![Xoriant logo]

CASE STUDY

IMPROVED INQUIRY PLATFORM WITH ENHANCED AUTOMATION FOR A MAJOR AUDITING FIRM

50-70% performance boost with Dashboard enhancement. Faster and hassle-free query resolution after automating the existing query process.

Client Background

Our client is one of the Big Four auditors and leading providers of professional services in the area of risk, financial services, business advisory, internal audit, corporate governance and tax and regulatory services. The client had built an inquiry platform which caters to the needs of all the entities from across the globe who are part of the auditing process. The inquiry platform focuses on processing those queries related to compliance, making sure all the pre-requisites for auditing such as legal documentation and other critical data are fulfilled by the auditing partners.

The client had created a solution for automated tracking of resolution of queries. However, the existing dynamic dashboard and inquiry submission form took a long time to load and the query process was still time-consuming for platform users. Also, the existing communication module was inefficient with lack of clarity on status of the query raised by a user and the functionalities for sending follow-ups were basic. Xoriant's expertise was needed to address and resolve the performance issues with the dashboard and the communication module of the inquiry platform. The key objectives included:

- Improve existing inquiry submission form and dashboard by rectifying performance issues.
- Modify the Communication module for effective query resolution.

Xoriant Solution | Key Contributions

Through this engagement, Xoriant helped the client to develop new features and improve developed features of the inquiry platform for faster processing of query requests. Xoriant's dashboard enhancements and

KEY BENEFITS

- Improved performance of different phases of the query process by around 60% with dashboard enhancement.

- Minimized the time taken to fetch inquiry data and display it on the dashboard from 25-30 seconds to 7-8 seconds.

- Simplified information management with a centralized intake form for query application users.

- Improved tracking of resolutions and required communications between users and approvers.

newly developed inquiry application form features enabled the auditing partners to raise a new query, track it and quickly close the document verifications to proceed further with the auditing process.

Our key contributions included:

1. **Enhanced dashboard for better performance**
- Developed a dashboard with drill-down feature for Inquiry Management.
- Modified and enhanced the backend logic for fetching data
- Enhanced the dashboard by implementing logic in Web API and SQL Server.
- Catered to UI Design feature requests from various stakeholders.

2. **Developed new features for the Communication module**
   Incorporated advanced features to improve the performance of the communication module:
- Added an attachment tile in the Inquiry Submission Form UI for allowing the user to add an attachment from the main email inquiry.
- Added a background job which monitors the incoming email responses and updates the database with latest emails.
- Implemented logic in Angular and Web API to accommodate the new functionalities.

3. **Implemented dynamic Role-Based Menu and configurable shared Enquiry for secure handling of inquiries**
- Resolved issues related to audit log added on the Admin Screen and Inquiry Platform problem resolved. Earlier, incorrect login status entries were being displayed and updated status entries were missing. Xoriant experts rectified the errors and improved the audit log.
- Included the last modified date on reviewer form to ensure accountability for reviewers as per the timelines mentioned in their SLAs.
- Rectified the flaws in the functioning of Active/De-active users feature on 'Manage Users' screen.

Technology Stack

ASP.NET API | Angular 6 | MVC | C# | SQL Server | Inquiry Platform

KEY BENEFITS

- Helped platform users with an enhanced communication module which makes responding to emails easier with additional features like adding attachment to the main inquiry, linking the email to the main inquiry, etc.

- Improved the process of legal document verification for platform users.

Xoriant is a product engineering, software development and technology services company, serving technology startups as well as mid-size to large corporations. We offer a flexible blend of onsite, offsite and offshore services from our 13 global offices with over 4000 software professionals. Xoriant has deep client relationships spanning over 30 years with various clients ranging from startups to Fortune 100 companies.