

NovaCorp · Designer Home Assignment

User Stories

Three personas, nine stories, the platform anchored to the work each user is actually trying to do.

GUIDING PRINCIPLE

Benchmarking starts with data cleaning. Every story below ladders up to a moment in the workflow where trust in the data, or trust in the agent's reasoning, is the real deliverable.

Jobs to be done — at a glance

| Persona | Top job-to-be-done |
|----------------------------|---|
| Procurement Manager | <i>"Help me know which vendors I need to push back on this week — and how much money is at stake."</i> |
| Finance Controller | <i>"Give me numbers I can defend in front of the audit committee, and tell me where the trend is going."</i> |
| Operations Analyst | <i>"Let me trust the data before anyone else uses it — and let me drill into the invoice when something looks off."</i> |

Persona 1 · Procurement Manager

PROCUREMENT MANAGER**Maya · Director of Procurement, EMEA****CONTEXT**

Owns vendor relationships across 12 countries. Reviews the previous week's exceptions every Monday morning. Has 30 minutes before her first call to triage what to escalate.

TOP JOB-TO-BE-DONE

"Help me know which vendors I need to push back on this week — and how much money is at stake."

US-1.1 Procurement Manager

As a **Procurement Manager**, I want a single dashboard view that ranks vendors by compliance rate and financial exposure so that I can spend my limited Monday review time on the vendors that matter most.

ACCEPTANCE CRITERIA

- ✓ Top 5 / Bottom 5 vendor list visible above the fold on the Compliance Overview screen.
- ✓ Compliance rate dual-encoded as a percentage and a visual bar.
- ✓ Sortable by exposure \$; sticky filter bar above the table.
- ✓ Hover a vendor row to see a 30-day mini-trend.

US-1.2 Procurement Manager

As a **Procurement Manager**, I want to see which line items deviate from the signed contract and by how

much so that I can build a credible recovery case in my next vendor call.

ACCEPTANCE CRITERIA

- ✓ Invoiced vs Expected columns rendered side-by-side on Invoice Detail.
- ✓ Deviation amount in red when non-zero, green at \$0.
- ✓ Contract reference linked from the invoice header.
- ✓ One-click export to share the breakdown with the vendor.

US-1.3 Procurement Manager

As a **Procurement Manager**, I want the system to tell me when an issue is systemic vs one-off so that I know whether to escalate to procurement strategy or just dispute the line.

ACCEPTANCE CRITERIA

- ✓ AI insight panel connects related invoices (e.g., "17 invoices with the same root cause").
- ✓ Total \$ recoverable across the cluster shown explicitly.
- ✓ Confidence percentage visible on every AI insight.
- ✓ Two action paths: batch recovery vs review-one-by-one.

Persona 2 · Finance Controller

FINANCE CONTROLLER

David · Director of Finance

CONTEXT

Reports directly to the CFO. Builds the quarterly leakage report for the audit committee. Cannot afford surprises in front of the board.

TOP JOB-TO-BE-DONE

"Give me numbers I can defend in front of the audit committee, and tell me where the trend is going."

US-2.1 Finance Controller

As a **Finance Controller**, I want at-a-glance KPIs for total financial exposure and net leakage with period-over-period delta so that I can answer "what's our position?" without opening a spreadsheet.

ACCEPTANCE CRITERIA

- ✓ KPI cards in row 1 of the dashboard: % Compliant, % Partial, % Non-Compliant, Total Exposure \$, Net Leakage \$.
- ✓ Each KPI shows the delta vs. prior period with directional color (▲ up / ▼ down).
- ✓ Click-through from any KPI to the underlying invoice list.
- ✓ Export the KPI band as a single image for the board pack.

US-2.2 Finance Controller

As a **Finance Controller**, I want a waterfall chart showing how overcharges and undercharges combine into net leakage so that I can present a credible breakdown of the net impact.

ACCEPTANCE CRITERIA

- ✓ Waterfall: gross overcharges → gross undercharges → net.
- ✓ Hoverable bars surface exact figures.
- ✓ Color follows status semantics (red overcharge, green undercharge).
- ✓ Exportable as PNG and SVG.

US-2.3 Finance Controller

As a **Finance Controller**, I want to see compliance rate over the last 4 quarters so that I can validate that our investment in the platform is paying off.

ACCEPTANCE CRITERIA

- ✓ 4-quarter trend line on the dashboard, minimum.
- ✓ Tooltip on each quarter shows %, N invoices, \$ leakage.

- ✓ Inline annotation when a step-change occurs (e.g., +6pp Q3).
- ✓ Drill-through to the period view.

Persona 3 · Operations Analyst

OPERATIONS ANALYST

Sarah · Senior Ops Analyst

CONTEXT

Lives inside the ingestion logs. Catches what humans miss. Trusts the data only after she's seen the agent's reasoning.

TOP JOB-TO-BE-DONE

"Let me trust the data before anyone else uses it — and let me drill into the invoice when something looks off."

US-3.1 Operations Analyst

As a **Operations Analyst**, I want a before/after data quality score after every ingestion so that I can confirm the data is clean enough to be audited.

ACCEPTANCE CRITERIA

- ✓ Two circular gauges side-by-side (e.g., 67 → 94) on Data Quality Report.
- ✓ Issue type breakdown by category: missing, duplicates, schema mismatches, currency, invalid refs.
- ✓ Visible delta and direction.
- ✓ Score updates in real time as the pipeline progresses.

US-3.2 Operations Analyst

As a **Operations Analyst**, I want to see the AI cleaning pipeline as a step-by-step flow with status so that I know exactly what was auto-resolved and where I need to intervene.

ACCEPTANCE CRITERIA

- ✓ Vertical pipeline with 5+ named steps and connector lines.
- ✓ Each step has a status marker: success ✓ / running pulse / paused ! / pending number.
- ✓ Amber pause when human input is needed (e.g., vendor harmonization).
- ✓ Append-only log with timestamps next to the pipeline.

US-3.3 Operations Analyst

As a **Operations Analyst**, I want to drill from a flagged exception down to the specific invoice line that caused it so that I can validate the agent's reasoning before approving any recovery action.

ACCEPTANCE CRITERIA

- ✓ Click an exception → opens Invoice Detail with the offending line highlighted.
- ✓ Audit trail shows the source data and the rule that fired.
- ✓ Back-to-list navigation preserves filter state.
- ✓ Reject / approve override actions logged with author + timestamp.

Story → screen coverage

How the nine stories map to the four required screens. If a screen has no story serving it, the IA has a gap.

| Story | S1 Dashboard | S2 Quality | S3 Invoice | S4 Root Cause |
|------------------------|--------------|------------|------------|---------------|
| US-1.1 · Vendor triage | ● | — | — | — |

| Story | S1 Dashboard | S2 Quality | S3 Invoice | S4 Root Cause |
|--------------------------------|--------------|------------|------------|---------------|
| US-1.2 · Contract alignment | — | — | ● | — |
| US-1.3 · Pattern recognition | ● | — | ● | ● |
| US-2.1 · Executive overview | ● | — | — | — |
| US-2.2 · Waterfall breakdown | ● | — | — | ● |
| US-2.3 · Trend over time | ● | — | — | ● |
| US-3.1 · Data trust signal | — | ● | — | — |
| US-3.2 · Pipeline transparency | — | ● | — | — |
| US-3.3 · Invoice-level drill | — | ● | ● | ● |

User Stories · Yossi P.