



SharePoint Intranet Portal



SharePoint Intranet Portal - Case Study

The Summary

Client is fastest growing private sector general insurance company in India; with innovative product offerings and customer service standards that are benchmarked to the best insurance practices in the world. In order to keep pace with a rapid growth, there arises need to streamline certain process for departments within and centralize the data repository.

AG Technologies developed SharePoint Intranet portal to streamline the process within the organization. The system involves Attendance Collection, State wise Holiday management and mapping it to Employee attendance calendar, importing leave information from SAP and employee Loss of Pay (LOP) report generation.

The Client

The client is one of the leading non-life Insurance providers in the country licensed by IRDA offering an exhaustive range of insurance products that covers most risks including Property, Marine, Casualty, and Liability. They are first general insurance company in India to be ISO 9001:2000 certified. They are fastest growing private sector General Insurance Company with innovative product offerings and customer service standards that are benchmarked to the best insurance practices in the world. They offer a wide range of products for corporate and individual customers. With a focus on customer centric products, multiple distribution channels and technology adoption and aim to capture substantial market share across product lines. Our client is a first company to provide digitally signed documents through an online interface.

The Business Requirement

Client has huge staff personnel at different location span all over India. They wanted a portal to be developed for internal communication which should help HR department to track, manage and report their staff attendance.

Client wants a system which will be flexible enough to incorporate the following broad sections:

1. HR Attendance

Project Summary

Industry: Insurance

Client Profile: General Insurance provide

Business Requirement:

Client has huge staff personnel at different location span all over India. They wanted a portal to be developed for internal communication which should help HR department to track, manage and report their staff attendance.

Solution Benefit:

- Collaborative communication portal for organization.
- User friendly tool to manage & track attendance.
- Accelerated information Processing.
- Quick availability of leave application history/reports for further analysis.



- State wise Public Holidays
 - Region to State Mapping
 - Importing Employee Leave Information from SAP
 - Attendance Collection
 - By Logging In / Out of the System
 - For Previous Days by Manager Approval
 - By Administrator after Cutoff date
 - Employee Attendance Calendar
 - LOP & MIS Reports
2. **Employment Confirmation or probation period extension**
 3. **HR Bonus**
 4. **Branding and Communication**
 5. **Online Premium Calculator for Insurance policies**
 6. **Risk Management System**
 7. **Lead Management System**
 8. **Idea Express**
 9. **Internal Job Posting**

The Solution

The developed system has following features:

1. **HR Attendance:** Portal has following features to help HR in maintaining the attendance of the employees
 - a. **Attendance Collection:** Each employee is required to log-in and log-out into the system to mark their presence for the day. These times will be taken as in-time and out-time for that respective day.
 - b. **Manage Region State Mapping:** Each state shall contain multiple regions while a region can be associated with only one state.
 - c. **Manage Public Holiday Master & Assigning Applicable Holidays:** Public holiday master contains list of applicable holidays. The Admin shall be able to add new holidays. A list of applicable holidays is generated based on the state and region.



- d. **Manage Employee Attendance:** The SAP system generates leave record of each employee in excel format. In order to manage the employee attendance; system will import a excel sheet from pre-defined location in pre-defined format. The data from excel file will be processed and database will be updated by the system. This record will be used to view the status of the leaves, leaves approved, remaining leave of each employee and will be reflected in employee's personal calendar.
 - e. **Log Employee Attendance for Previous day:** Employee will get the details of his attendance in calendar view. Employee can put his attendance against the previous absent days and this record will be sent for approval to the immediate manager. Once employee created a request in the system, the task will be generated for the manager and an email will be sent to manager regarding employee's request. Employee needs have to put his previous day attendance before the cutoff date for that month. Once the attendance is getting approved and added in attendance master, modification in this attendance is not allowed. If employee fails to put the attendance for previous day before cut off date then he can request his manager/ administrator to put the attendance.
 - f. **Manage Notification:** System allows admin user to send alert to all the applicable employees who are absent in the previous month & has not put their attendance against those days yet.
 - g. **Manage Cut off date:** The employees shall be able to put their attendance for the previous absent days to avoid the salary deduction. Admin user shall be able to set the cut off date for the month. This date will be set as the cutoff date for the previous month's salary process.
 - h. **Management Information System:** The MIS reports will be generated for loss of pay, attendance adjustment and attendance count. These reports will be stored in centralized location, so that all HR admin can access these reports. These reports will be generated for each month/ quarter.
 - i. **Master Data Management:** Employee profile, State master and Region master, these masters are maintained using this module.
2. **Employment Confirmation or probation period extension:** Admin defines matrix for confirmation and extension period. Admin can define signing authority based on the grade of the employee and can upload the digital signature of the signatory. The direct reporting manager and/or functional reporting manager gets notification <15> days prior to employee confirmation



date. System will send either confirmation or extension mail along with PDF document signed by authorize signatory.

- 3. HR Bonus:** HR will upload bonus details (excel file) to the system. HR can manually edit the bonus amount. HR can see the preview of the document (PDF file) of an individual employee and has facility to send mail in bunch of 50 to 100 to the respective employee.

10. Branding and Communication

a. Salient features from Branch Manager Perspective

- ✓ Ask for various collateral on-line
- ✓ Send stationary requests
- ✓ View the progress of the request
- ✓ Track all current and previous requests

b. Salient features from Regional Head Perspective

- ✓ Get notification via mail as well as via SMS
- ✓ Approve / reject / modify request from the central location
- ✓ View / Track requests from all the branches under him/her

c. Salient features from Corporate Head Perspective

- ✓ Manage various collateral masters and their inter dependencies
- ✓ Manage / maintain collaterals stock
- ✓ View / track pan India requests
- ✓ Get notification via mail as well as via SMS
- ✓ Integration with courier and vendors
- ✓ System generated notification when stock level falls below minimum stocks
- ✓ Reports
 - Brach wise collateral consumption reports
 - Stock update reports

d. Features available for Company Secretary

- ✓ Allow CS to manage meetings and documents
- ✓ Allow CS to manage various masters like meting type, key people
- ✓ Allow CS to manage Pre-Meting details
 - Setting agenda
 - Send notification to invitees
- ✓ Allow CS to manage Post-Meting details



- Invitees vs. Attendees
- Close meeting
- ✓ Search documents
- ✓ Expires documents after <x> number of years

e. Managing Visiting cards:

- ✓ Create and manage visiting cards

f. Vendor and Agent creation and management

11. Online Premium Calculator for Insurance policies

- ✓ Calculate the premium for a particular Insurance Type
- ✓ Create formula for the calculation of premium
- ✓ Manage the Masters for Insurance Types, Sub Insurance Types, Mapping between Insurance Types & Sub Insurance Types

12. Risk Management System

- ✓ Post queries related to the module
- ✓ Manage & Upload documents in the specified folder according to the rights.
- ✓ Reply to the query by admin.
- ✓ Email Notification for the posted queries

13. Lead Management System

- ✓ User can create Leads.
- ✓ User can view the leads and points he got.
- ✓ Admin in LMS-Admin group can do point to amount mapping.
- ✓ Admin can upload excel file to update the premium amount and status

14. Idea Express

- ✓ Users share an idea, view all ideas, view ideas approved by CEO
- ✓ Idea follows a 3 level workflow (COP, CFO, and CEO).
- ✓ System has facility of email Notification for each workflow level.

15. Internal Job Posting

- ✓ Employee can apply for the job
- ✓ HR users can create job positions for the related vacancy according to the zone, region, and branch.



- ✓ Mapping for the employee with the related job position

Technology and Tools:

Operating System Supported:

- Microsoft Windows Server 2003
- Microsoft Share Point Server 2007
- Microsoft .Net Framework 2.0 (ASP.NET, C#)
- Microsoft SQL Server 2005

The Solution Benefit

- Collaborative communication portal for the entire organization
- User friendly tool to manage & track attendance.
- Accelerated information Processing: People involved in the approval process are informed in real time by e-mail and alerts about the pending approval actions they are supposed to perform. This eliminates the waiting period largely.
- Region to state mapping facility.
- Facility to assign holiday to each state and region.
- MIS report generation viz. loss of pay, attendance adjustment, attendance count.