected month / year combination.

Technology and Tools:

- Visual Studio Team Suite 2005
- Microsoft SQL Server 2000
- .NET Framework SDK 2.0
- Visual Studio Tools for Office 2005
- Microsoft Office 2003 with SP1



The Solution Benefit

- The new smart document capabilities in Microsoft Office Word 2003 and Microsoft Office Excel 2003 enabled employees to enter vital information into files faster and more consistently.
- Based on information the employees enter, smart documents returned useful results that employees could use to fill out forms, write reports, or complete documents. Employees spent less time looking up data and placing it into files, and more time exercising their judgment and creativity.
- Data entered into a smart document solution was tagged and stored in a central repository so that it was easily accessed and reused later.
- Companies benefited from increased worker productivity while building valuable stores of standardized, reliable information.
- Through smart document technology, employee fetched data from any data source and could customize the Action Pane.
- Enabled employees to enter vital information into files faster and more consistently
- Reduced Data Redundancy.