

Schroders Qualitative Research Application

Case Study

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Schroders qualitative system for collection, collation, analysis and reporting of stocks and equities

Project Summary:

Analysts log into the SQRA system and record notes or industry information in relation to the relevant stock. Each day an email is sent informing all users of the new notes / info added to the system. The result is the ability to export detailed reports from a central secure information repository, which display and explain the information in a user-friendly format for client meetings.

Client:

Schroders

<http://www.schroders.com/australia/home/>

Client Business Background:

We are a wholly owned subsidiary of Schroders plc, a publicly listed UK company descending from a group that can trace its origins in banking and finance back over 200 years. Schroders was established in Sydney in 1961, and is home to the domestic research and investment teams that form an integral part of Schroders' Global network.

Project Challenge:

Schroders wished to centralise all stock notes and data for the creation of reports to be used during client meetings, supporting or opposing stock purchase or sale decisions.

A secure central place to record, save, archive and report on notes and other stock information in real time would help to reduce data error and make the latest information immediately available on the internal network without fear of referencing outdated resources.

Actions:

Development of an application with the following functionality:

- Centralised data storage
- Report generation
- Tracking of data across multiple divisions, industries, sub-industries and micro-industries.
- Tracking of stock supplier, competitor and customer information.
- Document upload



Outcomes:

The SQRA system allows for secure centralised data storage of all information related to stocks.

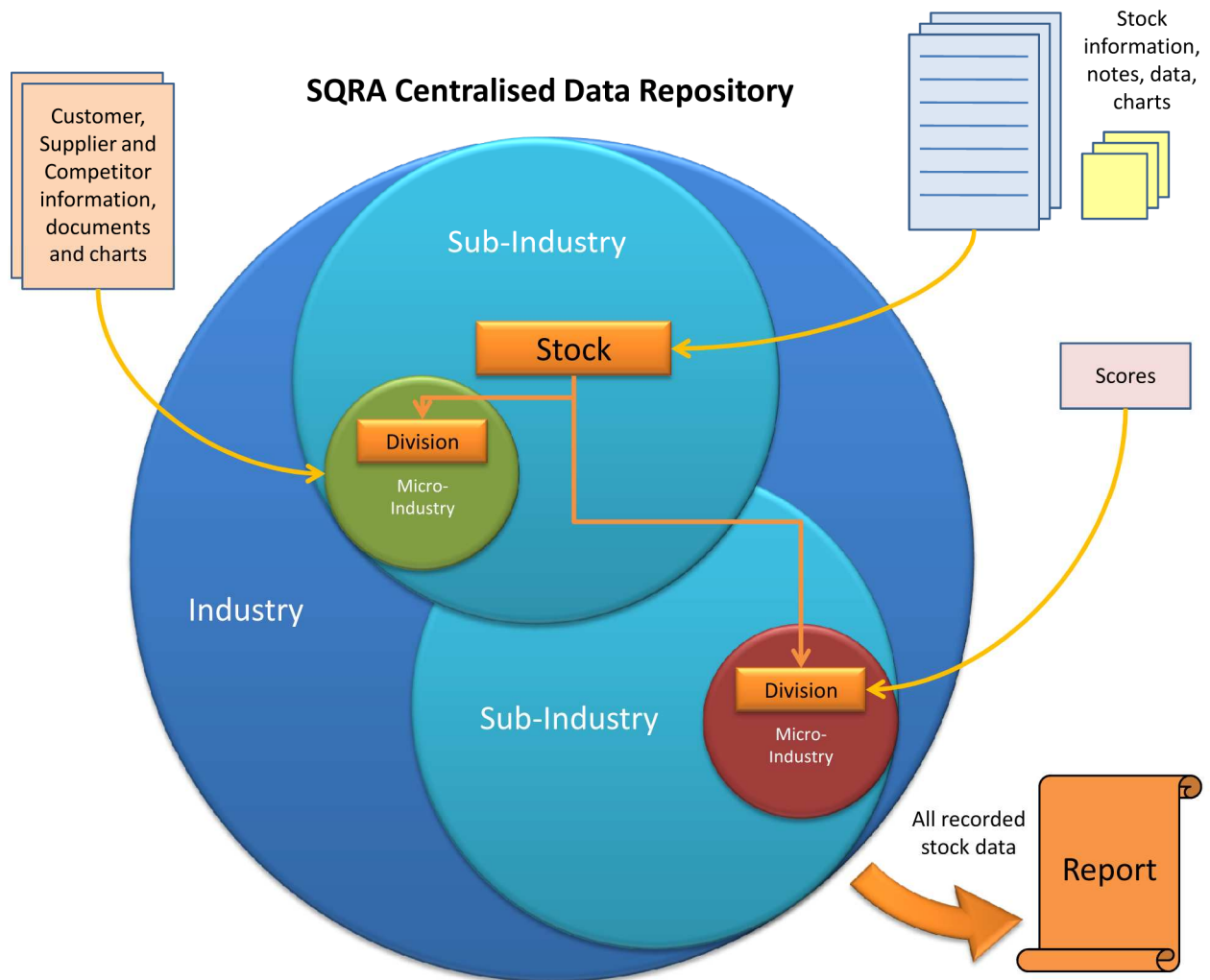
The system provides a comprehensive interface for adding notes and other data to stocks and industries. The information is broken down with each stock belonging to an industry and allowing for scores based on different factors to be allocated to stock divisions.

The provision for sub-industry and micro-industry data to be added allows for a thorough breakdown of information to be on hand when needed.

At any stage an analyst can request a report on a particular stock which will contain all notes, documents, charts, divisions, and scores as well as the details of customers, competitors, suppliers and contacts.

All data is stored on one server database, which is backed up daily.

Each time a user logs into the SQRA system, a summary of all updates that have been made since their last visit is displayed ensuring that all users are kept up to date with the latest information.



All reports can be exported in PDF format and emailed.

Technology Used:

The SQRA system was created using Adobe Flex, PHP, AlivePDF and MySQL.

Adobe Flex:

Adobe Flex is a software development kit released by Adobe Systems for the development and deployment of cross-platform rich Internet applications based on the Adobe Flash platform. Rich Internet applications (RIAs) are web applications that have some of the characteristics of desktop applications.

Flex is a highly productive, free open-source framework for building and maintaining expressive web applications that deploy consistently on all major browsers, desktops, and operating systems. The advantage of Flex is that it doesn't rely on page reloads, can have animations, interactive graphs and handles large datasets.

AlivePDF:

AlivePDF is an open-source ActionScript 3 (Flash, Flex, AIR) PDF generation library ported from the FPDF PHP project. It allows you to generate PDF's client-side.

PHP:

PHP is a widely-used general-purpose scripting language that is especially suited for web development and can be embedded into HTML.

MySQL:

MySQL is a relational database management system (RDBMS). The program runs as a server providing multi-user access to a number of databases.

Extension and Application:

The SQRA system model could be used for any organisation that requires collection and reporting of information in report format.

Screenshots:

