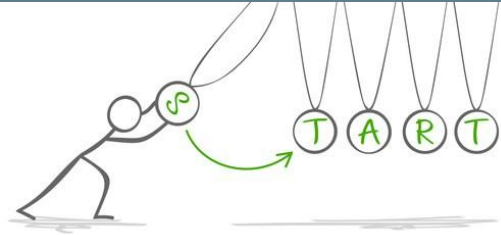


# Transaction R&D



Starting of a project

**Project Requirement :**

Process improvement of report generation application



**Timeline : 6 weeks**

**Project Scope :**

Identification of improvement areas  
Validation by client and Dev team  
implementation

**B2B**

After Secondary Research

**Project Requirement:**

R&D of consumption of Transactional Data



**Timeline : 16 weeks**

**Redefined Scope :**

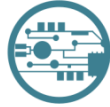
Persona identification and Creation – for 4 diff. types of users  
Identification of User requirement  
Functional requirement analysis  
Application design – Desktop & Tablet

# Stakeholders meetings

Before having a Q & A session with higher stakeholders I was ready with the KT from



**BA Team**



**Tech. Team**



**Project Manager**

## Questions to Stakeholders

- Why we need to build this, a reason for change?
- What are the goals to achieve?
- How the application is impacting on a business growth ?
- Who will be the user of an app?
- Do we have any competitor product ?



# Initial responses from higher stakeholders

## Questions to Stakeholders

---

- Why we need to build this, a reason for change?  
To enhance the performance in terms of issue solving, Reporting and Report Generation – There are several customer escalations on the time taken to solve the issues
- What are the goals to achieve?  
Need to improve the system before client complaints  
On time report creation and submission based on transaction data
- How the application is impacting on a business growth ?  
Current feedback from the client for report creation service and issue identification and solving was not up to the mark, So to gain client trust and sustain the client by providing best service is the ultimate moto to sustain the business
- Who will be the user of an app?  
Backend support engineer
- Do we have any competitor product ?    Its B2B but not aware about it

Stock Valuation  
James Morris Company

Nucleus

Magneto



# Empathy Map

## Said

- Works on problem identification and solving, Report generation and Give primary importance to P1 issues
- Managers are following 80/20 rule in failure transaction
- To solve any particular we require Transaction ID
- As P1 issues he needs to solve it in 4hrs and report with in 15 min
- I get requirement from Client and Managers
- I come in early morning shift 5.00 AM to 2.00 PM

## Did

- Demonstrated the actual end to end process of issue solving
- How Transaction ID is a critical entity to quickly identify the issue.
- Shared manual reports created, Parameters required to create manual report
- Showed the requests raised by clients and managers
- Importance of P1 issues

## Thought

- To manually type the report each time is a time consuming process, But its fine if we need to perform it twice a week
- Not aware about the transaction data- How it is helpful to solve or to create report?
- Transaction ID is a critical input to identify and solve the issue quickly

## Felt

- Why to work on report creation part as it is not a frequent event
- He did not feel any frustration or pain while working on current system



# Praveen Jadhav (Software Development Engineering Associate) ``

Age	28	Travel Time Office to Home	35 to 45 Mins
Occupation	System Engineer	Lives at	Market Yard ( Near Bibewadi )
Ongoing Project	Transaction Dashboard	Travelling By	Two Wheeler
Official Working hrs	5.00 AM To 2.00 PM		



## Normal Working Day

- Praveen comes in an early morning shift job.
- In a regular day he works on a problem identification and solving, Report generation and give primary importance to P1 issues.
- As P1 issues he needs to solve in it in 4hrs and report with in 15 min.
- To solve any particular issue Praveen require Transaction ID
- From transaction ID he can open the issue and analyze it quickly.
- Praveen used to generate report as per the managers requirement
- The SLA's are given by the managers.
- Manager follows 80 / 20 rule in failure transactions
- Praveen gets requirement from client and managers



## Goals

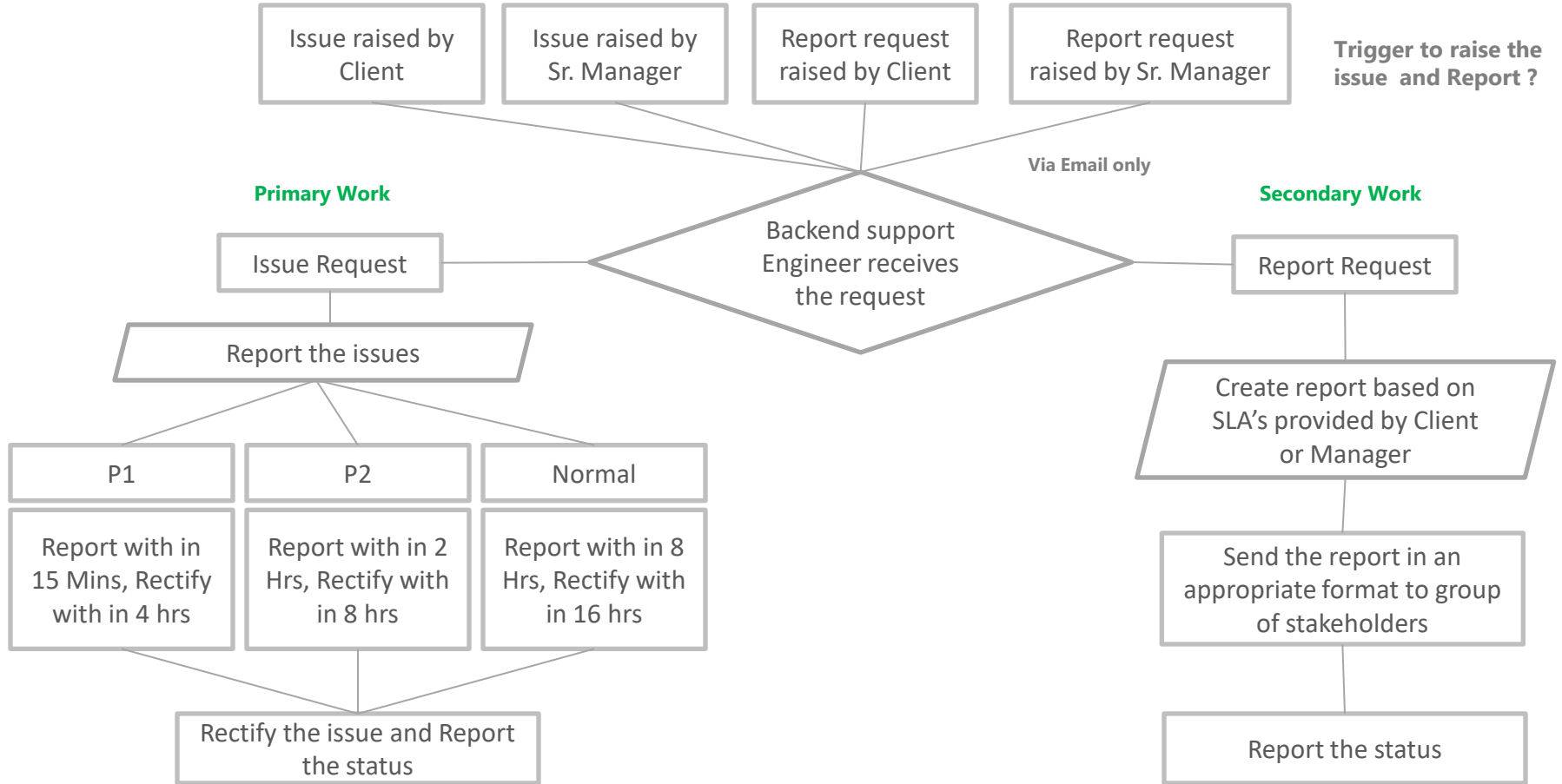
- Give primary importance to P1 issues.(Deadline 4 hrs & Reporting time 15 min )
- Generate report as per the managers requirement
- To follow report generation schedule
- Set the report parameters
- Solve the client issues ( With the help of Transaction ID )
- Identify the exact problem



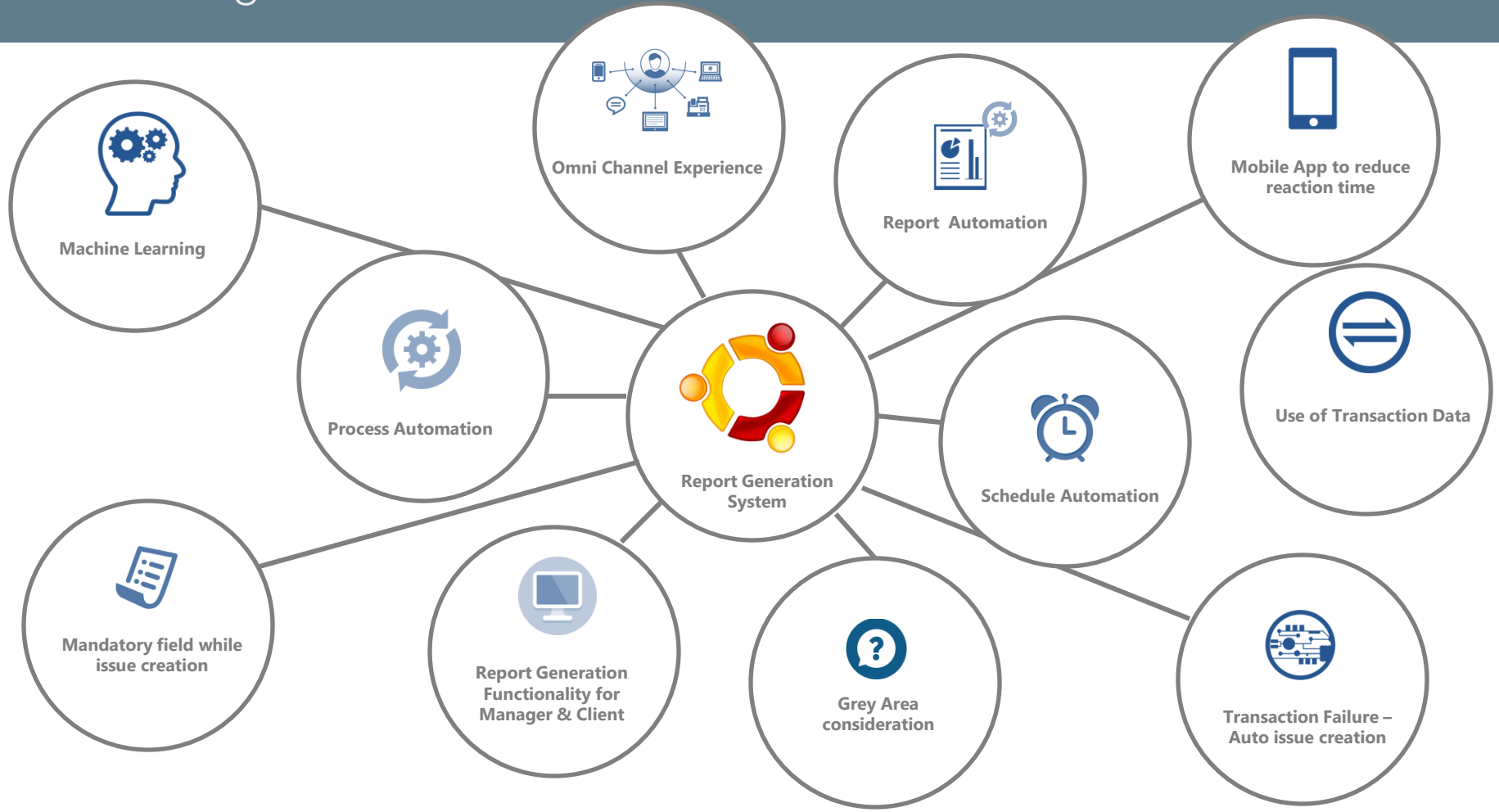
## Pain Points

- To type detail report is a time consuming task
- To report P1 issues with in 15 min is sometime gets challenging
- Sometimes client forgot to share transaction ID - Can not take any action if transaction ID is missing
- Report generation schedule - Need to follow it strictly
- Need to create multiple reports ( 7 to 8 reports ) in a day - 5 to 6 days in a month
- User was not aware about the fact that higher management was thinking to get daily 10 to 12 reports from this user.

# User Flow



# Brainstorming on ideas



# After Validation

- To type detail report is a time consuming task



**Process Automation**

- To report P1 issues with in 15 min is sometime gets challenging



**Omni Channel Experience**

- Sometimes client forgot to share transaction ID - Can not take any action if transaction ID is missing



**Mandatory field while issue creation**

- Report generation schedule - Need to follow it strictly



**Schedule Automation**

- Need to create multiple reports ( 7 to 8 reports ) in a day – 5 to 6 days in a month



**Report Automation**

- Use of transaction data



**Transaction Data Analysis**





# Design Decisions

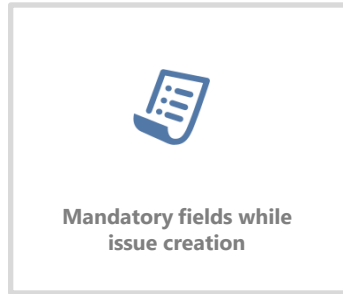


To report P1 issues with in 15 min is sometime gets challenging

Mobile phone access for primary user

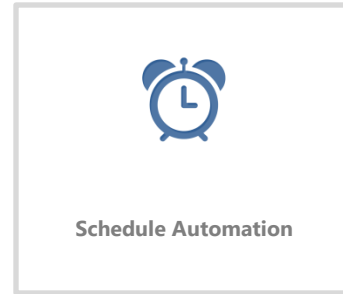


To include all the team for Transaction issue mail from Client and Sr. Manager – And any one can give confirmation on it



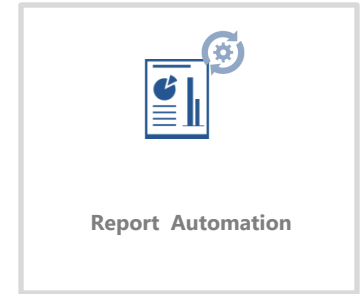
Sometimes client forgot to share transaction ID - Can not take any action if transaction ID is missing

Transaction ID should be a mandatory field while raising an issue.



Report generation schedule - Need to follow it strictly

If we succeed to automate the report then we can create a schedule assistance functionality , so that user can set a daily, weekly, Monthly, Quarterly and Yearly Schedule. ( Can get rid of unnecessary escalations )



To type detail report is a time consuming task

Can we templatize the report?

# Initial concept after understanding the model

After understanding the detail data elements, I have suggested Possible things to track from Data

Top Response Time

Top volume / Time

Top services by Transactions

Capacity vs Actual data pattern / Time

Repetitive operation failure pattern

User side and system side failure

Trend Generation

Repetitive User ID / Password failure

Scope for Machine learning

Top five failure services

Top successful services

Most failure operations by %

Most failure operations by Volume

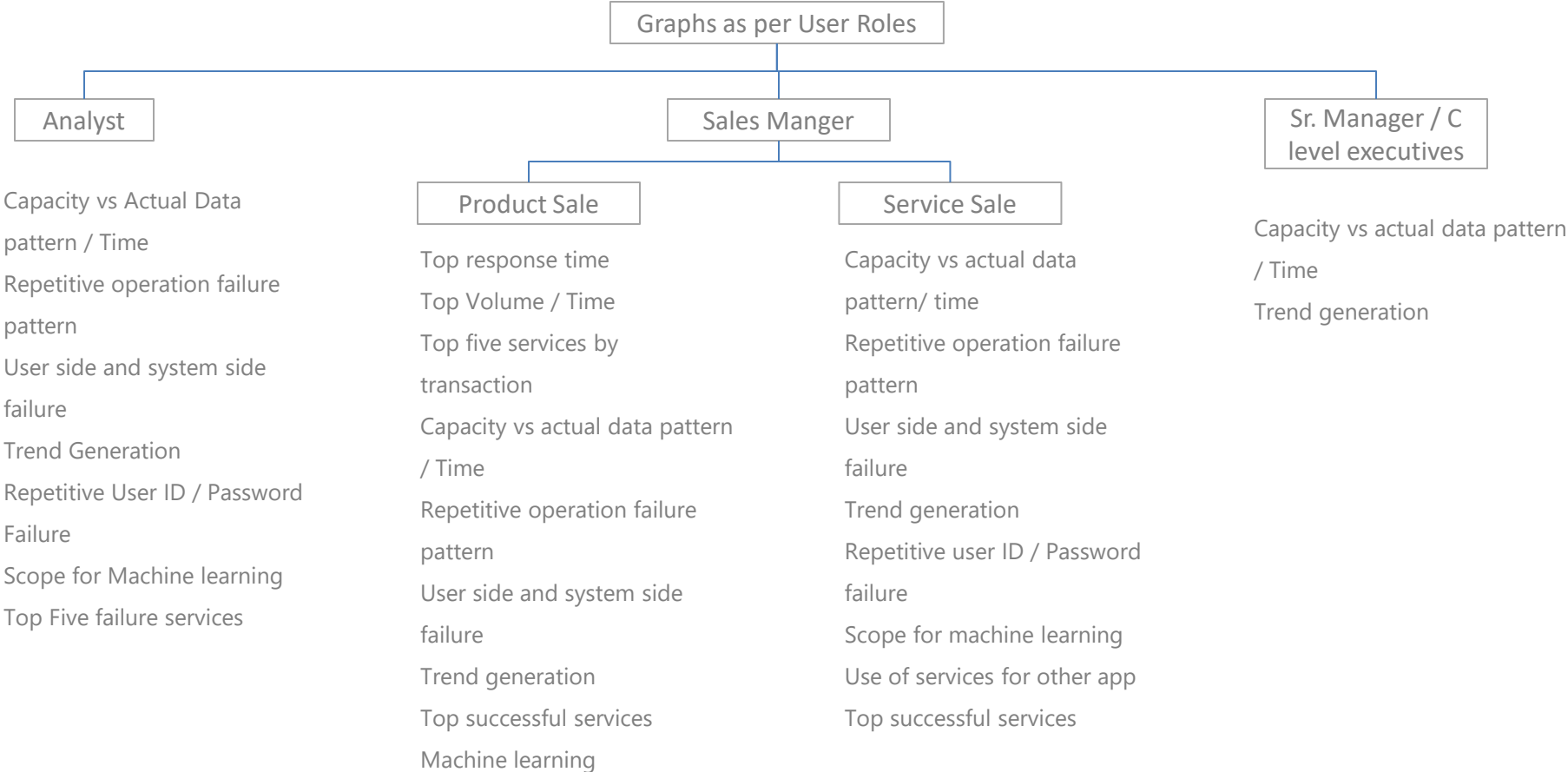
Most repetitive failure operations

Successful transaction against response time

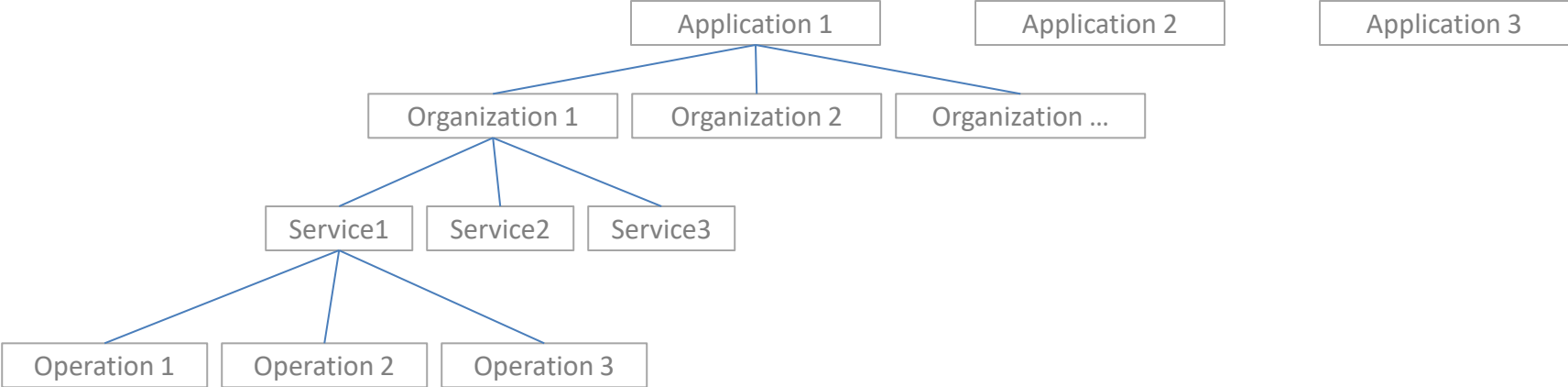


Simple question asked by client,  
“ How it is useful for us” ?

# Initial concept after understanding the model



# Understanding of Transaction Data - Structure



# Finalized functionalities

## Report Generation

Top Response Time

Top volume / Time

Top services by Transactions

Capacity vs Actual data pattern / Time

Repetitive operation failure pattern

User side and system side failure

Trend Generation

Repetitive User ID / Password failure

Scope for Machine learning

Top five failure services

Top successful services

Most failure operations by %

Most failure operations by Volume

Most repetitive failure operations

Successful transaction against response time

# Information Architecture

TDD



Dashboard

- Top Five Transaction Volume
- Response Time for Operations
- Capacity Alert for Operations
- Trend
- Top Five Failure Operations
- Repetitive Failure of Operations

List of Dashboard

Create New Dashboard

Select Widget

Services

- List of Services
- List of Transactions
- List of Operations

- Alert for Operations
- Alert for Services
- Alert for Transaction

Capacity Alert

- List of SLA
- Create SLA
- Edit SLA
- Delete SLA

- SLA Type
- Capacity
- Volume
- Response Time
- Trend
- Failure Percent

SLA List

Scheduled Jobs

- List of scheduled jobs
- Create New Schedule
- Edit Schedule Job
- Delete Schedule Job

Reports

- List of Reports
- Create New Report
- Edit Report
- Delete Report

Run Audit

- List of Audit
- Search Audit

# Responsive UI & Omni Channel Experience

The requirement of responsive app for Tablet and Mobile is a need based on user roles



Backend Developer

Icon: A person silhouette above a laptop icon.



Sales Team

Icon: A person silhouette above a smartphone and a tablet icon.



Higher Management

Icon: A person silhouette above a smartphone and a laptop icon.



# Design For Desktop / Laptop - 1280

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Dashboard
Services
Capacity Alert
SLA List
Scheduled Jobs
Reports
Run Audit

**Dashboard** List of Dashboard + Create New Dashboard ⚙ Select Widget

**Top Five Transaction Volume**

**Response Time for Operations**

**Capacity Alert for Operations**

**Trend**

**Top Five Failure Operations**

**Repetitive Failure of Operations**

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Dashboard
Services
Capacity Alert
SLA List
Scheduled Jobs
Reports
Run Audit

**List of Dashboard 18** Filter  Dashboard Name From Date To Date Dashboard Categories Apply Advance Search

Dashboard Name	Time & Date	Dashboard Summary	Edit	Delete
Response_Time_Opr220934	23-03-2018 11:36 AM	Service & Transaction based on Opr220934	<a href="#">✎</a>	<a href="#">🗑</a>
Response_Time_Opr220934	23-03-2018 11:36 AM	Service & Transaction based on Opr220934	<a href="#">✎</a>	<a href="#">🗑</a>
Response_Time_Opr220934	23-03-2018 11:36 AM	Service & Transaction based on Opr220934	<a href="#">✎</a>	<a href="#">🗑</a>
Response_Time_Opr220934	23-03-2018 11:36 AM	Service & Transaction based on Opr220934	<a href="#">✎</a>	<a href="#">🗑</a>
Response_Time_Opr220934	23-03-2018 11:36 AM	Service & Transaction based on Opr220934	<a href="#">✎</a>	<a href="#">🗑</a>
Response_Time_Opr220934	23-03-2018 11:36 AM	Service & Transaction based on Opr220934	<a href="#">✎</a>	<a href="#">🗑</a>
Response_Time_Opr220934	23-03-2018 11:36 AM	Service & Transaction based on Opr220934	<a href="#">✎</a>	<a href="#">🗑</a>
Response_Time_Opr220934	23-03-2018 11:36 AM	Service & Transaction based on Opr220934	<a href="#">✎</a>	<a href="#">🗑</a>
Response_Time_Opr220934	23-03-2018 11:36 AM	Service & Transaction based on Opr220934	<a href="#">✎</a>	<a href="#">🗑</a>
Response_Time_Opr220934	23-03-2018 11:36 AM	Service & Transaction based on Opr220934	<a href="#">✎</a>	<a href="#">🗑</a>
Response_Time_Opr220934	23-03-2018 11:36 AM	Service & Transaction based on Opr220934	<a href="#">✎</a>	<a href="#">🗑</a>
Response_Time_Opr220934	23-03-2018 11:36 AM	Service & Transaction based on Opr220934	<a href="#">✎</a>	<a href="#">🗑</a>

Showing 10 out of 18 ⏪ Page 1 of 2 ⏩

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Dashboard
Services
Capacity Alert
SLA List
Scheduled Jobs
Reports
Run Audit

**Create New Dashboard** < Back

Dashboard Name

Auto Refresh Time

From Date

Set as default Dashboard

Dashboard Description

To Date

Select Parameters

Auto Refresh Time

Auto Refresh Time

Auto Refresh Time

Auto Refresh Time

Add Service

Your Selection

**Org. Venture 24**

- 1. Service 40034223
- a. Opr25200021
- b. Opr88433444

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Dashboard
Services
Capacity Alert
SLA List
Scheduled Jobs
Reports
Run Audit

**List of SLA'S** Create New SLA

Filter  SLA Name  SLA Parameter

From Date  To Date

Apply

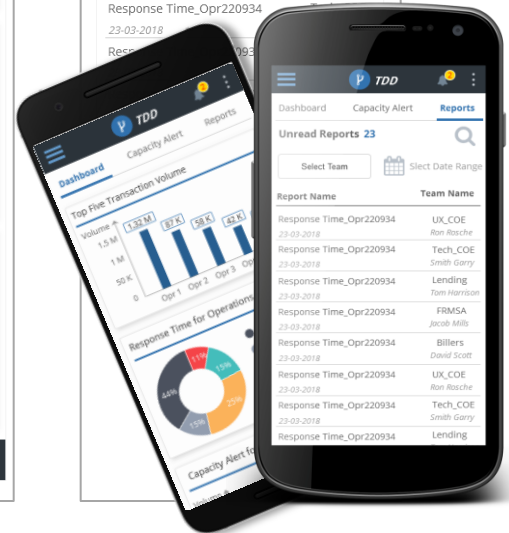
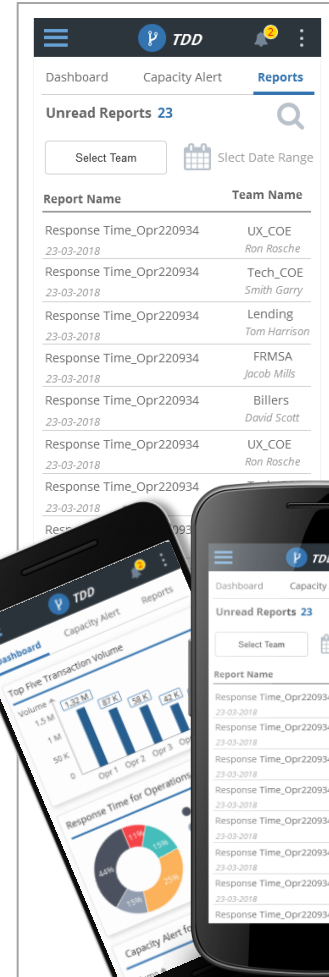
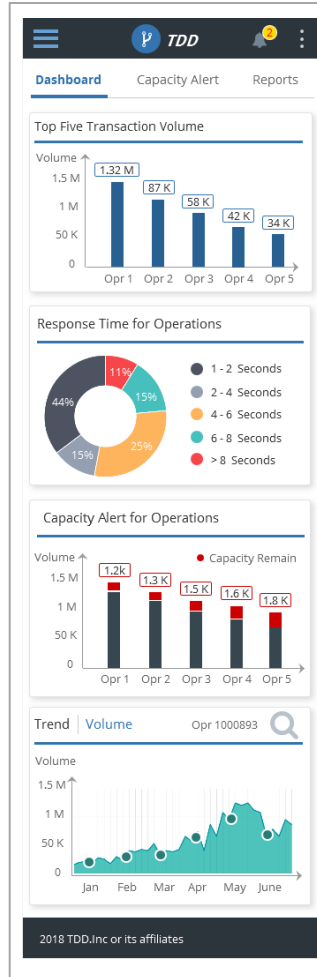
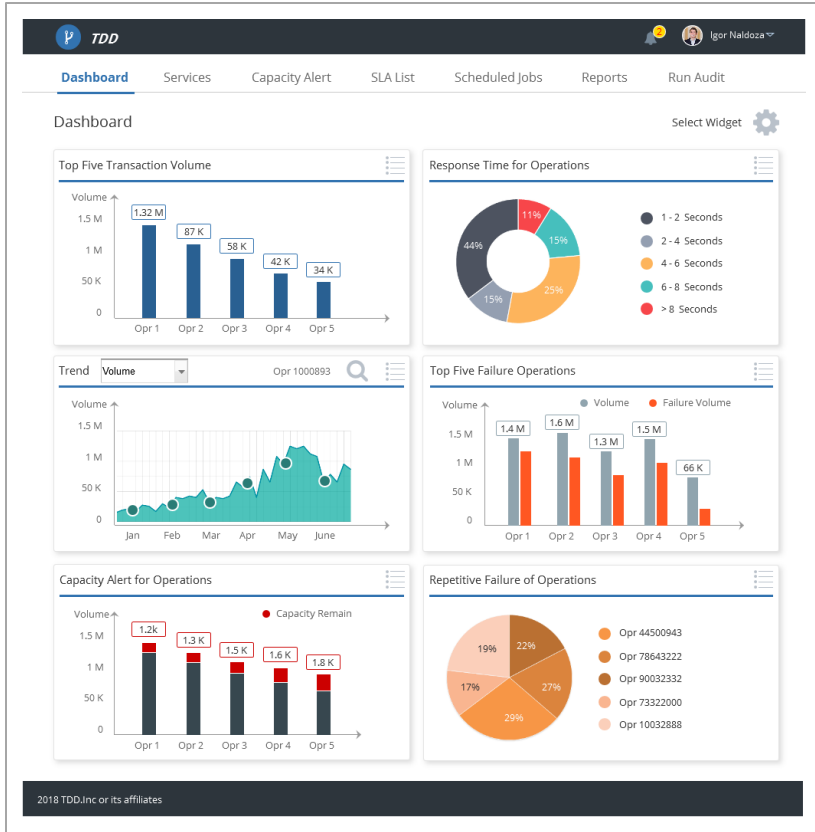
SLA Name	Time & Date	Parameter	SLA Summary	Edit	Delete
Response_Time_Opr220934	23-03-2018 11:36 AM	Capacity	Opr77349988_Opr234334	<a href="#">✎</a>	<a href="#">🗑</a>
Response_Time_Opr220934	23-03-2018 11:36 AM	Volume	Opr77349988_Opr234334	<a href="#">✎</a>	<a href="#">🗑</a>
Response_Time_Opr220934	23-03-2018 11:36 AM	Response Time	Opr77349988_Opr234334	<a href="#">✎</a>	<a href="#">🗑</a>
Response_Time_Opr220934	23-03-2018 11:36 AM	Trend Failure Percent	Opr77349988_Opr234334	<a href="#">✎</a>	<a href="#">🗑</a>
Response_Time_Opr220934	23-03-2018 11:36 AM	Capacity	Opr77349988_Opr234334	<a href="#">✎</a>	<a href="#">🗑</a>
Response_Time_Opr220934	23-03-2018 11:36 AM	Volume	Opr77349988_Opr234334	<a href="#">✎</a>	<a href="#">🗑</a>
Response_Time_Opr220934	23-03-2018 11:36 AM	Response Time	Opr77349988_Opr234334	<a href="#">✎</a>	<a href="#">🗑</a>
Response_Time_Opr220934	23-03-2018 11:36 AM	Trend Failure Percent	Opr77349988_Opr234334	<a href="#">✎</a>	<a href="#">🗑</a>
Response_Time_Opr220934	23-03-2018 11:36 AM	Capacity	Opr77349988_Opr234334	<a href="#">✎</a>	<a href="#">🗑</a>
Response_Time_Opr220934	23-03-2018 11:36 AM	Volume	Opr77349988_Opr234334	<a href="#">✎</a>	<a href="#">🗑</a>

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# Design For Tablet & Mobile Phones



Thank You

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Ashutosh Dusane

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