

Chapter 4 Case Study: Personal Finance, Inc. Data-Pooling Summary

Below is the summary of information that resulted:

Personal Finance, Inc. owns and operates Mutual Finance, a direct insurance sales. This company

has about 200, and that company is planning an international expansion by opening a new "subsidiary" in the British area. Personal Finance president, Charles Kent, hired an IT consultant,

Susan Park, to help develop an information system for that new facility. During the project, Susan

will work closely with Greg Lewis, who will manage the new operation.

Background

During requirements modeling for the new system, Susan Park met with several senior managers

and, as several Personal Finance executives. She conducted a series of interviews, reviewed company

records, discussed business operations, analyzed the financial data processing workflow, and identified

a complex of rules and billing transactions. Susan's objective was to develop a list of system requirements

for the proposed system.

The system must be able to maintain, without redundancy, both full and partial. Full members have access to all activities. Limited members are restricted in activities they have access to. Membership is granted to all members paying a regular fee. Full members have a change privilege. Changes in membership and services are recorded in exchange slips, which is signed by the member.

At the end of each day, each rule and change are stored on the financial data processing system. The financial data processing system is used to track the system. Daily rule changes are implemented automatically and stored in the system. Personal Finance president, Charles Kent, is responsible for the system, and Susan Park is responsible for the system.

At the end of the month, the financial manager uses financial data processing system to generate monthly summary of the Personal Finance transactions and changes, which is then submitted to the

Personal Trainer Inc Case Study Chapter

VM Jensen



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