

# Portfolio



CGI

A monthly newsletter for Wealth Portfolio Solutions

Issue 1, March 2015

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## Extra, Extra! Read all about it!

Introducing...the Portfolio! We're excited to announce the beginning of our monthly newsletter dedicated to the Wealth Portfolio Solutions team. Portfolio is aimed at sharing key business and operational updates, recognizing members, and revealing the latest social events and activities. It's important to us at CGI to recognize one another for a job well done and to keep up to date with our various teams and recent news.

Do you have some news for next month's issue? Contact [Snow Murdock](#) to submit your story.

## 1 STAYING UP-TO-DATE



Tweet, tweet!



Staying up-to-date is important, especially for a large team like WPS. So if you haven't already, start following [Wayne Hong](#) on twitter to get the latest updates and news on WPS!

Note: a request must be submitted and approved on twitter to receive access to this page.

### Together, we are Wealth Portfolio Solutions!

What's a better way to start off the new year than with a new identity! The PSSP team of Global Wealth & CM will now be recognized as Wealth Portfolio Solutions (WPS)!

### Wealth 360 5.0 and 5.1 GA

#### Update on Wealth 360 5.0 GA Release

It's official; Wealth360 5.0 General Availability (GA) Release is in the final stages! We're in the last stretches of system testing for Mvest optimization changes and our modern advanced Advisor Essential User Interface (UI). We're on target for the grand unveil in mid-April, and client and prospect demonstrations/presentations are already kicking into high gear.

In response to client feedback and as a part of our product roadmap, this release brings an intuitive Advisor UI built from the ground up, using responsive design via HTML5/CSS3, which means it is mobile/tablet ready and introduces many improvements to the platform. To name a few, java code has been fully componentized, it has been migrated to the lightweight Spring container, it runs on Tomcat instead of WebLogic, we've completed the SVN Migration, distilled fund accounting specific functions, simplified our internal system workflow engine, introduced single sign-on using the industry

### Accelerated Talent Development Program

With the success of the co-op program, there is no doubt that CGI is a company that welcomes the younger generation. Now with the introduction of the New Grads Program, CGI is definitely strengthening this reputation.

The program is aimed at new graduates from various colleges and universities, and includes nine months of training in different roles. At the end of the program, the graduates are matched with their most suited position.

The program began March 2 and the new graduates will be joining our floor March 23, so be sure to send a friendly CGI welcome!

### Operations Management Update

IGDC onsite rotation has commenced to address standardization and knowledge transfer. Sending a warm welcome to **Danish Mohammed**, who will be onsite until August, and other IGDC members arriving in April!

→ **Pubudu Jayawardena**, a Technical Analyst with the Hotline, celebrated 8 years with CGI on February 26th. Congratulations!

→ Incident Manager, **Stephan Parkinson**, has been brought in to address the incident report backlog and to help refine processes

→ We have increased responsiveness by assigning a shift supervisor in the IGDC EST team, **Venkatesh Mugdal**, and modifying hotline phone configuration

standard (SAML2), and web enabled the complete UI, including the existing Swing Interface, with a flexible and complete customizable menu system. That's right – as of 5.0 GA, Wealth360, will be a complete web interface!



### Update on Wealth 360 5.1 GA Release

We're very pleased to share that we have approval to proceed with the next release in our product roadmap, Wealth360 5.1 GA Release! We're excited by this release as it'll offer our clients greater capabilities and bring us closer to being at the top of the market place for Portfolio Management Solution offerings. In addition, this release will complete our vision of having a common core code base and standardize our conversion/migration processes for all future clients. The focus in this release will include providing further efficiency for centrally managed Unified Managed Account (UMA) administration, enabling financial planning by integrating with Goal-Based investment tool(s), providing Data as a Service for statements and reports, implementing and building out Rep as PM Advisor Practice management capabilities, while continuing to advance on our 5.0 Advisor modern UI design. Release 5.1 will advance our product to be the best UMA platform in Canada. As well, release 5.1 is a stepping stone for Release 5.2 which is focused on getting our product U.S. ready...but, that's yet to come...

We'd like to take this opportunity to thank the 5.0 team for their contributions, the 5.1 team for building a compelling case, obtaining approval to proceed in the next leg of the product roadmap, and to the balance of the organization for supporting the various versions of the product we have and keeping the lights on! Our collective future is exciting!

### MPower Development

→ The formulation of the product roadmap is well underway and we are getting excited with the opportunities and the possibilities ahead for our Fund Accounting platform.

→ The Scotia Frame Project to bring licensed environments onto CGI's managed services solution, along with the product consolidation roadmap is now underway. This is a highly critical project and it is a must-win for us. We look forward to some great work from the team, led by **Sharon Cameron**.

→ The RBC I&TS Frame project for the merge of RBC environments has commenced. This is also a must-win for us in order to work as true partners with RBC I&TS to upgrade, consolidate, merge and move the product forward. Once again, we look forward to seeing some great work from the team, led by **Ruth Jakob**.

→ We received a CSAP rating of 9.81 on the RBC Trial Balance extract project. Excellent work team!

→ We look forward to having **Bob Houston** back with us in late-March. Welcome back, Bob! We hope you're ready because we've got some exciting work ahead of us!

→ To promote better collaboration and hotline coverage, we've acquired new hotline wireless headsets!

→ **Ray Stacey** and **Emma Shaikh** have recently been established as Technical and Operational leads for the DBA team. Congrats!

→ On February 4/5th, the Operations, Service Delivery, and GIS team worked tirelessly to recover from a critical outage incident affecting multiple clients due to a MVC incident that caused the SAN to fail. Great job everyone!

### User Group Session – February Edition

On February 19, CGI hosted our 2nd bi-monthly user group session at the Toronto Board of Trade Conference Centre. These sessions are designed to promote CGI's thought leadership amongst our user base, engage in discussions on current topics and give all of our stakeholders a networking opportunity. We had over 20 users across 6 clients registered for the event which is an increase from our first session. We are definitely headed in the right direction on this one!

The topic in our most recent session covered the 2016 reporting requirements being imposed on our clients by the CRM II regulation. Under this regulation, our clients must provide annual statements that illustrate money weighted rate of returns as well as a disclosure on all fee/compensation that the firm receives as the result of investment activity within each of their client accounts. CGI reviewed the impact to our MPower/MVest applications necessary to support the data required to conform to this regulation. We also had a lively discussion on the impact this would have on their current client reporting processes and client experience. This has led to further discussion and potential consulting engagements.

Our next session is planned for April and will cover our 5.0 release and roadmap for 5.1!



### MVest Maintenance Release

→ From the middle of January to March 10, 4 releases deployed to production, 2 data refreshes in UAT and 17 deployments to internal and UAT environments. The team is currently working on 8 releases and 1 project. Great work so far, but we have another very busy few months ahead of us!

→ A client sends their thanks to **Michelle Anthony** and the SDM & Maintenance Release team, stating that CGI has been consistently documenting actions and amending statuses as new updates come in. Well done **Joyce Tsang** and **Nelson Quach**!

## E-Settlement Development

- The EPQ Project Team is continuing to work towards a July 1 live date.
- The team is enhancing our support process by integrating both Level 2 and Level 3 Service Desk issues into the application maintenance methodology.
- The 2014 Year End Tax Release was successfully implemented in January.
- Work is currently underway on the Spring 2015 Release, currently targeted for a May implementation. The major content will be focused on Fundserv 25 changes.

We successfully executed a DFAR in production to update over 10,000 sleeves. It was a long day for all, but thanks to everyone working through it, there were no issues! Phase 2 DFAR to update over 8,000 sleeves is scheduled for production March 21.

Client identified critical issues with their year-end statements. In just over 2 weeks, the team analyzed, designed and coded the fixes, jointly tested with the client, deployed to production and executed 4 DFAR's on data previously converted. As a result of the collaboration between the SDM, Client, Operations and Maintenance teams (GTA and IGDC), we were able to quickly resolve these critical production issues. Excellent teamwork!

First maintenance release following our standard Mvest release process was successfully deployed to **Raymond James** (4.2 environment) to begin testing. We expect to deploy to production later this month.

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## PROFILES: ANDREW COOPER



### Name

Andrew Cooper

### Title

Director, Operational Support

### Birthday

February 10

### Educational background

B.Comm with a minor in Finance

### Recent work experience

**ADP Canada** – responsible for managing the application support for ADP's flagship Human Capital Management application.

**BMO Capital Markets** – responsible for managing the Infrastructure Operations group

### Hobbies, interests and passions

Studying human potential & high performance organizational cultures, building home theatre PCs, and trying new foods & activities.

### What do you like to do on weekends?

Relax and spend quality time with my family

### One word to describe yourself

Passionate

### Dream job when you were young

Certified Financial Analyst

### If you could have dinner with anyone in history or in present time, who would it be?

Buddha

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## 3

## WORK & PLAY



### Snowy weather, friendly visits

We love when our IGDC friends come and visit us – and it looks like they like it too! The W360 5.0 team in GTA welcomed **Arati Despande** with open arms when she recently visited us from India. Based on this photo, we think she got the full Canadian experience, don't you?

### Introducing...the Fun Committee!

We are very pleased to announce the launch of our Fun Committee!

Sponsored by **Clara Fancy** and **Andrew Cooper**, this committee's objective is to bring the third floor members together for monthly social events that encourage team building and just having a little fun with our colleagues! The Fun Committee is targeting to hold an event for every 3rd Tuesday of each month.





Please join us for our debut event on St. Patrick's Day, **Tuesday, March 17 at 2PM in the India Room**. If you wear green, you'll be able to enjoy a cup of hot cocoa, on us! If you don't wear green, the Leprechaun will require a contribution to the pot of gold this year for the United Way.

Want to share some ideas? Contact your Fun Committee members: [Danica Chan](#), [Joyce Tsang](#), [Ruth Jakob](#) and [Vaibhav Gupta](#).

**Gong Hey Fat Choy!**

On February 18, the WPS team celebrated Chinese New Year with a raffle and some delicious dim sum!

Sending a wide thank-you to everyone who helped – it was a great turn out. Congratulations **Tao Zou** for winning the \$25 MasterCard gift card!

**Influencing and leading others with Toastmasters**

*Toastmasters* offer members the opportunity to develop communication and leadership skills, as well as foster self-confidence and personal growth. Members gain practical experience with public speaking in a supportive and positive learning environment that provides friendly and constructive peer feedback. Toastmasters teach members how to influence, lead and network with their team. The best part? Not only are the Toastmasters meetings held right here, on CGI premises, but the membership fee can also be expensed by members of CGI!



**When:** Wednesdays, from 12p.m. to 1p.m.  
**Where:** India room, 3 floor, 150 Commerce Valley Drive (please confirm with Goldy Sheinin in case of last minute changes).

Whether you would like to participate or to first observe, everyone is welcome to come and see if Toastmasters is right for them. Guests can attend up to three meetings before deciding on joining.

**How do I join?**  
 Contact [Goldy Sheinin](#). If you join in March, the membership fee for the year will be \$100. For more information on the pricing, click [here](#).

Questions? Contact [Goldy Sheinin](#).



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**4 ABOVE & BEYOND**



**APPLAUD**

Put your hands together for these folks who received an APPLAUD for living CGI values in January and February.

**For living the value of "Intrapreneurship and Sharing"**

- Nelson Quach
- Junaid Qureshi
- Danica Chan
- Patrick Yam
- Frances Ma
- Haris Azeez

**Bravo!**

**Bravo Ashray Gokul!**  
 Ashray has brought in the much needed enthusiasm, energy and reactiveness to steer us in the right direction.

**Bravo Christine Samuel!**  
 Thank you for initiating the lunch-and-learn sessions for the Wealth360 Product Development team.

### For living the value of "Respect"

- Saiqa Chaudry
- Georgina Atkinson
- Arthur Silva

### For living the value of "Partnership and Quality"

- Laurie Murphy
- Norine Kiddie
- Chris Bischoff
- Robert McCrimmon
- Kourosh Adybeik
- Lydia Nazareth
- Christian Devarapalli
- Junaid Qureshi
- TD DFAR Deployment team:
  - Joyce Tsang
  - Michelle Anthony
  - Nelson Quach
  - Emma Shaikh
  - Igor Savichev
  - Lisa Chen
  - Tao Zou
  - Junaid Qureshi

### Bravo Chetan Puwar!

For your support over the Family Day weekend for the Wealth360 5.0 project. For being completely responsive and on top of environment issues working through multiple issues to ensure IGDC was well supported.

#### Impact

#### Congratulations to the RBC pControl project team!

The pControl project was delivered on-time and on-budget for the client. **RBC exceeded their internal business case** as a result of the highly successful implementation. Senior RBC executives are delighted by our joint success on this project.

This project success has **positioned us to assist with a Europe/Asia implementation** of the same functionality and has a substantial positive impact on our client relationship.

- |                    |                            |
|--------------------|----------------------------|
| → Arjun Jayarajan  | → Kalaisivaraman Ilangovan |
| → Arthur Silva     | → Methya Aristanto         |
| → Ashraf Saad      | → Patrick Yam              |
| → Brian Langendock | → Sachin Warlyani          |
| → Carol Wiseman    | → Sateesh Balla            |
| → Gagan Singh      | → Senad Trtovac            |
| → Garnet Callender | → Shankar Dabadi           |
| → Heather Loizides | → Sharon Cameron           |
| → Ian Shore        | → Soorej Balan             |
| → Jane De Guia     | → Sriram Cadambi           |
| → Junaid Qureshi   | → Tateana Dreizis          |
| → Daniel Fong      |                            |

## What's the difference between these awards? How do I nominate someone?

### APPLAUD

Did someone go above and beyond for you today? Submit an Applaud nomination! These hardworking members will be included in next month's issue of Portfolio and will be emailed a certificate – no approvals required!

#### How to nominate someone for an APPLAUD

1. Select this [link](#).
2. Click on the value you wish to recognize.
3. You'll be directed to a form to enter the member's name and a message as to why you are nominating them.

### Bravo!

Do you know someone who makes a contribution day after day and deserves a little something more? Give them a Bravo! Those nominated will be included in next month's issue of Portfolio and will receive a certificate and VIPass.

#### How to nominate someone for a Bravo!

1. Complete this [form](#) and submit it to your colleague's manager for approval.
2. Once approved, send the form with the approval to [CGI GTA Banking Services Bravo Awards](#).
3. After it's been processed, the Bravo! certificate will be sent to the manager, who will present it to the nominee.
4. The nominee will receive an email with a VIPass certificate number and instructions on logging onto the site and exchanging the VIPass for gift certificates

### Impact

Do you know of a team or individual who exemplifies CGI's values and stands out as a true leader who's making a difference in our business? Nominate them for an Impact award! Winners will be included in the following issue of Portfolio and will receive an award.

Note: Approval required by the GTA Leadership Team

#### How to nominate someone for an Impact:

Send an email to your director with the information below, and the director will forward the nomination to the [CGI GTA Impact Award Committee](#).

- Nominee's name
- Period (start and end dates) during which the event/action happened
- Detailed description of the event/action
- Outcome of the event/action
- CGI value that you believe is aligned with the event/action

The next deadline for nominations this year is September 7.

Still have questions? Review this [CGI Recognition Brochure](#).



Give a warm CGI welcome to...



**Gary Lam | Business Analyst, Global Wealth**

Gary recently graduated from the University of Waterloo with a Bachelor of Applied Science, System Design Engineering and an option in Management Sciences in August 2014. His major interests include travelling, racket sports, and swimming.

**Fun Fact:** After graduation, Gary travelled through Europe and had the time of his life. The highlight of the trip was that Gary experienced paragliding over the mountains in the Swiss Alps.



**Hira Zahid | Business Analyst, Global Wealth**

Hira graduated from the University of Waterloo with a Bachelor's Degree in Financial Economics in August 2014. Being an avid reader and a caffeine addict, Hira enjoys the company of a criminology book while sipping away on a warm cup of coffee. Her interests also include photography and travelling.

**Fun Fact:** Hira had an extraordinary eye for fashion since she was a child ([see full photo here](#)).



**Cindy Liang | Project Control Officer, EPQ**

Cindy graduated from the University of Waterloo with a Bachelor of Arts Degree in Honours Economics and a minor in Psychology in August 2014. Her major interest includes water sports, Muay Thai boxing, and cooking.

**Fun Fact:** Cindy's goal in 2015 is to start her own YouTube channel, featuring all her cooking and baking creations. Stay tuned and please subscribe!



**Snow Murdock | Project Delivery Officer, Co-op**

Snow is an Arts and Business student at the University of Waterloo, majoring in Sociology. Although she has a versatile set of skills, such as visual arts and computer science, her major interests include sales, marketing, and technology. She is also passionate about cooking and writing. Snow is scheduled to graduate in April 2016.

**Fun Fact:** Snow is 22 years old and has already traveled to 20 different countries.



**Eric Wong | Technical Consultant, Co-op**

Eric is a Management Engineering student at the University of Waterloo. His major interests include learning new software, and supporting his peers. He's scheduled to graduate in April 2016.

**Fun Fact:** Eric enjoys Ultimate Frisbee, Jitz, and reading.



**Nirruithik Srikantha | Project Control Officer, Co-op**

Nirruithik is a fourth year Business Technology Management (BTM) student at Ryerson University. His experience in business and IT enables him to bridge the gap between business and information technologies, solve business problems, and develop business strategies. He's scheduled to graduate in April 2016.

**Fun Fact:** Nirruithik played Varsity football for four years and has set a goal to watch a football game in each US state.



**Tomasz Szwiega | Technical Analyst, Co-op**

Tomasz is a Computer Engineering student at the University of Waterloo. With interests and strengths in hardware design and programming, he's looking to learn and try out various projects and roles at his co-op placements. With two school terms left, he's scheduled to graduate in April 2016.

**Fun Fact:** Tomasz enjoys playing ping pong and dodge ball.



**Andrew Cooper | Director, Operations**

Andrew is a versatile leader with extensive experience in Support and Operations in Financial services. He has previously worked with RBC Investor Services, BMO Capital Markets, and ADP Canada. Andrew holds a B.Comm with a minor in Finance from Ryerson University and is an ITIL V2 certified expert. Andrew is married with two children and enjoys building home theatre PC's in his spare time.

**Fun Fact:** Andrew in a previous life was a champion Ballroom and Latin American dancer who competed internationally.

**Farewell – wishing you all the best of luck!**

**Gabriel Chan | Technical Analyst**

"I would like to express the company's appreciation for the time Gabriel has spent with us. Gabriel has been with the company for about two years and worked on several Cognos enhancement projects over this period of time. His strong work ethic and valuable contribution to the projects will be remembered. The team will definitely miss him and on behalf of the team, I wish Gabriel all the best and much success in his future endeavors." - Derek Fong, Director, Architecture

**Garnet Callender | RBC Business Analyst**

"Sad to say that Garnet Callender is leaving us. Garnet has been a valuable member of the RBC dedicated resource team for quite some time now. His MPower knowledge will be missed by the team. We would like to wish Garnet success in his future endeavors." - Mike O'Riley, Director, MPower

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**Have a story or news to share? Email [Snow Murdock](mailto:Snow.Murdock) for it to be included in next month's issue of Portfolio!**

Founded in 1976, CGI is a global IT and business process services provider with 68,000 professionals delivering high-quality business consulting, systems integration and outsourcing services.

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