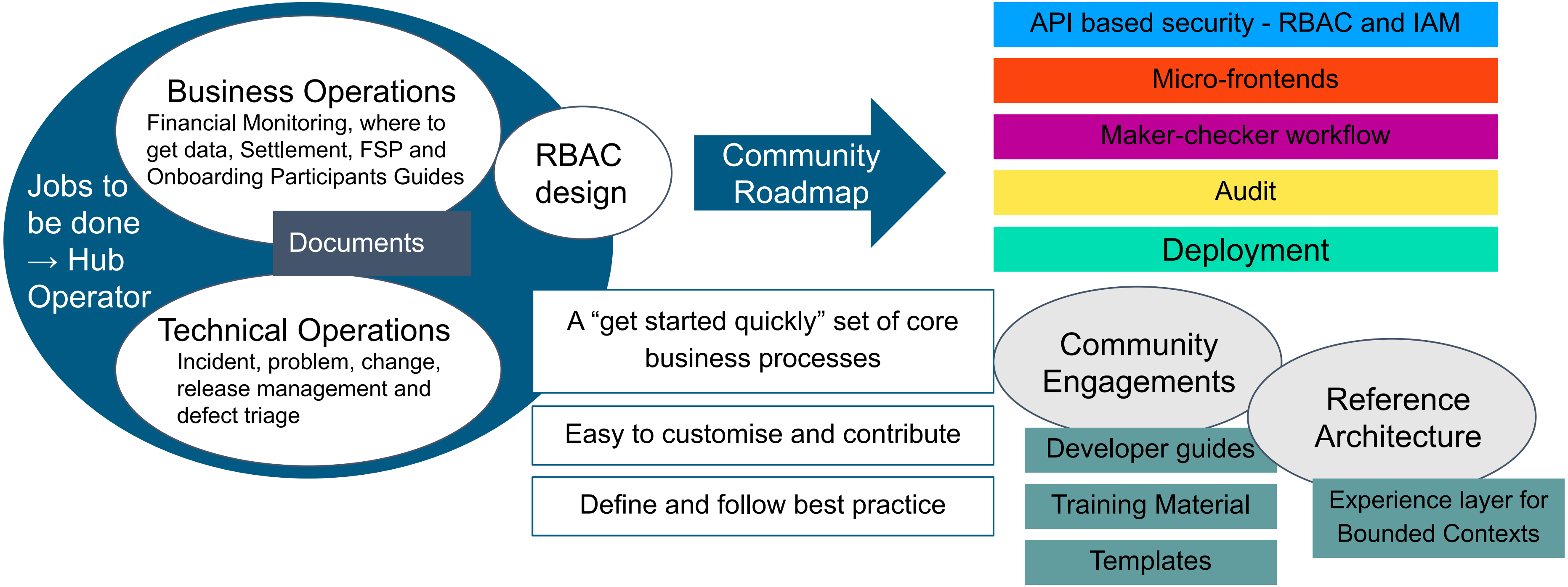
COMMUNITY mojaloop MEETING

Biz Ops Framework workstream

PI18 convening review

Summary: What is the BizOps Framework?

… a structure that promotes community collaboration in building experience layer APIs, capturing best operational practices, and a model for building out UX for Hub operators



Jobs to be done → Hub Operator

Business Operations

Financial Monitoring, where to get data, Settlement, FSP and Onboarding Participants Guides

Documents

Technical Operations

Incident, problem, change, release management and defect triage

RBAC design

Community Roadmap

API based security - RBAC and IAM

Micro-frontends

Maker-checker workflow

Audit

Deployment

A “get started quickly” set of core business processes

Easy to customise and contribute

Define and follow best practice

Community Engagements

Developer guides

Training Material

Templates

Reference Architecture

Experience layer for Bounded Contexts

PI 17 Goal - Biz Ops Framework

Confidence Vote:

Goal

Key Epics Objectives

✓ 1. **As a** hub operator **I would like to** build reports that support my operations **so that I** am able to improve efficiencies and reduce operational costs as and when required.

✗ **2.As a** hub operator **I would like to** amend the mojaloop documentation on hub operational processes **as** current processes are optimised and extended.

✓ **3. As a** hub operator **I would like to** improve the current microservice offering by either making the user experience more intuitive, and/or by extending the backend functionality **so that I** am able to improve efficiencies and reduce operational costs as and when required.

✗ **4. As a** hub operator **I would like to** build a new microservice that supports business process **so that I** am able to improve efficiencies and reduce operational costs as and when required.

Not Doing now but important next & Risk / Issues

1. **Risks:** Incompatibility with other Hub operator deployments ? --> more work before adopting BOF
2. **Risks:** RBAC limitation of restrictions because of how the current operational API is implemented
3. **Risks:** Only minimal documentation on how to extend solutions

Progress

Progress

Success Defined How?

✓ 1. A community member adding new report

✓ ✗ 2. A community member merging changes into BOP micro-frontend

✗ 3. Community member merging changes into doc master repo

✗ 4. [Stretch] A community member creating a new micro-frontend

1.

Supporting Report Development

1. Extended IaC to deploy public and private reports
2. Report developer environment
3. Report developer guide
4. Added helm tests to test the reports
5. Extended IaC to run helm test from a pipeline

Supporting WynePay CUG

(close user group)

Hardening the framework to ensure that it works as a MVP for a scheme by making it work for WynePay close user group pre production go-live.

1. UI extensions to support operations
2. Report extensions
3. The addition of an Experience layer - attach identity for audits.
4. Settlement account audits
5. Participant lifecycle audits

Framework maturity and standardization

1. RBAC Deployment tests - helm tests
2. IaC and deployment testing integration - testing pipelines

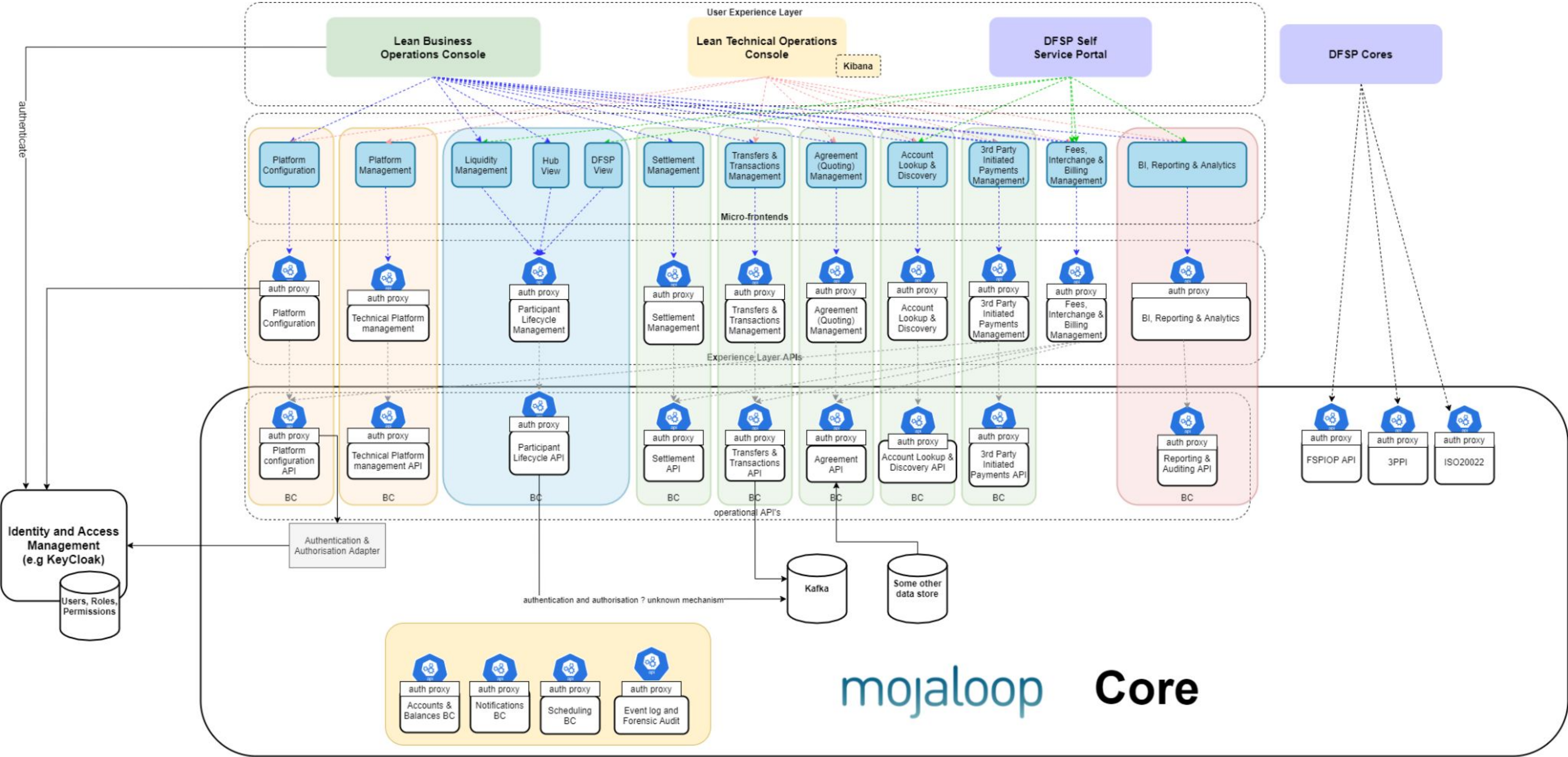
All new features

3. CICD - functional automation testing
4. IaC integration

BoF - Roadmap

Framework Scope	Documentation of Business Processes	Framework Build	Hardening of Framework	Build Guildes	Build Training
PI 16	1. Tech Ops 2. Settlement 3. RBAC controls 4. Onboarding DFSP	1. Adoption of Ory Identity Framework 2. Helm charts 3. Segregation of duties 4. IaC integration 5. Standard User Roles	1. Reporting BC 2. Tech Platform BC - User Management 3. Finance Portal adoption	1. Micro-frontend Usage guide for devs 2. Functional Demos 3. Finance Portal functional Demos 4. Enhanced User Roles	
PI 17			4. Reaching MVP 5. Maturity and standardization	5. Report dev guide	
PI 18			6. Settlement BC 7. Payment Manager - settlement report integration 8. Maturity and standardization		
Backlog	5. Onboarding DFSP 6. Financial Monitoring 7. DFSP Management		9. Participant Lifecycle Onboarding 10. Participant Lifecycle Liquidity Management	6. Detailed developer guide	1. MTP course for business users 2. MTP course for developers

Where we want to be …


User Experience Layer
Lean Business Operations Console
Lean Technical Operations Console
Kibana
DFSP Self Service Portal
DFSP Cores
authenticate
Platform Configuration
Platform Management
Liquidity Management
Hub View
DFSP View
Settlement Management
Transfers & Transactions Management
Agreement (Quoting) Management
Account Lookup & Discovery
3rd Party Initiated Payments Management
Fees, Interchange & Billing Management
BI, Reporting & Analytics
Micro-frontends
auth proxy
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Reporting & Auditing API
auth proxy
FSPIOP API
auth proxy
3PPI
auth proxy
ISO20022
BC
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BC
BC
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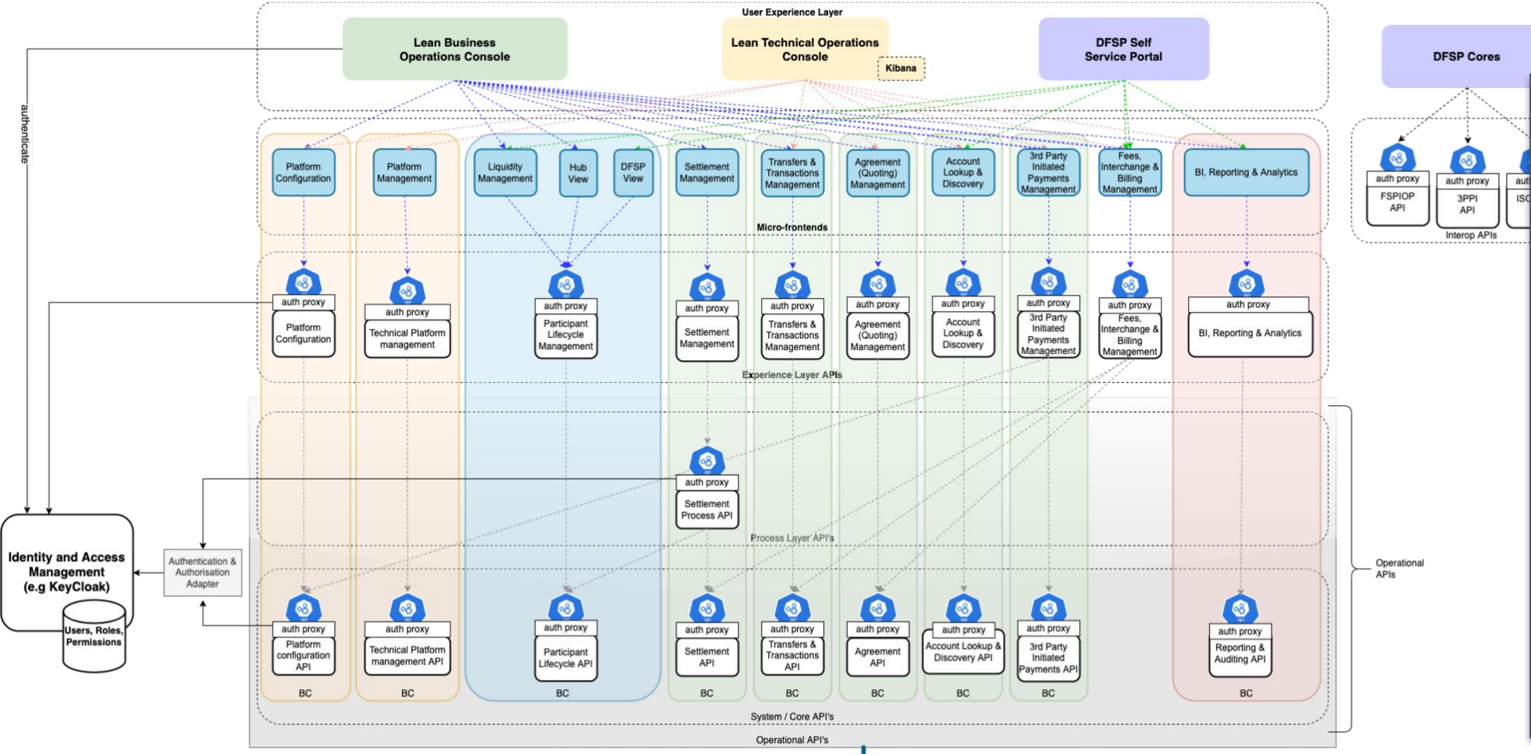
BC
BC
BC
BC
operational API's
Identity and Access Management (e.g KeyCloak)
Users, Roles, Permissions
Authentication & Authorisation Adapter
authentication and authorisation ? unknown mechanism
Kafka
Some other data store
auth proxy
Accounts & Balances BC
auth proxy
Notifications BC
auth proxy
Scheduling BC
auth proxy
Event log and Forensic Audit
mojaloop
Core

Settlement BC - design

https://mojaloop.github.io/business-operations-framework-docs/guide/SettlementBC.html

Business process functions

1. Closing a Settlement window
2. Settlement Initiation
3. Settlement Initiation report
4. Finalization & settlement account rebalancing



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Experience Layer APIs
Settlement Process API
Process Layer API's
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Technical Platform management API
Participant Lifecycle API
Settlement API
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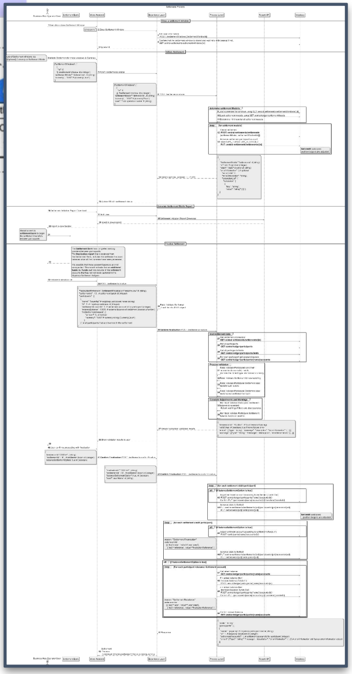
Agreement API
Account Lookup & Discovery API
3rd Party Initiated Payments API
Reporting & Auditing API
BC
System / Core API's
Operational API's
Operational APIs



DFSP Payment Manager - integrate settlement reports

Users with the correct roles can access settlement reports directly from inside Payment Manager

1. Automates distribution of settlement reports
2. Adds authorisation and logging to settlement report access
3. Implements participant isolation; (so DFSPs cannot see each other's reports).

Maturity and standardization

Testing Maturity

1. CICD tests that are able to run on Dev’s machine
   a. Unit Tests
   b. Narrow Integration tests
   c. [Function testing] (when possible)
2. Functional testing manually run against a chosen deployment
3. Helm test running functional tests on deployment
4. IaC pipeline to run helm tests

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