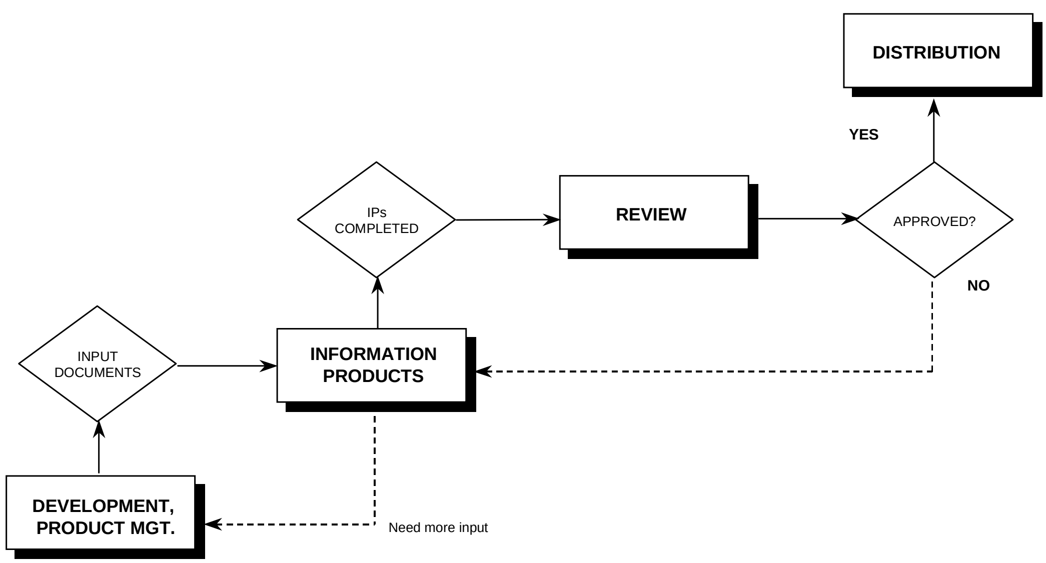
Information Products Process

eCommerce Solutions



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Contents

Introduction

This document describes the process used to develop Information Products (IPs) that support the software applications and services that NCR's eCommerce Solutions organization provides. It is addressed to all e-commerce development, support, and product-management personnel.

Why We Need a Process

It's a given. Quality documentation makes all of our lives easier. From development organizations to end customers, coherent, up-to-date documentation products enable us to develop, run, and maintain software products and services with ease, accuracy, and completeness.

By implementing a well-defined process owned by the Manager of Information Products, we should be better positioned to streamline and prioritize existing projects, as well as respond to unexpected needs and still keep information product development on track.

Who Uses eCommerce Information Products?

As in most development and support environments, a multitude of users rely on quality documentation to do their jobs and stimulate business growth. The following diagram depicts those audiences.

eCommerce Documentation Audiences

Following is a brief overview on how each of these audiences might use various types of information products.

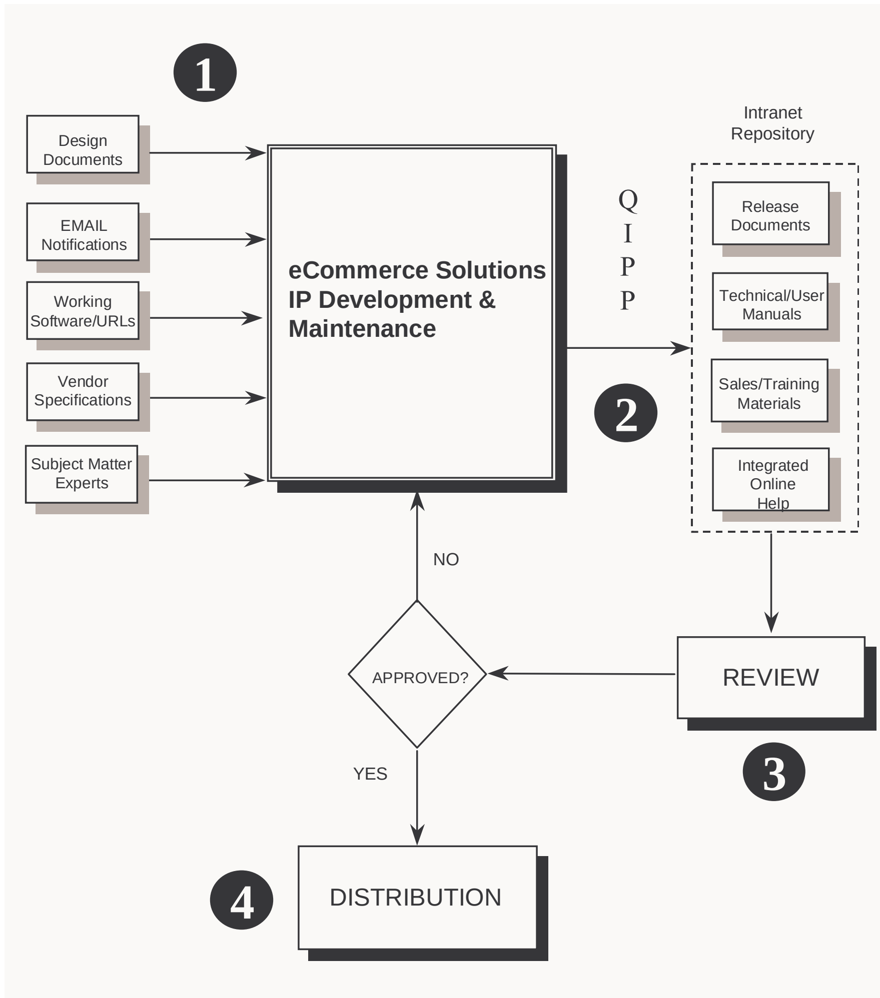
- **Developer —** Database layouts, field definitions, and program information help developers stay current with daily / weekly / monthly software changes, additions, and deletions.
- **Sales —** Contact Lists, User Guides, Product Descriptions, Pricing Information, and Demos enable sales personnel and other customer-facing associates keep abreast of new product offerings and whom to target for new business opportunities.
- **Financial Institutions —** Online Administrator procedures (in the form of integrated online help) enable bank administrators to better serve their end customers without having to contact NCR for help.
- **End Customers —** Online user procedures (in the form of integrated online help) enable consumers to easily understand and perform simple day-to-day tasks without having to call their financial institution for assistance.

- **Support/DBAs —** Database layouts, field definitions, program information, system operation procedures, and file-extract bank details enable support personnel to more easily identify, diagnose, and solve system-related problems.
- **Marketing —** Product Descriptions, Pricing Information, and Demos can assist Marketing staffs with developing marketing collateral (slip sheets, brochures, etc.) used for generating new business at trade shows, etc.
- **Vendors —** File-extract and Application Interface (API) documentation enables third-party software vendors to understand how to interface to our systems.
- **Product Management —** Contact Lists, User Guides, Product Descriptions, Pricing Information, and Demos enable our Product Managers to have instant, up-to-date documentation for training sessions and business-generating relationships with existing, new, and potential client accounts.

A Team Approach

Like any worthwhile endeavor, cooperation is the key to success. To make this process work, we must engage our efforts across the eCommerce Solutions infrastructure. Through a team approach, we can all effect excellent and timely information products that will meet the special needs of our customers.

Figure 1
Information Products Process Workflow



Information Products (IP) Process

As shown in Figure 1, the overall IP process consists of four major activities:

- Input
- Development and Maintenance
- Review
- Distribution

Step 1 — Input

After the eCommerce Development and / or Product Management Teams have determined what features / functions or changes to implement for any new or existing deliverables, they must submit the appropriate input to the Information Products Manager. Input can come in many forms, including:

- **Design Documents —** Identifies such things as screen changes, operational changes, database changes, test URLs with working passwords and test accounts, report changes, etc.
- **Email Notifications —** As a courtesy, email notifications can serve as a heads up that a new feature / function or change is coming. It also serves as an excellent protocol to identify system changes without having to re-iterate entire design documents.
- **Working Software —** Must be available to the Information Products Team for testing. Software can be freestanding applications, demos, or URLs from which testing can occur. Test passwords and working accounts must be available.
- **Vendor Specifications —** Each time eCommerce incorporates a vendor product (e.g., a vendor bill-payment module) into an NCR deliverable, the IP Team usually needs the vendor materials (specs, hard-copy, etc.) in order to develop the appropriate information products. The e-commerce liaison between NCR and the vendor is responsible for getting that information to the IP Team.
- **Subject Matter Experts —** For every project, one or more subject matter experts must be made available to the IP Team for questions and research purposes.

If any input lacks the appropriate detail, the IP Team will re-request the information and proceed with development ONLY after those needs are satisfied.

Step 2 — IP Development and Maintenance

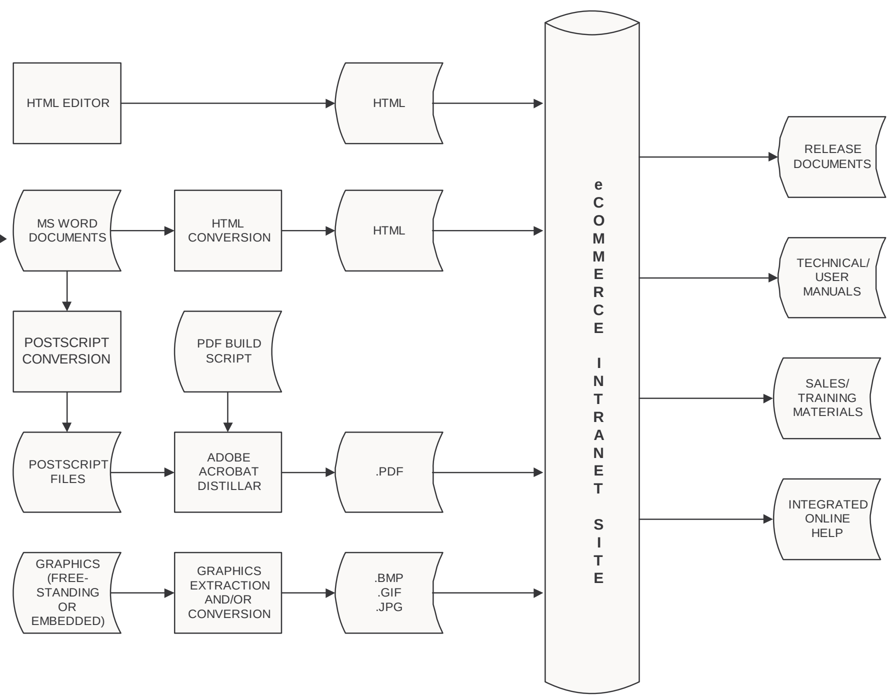
Using the input from **Step 1**, and NCR's *Quality Information Products Process* (QIPP) methodologies, the IP Team generates the appropriate information product deliverables. Deliverables can include (but are not limited to) the following:

- Release Documentation
- Technical / User Manuals
- Sales / Training Materials
- Integrated Online Help

All of these items are stored and maintained on the eCommerce Solutions Intranet Site, located at the following URL: **http://149.25.112.225/ecsdocs/EC_Info_Products.htm**

The following diagram illustrates the IP Team's production workflow as the writing process takes place.

eCommerce Solutions IP Team Production Environment

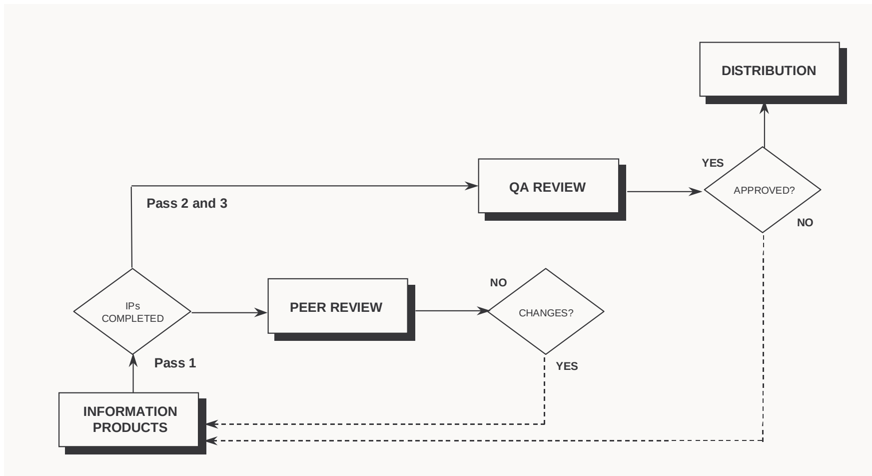


For paper-based documents such as technical and user guides, authors use special Word templates that support NCR's *Quality Format Guideline*. Each resulting book consists of multiple .doc files in order to support the required formats for the various components (covers, TOCs, etc.). For space-saving and re-use purposes, all graphics are linked, not embedded. For efficient deployment over email and intranet protocols, all documents are converted to single PDF files.

In this environment, authors use a variety of software products to generate source text (.doc, html, .pdf) and graphics files (.bmp, .gif, .jpg) stored in an intranet repository site for easy access and reuse. All paper-based documentation strictly adheres to the company's *Quality Format Guideline*. In addition, all online help files are configured for quick loading and integration into our Electronic Banking System maintained on shared and dedicated servers.

Step 3 — Review

Essentially, the review process takes place in three passes and involves key individuals and teams.



Pass 1: The IP Team submits completed IPs to product managers, developers, and development managers for a peer review. If necessary, additional peer reviews may commence before Pass 2.

Pass 2: The IP Team makes necessary corrections, and submits IPs to the QA Team for review.

Pass 3: The IP Team makes the necessary corrections, and submits final copy to QA for final approval.

Note: Although the eCommerce Solutions organization currently does not have a formal QA Team in place, its QA function does help enforce documentation standards. A more formal QA process would more than likely strengthen this activity even more.

Step 4 — Distribution

After QA approves the information products, the IP Team configures them accordingly on intranet sites, servers, CD-ROMs, etc. for distribution to the appropriate internal/external parties.

The No Input No Output Policy

To ensure that eCommerce information product deliverables are as successful as possible, the IP Team is committed to delivering quality, technically accurate, up-to-date documentation and training materials to our data centers and end users. Therefore, **INPUT IS CRITICAL.**

Figure 2
The NINO Policy

Besides the actual systems themselves, the design documents and other related input provide the most vital source material on which information products are based. Without them, the IP Team cannot confidently or accurately produce supporting documentation and training materials for significant undertakings such as internet banking, portals, account aggregation, and so on.

With these points in mind, we can conclude that if there is no input or missing input for any given project, that project will be assigned a pending status on the information-products schedule until all input requirements are met.

Special Note

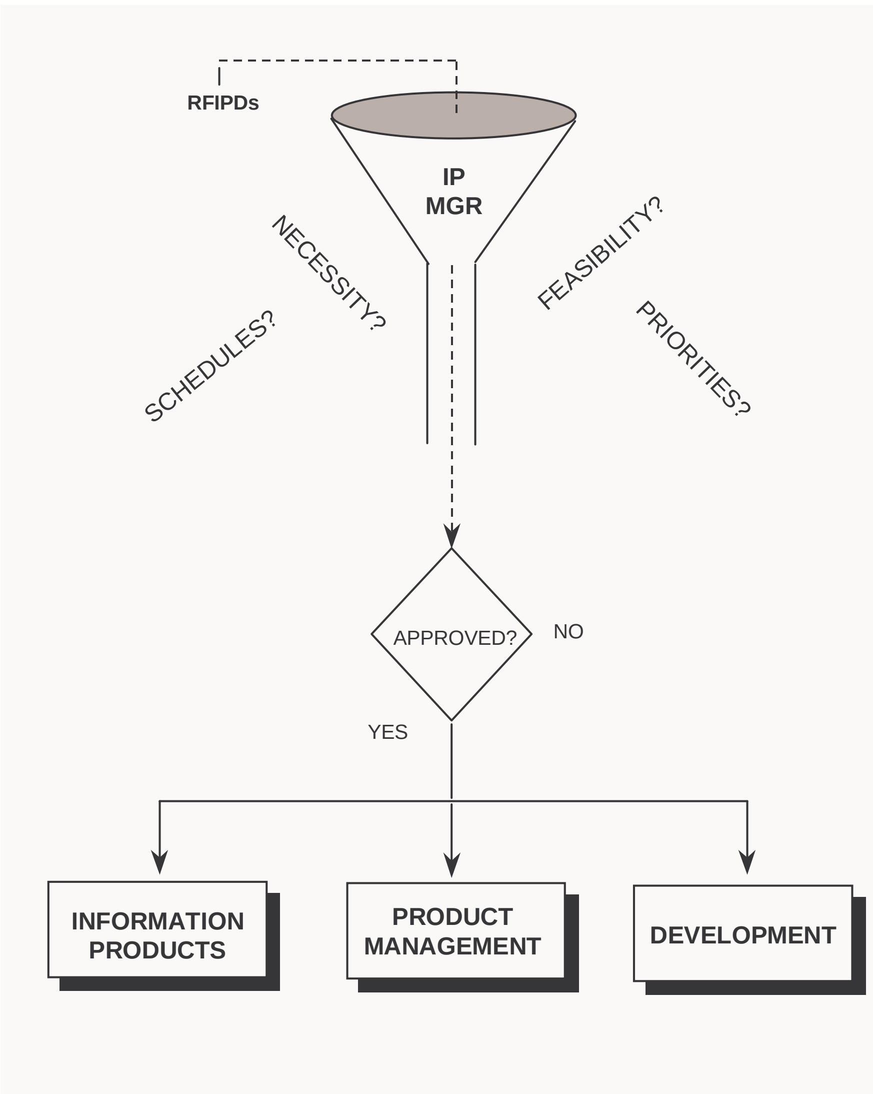
Although **formal design documents** have proven to be the best vehicle for documentation input and tracking software changes for a newly implemented feature, the IP Team is willing to accept change requests **via email** when it makes sense for quick information-product turnaround time.

The key here is to maintain an **adequate paper trail** that records changes for historical purposes. Verbal documentation changes are unacceptable, as they lend themselves to high error rates, misinterpretation. and no tracking mechanism.

Special Requests For Information Products (RFIPs)

New Development

All special RFIPs (special sales tools, vendor interface specs, etc.) outside the normally scheduled workflow must be funneled through the eCommerce IP Team. Upon receiving a special development request, the IP Team Manager works with other e-commerce managers to:



- Determine the feasibility of the request.
- Identify what impact the implementation would have on current IP projects and schedules.
- Adjust the project schedules and priorities lists accordingly to accommodate changes in the current workflow.
- Engage all pertinent organizations (development, etc.) with the IP Team.

From this point on, all parties must work as a team to follow the information products process. Ideally, under the IP Manager's direction, these collaborative efforts will ensure successful implementations for all projects with little or no disruptions in schedules.

NOTE: As high-priority projects are completed, the IP Manager will determine the order in which to move medium-priority projects into high-priority status. In doing so, all input requirements must be met before any information-product development takes place.

Other Requests

Many times, the IP Team receives requests to place documentation items from other sources on the eCommerce Solutions intranet site.

While some items are legitimate and fit in the overall IP scheme, many fall short of the site's overall scope. Therefore, the IP Team will follow the above process to determine those items that fit and those that do not. Additionally, for quality purposes, the **IP Team reserves the right to edit any submitted documentation item for grammar, readability, and usability**.