



RFP Assistant

Transforming Winning Proposals into
Customers — Quickly & Efficiently



A Functional Specification Proposal

by Steven A. Wicinski

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Introduction

What is RFP Assistant?

RFP Assistant is a web-based, password-protected solution that provides easy, organized access to the many informational elements needed to respond quickly to customer RFPs.

By using this system, RFP Developers can:

- Quickly scan through a series of information modules that are neatly organized categorically.
- Highlight and copy HTML-based information provided in pop-up windows.
- Easily paste information into the RFP-response document (typically a Word file provided by the requesting institution).
- Track an RFP's ongoing progress.

After NCR completes and approves an RFP response and any add-on documents (attachments), the receiving institution can:

- Access a special password-protected web page that outlines the contents of the entire RFP package.
- Display each component of the RFP package.
- Request a CD-ROM of the RFP package.
- Download a zipped version of the RFP.

All this before the hard copy RFP even arrives at the customer's site! In fact, this system eliminates the need for hard copy!

Why Do We Need This?

Currently, developing new RFP responses and attachments requires a lot of tedious referencing back and forth between former RFP packages. Developers have no where to go for consistent, coherent "base" information. Also, it's become increasingly difficult to keep track of what's already been written across so many RFP responses.

Using database technology, RFP Assistant provides a common place in which to store a variety of informational elements (organization charts, architecture schematics, disclosures, etc.) that proposal writers need during the RFP-development process. So, instead of searching through existing documents for information, developers can easily access and obtain well-categorized information from a well-organized database.

Useful Terms:

RFP R(equest) F(or) P(roposal) — A document that an institution uses to solicit comprehensive information about a company's products and/or services.

RFP Developer — The person(s) involved in preparing the *RFP Response*.

RFP Package — The RFP Response document, plus any accompanying attachments (charts, PowerPoint slides, etc.) used to gain a business relationship with the institution.

RFP Response — The primary RFP document NCR returns to the requesting institution.

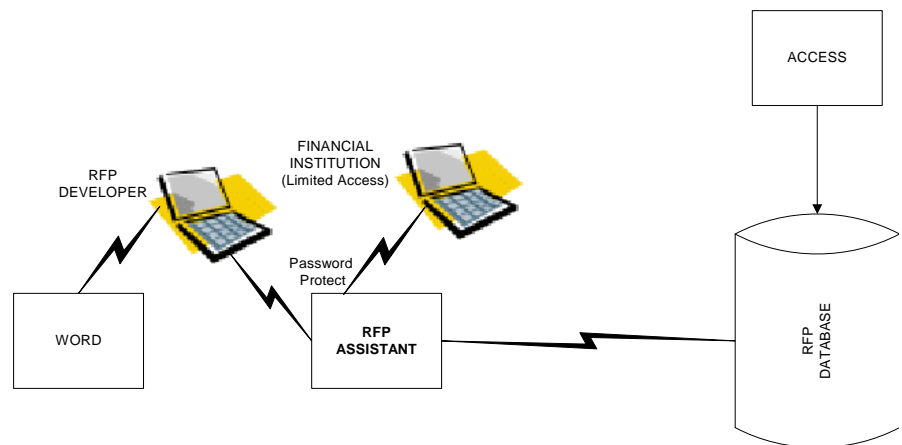
How It Works

After a user signs on to RFP Assistant, the system determines the user's level of access to the RFP database, then displays the appropriate supporting screens and menu items for the session.

The interface provides three levels of access, including:

- **Administrator** — Full database access and password-maintenance privileges
- **RFP Developer** — Full database access
- **Institution** — Restricted access to a specific RFP package only

Using a variety of search queries, developers can request informational elements on a wide range of topics. Once selected, each topic provides a pop-up window containing the supporting information. From the pop-ups, developers can easily and instantly copy and paste information into the appropriate areas of the RFP response.



After an RFP package is completed and resides in the database, the awaiting institution (a bank, a credit union, an insurance company, etc.) can immediately log into the password-protected RFP Assistant web site to access, display, download, and print the RFP information. As a result, the institution no longer has to wait for hard copy to arrive before reviewing the proposal.

With this capability, not only can we reduce our RFP turnaround time, we can place ourselves in a competitive advantage by offering just-in-time online information.

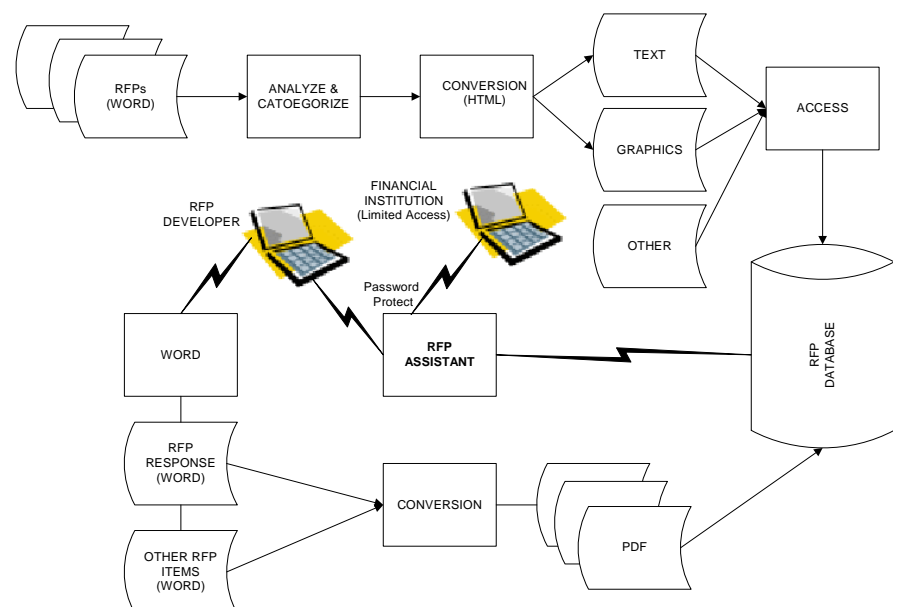
Implementation

Implementing RFP Assistant involves numerous tasks, including:

- Document analysis
- Information categorization
- Document conversion
- Database development
- Web site development
- Database/Web Integration
- Database Updates
- User Password Assignments & Maintenance
- RFP Package Editing
- Online RFP Deployment

Below is an illustration of the overall process, followed by brief discussions for each activity.

RFP Assistant Implementation Process



Document Analysis

Document Analysis involves looking closely at completed RFP packages prepared for a variety of institutions, identifying all the informational elements that are commonly used, and those that are customized. Ultimately, the goal is to identify a standard, ongoing list of information modules that will be used over and over again in future RFPs.

In addition to existing RFP-response content, we'll analyze content from the various supporting documents (attachments such as charts on pricing, project management tasks, etc.) that have been configured with our RFP packages.

Information Categorization

In this phase, as we evaluate our RFP Packages, we will decompose RFP responses so that we can assign them to informational categories. We'll then take the resulting categories and group them accordingly within the various document modules identified during *Document Analysis*.

Document Conversions

After all the document modules are configured with the appropriate information, we'll convert them to HTML text and web-ready graphics (specifically .JPG, GIF). In addition, there will be some modules that will remain in their native formats (e.g., Excel and PowerPoint files) and stored in the database as-is for reuse. After an RFP Package is completed, all of its contents will be converted to PDF for customer access.

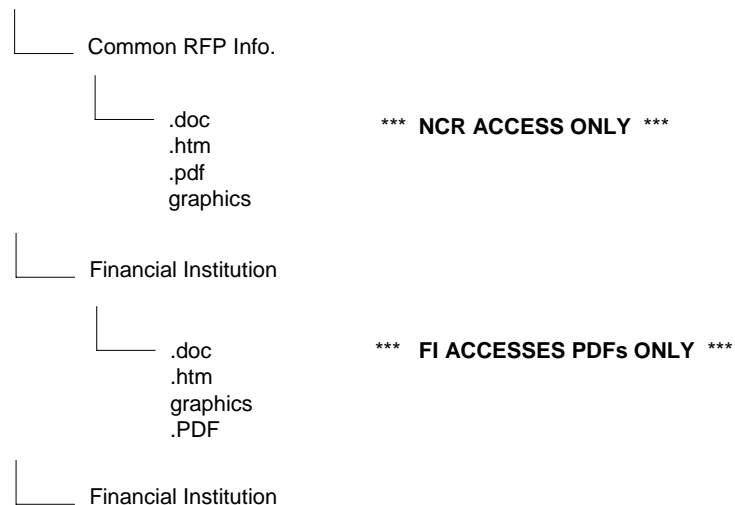
Why HTML?

Due to various template incompatibilities, it is often difficult to copy and paste information from one Word document to the next without poor results. Normally, HTML content minimizes this hassle and yields less clean-up and reformatting.

Why PDF?

PDF offers the greatest level of security for official information. Therefore, for web access, only PDFs will be available to customers who are awaiting their respective RFP Packages.

RFP DATABASE



As shown above, one common directory (accessible only by NCR) will warehouse the information elements used to complete NCR's RFP packages. That way, all RFP developers will retrieve the same

information from one place, thus eliminating any storage-related duplication and inconsistent content. Secondly, to ensure professionalism, each information module will be well written with consistency in grammar, content organization, and format – all qualities to ensure the utmost professionalism.

In addition, each financial institution will occupy a directory structure that maintains the proposal information exclusive to their organization. Through secure password protection, NCR will have access to all institution files, while each institution will have access only to their respective PDFs completed for RFP deployment.

Database Development

From an Information Products perspective, developing the RFP database involves various carefully planned activities, such as:

- Converting content from existing RFP Response documents to HTML text and web-ready graphics.
- Converting content from various other eCommerce documents to HTML text and graphics as well as PDF.
- Editing the content for consistency across all topics.
- Preparing MS Access database tables that the system will use when a user looks up and retrieves information elements.
- Developing the necessary programming code that enables communications between the database and the RFP Assistant web site.

Web Site Development

There are at least three levels of web site development to address for this project, including:

- Administrator
- RFP Developer
- End User (institution-specific)

Essentially, all user entry points will access the same database but with varying restrictions. Through password-protection techniques, users will perform tasks based on their specific security levels.

Database/Web Integration

In addition to all the standard web development, we will need to develop the necessary code that enables the Access database to communicate with the various web pages.

Database Updates

After the database is in place, it will be up to Information Engineers and RFP Developers to populate and maintain the database with new information in an ongoing manner.

**User Password
Assignments &
Maintenance**

After the system is in place, key individuals will be assigned an administrative role, allowing them to establish and maintain system access for other administrators, RFP Developers, and end customers. For more details, see *Administrator Procedures*, page 7.

RFP Package Editing

By working together closely, Information Engineers and RFP developers will ensure that RFP packages maintain a consistent look and feel as well as provide the appropriate, comprehensive information for each institution.

Online RFP Deployment

After an RFP package is approved, an Information Engineer will post the online RFP on the RFP Assistant web site, then set up the appropriate password access for the awaiting institution. An RFP Developer or Account Consultant will be responsible for notifying the institution with the passwords and procedures for accessing their completed RFP Package online.

Resources & Tasks Matrix

The following matrix ties in the aforementioned activities with the resources necessary to implement and maintain RFP Assistant.

Task	Info Engineer	RFP Developer	Programmer
1. Document Analysis	X	X	
2. Info Categorization	X	X	
3. Document Conversions	X		
4. Database Development	X		X
5. Web Design & Development	X		X
6. Database/Web Integration			X
7. Database Updates	X	X	
8. User Password Assignments & Maintenance	X		
9. RFP Package Editing	X	X	
10. Online RFP Deployment	X		

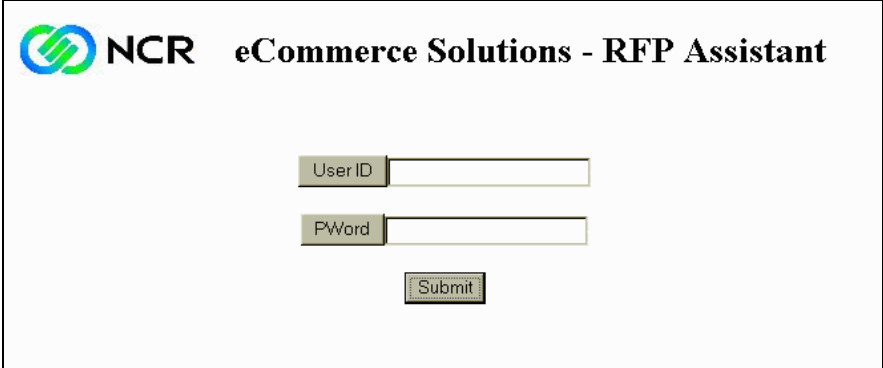
The remainder of this specification outlines the various step-by-step tasks and the interface screens that support them.

Administrator Procedures

Administrators have full access to the system. They can do everything RFP developers and institutions can do, plus they can set up and maintain system access for all users.

Accessing the System

1. Upon accessing the RFP Assistant URL, the *Sign-On* screen displays.



2. Complete the screen with your administrator **User ID** and **Password**. The *Welcome* screen displays.



Only administrators
can assign passwords.

Managing System Access

After signing on as an administrator, you can easily set up system access for a variety of other users, including other administrators, RFP developers, and institutions.

To launch this capability, select **Assign Access** from the *Welcome* screen. The *Assign System Access* screen displays.

Assign System Access Screen

From this screen you may establish access rights for new users, and delete access rights for existing ones. Following are step-by-step instructions for each option.

Adding a New User

1. From the *Assign System Access* screen, select **Add a New User**. The *Add User* screen displays.

Add a New User Input Screen

		***** System Access Capabilities *****		
User ID	Password	Admin	RFP Developer	Institution
<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

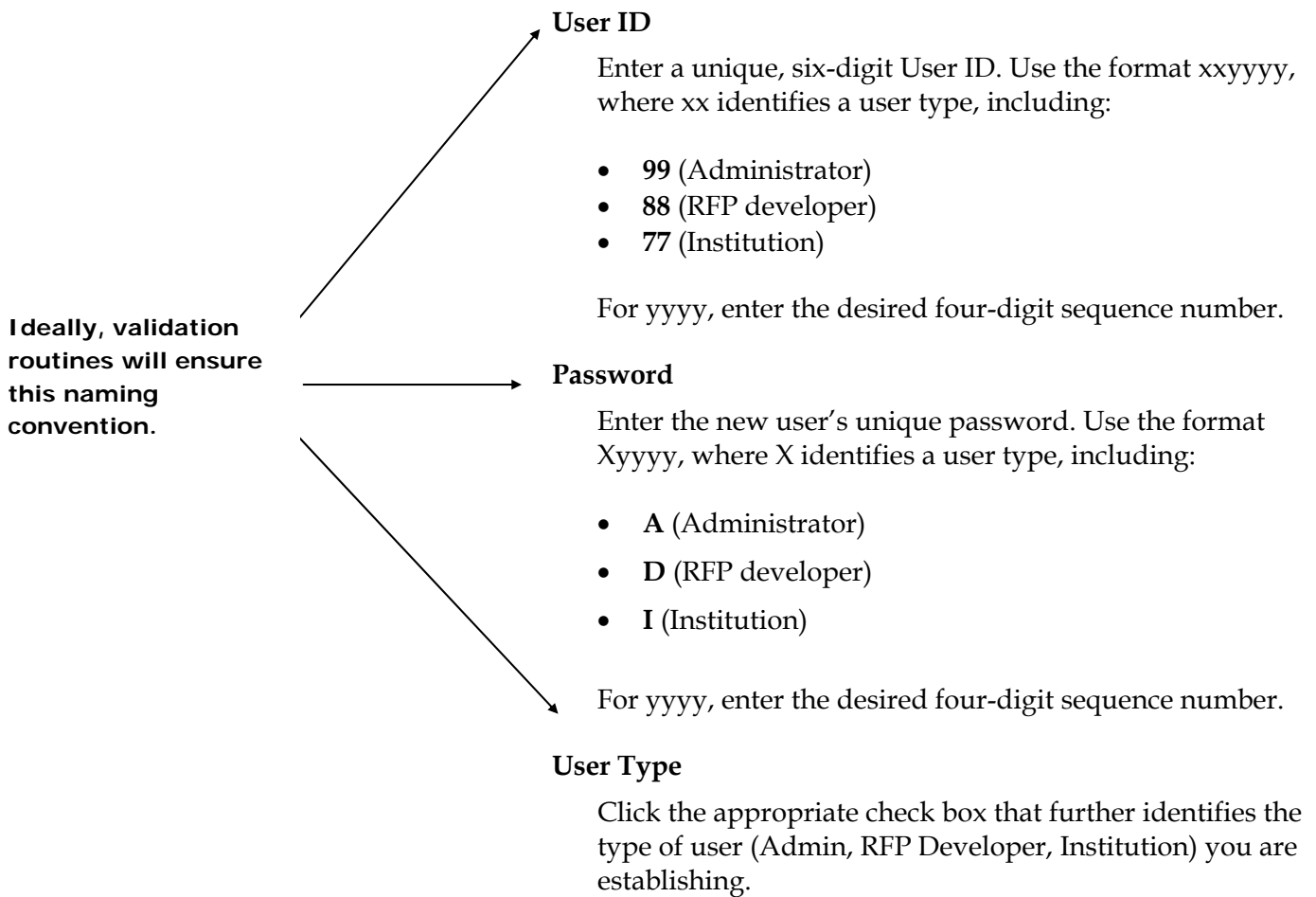
User ID Conventions:

- Begin Admin with 99
- Begin RFP Developer with 88
- Begin Institution with 77

Password Conventions:

- Begin Admin with the letter A
- Begin RFP developer with the letter D
- Begin Institution with the letter I

2. Complete the screen with the following information for each new user you are establishing.




3. Click **Submit**. A confirmation screen displays.

Deleting User Access

1. From the *Assign System Access* screen, select **Delete User Access**. The *Delete User* screen displays.

Delete User Access Screen



The screenshot shows the 'Delete User Access' screen within the 'eCommerce Solutions - RFP Assistant' application. The page header includes the NCR logo and the text 'Assign System Access' and 'Delete User Access'. Below the header is a table with two columns: 'User ID' and 'Password'. Each column contains a text input field. At the bottom of the form are two buttons: 'Submit' and 'Reset'.

User ID	Password
<input type="text"/>	<input type="text"/>

Submit Reset

2. Complete the screen with the appropriate User ID and Password.
3. Click **Submit**. A confirmation screen displays.

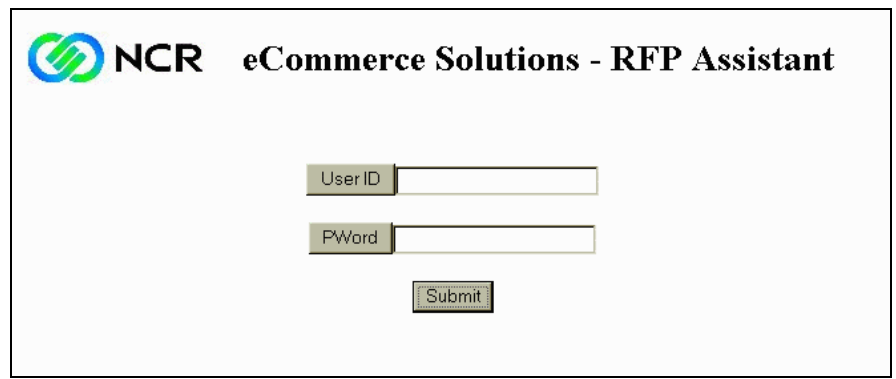
RFP Developer Procedures

Prior to each session, the RFP developer opens the RFP-response document (presumably a Word document) received from the institution. Then, using information obtained from the RFP Assistant database, the developer populates the proposal with answers to the various questions throughout the RFP response.

Accessing RFP Assistant

Sign-on Screen

1. Upon accessing the RFP Assistant URL, the *Sign-on* screen displays.



The screenshot shows the sign-on interface for NCR eCommerce Solutions - RFP Assistant. It includes a logo on the left, the title 'NCR eCommerce Solutions - RFP Assistant' at the top, and three input fields: 'User ID', 'PWord', and a 'Submit' button.

2. Complete the screen with the following values:
 - **User ID** – Assigned by an administrator.
 - **Password** – Assigned by an administrator.
3. Click the **Submit** button. The *Welcome* Screen displays.

Maintenance requests might apply to a future release.



The screenshot shows the welcome screen for NCR eCommerce Solutions - RFP Assistant. It includes the NCR logo and title at the top. A navigation bar contains links for 'Welcome', 'Search Database', 'Maintenance Requests', and 'RFP Status Report'. The main content area displays 'Welcome!'.

Database Searches and Information Retrieval

Database Search Screen

To find information on the database, the user performs the following:

1. Click **Search Database**. The *Search Database* screen displays.

Enter

Search for:

Go Reset

2. Enter a keyword or search category. (Perhaps, there could be multiple search buttons: one for a specific key word, and others with drop-down lists of information categories.)
3. Click **Go**. A results screen displays.

Database Retrieval Results

Requested information category

Each database hit opens a pop-up window

Category Requested	Supporting Information Modules
Architecture	System Architecture OFX Compliance Operating Systems SQL

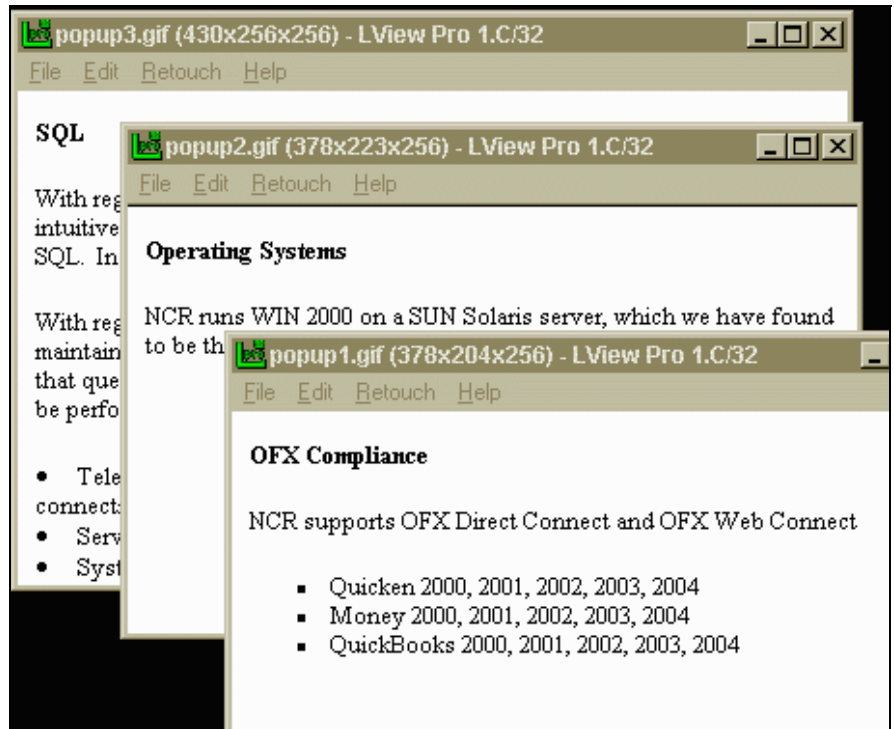
This screen provides a list of hits for each information category (left column) you requested. Depending on the categories, the supporting information (right column) could appear for more than one category.

NOTE: This screen shows one example of how information is categorized and cross-referenced on the RFP database.

4. To display an information module (right-hand column of the *Database Retrieval Results* screen), click the desired link. A pop-up window displays.

Pop-up Screens

The user can easily copy the information from a pop-up window and paste it into the RFP document.



Depending on the information you need, you might have to open several pop-up windows before you find exactly what you want.

5. If the pop-up contains the information you're looking for, highlight the information, copy it to the clipboard, and paste it directly into your RFP document.
6. Repeat **step 4-5** for each pop-up you wish to use.

After completing the RFP and all of its attachments, the developer forwards all documents to the Information Products Team (or a proposal center) for conversion processing and web delivery.

RFP Status & Review

To review the status of any given RFP, developers can access the RFPs as follows:

1. From the *Welcome* screen, select **RFP Status Report**. The *RFP Status Report* screen displays.

RFP Status Screen

Click to see RFP components currently underway.

Institution	Status
Hawaii National Bank	Completed
Institution X	In Process
Institution Y	In Process
Institution Z	In Process

2. Click the institution whose RFP you wish to review.

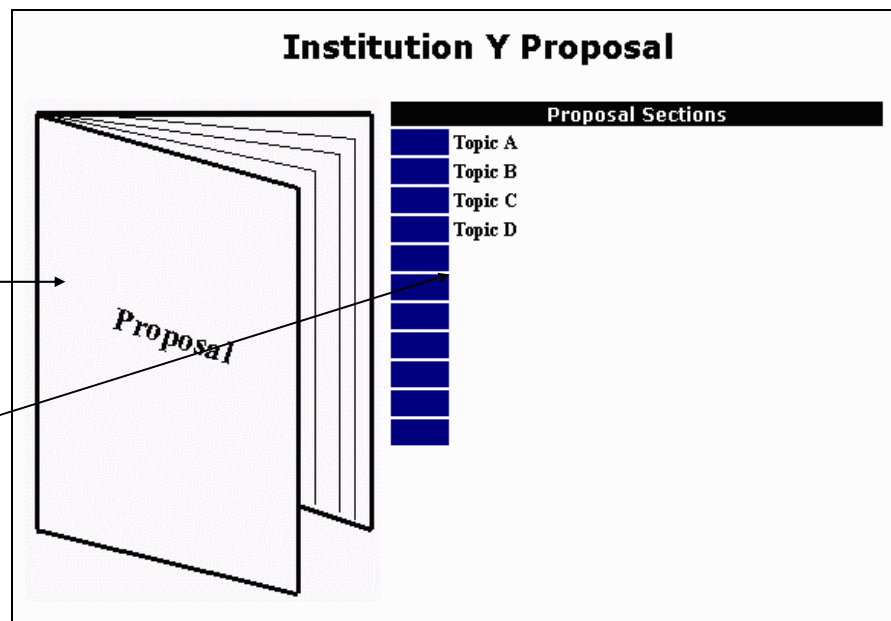
Proposals In Process

For proposals currently in process, the *In Process* screen displays.

Display For Proposal In Process

Default cover

Section topics, including RFP Response and attachments



Completed Proposals

For completed proposals, the following screen displays:

Display For Completed Proposal

Request CD

Get ZIP File

Hawaii National Proposal

Transforming Transactions into Relationships

A Proposal for Online Banking

Prepared by:
NCR Corporation
April 30, 2004

HAWAII NATIONAL BANK

NCR

Proposal Sections

- (1) [Table of Contents](#)
- (2) [Executive Summary](#)
- (3) [NCR Response](#)
- (4) [Pricing](#)
- (5) [Leadership Team Bios](#)
- (6) [Support Services & Escalation Guidelines](#)
- (7) [eCommerce Operations](#)
- (8) [Change Control](#)
- (9) [Account Summary](#)
- (10) [Metavante Bill Pay Admin Flow](#)
- (11) [Managing Entitlements](#)
- (12) [Alerts & Notifications](#)
- (13) [ACH Reports](#)
- (14) [Gomez Benchmark Report](#)
- (15) [Sample Project Plan](#)
- (16) [Master Solutions Agreement](#)
- (17) [Processing Services Addendum](#)
- (18) [Order Form](#)
- (19) [NCR 2003 Annual Report](#)
- (20) [Sample Test Script](#)
- (20) [Logical Data Architecture](#)

Link to Request a CD

Link to Request a Zip File

Front Cover as it appears with the printed RFP Package

Links to all the PDF components

Note: This is same screen the institution receiving the proposal will see.

Institution Procedures

Accessing the System

After an RFP and all of its components are completed, converted to PDF, and delivered on the RFP Assistant web site, the receiving institution can immediately access the online RFP Package.

1. Access the RFP Assistant URL. The *Sign-On* screen displays.

Highly secure,
institution-
specific sign-on

2. Complete the screen with the appropriate **User ID** and **Password**.

Link to Request a
CD

Link to
Request a
Zip File

Front Cover as
it appears on
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Links to all the PDF
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	Table of Contents
(1)	Executive Summary
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(3)	Pricing
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(6)	eCommerce Operations
(7)	Change Control
(8)	Account Summary
(9)	Metavante Bill Pay Admin Flow
(10)	Managing Entitlements
(11)	Alerts & Notifications
(12)	ACH Reports
(13)	Gomez Benchmark Report
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