

# KPI Portal User Manual

## Revision History :-

#	Author	Approver/Reviewer	Date	Version	Comments
1	Rupak Ghosh	Vipin Kumar R. Jaiswar	16 <sup>th</sup> July 2021	1.0.0.1	Document Created.
2	Rupak Ghosh	Vipin Kumar R. Jaiswar	15 <sup>th</sup> Feb 20212	1.0.0.2	Document Update & FAQ Section Add.

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## Introduction ( A Brief About KPI Portal)

- KPI portal will serve the purpose to collect system/process/interface performance/error logs and storing them at a single location and based on collected information, creating and displaying the Real-Time/Near-Real-Time dashboard into the “KPI Portal”. This KPI portal can be accessed by across the organization, so to get the Dashboard created, based on the industial (IT, COE’s, management etc..) requirement.

## KPI Portal Modules - A Quick Overview

Below are the snapshots of the KPI Portal Modules :-

Module Name	Functionality
Settings	
<b>Business Management</b>	Responsible for creating, updating & deleting different BFL businesses ( Ex :- B2B,CC,PLCS );
<b>Role Management</b>	Responsible for creating, updating & deleting roles in accordance with the accessibility of the portal ( Ex :- Administrator, Business COE, TechOps Team etc. );
<b>System Management</b>	Responsible for creating, updating & deleting different BFL System Names ( Ex :- 3IN1, Mobikwik, ATOS etc );
<b>Module Management</b>	Responsible for creating, updating & deleting different modules ( i.e which are shown in the hamburger menu ) ( Ex :- Business Management, System Management etc. );
<b>Access Management</b>	Responsible for providing read, edit & delete access to different roles ( Ex :- To provide read access to IT-PMO for Business Management );
<b>KPI Classification</b>	Responsible for creating, updating & deleting different KPI categories;
<b>Process &amp; Sub-Processes</b>	Responsible for creating, updating & deleting different processes & sub-processes for different systems in <b>System Module</b> ;

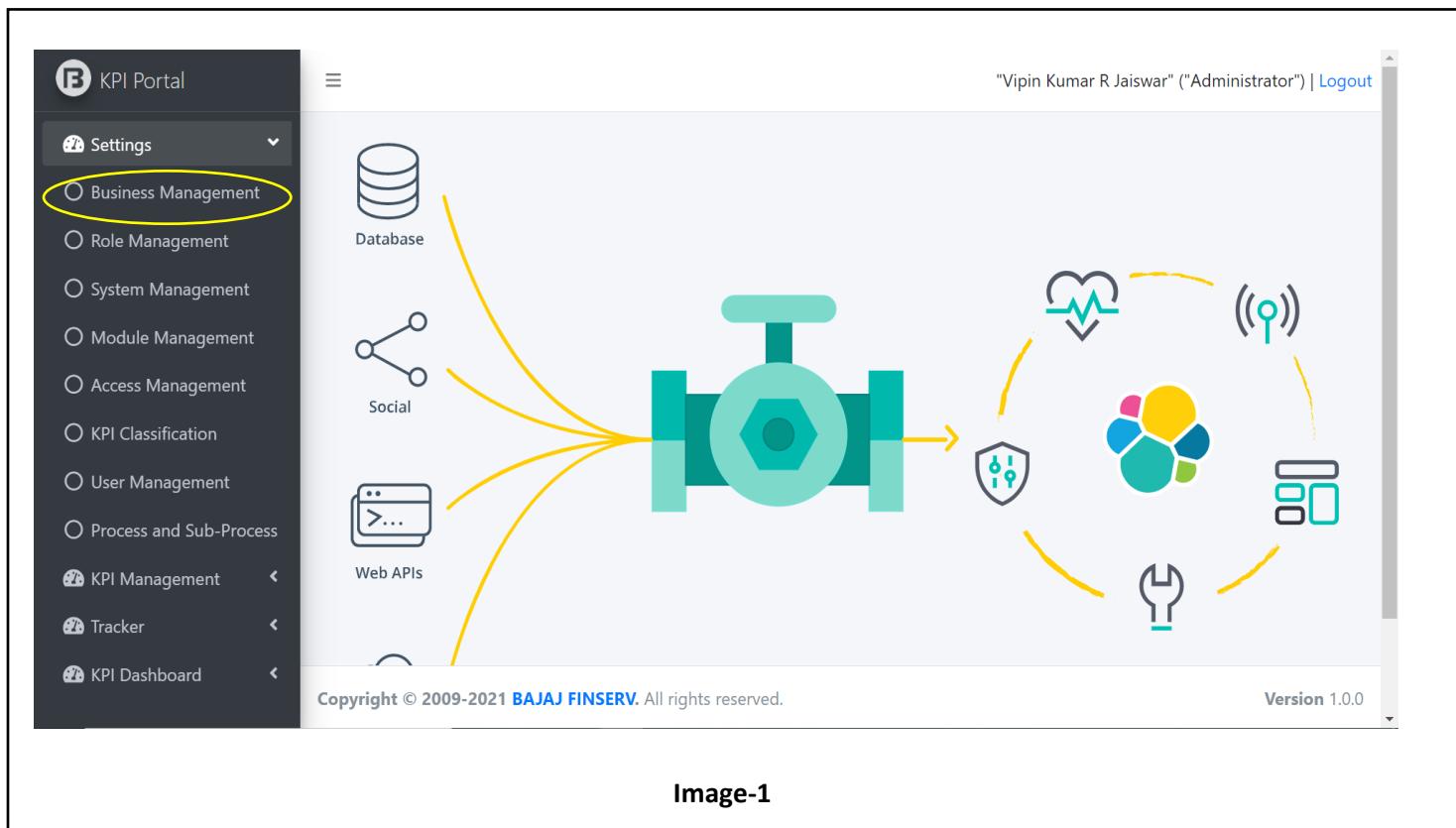
<b>KPI Management</b>	
<b>Set KPI</b>	Responsible for creating, updating & deleting different KPIs which will be tracked through KPI Portal;
<b>Set KPI Threshold</b>	Responsible for setting thresholds to each & every KPI so that they can be monitored & to set thresholds to generate Kaizala alert with the particular alert message to be shown;
<b>KPI Access</b>	Responsible for providing access to different KPIs to different stakeholders;
<b>Tracker</b>	
<b>Planned Downtime</b>	Responsible for creating, updating & deleting downtimes for different APIs;
<b>Runtime Downtime</b>	Responsible for creating, updating & deleting “Unplanned” downtimes for different APIs;
<b>KPI Dashboard</b>	
<b>Dashboard</b>	Responsible for showing KPI Monitoring dashboards to Users of the portal who have access to a set of particular KPIs ( Linked With PowerBI );

## KPI Portal Modules - In Details

### Settings :-

→ **Business Management :-** Different Business Verticals of BFL will reside here. Only Administrator has the access to Create & Delete multiple Businesses .

- **Location :-** Navigate to the main menu bar and click on “Settings >> Business Management”. After clicking on the said options, user will able to see the list of the businesses. [ Refer to Image-1 ]



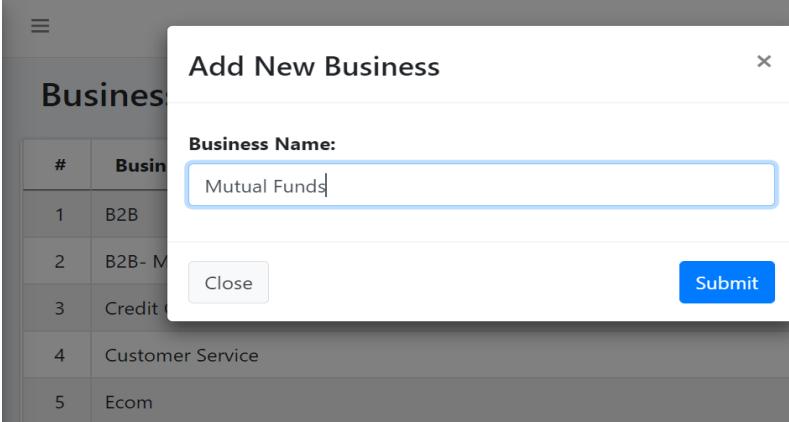
**Image-1**

- **Content :-** Business Management Contains different Businesses of BFL with Create-Edit-Delete Functionality ( Only To Selected Users ). [ Refer to Image-2 ]

Business Management		<a href="#">+ Add New Business</a>
#	Business Name	Action
1	B2B	
2	B2B- Marketplace/E-Store	
3	Credit Card	
4	Customer Service	
5	Ecom	

**Image-2**

- **Create New Business :-** To create a new business, navigate to “ + Add New Business ”. A pop-up window will open up where user will provide Business Name. Afterwards, on clicking “Submit” button, new business will be added & will be shown on dashboard. [ Refer to Image-3 ]



The screenshot shows a modal window titled "Add New Business". Inside the modal, there is a form field labeled "Business Name:" containing the text "Mutual Funds". Below the form are two buttons: "Close" on the left and "Submit" on the right. In the background, the main "Business Management" table is visible, showing rows for B2B, B2B- Marketplace/E-Store, Credit Card, Customer Service, and Ecom.

"Vipin Kumar R Jaiswar" ("Administrator") | [Logout](#)

[+ Add New Business](#)

#	Business Name	Action
1	B2B	
2	B2B- M	
3	Credit	
4	Customer Service	
5	Ecom	

"Vipin" ✓ Record added successfully.

[+ Add New Business](#)

**Image -3**

- **Edit Existing Business :-** To edit an existing business, navigate to the “Edit” icon beside the desired Business name. A pop-up window will open up where user will provide updated Business Name. Afterwards, on clicking “Submit” button, updated business name will be added & will be shown on dashboard. [ Refer To Image-4 ]

The screenshot illustrates the process of updating a business name in the KPI Portal. It shows three main views:

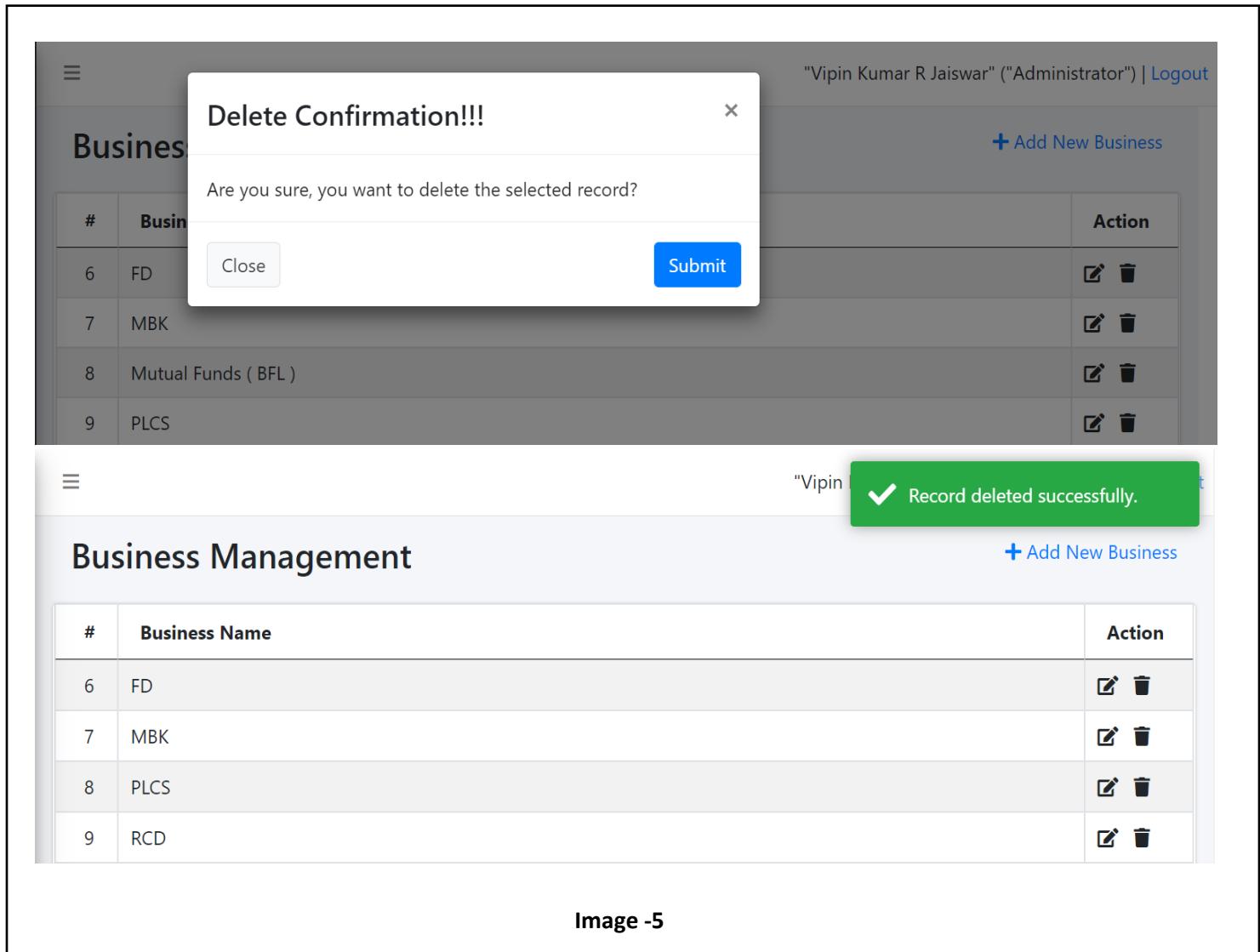
- Business Management List:** Shows a table of businesses with columns for #, Business Name, and Action (Edit/Delete). One row is highlighted with a blue oval.
- Edit Business Modal (Step 1):** A modal window titled "Edit Business" with a "Business Name" field containing "Mutual Funds". It includes "Close" and "Submit" buttons.
- Edit Business Modal (Step 2):** The same modal window, but the "Business Name" field now contains "Mutual Fund (BFL)".
- Success Message:** A green toast notification at the top right says "Record updated successfully." with a checkmark icon.

The table data in the Business Management list is as follows:

#	Business Name	Action
6	FD	
7	MBK	
8	Mutual Fund (BFL)	
9	PLCS	

Image-4

- **Delete Business :-** To delete an existing business, navigate to the “Delete” icon beside the desired Business name. A pop-up window will open up where user will provide confirmation to delete the selected business. Afterwards, on clicking “ Submit ” button, selected business will be removed from the dashboard. [ Refer To Image-5]



**Delete Confirmation!!!**

Are you sure, you want to delete the selected record?

**Business Management**

#	Business Name	Action
6	FD	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
7	MBK	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
8	Mutual Funds ( BFL )	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
9	PLCS	<input type="button" value="Edit"/> <input type="button" value="Delete"/>

Record deleted successfully.

**Image -5**