

## **Peter Domke**

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## **Personal Profile, Skills and Project List**

As of September 2015

### **Personal Profile**

Studies	Humanities (German Literature, Philosophy, Latin) M.A., University of Frankfurt
Born	1960
Industry experience since	1989
Languages	English, French, German
Certifications	2005 Microsoft Certified Application Developer VB.NET 2010 Microsoft Certified Professional Developer C# 2014 IREB Certified Professional Requirements Engineering – Foundation Level (CPRE-FL)

### **Skills**

#### **Main focus**

- Development of extensions and add-ins for Custom Business Solutions around Microsoft Office (Outlook, Word, Excel, PowerPoint, Access) – using either .net technologies or VBA
- Development of simple and complex document templates for the use in Microsoft Word and of Document Assembly applications
- Development of Excel customizations
- Development of Microsoft Outlook add-ins
- Combining Microsoft Office and Document Management Software
- Application development using C#, VB.net, Visual Basic 6.0 (Legacy) and Visual Basic for Applications (VBA)

- Requirements Analysis

### **Industrial Sectors**

Banking / Law / Insurance / Federations / Service sector / Industry

### **Programming Languages / Databases**

- MS Office (C# and VB.NET-based add-ins, VBA and legacy languages)
- Visual Studio .NET (C#, VB.net), Visual Basic 6.0 (Legacy)
- SQL and XML
- Microsoft SQL-Server
- Windows Installer (MSI, WIX)

### **Document Management Software**

- Document Management: OpenText eDocs (formerly Hummingbird DM/DocsOpen)

### **Techniques**

- Requirements Analysis

## **Fields of business activity**

### **Add-ins and customizations for Microsoft Office**

After working as a trainer for software suites in the 90s, I switched to the development of customizations for the Microsoft Office Suite. While up to 2007/2008 the program language of choice was VBA and VB6 for COM-based add-ins, I'm working today mostly with the .net languages (C# and vb.net) to create application-wide add-ins.

The selection of the programming language depends of the client's requirements.

I can cover all stages of the development process:

- Requirements Analysis
- Development (Prototyping, UI design, Programming, Tests)
- Deployment

Additionally, I provide the necessary infrastructure for development:

- Microsoft Developer Licenses (MSDN)
- VMWare lab infrastructure with Windows Servers (Exchange, SharePoint, etc.) and Office clients in all languages and versions

- Thawte Authenticode Certificate to sign deliverables (Dlls, VBA macros, MSI setups)
- Productivity tools for analysis source code, e.g. for migration projects (Aivosto Project Analyzer with VBA Analyzer, Redgate SQL Compare)
- Rapid Development Tools and Third-Party-Libraries, for which I own distribution licenses (Add-in Express, Redemption)
- Creation of MSI setups
- Source code repositories
- Help file creation

### **Specialist for Document Templates and Document Assembly**

In the current decade the need for documents starts to slow down, since most communication between offices and with business clients is done paperless. But in a lot of business cases documents are still necessary: a) correspondence documents; and b) long and structured documents.

Unfortunately, for the greater part of people working in IT the concept of "document templates" refers only to a simple Word document with some basic layout and sample text. This static approach works usually well in limited environments, e.g. for a firm with just one location and no branches doing business in just one language.

In the case of more complex environments (firms with multiple locations or branches, doing business in three languages) the static approach creates a large number of static templates, which will not easily be administrated. On the contrary, the dynamic creation of documents can be very quick and cost-effective. The same idea applies to documents like offers and contracts, which have to be assembled using blocks of default text and individual content related to the case.

Important aspects for documents:

- Document creation with the help of "Assistents" and user input dialogs
- Templates for documents with complex structures
- Professional formatting through the use of styles
- Document structure with headings and numberings
- Simplification of the print process (minimizing the letterhead issues)

### **Development of Outlook add-ins**

Outlook is for a lot of information workers the main workplace. A large number of business cases exist, in which Outlook items like e-mails, contacts or appointments have to be connected to external information, have to be organized or exported.

Often software like contact managers, customer relationship systems and communication assistances integrate with Outlook through add-ins, which are bought with the software and can be used at no additional cost. However, there are business cases in which no ready solution exists, and in which a business can use a custom Outlook add-in to add value.

Outlook development needs necessarily the use of a programming language like C# or vb.net, because VBA solutions cannot be deployed.

### **Development of Excel customizations**

Excel is THE tool in controlling and business reporting. The Excel power user has profound domain knowledge. Usually he has created a complex model, which uses formulas, lookups and links. No further support is necessary.

However, as soon as dynamic aspects are moving in, programmed solutions have to be considered; for example:

- repeated data input from text files in a certain format
- conversion of data
- pulling data / consolidation of data from backend systems
- repeated generation of filtered data output, etc.

In these cases an add-in based on VBA or .net can boost productivity and can assure data quality (an important subject with all Excel solutions created on the department- and team-level).

### **Databases**

In nearly each project we have to deal with databases. I do know my SQL and was able to prove this during software migration projects and in application development.

### **Document Management**

I'm specialist for eDocs DM from Open Text and support clients in migrations, administration and customization for this document management system.

### **Requirements Engineering**

In most of my projects data collection for requirements and their qualification was part of the project. On the client's side, often only the result is defined, but details and workflows are missing, and a specification is an animal rarely seen in add-in development. So it was part of the developers work to define the system context and to determine the use cases.

## Project list with short descriptions

The list shows only the most interesting or new projects and is not exhaustive. References can be named if desired.

### Large German retailer with booming e-commerce outfits (2014-2015)

*Excel 2013 Reporting-Tool for E-Commerce Management*

**Mission/Situation:** The holding company supervises approx. 90 outfits which are running webshops for their businesses. The management should be informed about the e-commerce sales on a monthly base. Raw data are generated by Webtrends analysis tools and must be aggregated, consolidated and presented with concentration on the Key Performance Indicators for webshops like Visits, Bounce Rate, Average Order Value, Buyer Conversion Rate and others. Presentation will be done through Dashboards and Reports with heavy visualization.

The strategy department for e-commerce asks for a tool which allows the power users in the department to make changes in the reporting without the need to refer to IT staff.

**Solution:** The raw data are mostly consolidated and aggregated through a PHP application, and the report base data are provided in a MySQL database. It was my job to use this data for the desired output.

I developed a system with two components:

A. Excel-Templates – these are Excel workbooks with sheets to be filled with data, and sheets containing the dashboard, charts or reports which are used for a PDF output. These templates can be changed by experienced users.

B. A "Reporting-Tool" programmed in VBA which is used to pull the data from MySQL. An interface allows the user to select the desired "focus" of the report (company groups, holding, single companies) and other parameters.

This project is showcased on my website: <http://www.domke-consulting.com/en/projects-and-references/data-representation.html> (Excel Dashboard and Reporting Solution)

### German Service Sector Holding (1999 - 2015)

*Project "Excel Reporting Add-ins"*

**Mission/Situation:** the sales CRM system contains all data about leads and running contracts, but lacks some desired reporting functionality which is desired by the management. Key Performance Indicators should be shown on a monthly basis, preferably with Excel to allow additional analysis.

**Solution:** Multiple VBA-based Excel add-ins were created to pull the data from the CRM system, to do some consolidation and to output them to the desired report format. The first solution was already created in 2000 with Excel 97 VBA. During lifetime, the

solutions were constantly updated (changes in the underlying database), but in 2015 they are still used in production.

*Project "Migration to Office 2007/2010" (2013-2015)*

For this client I developed during the years 1999 to 2012 a document template set and multiple add-ins for Microsoft Office (Word, Outlook, Excel and Access). These had to be modernized and moved to the new Microsoft Office 2010 platform on Citrix terminal sever. I did a complete redesign of the mostly VBA-based architecture and migrated the functions to .net-based add-ins and applications.

*Project "Document Templates" (1999-2014)*

**Mission:** Creation of a document template system to minimize the use of the pre-printed letterheads (stationery for 15 departments, 80 sub firms, 250 subsidiaries).

**Description:** Creation of a firm-wide unique layout, creation of dialog-oriented templates printing the address and legal information on the letterheads; interface to the CRM system, help file.

*Project "Standardization of user profile data and Outlook signatures (2007-2014)*

**Mission:** Documents and e-Mails contain a mixture of personal and obligatory firm data. These data must be provided for each user in an automated way. "Firm data" refers to one of the 200+ legal entities, to which users belong.

**Solution:** Firm data available in a SQL Server database are put together with individual user data to create Outlook signatures and Word sender's information sets. Word document footers and Outlook signatures contain always the current legal information of the entity.

**Construction firm (2012 – 2013)**

I did a technically complex migration from DocsOpen 3.9 (document management system based on SQL Server 2000/Windows 2000) to Open Text eDocs DM 5.3 (based on SQL Server 2008/Windows 2008/Citrix Terminal Server), together with a move of the Word document templates and add-ins from Office 2000 to Office 2010. I created new add-ins for Outlook and Excel with added functionality.

**Software vendor (2011 – 2012)**

Befine Solutions AG in Freiburg, Germany provides a file transfer solution named "Cryptshare". A web- and a Lotus Notes user interface are available, but clients demanded integration in Outlook.

I was asked to develop an add-in solution, which is sold as "Cryptshare for Outlook". The add-in was developed in C#, using the RAD tool "Add-in Express" as a platform for version-independent add-ins, and using the Redemption library from Dmitry

Streblechenko. The add-in supports Outlook versions from 2003 to 2013 (32/64 bit) in different languages.

### **International bank (2008 - 2009)**

Concept and development of an Excel automation solution for the calculation of Profit-and-Loss figures of structured products. Deliverables: (1) Deployment utility to transfer and update complex spreadsheets in a secure environment, (2) ASP.NET website for the start and administration of risk calculations, (3) Pricing utility to automate calculations based on Excel spreadsheets.

Solution used Excel, Visual Studio 2008 and SQL Server.

### **International Law Firm (1996 - 2015)**

From 1996 to 2012 development and maintenance of the document template system beginning with Office 95. Multiple migrations to newer Office versions, development of interfaces to databases (Oracle / SQL-Server) and document management systems (DocsOpen-API, iManage-API, iManage Scripting). Integrated online help.

Development of two different invoicing applications using VB 6.0/VBA, development of back office tools using the .net programming languages (see on my website <http://www.domke-consulting.com/en/projects-and-references/application-development.html> "A typical Office Automation Sample using C#").

### **German Law Firm (2000 - 2014)**

Development of a COM Add-in for Outlook to interface with the DMS system.

Since 2000 development of the firm's document template system:

- Project lead during the 2005 migration to Office 2003, SQL-Server 2003, Humming DM document management system.
- 2009: Update to DM 5.2., moving from ODMA to COM architecture.
- 2013/2014: Update to Windows 7 with Office 2010 with a complete redesign of the template system (moving from VBA code to .net-based add-ins).

### **German Bank (1997 - 2013)**

*Project "Word Macros" (since 1997)*

Development and maintenance of the global Word add-ins and the complete template set (30+) with a high level of automation. Development of a large number of special office-based solutions for different departments.

In 2011 to 2012, all add-ins and templates have been migrated to Windows 7 and Office 2010.

*Project "Seat database" (2004)*

Creation of a database for administrative purposes (seat members of the bank) using SQL-Server, Visual Basic 6.0, ActiveReports.

*Project "Scout-Dialogs" (1998 - 2007)*

**Mission:** Migration of automated documents from the mainframe to a desktop system using Visual Basic and MS-Office (Start in 1998 / Visual Basic 6.0/Word 97/Windows NT 4.0)

**Description:** Analysis of the complex documents used in the mainframe text processor and conception of the new architecture. VB-Programs are collecting the information from the user, Word is used as frontend for the document generation. The documents are often of high complexity and contain multiple documents in one "Word document" (e.g. client letter, multiple copies, internal record). - Development of all formatting and printing procedures in Word.

Since 2000: maintenance and content management of the system; migration to Office 2003; the system has undergone two rebrandings.

*Project "Management of the organizational policies with Sharepoint" (2006-2007)*

**Mission:** Management and administration of the 1.200+ organizational policies (=chapters) is based on e-Mails and paper circulation. The project will introduce Microsoft Sharepoint Services with customizations to improve the workflow.

**Description:** Workshops for the requirements analysis, documentation of the use cases and the requirement specification, creation of the test situation, surveillance and documentation of the test, quality management, presentation for the management, kickoff-presentations for the users of the new system.

## **Swiss/German Insurance**

*Project "Agency document templates" (2001)*

**Mission:** Development of the Word-Frontend for the agency support system.

**Description:** The agency support system exports the data for mailings and individual letters. Prepared text blocks must be integrated. The document layout is administered by the IT staff and localized in the agency by VBA macros.

*Project "Contract Generator (2002)"*

**Mission:** Application to generate insurance contracts based on daily data from the mainframe system.

**Description:** The contract data are delivered nightly by file transfer from the mainframe. The file format is a position-based text file, which is zipped. The application must unzip the files, archive them and put them into the working directory. A Word add-

in generates the contracts from the data with appropriate layouts using text blocks from a directory and an Excel configuration file.

### **State Agency**

*Project "Small workflow solution for tasks" (2007)*

**Mission:** The agency uses a call center software running on an IBM iSeries. In certain circumstances the call center agent must create tasks for department specialists. The IT administration decides not to use additional workflow software. Microsoft Outlook shall be used as frontend.

**Solution:** The call center application on the IBM iSeries can (1) output data in XML and can (2) start applications running in the Windows environment. A set of scripts (VBScript) reads the XML transfer file and creates (1) a task in certain Exchange folders and (2) a PDF file from the data for the document repository. To accomplish some of the steps, external libraries were used: Redemption ([www.dimastr.com](http://www.dimastr.com)) and eDocEngine from Gnostice ([www.gnostice.com](http://www.gnostice.com)).