

Please find below few of my current work samples, which I can share.

In my current organization, one of the Products I work on is called Sonata. I help in authoring it's Online Help and Release Notes along with Business Analysts and Consultants working on that specific enhancement. Template and layout for structuring Online Help content and Release Note information was created by me. It is something that has evolved over time based on feedback received from clients.

1. **Online Help** – It is created using Adobe RoboHelp tool, context sensitively linked to the Sonata software product as a Responsive HTML5 output. Help project files are stored along with the Product's code files in Git repository. All Help changes are committed and pushed to the Git repository to reflect in the latest build. Sample of one page provided below:

Sonata Online Help

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Global Documentation Dashboard

- Australian Superannuation Dashboard
 - Employer Processing Dashboard
 - What is Employer Processing**
 - Create Employer
 - Create Employer Account
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 - Year End Processing Dashboard
 - Insurance Dashboard
 - Retiree Life Insurance Dashboard

What is Employer Processing?

[<< Back to Employer Processing Dashboard](#)

Employer Processing - Business Context

Employer Processing from a Sonata perspective encompasses 4 processes:

Create Employer

Create Employer Account

Employer Maintenance

Load Employer Process

Image: Employer Processing

You can click on the above chevrons to navigate to the respective processes.

These processes are required to facilitate the receipt of Superannuation contributions.

Create Employer (Client Record)

Sonata is a 'Client-Centric' system which means that a person or company is represented in the system as a Client entity. Each Employer is established as a Client type of Company. A client may have multiple roles and many relationships.

A client type of Company is created for each Participating and Non-Participating Employer.

A Participating Employer is a sponsoring employer that has an agreement with the superannuation fund of their own volition. These employers must be added as company Clients to the system so that bank account & other details are stored.

A Non-Participating Employer is any sponsoring employer that has no agreement with the fund but still contributes employer mandated contributions to the superannuation fund on behalf of a member to comply with Choice of Fund legislation.

Create Employer (Scheme Location/Employer)

A new Employer record is also created for the new employer under a Scheme. This allows Scheme Categories to be made available to the members who have a primary association with the employer. Insurance/benefit options available within each category are then available for selection.

An Employer hierarchy can also be established with a Parent and Child Employers.

Create Employer Account

Employer Accounts behave like a simplified unit trust product account even though they are for a superannuation product. All Employer Accounts are fully invested in just the one fund. No Contribution Transaction records are created for employer accounts and all transactions have a balance type of 'Payer'.

Maintain Employer

This process facilitates changes to the Employer Scheme record created above.

Load Employer Process

The Load Employer Process is a generic process for uploading employer data from a third-party system. The file upload only updates existing employers in the system and no new employers will be created as part of this process.

2. **Release Note** – Sonata Release Notes are created for every Product release iteration to help clients understand the updates available in that particular release. I help Business Analyst author a Release Note and review it. Since I lead the Technical Writing team, I also review every release note reviewed by team members before final approval and release to clients to ensure high quality. The onus of Release Notes delivery lies on me. Currently, every release may contain anywhere from 30 to 80 Release notes depending on the number of enhancements (User Stories) completed as part of that release. Release Notes Report is extracted from Jenkins DevOps tool.

One Sample Release Note below:

UK Region - Internal Transfers Enhanced to make them Currency Aware and Validate W-8BEN certificate for US Asset transfers

Overview

Sonata's existing **Transfers Wizard** has been enhanced to be currency aware and create a single transaction event record with a separate account transaction for each currency. The transaction event currency will reflect the Product Cash Asset (PCA) currency and the value of the transaction event will be calculated from the sum of the underlying account transactions using a notional Foreign Exchange (FX) rate.

Further, a new validation has been added in the wizard to prevent award transfers of USD stock to the participant (Target Account) without the necessary W-8BEN certificate in place and in force. Thus, when a Transfer involves USD assets, a validation will be performed by the wizard to ensure that the Target Account has a valid **Certificate of Foreign Status of Beneficial Owner for United States Tax Withholding and Reporting (Form W-8BEN)** that has not expired.

The Sonata Business Services (SBS) operation **createTransfer** has been enhanced to validate W-8BEN certification status. When a Transfer involves USD assets, validation will be performed to ensure that the Target Account has a valid W-8BEN certificate in the same way as described above for Sonata's **Transfers Wizard**.

With this enhancement, all internal Transfer Transaction Types including stock transfer, award transfer, and award clawback, will support transferring multi-currency assets between two accounts via both Sonata and SBS operation **createTransfer**. Moreover, validation will be performed for the W-8BEN certificate for USD asset transfers.

Prior to this enhancement, the **Transfers Wizard** did not display the asset currency correctly and contained an incorrect transaction amount when non - PCA currencies were involved. When transferring awards in USD stock, Sonata had no validation to verify whether the participant (Target Account) had a W-8BEN certificate and that its expiry date was not exceeded.

Note: For more information on the following terms – Transfers, Award Transfer, and Form W-8BEN please refer to [Sonata Glossary](#).

This change is specific to the UK region.

Key Features

- **Demonstrable Additions**
 - The **Transaction Details** screen of the **Transfers Wizard** will display the appropriate currency of the assets next to each of the **Net Value**, **Gross Value**, and **Fee Amount** fields for making itself currency aware.
 - The number of units to be transferred is already calculated based on the **currency Net / Gross value** entered and divided by the latest known price of the asset.

- In the **Transfer Details** page of the **Transfers Wizard**, the **Acquisition Book Cost** field has been updated to no longer display a currency code/symbol, and if an amount is entered it will just show within the wizard as a monetary value without any associated currency. This is because the currency of the book cost will be the Asset Currency of the asset selected in the transfer which is unknown until the asset is selected in the **Transaction Details** page of the wizard.
- In the **Transfers Details** page of the **Transfers Wizard**, the **Acquisition Book Cost** field has been changed to **Acquisition Book Cost Amount (In Asset Currency)**.
- A temporary hard-coded change has been made on the **Residual Payments** screen of **Transfers Wizard** so that the **Exclusion** check box will be checked and disabled and the **Reason** field will be populated with the following text "Residual Pay in non-PCA currency is not supported." and disabled when any of the assets included in the transfer has non-PCA currency.
- Sonata will create a single transaction record with a separate account transaction record per currency.
- Transaction event currency will reflect the **product cash account currency** and will be calculated from the underlying account transactions using a notional FX rate.
- In the **Account to Transfer To** screen of the **Transfers Wizard**, an additional validation has been introduced to ensure that the Target Account has a valid W-8BEN and the associated W-8BEN expiry date is greater than or equal to the Effective Date of the Transfer via Sonata or **createTransfer** SBS operation if the asset's currency of any of the assets being transferred is USD. This is irrespective of the Transaction Type that may be Transfer, Award Transfer, or Award Clawback.
- **Menu Path**
 - **Classic Menu**
 - Wealth Management > Transaction Processing > Transfers
 - **Graphical Menu**
 - Wealth Configuration Menu > Transaction Processing > Transfers

Implementation Considerations

- No configuration required.

3. **Global Development Management, Governance and Quality** – I work along with Regional and Engineering Heads (in New Zealand, Australia, India, Poland and South Africa) to create multiple new Confluence spaces from scratch, to design and maintain structured Team level details (Processes, Reports, Plans etc.) This involves coordination with multiple stakeholders across the globe to create Global Templates for Processes, Guidelines, Specifications, Root Cause Analysis, Governance and Trainings. Attaching sample screenshots of few of these spaces/pages created by me, which I can share and do not contain sensitive information.

Confluence Spaces People Ideation Communities Calendars Create ... Search

Global Engineering Organization GEO

Bravura's Purpose
Prosperity for our customers.

Bravura's Mission
Develop innovative technology solutions that power the world's financial institutions.

Click on the text/image links below to navigate to the respective pages containing the information.

GEO Department Structure
Alignment of various teams within GEO

GEO Leadership Team
People who drive our teams

Human Resources (HR) Team
Human Resources supporting Employees

The diagram illustrates the organizational structure of the Global Engineering Organization (GEO). At the center is a hub labeled 'GEO'. Surrounding this hub are seven teams, each represented by an icon and a label: 'Engineering Development Management Office (DMO)' (top-left, red), 'Solution Design Team (SDT)' (top-right, blue), 'Functional Architecture' (right, orange), 'Global Release Management (GRM)' (bottom-right, blue), 'Global Quality Management (GQM)' (bottom, purple), 'Global Product Development Team (PDT)' (bottom-left, grey), and 'Technical Architecture' (top, green). Arrows connect the central hub to each of these teams, indicating a central role for GEO in coordinating these functions.

Sonata Specifications Home

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List of Specification Pages

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- > Base Asset Register
- > Base Calculation Engine
- > Base Claims
- > Base Client
- > Base Common
- > Base Customer Service
- > Base Group Life
- > Base ISAs & PEPs (UK Specific)
- > Base Life
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- > Base Wealth Management
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- > Sonata Alta Process Models

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Getting Started

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Create Page with Predefined Template

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- Orchestrator Process Model Template

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