

# International Financial Services Group

State-of-the-industry Web platform for internal staff, and global trading partners and customers

## The Organization

This leading global financial services group is one of the largest investment firms in the world, managing three-quarters of a trillion dollars worth of assets. The company has an annual IT budget of \$120 million.

## The Business Challenge

The group had outgrown its first-generation eBusiness infrastructure and needed to establish a solution that would comprise a single point of access for both internal and external users. It had to have centralized control but allow regional divisions around the world to operate semi-autonomously to respond best to specific market needs. It had to support multi-language, fully localized content and that content had to be secure both inside and outside the firewall. It had to be easy to use for non-technical authors, and costs had to be kept under control.

## The Burntsand Solution

To fulfill the content-communications-eBusiness triad, the solution was built around Documentum for managing and publishing the content and Web pages; ATG server technologies for personalizing the Web pages, and BEA for handling transactions, and updating data and content from regional systems in the central servers.

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There were several major challenges. It had to have centralized control but regional divisions had to operate semi-autonomously to respond best to specific market needs. It had to support multi-language, fully localized content and that content had to be secure both inside and outside the firewall. It had to be easy to use as many content contributors have little or no IT expertise or skills, and costs had to be kept under control.

The group chose Documentum for Web Content Management (WCM), in combination with J2EE-compliant application server technologies from Art Technology Group (ATG) and personalization and commerce services from BEA Systems.

Burntsand was chosen to undertake the architecture of the solution because of its proven success with Documentum and the fact that it was the first to integrate Documentum and ATG. Burntsand also worked as part of the group's team on some of the implementation.

"We're in the habit of engaging with people who want to help us not just select a product, but also put it in and work with our people to do knowledge transfer along the way," said the group's head of global technology.

Implementation is based on an iterative Burntsand methodology called UpFront™, which utilizes functional prototyping and requirements gathering in order to design and build an end-to-end eBusiness solution capable of scaling according to demand while affording the easy adoption of new features and functionality over time.

## Regional control, centralized management

The group's operations span dozens of countries in one of the world's most competitive industries. Its products and services vary from one location to another. All content and interactions must be fully localized in terms of the language, cultural norms, legal, and other provincial requirements of each market. Regional divisions conduct business on a semi-autonomous basis to maximize their responsiveness to local market conditions.

The requirements of a world brand, the need for scale economies, as well as quality and consistency still demand adequate centralization and control, however. This is necessary across the entire content lifecycle – from initial authoring, editorial and approval to publishing, timing, personalization, obsolescence and long-term archiving and records

## ABOUT BURNTSAND

Burntsand is a technology consulting firm specializing in integrating content, processes and data. For more than a decade, Burntsand has been a respected EMC Documentum partner with proven expertise in Enterprise Content Management. Leading organizations have trusted Burntsand to deliver results-oriented business solutions including document management and scanning, digital asset management, web and portal publishing, publications automation, and records retention. Burntsand delivers optimum time to value and unrivaled customer experience whether delivering an Enterprise Content Management Roadmap, complex integration or product installation. Our consultants work hard to ensure that accountability, leadership, teamwork and trust are the guiding principles of every engagement. With additional expertise in .NET development, Burntsand can help you create intelligent solutions that integrate seamlessly with your business.

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retention. The dynamic assembly and dispatch of continually personalized information, interactions and experiences also means that the content will increase dramatically in the near-term.

## Documentum Powered Web Content Management

Documentum's industrial strength WCM capabilities are at the heart of this overall eBusiness solution. Sophisticated workflows and content tagging capabilities facilitate the authoring and approval process. Efficient production methods reduce the effort needed to locate, retrieve, modify and apply existing items to new purposes. They also make regional control of content and customers possible. Where necessary, divisional workflows can be linked to group-level contributions and approvals. Since each region maintains its own data and systems, a specified schema is used so remote offices can update a centralized instance. They can publish content directly to the Documentum WebCache™. From there, an application server uses the group's customer management logic to draw the appropriate content needed to dispatch personalized information to users.

## Application Server Technologies

To complete the content-communications-eBusiness triad, this solution relies on application server technologies from both ATG and BEA Systems. Together with Documentum, they address three key functional aspects of the system – ATG's Dynamo™ for personalizing Web pages, Documentum for managing and publishing content and Web pages, and BEA's WebLogic™ for handling transactions and updating data and content from regional systems in the central servers.

The new solution, by integrating with an existing WebLogic implementation, accomplished inter-operability with disparate financial and legacy systems, many of which were home-grown. ATG personalization leveraged existing LDAP internal employee and customer databases for both user validation and personalization. By populating Documentum's WebCache with the site's current-state content from the repository, ATG's Dynamo can pass dynamically assembled information to an HTTP server for high-performance delivery to users.

## The Solution Provides...

- Centralized Management
- High Degree of Personalization
- Security
- Templates and Tools
- Total Content Lifecycle Management