

# Research Synthesis

Interview notes

**Participant1**

It thinks the monitoring could become bigger in short time

The process has no changes for 2 years

The current process is the unique implementation for the monitoring problem

Want to spend less time monitoring for do different stuff

There is no internet in the work computers

Hates the current process of monitoring

**Participant2**

The objective is to inform to the board the status of specific Financial Institution

The current process include the use of Excel, Outlook and Visual Basic of Excel individually

It appears the process could be done 100 times in a day.

The team uses till 3 hours of HR every day

Make a complete report each hour

Web apps or apps using web services are locked in the BANXICO computers.

**Participant3**

He wanted to know the current status of a Financial Institution in the Payment Systems of Mexico

Excel is a good tool for a quick report, but no for a recursive process.

The process has to be done in Bank of Mexico Computers.

The monitoring is demanding for the team.

Using the same long process since 2018

An unique tool could reduce the time dedicated to the process.

## Themes and opportunities

### Reduce the time in the monitoring process

It thinks the monitoring could become bigger in short time

The monitoring is demanding for the team.

Want to spend less time monitoring for do different stuff

The team uses till 3 hours of HR every day

Make a complete report each hour

It appears the process could be done 100 times in a day.

### Goals for the participants

He wanted to know the current status of a Financial Institution in the Payment Systems of Mexico

The objective is to inform to the board the status of specific Financial Institution

He wants an unique tool could reduce the time dedicated to the process.

### Current process

The current process is the unique implementation for the monitoring problem

Using the same long process since 2018

The process has no changes for 2 years

### Restrictions

There is no internet in the work computers

Excel is a good tool for a quick report, but no for a recursive process.

Web apps or apps using web services are locked in the BANXICO computers.

The current process include the use of Excel, Outlook and Visual Basic of Excel individually

The process has to be done in Bank of Mexico Computers.

## Feature Ideation

Integrate automatic monitoring to the current app.

Create a shared document where we can check all info of institutions.

Create a dedicated app for do monitoring attached to the needs of the area.

Extract info and make the reports manual every certain time.

Create an AI to identify uncommon activity of institutions on their operations.

Improve the current excel macro to send emails and identify specific cases of activity of institutions

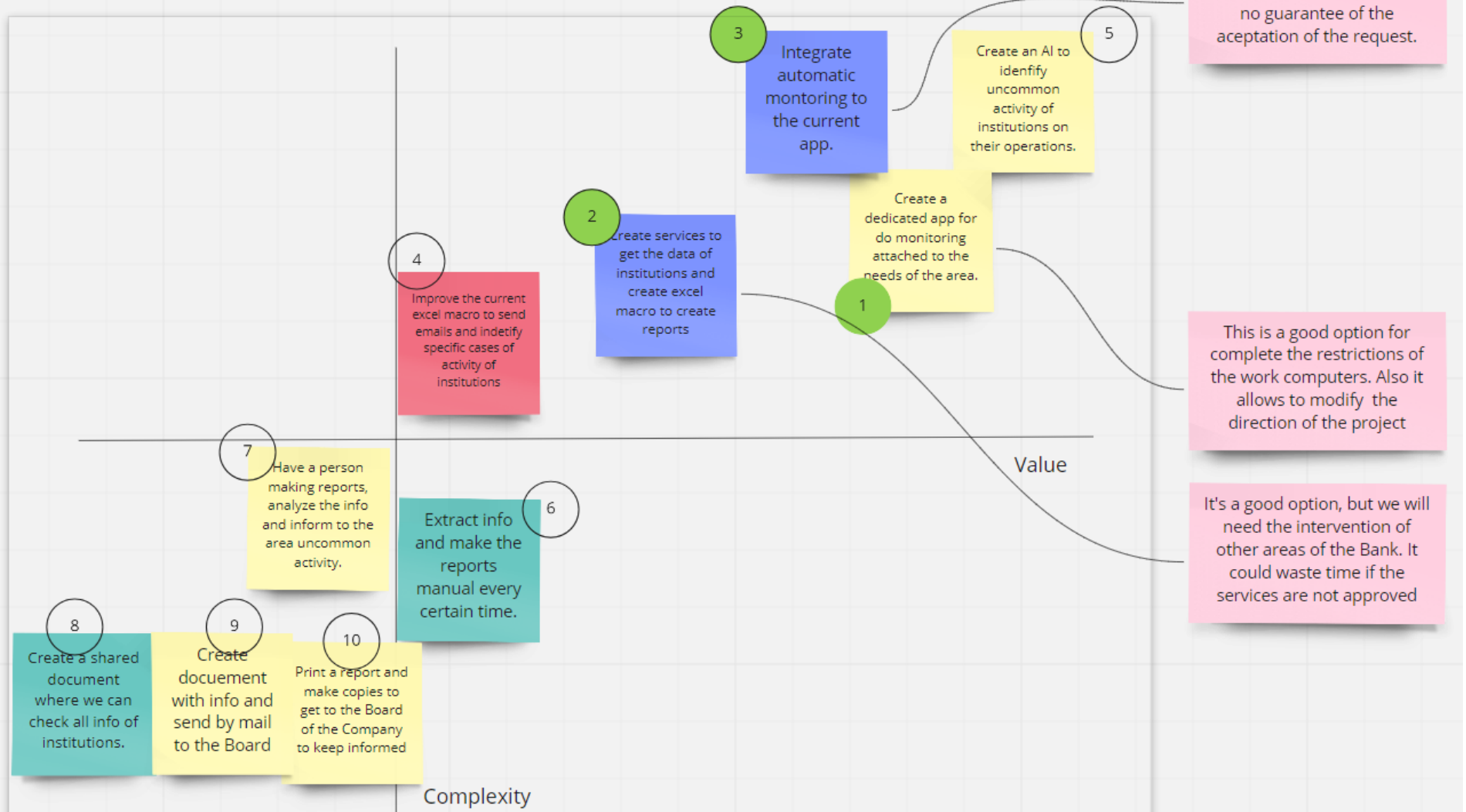
Create services to get the data of institutions and create excel macro to create reports

Have a person making reports, analyze the info and inform to the area uncommon activity.

Print a report and make copies to get to the Board of the Company to keep informed

Create document with info and send by mail to the Board

## Feature Prioritization



ITERATION 1

Participant:

Monitoring Systems:

A ☐

B ☐

C ☐

periodicity:  minutes

Add a participant directly and configure before start the monitoring.

Type of Institution

Participant

☒ Monitor by default

☐ A

☐ B

☐ C

Filter type of institution and set a default checkbox for a default monitoring.

Have 2 lists. The first one to select participants and the second one to show which participants are being monitored. Add

Monitor

Current

Part A

Part C

Part D

Part E

Part F

Participant B

Participant G

Configuration

Participant Name

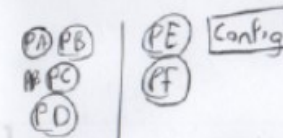
Systems: ☐ A

☐ B

☐ C

Periodicity:  Minutes

Same idea that that the previous one but using "drag and drop"



There are 2 critical moments of the app.  
First Row.- Add participant to monitoring  
Second Row.- Show info about participant

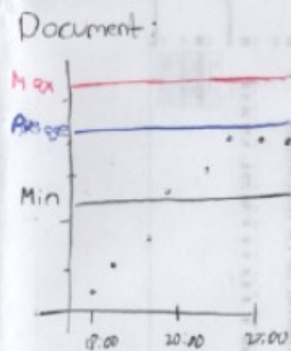
Email:

Participant A

18.00	-	-	-
19.00	-	-	-
20.00	-	-	-

Average

Show in an email the information in a table get by the monitoring. An email by participant



Show the info in graph in a document.

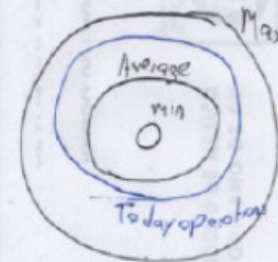
Email:

\*Just if the operation surpass the max registered\*

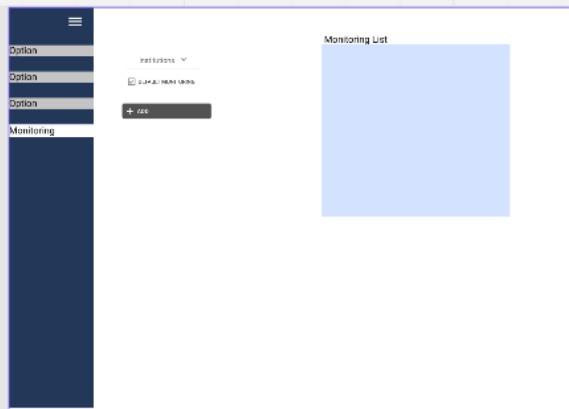
"Review the next link because there is unusual operations' link"

*Log*

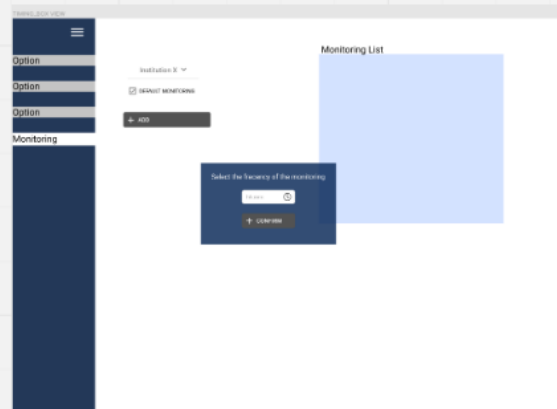
If the participant surpasses its max operation send an email to alert.



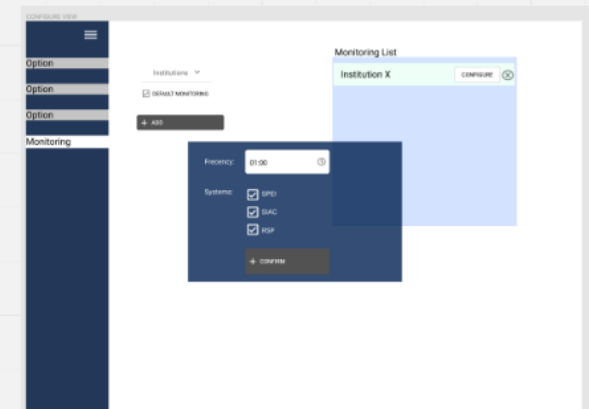
Show the info in a graph that is filling to the max registered.



View for adding institutions to the Monitoring Process.



After adding an institution, the app requires the frequency of the monitoring.

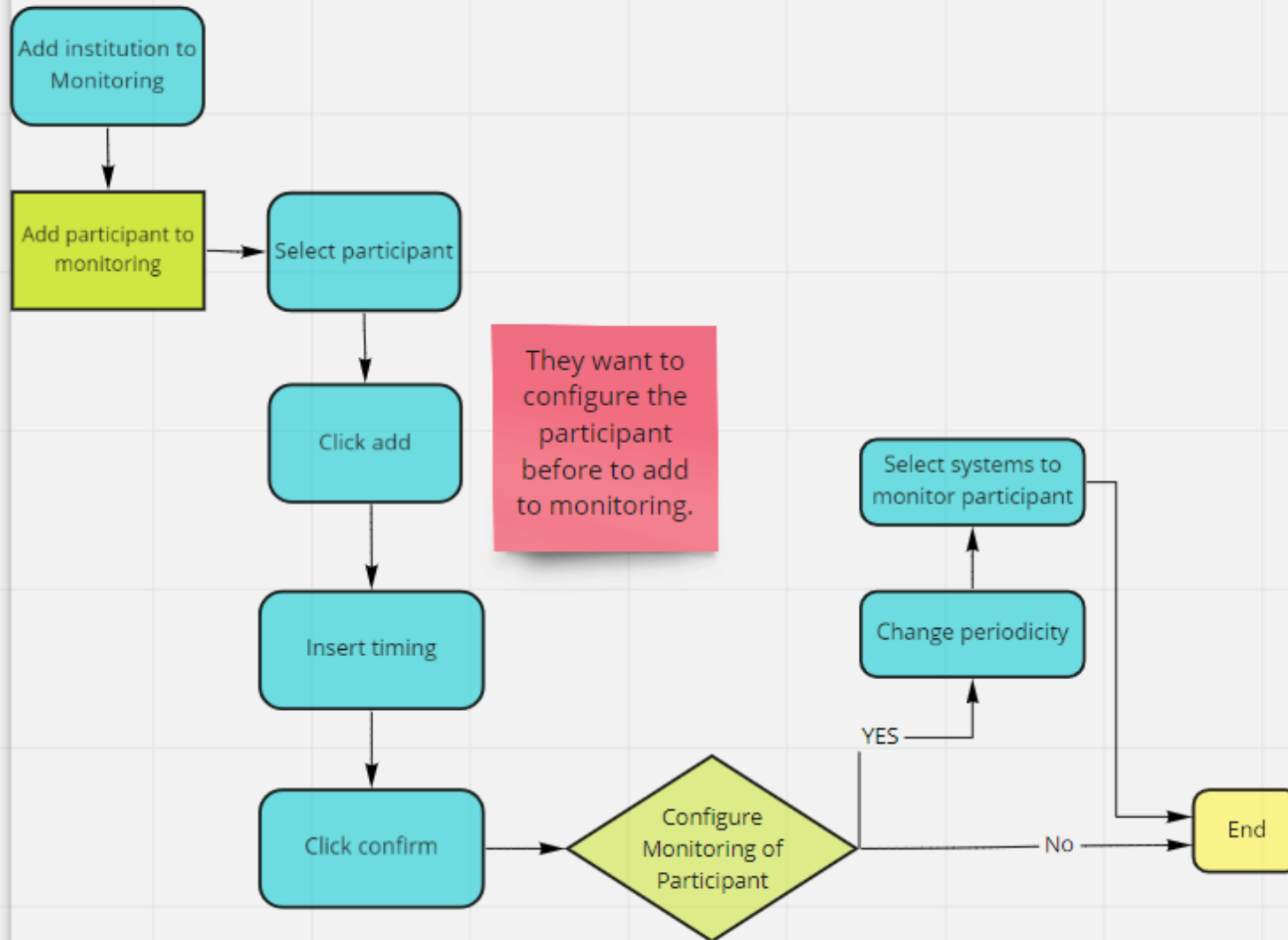


This view allows to configure an institution in frequency and systems to monitoring a specific institution.

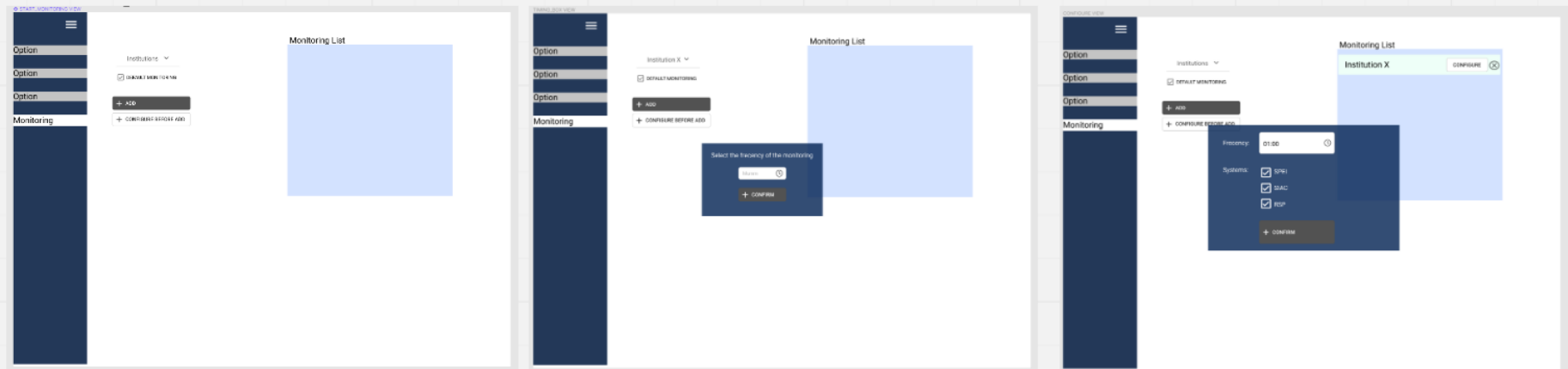


ITERATION 2

[https://docs.google.com/document/d/1G8XljMMOgZ69-1Bpaulk2wl29Xhv4\\_Ljks8Xtj1blEc/edit?usp=sharing](https://docs.google.com/document/d/1G8XljMMOgZ69-1Bpaulk2wl29Xhv4_Ljks8Xtj1blEc/edit?usp=sharing)



**FLOW LINK**



We added a secondary button to configure the participant before to be added to the monitoring.