Bo Xie

**Summary:**

* 7 years of IT professional experience as Business Analysis in Banking and Healthcare domain
* Hands on experience gathering requirements, interviewing senior level company officials to gather requirements for documenting project functional specification.
* Strong knowledge & understanding of industry standard methodologies including Software Development Life Cycle (SDLC) and Iterative Software Development Life Cycle Process as per Rational Unified Process (RUP) and Agile Methodology.
* Expertise in gathering, analyzing, defining and documenting end user business requirements and system requirement specifications.
* Extensive experience in Salesforce.com SFA.
* Expertise with Administration and Configuration of Salesforce.com CRM to populate and maintain data.
* Extensive experience in creating and documenting Business Requirements and System Functional Specifications including use cases.
* Successful in translating business requirements and user expectations into detailed specifications employing Unified Modeling Language (UML), drawing UML diagrams, Activity Diagrams, and State Diagrams using MS Visio.
* Hands on experience in Administration setup like managing Users, Security Controls and Data Management on service cloud for HR team.
* Conducted User Acceptance Testing (UAT).
* Experience in working with different modules of ALM/Quality Center such as Requirements, Test Plan and Defects.
* Proficient in using UML in behavioral, structural and architectural modeling – in creating Use Case, State, Activity, Class and Sequence diagrams.
* Experience in gathering user requirements, application development, testing and documentation using Rational Requisite Pro
* Experience in development methodologies like- SDLC, AGILE and Waterfall
* Well-versed in project management tool (MS Project) for status reporting, planning and resource allocation.
* Experience in working with QA Testing Team, creating Test Plans, Test Cases and Test Scripts.
* Expertise in the management of System/User Request Change, and handle User Conflicts.
* Enthusiastic and out-going individual, with good ability to interact with the team members

**IT Skills**

* Platforms - MS-DOS, Windows 95/98/NT/2000/XP, Unix, Solaris
* Languages - SQL, PL/SQL
* RDBMS – Oracle, MS SQL Server
* Defect Reporting - Bugzilla, HP ALM/Quality Center
* ETL Tools – Informatica, ab initio, SSIS, DataStage
* BI Tools – Business Objects, Cognos, OBIEE
* Version Control - Visual Source Safe, WinCVS
* Methodologies - SDLC, Waterfall, Spiral, Agile, Scrum,

**EXPERIENCE SUMMARY:**

**Bank of America, Charlotte, NC**

**Jan 2016- Present**

**Business Analyst**

Bank of America is a diversified financial services company with operations around the world. The project was a web-based application involving the automation of Mortgage loan origination process beginning from origination/opening a mortgage application through funding/closing. The system performed all the business functions of the loan process such as set-up Account information, New Loan set-up, the Appraisal, credit and income. The project involved modules for Pre Approval, Application, Underwriting, Pricing, Processing, and Closing.

**Responsibilities:**

* Performed Requirements Gathering and Analysis, interviewed the SME (Subject Matter Experts), and ensured that contributors and all key stakeholders were motivated to complete assigned tasks.
* Performed Gap Analysis to identify the deficiencies of the current system and to identify the requirements for the proposed system.
* Responsible for Documentation in each phase of RUP Methodology, Risk Assessment, and Validation & Verification process.
* Participated with development teams to design and implement business intelligence solutions.
* Facilitated Joint Application Development (JAD) Sessions for communicating and managing expectations.
* Support Internal and external auditors for department audit.
* Worked with the development team to make sure that they understood the user requirements and that the system developed met those requirements.
* Participated in developing test plans and test procedure templates and guidelines to be used by the project team with detailed screen layouts with regards to various types of corporate actions.
* Defined and promulgated test cases based on the requirements outlined in the test plan as part of the development cycle.
* Experience integrating salesforce.com with other apps.
* Integrated the Web Services for extracting the data from external systems to display in the pages of Salesforce.com.
* Involved in Salesforce.com application Setup activities and customized the apps to match the functional needs of the organization.
* Coordinated with QA team on campaign reporting of Salesforce Cloud Enterprise Edition application.
* Performed Defect Tracking and Change Control Procedures using Rational Clear Quest and Configuration Management and Version Control using Rational Clear Case.
* Was involved in Integration Testing, Regression Testing, and User Acceptance Test before releasing the application.
* Created ETL test data for all ETL mapping rules to test the functionality of the ETL Mapping.
* Used ETL tool for Extraction, Transformation and Loading the data into target database.
* Involved in the development of Test Plans, Test Cases and Expected Results, and coordinated the tests with the QA team to verify implementation of new features and enhancements.
* Conducted UAT testing and gave training to users about application.
* Used SQL queries to analyse data for decision making.
* Worked with the Project Manager on various Project Management activities like keeping track of Project Status, Deadlines, Environment Request, and Compliance Issues.

**Environment:** Windows XP, SQL, MS-Visio, Rational Rose, Oracle, MS-Project, Rational ClearQuest, Requisite Pro.

**Wells Fargo, San Leandro, CA**

**April- 2014- Dec 2015**

**Business Analyst**

Wells Fargo is the leading Financial Service company in California, offering banking, insurance, investments, mortgage and customer finance. One of the big four banks in US and one of the premier private lending institutions. It provides broad range of banking and investment management products and services. It also provides wealth management services to high net worth individuals. My project is the development of a model for the valuation of portfolio that is helpful for the analyst in making investment decisions, recommendations and action.

**Responsibilities:**

* Analysis and understanding the existing functionalities and new requirements for the application development.
* Involved in Requirement Gatherings for all the interfaces in integration
* Responsible for documenting business, functional requirements, and technical specs for converting their reports from Crystal to SQL (SSRS); application enhancements, optimization, and upgrades.
* Facilitate daily scrum, sprint planning and sprint retrospectives meeting.
* Created User Stories, while describing the behaviour of the system and model them in MS Visio. Thus enabling effective mock-ups for demos to be shared with business owners.
* Provided functional and technical documentation, including Business Requirements, Functional Requirements, Use Cases and Design and Process flows
* Worked on release on multiple sprints after successful completion of sprints.
* Performed UAT testing on scrum completion.
* Responsible for Integration, Unit testing, bug fixing
* Provided technical writing support in writing, editing, and formatting of technical documents such as Requirements Specifications, Functional Requirements Documents (FRDs), Communications Plans, System Design Documents (SDDs), Standards Operating Procedures (SOPs), and Test Plans following System Development Lifecycle.
* Used object-oriented analysis and Agile for business requirements, business processes design (Use Cases using UML).
* Analysing data and querying SQL tables, views, and reports for updates, changes, and functional support.
* Experience integrating salesforce.com with other apps.
* Involved in Salesforce.com application Setup activities and customized the apps to match the functional needs of the organization.
* Was responsible for conducting testing on campaign reporting of Salesforce Cloud Enterprise Edition application.
* Prioritized outstanding defects and system problems, ensuring accuracy and deadlines were met.
* Prioritized business and systems problems; analysed legislation and conducted impact analysis.
* Provided the Project Manager with high level design documentation, used to communicate the software enhancement to the client. Using Microsoft Power Point and Visio.
* Implementing the background jobs and monitoring the background jobs 24X7
* Participated in client business requirement workshops, analysed business and functional requirements provided by the client to create User Stories and Use Cases.
* Worked closely with Data Architect to review all the conceptual, logical and physical database
* To support UAT (user acceptance testing) for the new enhancements or developments on ONE PLAN application.
* Preparing necessary documents for unit testing. Preparation of test case documents to test the business/technical functionality of the application.

**Environment:** Windows Server 2008, Oracle, MS Excel, MS Visio, MS Project, SOAP, UML, SDLC/Agile, HP ALM.

**JP Morgan Chase, Sugarland, TX Sept 2012- March 2014**

**Business Analyst**

JPMorgan Chase & Co. is a multinational banking and financing services holding company headquartered in New York City. It is the largest bank in the United States by total assets. The project was to design and develop a derivatives exchange application. This application supports front-end trading access via internet, risk management for futures and options exchanges. It also provides a variety of strategies modules and pre-trade analytic.

**Responsibilities: -**

* Conducted JAD sessions to allow different stakeholders to communicate their perspectives with each other, resolve any issues and come to an agreement quickly.
* Involved in requirement gathering using Rational Requisite Pro, which included interviews, brainstorms and meetings with stakeholders.
* Identified the current business process, documented the work flow and improved the efficiency of the current business process.
* Extensively involved in all the waves to make sure that documented functional requirements are met.
* Identified and created all necessary Business Use Cases from requirements, created UML Diagrams including Use Cases Diagrams, Activity Diagrams, Sequence Diagrams, and Class Diagrams using Microsoft Visio.
* Involved in the creation and maintenance of the Workflow plans and artefacts for all the waves
* Implemented an integrated RUP solution with complete line of traceability for all the artefacts of web development projects.
* Worked on Derivatives Trading Cycle, Derivatives Pricing, Sales and Marketing, and Performance measurement.
* Involved as a SME in the decision making regarding the securities and derivatives products.
* Maintained and kept track of stakeholders’ requests for enhancements and changes using Rational Clear Quest.
* Expertise in Performance Management, Asset Management, Credit Management, Client Reporting and implementing its benefits.
* Understood the business logic, User Requirements and test-objectives to develop test plans, test cases, and test case execution using Test Director.
* Tested the application manually by executing Test Cases prior to Automation.
* Involved in automating test cases using QTP and Load Runner.
* Performed all kinds of testing including regression, system, integration, end to end, smoke, functional, back end and front end testing.
* Participated in Bug-Review meetings with software developers, QA engineers, managers and suggested enhancements to the existed application from business perspectives, provided solutions to existing bugs.
* Conducted UAT (User Acceptance Testing) to make sure that all the user requirements are catered by the application.
* Worked closely with Data Architect to review all the conceptual, logical and physical database design models with respect to functions, definition, maintenance review and support Data analysis, Data Quality and ETL design that feeds the logical data models.
* Involved in preparing a simple and detailed User manual for the application, for an intended user.
* Used Microsoft Project to manage schedules, deadlines, resources and collaboration on the project.

**Environment:**

UML, Microsoft Office(Word, PowerPoint, Access, Excel Macros and Pivot, Outlook, Project, Visio), UML, HTML, Oracle, SQL Server Reporting Services.

**Citibank, New York, NY**

**Jan 2011– Aug 2012**

**Business Analyst**

Citibank is the third largest bank holding company in the Unites States by total assets. In addition to the standard banking, it also offers insurance, credit cards and investment products. The project involved developing a risk analysis and modelling system for the collateral pools that are to be securitized. It was intended to help the business users to structure the securities based on collateral pool characteristics. Credit Risk and Prepayment Risk could be assessed and the system could also determine loss provisions based on the expected range of loss estimated by foreclosure frequencies and loss severity of the mortgages. The rating criteria used by the various Credit Rating Agencies such as Fitch, Moody’s and Standard and Poor's could be applied to calculate the level of Credit Enhancement required for the various trenches of securities.

**Responsibilities:**

* Conducted brainstorming sessions to extrapolate the requirements that are not stated.
* Worked with business sponsors to elicit business/functional requirements and generated use cases in accordance with RUP Best Practices.
* Extensively used Rational Requisite Pro to document, review and analyze the requirements.
* Used UML and RUP methodology to capture, analyze and translate business requirements
* Developed business Use Case scenarios, sequence diagrams, and class diagrams.
* Prepared Rational Suite (Clear Quest and Requisite Pro) training materials for user and administrators and trained nearly thirty of them in the branch office.
* Structured flexible test plans, test cases and test scripts to test entire application based on business requirements, technical specifications, product knowledge and use case scenarios.
* Experienced in Loan Origination.
* Experienced with End to End aspects of Loan Origination System (Setup, Configure, Process Flow, Loan Origination Processing).
* Addressed all aspects of the loan life cycle, starting from identifying a prospective client to the loan closure.
* Participated in project review meetings to resolve defect related issues.
* Revised existing documentation comprehensively to enhance the ability of the stakeholders to proceed with the next major phase of developing the application.
* Performed User Acceptance Testing on behalf of end-user to ensure that the user requirements are satisfied and properly tested.
* Assisted in implementation and deployment of the best SCM processes with seamless integration among various phases of Software Development Life Cycle (SDLC) such as Change Request and Product Life Cycle Management utilizing UCM component of Rational Suite.

**Environment:**

Rational Requisite Pro, UML, Windows 2000, UNIX, Microsoft Office suite 2007, MS Visio, SQL server.

**Barclays PLC, New York, NY**

**Jan 2010– Dec 2010**

**Business Analyst**

Barclays is one of the big broker dealers for the US treasury bonds. The software was developed to take care of the back office operations of the T-Bills/T-Notes/T-Bonds that were traded so as to settle the trade in T+1 day. It has the features of reporting to FRB about the trade activity. It was also developed to manage the operations of the corporate bonds.

**Responsibilities:**

* Interacted with portfolio analysts and asset managers heads to finalize the Business Requirements for the application.
* Conducted JAD (Joint Application development) for the requirement gathering and used Rational Requisite pro to analyse and prioritized the requirements.
* Performed the requirement analysis and documented the requirements using Rational Requisite Pro.
* Used RUP methodology to define user’s requirements and to design the final system.
* Produced the visual models for the application using Rational Rose to create use cases, state charts, sequence diagrams, deployment diagrams, and activity diagrams.
* Followed a structured approach to organize requirements into logical groupings of essential business process, business rules, information needs and insured that critical requirements are not missed.
* Involved in mapping and improving the current business process.
* Assisted Portfolio Manager in Equities, Fixed Income Securities, Derivatives, Mortgage Products, mutual fund, hedge fund and asset backed securities.
* Experienced in FX, closely interacted with designers and software developers to understand application functionality and navigational flow and keep them updated about Business user’s sentiments.
* Involved in analysis of various types of risks (Credit Risk, Market Risk) which impact the portfolio management.
* Analysed system requirements, developed detailed Test plan, Test cases, Test scripts for testing the functionality, GUI and security testing.
* Performed risk analysis of the requirements to identify the key business risk areas for the project and prioritized the application development and testing.
* Facilitated the weekly meetings with the review teams to continuously improve the QA process for the application development.
* Used power point presentations for conduction walkthroughs with the stakeholders.
* Conducted walkthroughs with the end users and stakeholders to gather the modification requests from the user to upgrade or change the business specifications for the product.
* Monitored and analysed the development of cascading style sheets in HTML at front end.

**Environment:**

Microsoft Office suite (Word, PowerPoint, Access, Excel Pivot, Rational requisite pro, Outlook, Project, Visio), Windows, Microsoft SQL Server, Oracle, ML, PL/SQL, SQL, Quality Center .