



Creating an Online Portal

A rapid and robust set up of
an online portal

Paul Meehan Test Manager

2i Group
117 Hanover Street
Edinburgh
EH2 1DJ
T. +44 (0) 131 220 6888
info@2i-it.com
www.2i-it.com



Creating an Online Portal

A rapid and robust set up of an online portal

Our client, a leading wealth management company, had recently acquired the clients and portfolio management business of a similar company. Following the successful migration of clients and funds, the business required an online portal to allow clients to view their portfolios 24/7 in real time, thereby saving time spent on phone calls to portfolio managers and providing the same service that their new clients had enjoyed with their previous fund manager.

2i were brought in to run the management and testing of the project and provide services across all areas of the Software Development Lifecycle. We also had to overcome issues with data quality and the challenge of working with a third party development team.

- We were involved in the analysis and documentation of the clean-up required to resolve client data anomalies for online registration
- We liaised with third party development teams to ensure code delivery and defect fixes were triaged and resolved in a timely manner and system tested
- We produced key milestone reporting for executive board meetings, including RAG (Red, Amber, Green) status reports monitoring deliverables at risk or late
- We tracked all defects using Quality Centre for auditability
- We engaged with the client to identify missing functionality and enhance the online application.
- We engaged with the client to identify missing functionality and enhance the online application

“In the 3 months of the project, our team raised, tracked and closed 84 UAT defects.”