

Insurance Document Management System developed in both desktop & web modes

The Dutch insurance company provided its users & clients with a familiar desktop-like UI available from any standard browser developed with Visual WebGui.

Overview

The Dutch Insurance company turned to ZB Consulting and KdM Software in order to develop a custom Document Management application that would allow its staff and users to add, edit and review documents regardless of their physical location. The documents stored in the system describe various workflow procedures, policies, specifications, offers, and they are grouped together in a tree-based hierarchy.

Business needs

The insurance company needed a document management application that could serve local users and remote users/clients exactly the same by allowing them to add, edit and review documents. The documents (most of which are already available) to be managed are in MS Word documents, PDF, and Excel formats.

Users must have the possibility to easily import those documents into the system, keeping the original formatting as much as possible, but still, being able to manually adjust and link between inter-related documents if necessary. It is also important to be able to manage different user groups within the organization such as Administration, Finance, Accounting, Customers Management, and Insurance Management and define permissions for each group and also specific users.

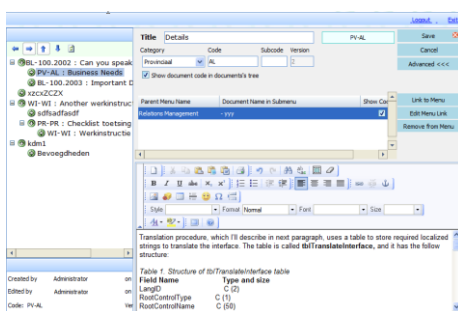
For example: All users from Insurance Management group should have permissions to view any document describing a workflow for their department. There also should be a supervisor user in the Insurance Management group that has the rights to edit the

documents (besides- the members of Administration group). This supervisor user could also have access to some Management (group) documents, edited by Administration and get notices of additional changes that

should be implemented on some Insurance Management workflow procedures.

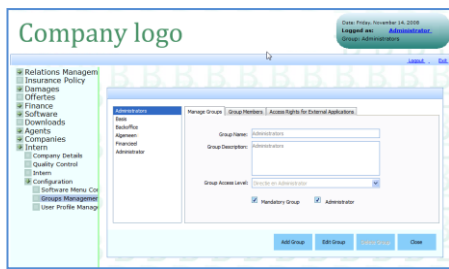
In addition to user groups within the organization, various user groups outside of the organization should be able to access some documents. While those groups usually receive basic access level, they should have more advanced access self related documents, like contracts, annexes, etc.

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Visual WebGui - the most popular open source 'Web like Desktop' framework

These users within and outside the organization were used to working with desktop applications, so the customer was looking for a



similar experience. The customer didn't want a standard web-based CMS, so they sought for an application that can be used by both local and remote users using the same UI.

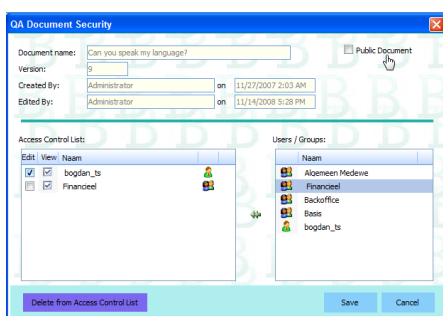
The Solution

The identified solution was to create a web application which can be accessed via a standard web browser by all users (office/remote staff & customers) and still have the same UI.

Visual WebGui was chosen for this project because it allows the rich user experience (desktop-like) that the customer demanded on the web, and at the same time providing a responsive data-intensive solution.

In addition, the limited time frame and budget forced ZB Consulting and KdM Software to look for a productive and cost-effective framework. Visual WebGui suited those requirements as Bogdan Zamfir head developer & founder of ZB Consulting commented: "We were very familiar with NET-based desktop development (WinForms) and leveraging this experience would allow us to build the system much faster than is using a classic Web approach."

On top of this, Visual WebGui also allowed to create two presentation layers, for both Web and Desktop with the same source code. However, the result needed to be an exact UI for both modes. Since some key controls looked different in web and desktop modes, ZB-Consulting created a WinForm application hosting a browser control, and ran the web application inside this browser control with



UltiDev internal web server. "This way we were able to offer the client the same user experience when using the application in web and desktop mode, and also offer a dedicated desktop mode for internal use, as required." Said Bogdan

The application was developed using Visual Studio Professional 2005 with NET 2.0, Sql Server 2005, FckEditor for web-based rich editor, and Cassini UltiDev web server for internal embedded web server.

Benefits

Because Due to the productivity achieved with the Visual WebGui framework it was possible to develop a rich desktop-like UI for web in the given time frame for this project. "The WinForms-like

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development mode allowed developing the user interface for the application much faster than using any other web-based approach." This was a key factor in delivering the application to the client on time and budget.

In terms of user experience, the rich-UI, AJAX based interaction within VWG, and the responsiveness of the interface allow customers a user experience that feels and behaves like a desktop application. The client's users and customers who were used to working with a desktop application received a web application that can be accessed from any standard browser but still uses the same UI.

For more Visual WebGui test cases please visit:
www.VisualWebGui.com/Showcases/tabid/358/Default.aspx