**Charles Schwab**

**Project -** User Authentication Module

**Duration** – Jun 2005 to Dec 2006

**Team Size** – BA/QA - 3, DA - 2, Dev - 6, PM - 1 (Total 12)

**Project:**

UAM is a web based application which authorizes the customers to the various products, services and functions provided by the bank. It allows the clients to use the products and also authenticates by providing different roles to the users. It handles individual settings of a product to different clients depending upon what the clients need. It also handles user level settings. It generates audit reports, weekly & monthly reports of transactions performed on the products.

**SDLC:** Waterfall

**Responsibilities:**

* Worked with the PM to decide upon the best methodology for the project and the best approach for requirement gathering.
* Responsible for conducting interviews with fund management team, and one on one meeting with the portfolio managers.
* Responsible for collecting and managed business requirements, along with business process and developed the **Business Requirement Documents** (BRD).
* Developed **Functional Requirement Specifications** (FRS) and **Supplementary Specifications** (non-functional).
* Identified and tracked Project Issues and Risks.
* Designed and developed all **Use Cases, Use Case Diagrams, Activity diagrams and Class diagrams.**
* Assisted the PM in setting realistic project expectations and in evaluating the impact of changes on the organization and plans accordingly and conducted project related presentations.
* Worked with developers to make sure that they understand the **Use Cases** and worked with quality control teams to develop **Test Plans and Test Cases.**
* Responsible for designing and implementing the basic **SQL** queries for **Quality Assurance testing**.
* Partnered with the technical areas in the research and resolution of system and **User Acceptance Testing** (UAT), Test Plans and documentation of test reports.

**Background On the project & detailed project description:**

UAM is a Charles Schwab application for entitling bank customers to use whole sale products.

Through this application,customers can enroll themselves or the bank operators can do the enrollment on behalf of the customers.

The different products offered by the bank are Credit Management, Gift Card, Wire Transfers,

and Basic banking, etc.

With every release, there were new products being added to the bank and the application had to be enhanced to provide features to authenticate the products, maintain user profile, product profile and generate new reports.

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**Environment:** MS Suite, Java, J2EE, JavaScript, Oracle, JSP, SQL, XML, Quick TestPro, Test Director, Load Runner & Windows 2000

**Primary role in the project:**

* My main role as a BA was to gather requirements, coordinate with the client and document the requirements in a clear format.
* Freeze requirements, get client’s sign off on the SRS.
* Conduct joint meeting with developers and testers and explain about the application functionality
* Share SRS with developers and testers.
* Clarify doubts (for testers and developers) - If any
* Track project plan (project manager will prepare project plan)
* Conduct weekly review meetings for the development team to know development status and any risks
* Raise risk alarms (if any)
* Discuss with technical team lead and project manager to mitigate risks
* Status Reporting - send weekly status reports to clients.
* Schedule weekly call with clients and based on call prepare MOM (Minutes of Meeting)
* Circulate MOM to all the stakeholders of the project.
* Coordinate while UAT is going

**The business problem you were trying to solve with this project :**

The bank added new products to cater to the needs of the customer.

**Top business requirements:**

1. Add new products to the manage product access screen (There should be the ability to add new wholesale products to our application)
2. Update company reports
3. Update user reports
4. Modify user detailed report

**Who are the customers of the application?**

Various wholesale clients (of business banking). Macy’s was one of our clients. JC Penney was one of our clients. McDonalds was one of our clients. Which groups of Macys used this application? One team would be the HR team (of Macys) to run payroll of Macy’s employees. The Finance team (of Macys) will use our application to see how they can best invest their money in various mutual funds. Will all the HR employees of Macy’s have similar access level on payroll application? No! Manager will have some level of access (Create a new employee payroll, Change payroll rate, Delete an employee payroll). HR Admin will have lower level of access like (Add hours for an employee, change hours for an employee). This HR Admin will not have access to functionality of Charles Schwab’s HR application of Create a new employee, Change payroll rate, etc.). Our UAM application allowed Macy’s HR managers to create new userid/password for HR Admins, give them specific access levels, change their passwords, change the role of a user id (From say Admin to Assistant Manager)).