



**INVESTMENT MANAGEMENT PORTAL**

## Client Overview

Our client has an online platform for managing investments of its customers. Our client had a basic online advisory portal for the retirement savings plans sponsored by an employer, in which investment advice to prepare for retirement was provided for employees.

## Engagement Situation

Due to highly volatile and competitive financial market, our client wanted to build a state of the art online portal for employees who will use the portal to select and invest in retirement plans. There were multiple situations where client wanted to improve its existing portal like introduce the portal with 401(k) interfaces for vendors and make their existing portal responsive so as to be available across devices. They wanted to leverage the current advancements in technology to develop the new version.

## Key Requirements :

- Migrate the existing application from Python and Django to Ruby on Rails.
- Redesign the existing website to make it responsive, the layout should be compatible with desktop, mobile and tab browsers.
- Connect with the 401 (k) providers APIs.
- Connect the application to centralized database.
- Integrate electronic signature AP API.
- Provide capability to add lists of financial investment funds in the portal

## Xoriant Solution

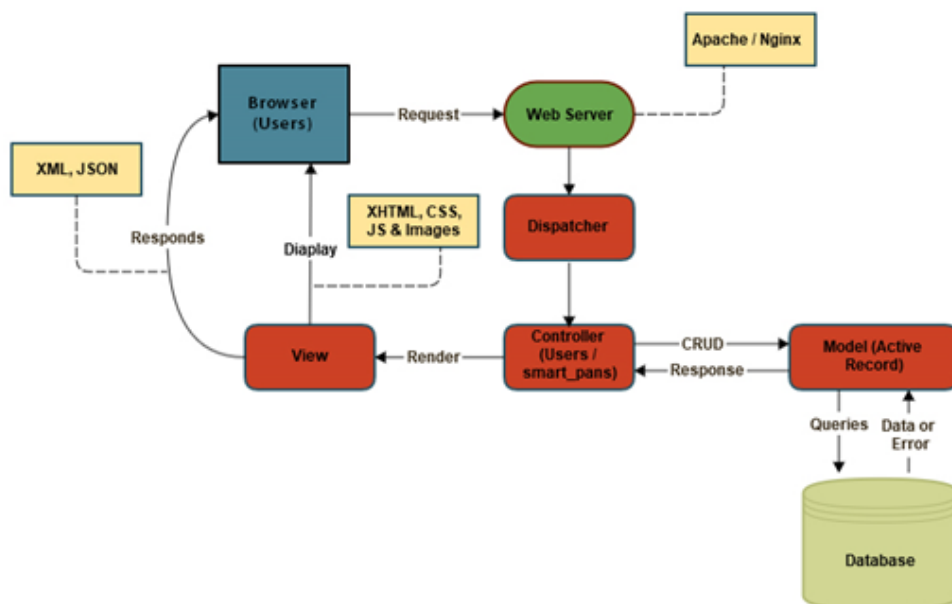
Xoriant team worked closely with client to understand the requirements and created an engagement roadmap. Xoriant migrated, re-designed and enhanced the existing system using Ruby on Rails. Xoriant team worked on the following areas:

- Front End: A responsive website with enhanced user experience (UX) with intuitive and rich user centered design along with extensive user interface (UI) was designed for web based application.
- Added Smart Plan functionality for listing all the fund options.
- Created a \*.CSV file upload feature to manually override account balances in the database corresponding to account number.

## Xoriant Key Contribution

- Created a new administrative portal for the client to edit database objects, user data, and view user profile from the admin page using GIT open source distributed control system.
- Connected web based application to centralized database using the available APIs.
- Developed a module where a client can sign a PDF, by integrating electronic signature feature using RightSignature API.
- Implemented feature to portal to connect to 401(k) providers and brokerage firms going forward using their APIs.
- Integrated Schwab API, which was used to pull and push the users 401 (k) plan details.
- Developed a responsive website with great user experience using Twitter Bootstrap, HTML5 and CSS3.
- Integrated Charjs (jQuery Library) and configured the Doughnut Pie Charts, where user can see the percent each fund is allocated, and based on that user can modify the fund allocation.
- Integrated a fund allocation module where a system will allocate funds based on current income, age and retirement age with option of customization before freezing the fund allocation based on a defined rule engine

## Architecture Diagram



## Tools & Technologies

- Ruby on Rails – 4.2.0
- JavaScript – jQuery, Chart.js
- Postgres
- APIs – RightSignature, Schwab
- GIT
- JIRA
- XML, HTML5, CSS3, Bootstrap
- JSON

## Business Benefits

- Reduced user redundancy by 100% with an administrative panel to keep track of the database and user profiles.
- Enhanced the performance by 80% of the portal by migrating it to latest version of Ruby on Rails, and by adding Schwab API, as in the first version the site was static and was not connected to any third part API.
- Improved the security of the portal by adding electronic signature.  
Enhanced overall acceptance of the web based application by making it compatible with desktop, mobiles and tablets.