



# CASE STUDY

## Secure Employer Extranet for Pension Trust Company

### The Client

Our client invests and manages one of Canada's largest pension funds and administers a plan with assets under management exceeding \$13.6 billion. They have more than 80,000 plan members, pensioners and employers.

The client asked VAULT to develop a secure extranet site for employers so they could exchange sensitive member and pensioner data with the manager. The main objectives were to improve customer (i.e. employer) satisfaction and increase operational efficiencies through streamlined workflow – both externally with employers and internally with staff of the pension manager.

### The Challenge

The pension trust exchanged member and pensioner data with different employers in a variety of ways – floppy disk, email, FTP sites – but each method involved inconsistent delivery and often incomplete data. These processes were inefficient for both parties, often requiring repeated attempts to collect the right data each month. VAULT needed to develop a highly secure and consistent means so employers could submit confidential data to the pension trust and allow both parties to be able to exchange information within a secure messaging environment. Another important objective was to build awareness and buy-in of the employer site by developing a true understanding of employer needs; this was made possible by engaging employers and other stakeholders throughout the entire process.

The pension trust would be managing over 100 users in total through this web application, 20% of whom would have a 'high level' of access to sensitive employee data and 80% with a 'browse level' of access. Additionally, the pension trust needed to control access to specific employer site sections through the use of groups and roles. However, the high turnover of employers' staff would further complicate matters of registration and authentication.

### The Solution

VAULT was deeply involved with the pension trust – including at the Board level – to help the client with its budgeting process and gain budgetary approval for the initiative. Considerable time was spent on a proof of concept to gain a full understanding of what was involved in the project from a risk standpoint, how it would integrate with the organization's existing infrastructure, what the costs would be, and when things would happen. This was a large project that required Board signoff upfront and with that achieved, both VAULT and the pension trust client developed a strong working relationship.

VAULT recommended developing a web solution that leveraged the client's existing technology infrastructure to satisfy the stringent requirements of the pension trust company's technical environment and the specific requirements of the many employers using the site. To ensure that system and performance requirements would be met, VAULT would rely on a strict approach to documentation and quality assurance. This was all incorporated into the project plan.

The VAULT response was a portal solution developed in Oracle Portal 9iAS, integrated with the pension manager's secure member services web application and database. A prototype was developed and tested with users in order to reduce overall development costs and risks. Usability testing of prototypes strengthened the commitment of employers to the new web site and ensured that the solution satisfied the needs of both the pension trust staff and employers. VAULT also had to provide employers with ancillary functionality in order to encourage them to adopt the new online tool and thereby receive additional benefits. Once deployment was completed, online reports would reinforce the value of the tool for employers and reduce the number of requests for, and effort to produce ad hoc reports for pension trust staff and employers.

### The Benefits

The end result was improved communications with employers, far less time devoted by the employer and client staff on communications activities – leading to significant cost savings – and a strengthening of the pension trust's relationship with employers. And while the entire initiative was behind-the-scenes and transparent to the pension trust's members and pensioners, more than 80,000 members and pensioners ultimately benefited with improved customer service quality and response time.

### Technologies Used

Development Tools: Oracle 9i Developer Suite

Database: Oracle 9i

Web server: Oracle 9iAS

Operating System: Windows 2000



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