Term Project

Team 20 - Milestone IV

msci 100

FinanceBot

User Manual

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# 1.0 Introduction:

This project aims to create a decision support system that will help any decision-maker make decisions. Our team has approached a client working in a firm for digital authentication and financial crime. Out client is the product owner, meaning he is in charge of determining product features and planning out the schedule for executing these features. He oversees assigning the right resources and capital in the correct places.

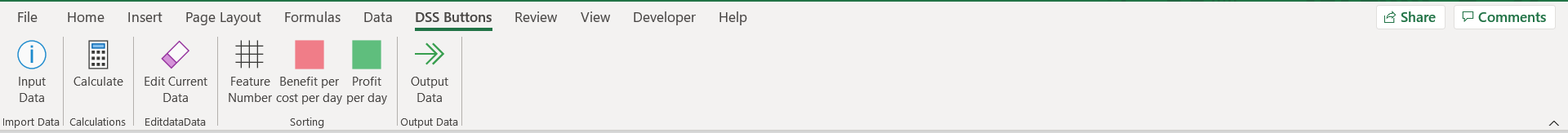
Our client must decide which of the features presented are the best options. This is done by taking into consideration factors like cost, benefit, and effort of each option, while also making sure of the ‘mutually exclusive’ and ‘precedes’ conditionals. The main problem that our client is facing is that his work is mainly manual, and very time consuming. Our Aim is to support key decision making using quantitative analysis. Therefore, we are aiming to automate most of his work and make it easier for him to navigate between the options using VBA on excel.

# 2.0 Description of the DSS Application:

1. User has a widget to rank features based on benefit per day
2. User has a widget to rank features based on profit per day
3. DSS manipulates data with considerations of conditions of mutually exclusive features and preceding features
4. User can enter data manually or import it from an existing file on their device as the user might have up to 500 features to be taken into consideration.
5. User can use a widget to display data in chart form (current selection includes bar and line graph)
6. User can delete data to remove any erroneous data which might affect the DSS’s quantitative analysis. User will see a Message Box that prompts them to enter the row to be deleted.

# 3.0 Installation instructions:

1. Install the excel macro file
2. Give permission to the Excel File and enable the macro content
3. Open File>Options>Customize Ribbon>Import/Export>Import Customization File.
4. Look for the location of this workbook.
5. You will find an EXPORTEDUI File that has a name of “CustomRibbon”.
6. Select the File and update the ribbon.

The Ribbon will look like this:

# 4.0 Entering Data:

To enter Data, click on the Input Data Button, then:

## To enter Data from an Existing File

1. Click on *Select File* and select the file from the file browser
2. Choose the sheet that has the Data you want to import.
3. Type in the letter of the column in which the different factors are present in. (Ex. If the Feature number is present in column B, then type “B” in the designated textbox.) *(Note: Make sure that the file you select does not contain any merged cells within the data range or any empty rows.)*
4. Graphical user interface, application, Excel

   Description automatically generatedDecide if you want this data to be moved into a new data sheet or an existing one. If you want to import the data into an existing sheet, then you must choose the sheet that you want to import it to. *(Note: Choosing to import the data into an existing sheet will overwrite the data. If you do not want to overwrite the data, see the next section 3.2)*

## Entering Data Manually

1. Click on *Enter Data Manually* (Page 2) from the Input user form.
2. First off, decide if you want the data to be transferred into an existing sheet, or into a new sheet. If you want it onto a new sheet, then you must specify the sheet using the combo box.
3. Enter values for Feature Number, Cost, Benefit, Effort, Mutually Exclusive Features and Preceding Features.
4. Click on the *Insert Data* button, and then the data will be inserted into the sheet. The text boxes will reset for you to enter more data.

*NOTE: The user form will not close unless you decide to close it.*

# 5.0 Generating DSS Output:

1. Click on the *Calculate Output* button, which runs preset formulas and calculations.
2. This will calculate two ranks that you can choose to assess the data according to:
3. The first rank gives you the Profit per day, which is the amount of profit you can gain from each feature per day.
4. *Graphical user interface, table, Excel

   Description automatically generated*The second rank gives you the benefit per cost per day, which gives you the amount of benefit you can gain per the cost per day for each feature.

# 6.0 Contextualizing and Charting Output Data:

1. Click on *Generate Statistical Analysis* Button, which will display a form consisting of two pages:
2. Graphical user interface

   Description automatically generatedThe First page is called *Statistical Analysis Page.* This displays general statistical statements about the top 5 Features, the Worst 5 Features, and some statistical statements about the relationship between the features.
3. The second page is called *Charts and Graphs.*  This allows you to generate different charts and graphs for the given input. Choose the sheet that has the data you want to analyze, then choose the chart that you want to look at from the combo box.

Graphical user interface

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1. Graphical user interface, application, table, Excel

   Description automatically generatedThe charts that you selected will be displayed in the “Outputs” Sheet.

# 7.0 Edit and Sort Current Data:

## 7.1 To Edit Current Data, click on Edit Feature button, then:

### 7.1.1 To Edit a Feature’s Characteristics:

1. Click on *Edit Feature Characteristics* (Page 1) from the user form.
2. Enter the Feature number you want to edit in the textbox.
3. Click on *Go to Feature* button*,* which will take you to the row that contains the feature number and its characteristics.
4. Manually edit the Feature’s characteristics.

Graphical user interface, table, Excel

Description automatically generated

### 7.1.2 To Remove Click on Delete Feature row button

Click on the *Remove or Delete a Feature* (Page 2) from the user form.

Enter the Feature number that you want to remove in the textbox.

Click *OK* button, which will delete the feature after a message box appears ‘Are you sure you want to delete feature #?’

Graphical user interface, application

Description automatically generated

## To Sort Current Data:

To sort the data that is available in the worksheet, there are three sorting options that you have:

1. Sort according to feature number, this sorts the data according to the feature number in ascending order
2. Sort according to Profit per day, this sorts the data according to the profit per day in descending order.
3. Sort according to Benefit per cost per day, this sorts the data according to the benefit per cost per day in descending order.

# 8.0 Troubleshooting:

* All features have been tested and made error-proof
* Despite this, if there are any errors, please contact anyone from our team, and we will correct the errors

# 9.0 Contact details:

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| --- | --- |
| Name | Email |
| Omkaar | okamath@uwaterloo.ca |
| Joseph | jsakkab@uwaterloo.ca |
| Anna | s597lee@uwaterloo.ca |
| Anushka | aasharda@uwaterloo.ca |
| Rama | r2alaghbar@uwaterloo.ca |
| Sunith | sareng@uwaterloo.ca |

# 10.0 References

We chose this format after understanding and defining what the user manual is. It is a document to be read by the user to understand how to use our application. So, we have optimized it for the users ease of understanding, and kept the technical jargon to a minimum

User Manual Template and Guide to Create Your Own Manual in 15 Steps. (2020). Retrieved 13 November 2020, from https://instrktiv.com/en/user-manual-template/