Parameter Documentation Proposal

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SUMMARY

Objective

Improving the existing documentation of the parameters used by the key backend software on the internal Wiki-Tool from Business point of view. Additional tasks can be done based on agreement and priority for Central Eastern Europe stakeholders.

The existing documentation frequently lacks information about
- Why the parameter was created
- In which business case the parameter has to be set up
- How the parameter will influence the business process
- How the parameter correlates with other parameters (Interdependencies of Parameters)

The objective of this assignment is to improve these four areas for a specific set of parameters as offered below.

If requested, I can also update the broken hyperlinks to other parameters (**see Precision - Option 1**)

If requested, I can provide a business requirement to remove unused parameters (**see Precision - Option 2**)

Whenever feasible, additional more technical information can be added (**see Precision - Option 3**)

Validations of Parameter documentations can be done only under specific conditions (**see Precision - Option 4**)

Approach

Step 1: Collecting information about Parameters by interviewing experts and using the already available information (e.g. personal knowledge, documents on the document management system, local/country parameter documentations, etc.)

Step 2: Adding the missing business related information to the internal Wiki-Tool

Effort

It is expected that the effort is ca. 1,5 - 2 hours per parameter (for me). Additional coordination and interview effort of 10 hours must be taken into account. The proposal is based on a time and material mode.

PRECISON

(…)

Option 1:
Additionally, I can update the links (hyperlinks to related documents/parameters) that were broken due to the recent updates of the documentation resulting from a refactoring of several parameters within the most recent software release.

Option 2:
Based on a first assessment of the parameters I also recommend a clean-up of parameters that are not used - this could be especially interesting, as the performance of the parameter user interface is not satisfactory for users. Based on agreement the assignment can be extended (follow-up action) to provide a business requirement for removal of unused parameters. Parameters that are not used by the software but are used for other purposes (Reports, etc.) will be excluded from the removal proposal.

Parameters that can be documented

For the following parameters it is possible to provide additional information. **Please indicate the priority (3 = most important, 2 = important, 1 = interesting, if possible).**

(…)

Technical information to parameters

Based on information of Shared Service Center members, the following technical information is missing on various parameters

- Category of the parameter (e.g. Main area that is influenced by the Parameter) with the possibility to filter on this Category (Useful for future roll-outs of the software to other countries)
- Priority of the parameter (within one category and per product type. E.g.: Priority 1 - must be set or reviewed, depends on the product and parameter is important in all countries. Priority 2 - recommended to be set or reviewed. Probably similar for some risks/similar products. Priority 3 - Default values are usually correct. Different values must be set up only for some countries or very special products/ partners.)
- Stored procedures that use that parameter (if any)
- Special cases for data imports - rare cases, specific cases of datafile processing that must be considered when setting up a new product

Within this assignment it is <u>not</u> possible to add this information to all parameters in the Wiki-Tool as I lack the technical knowledge and access to the database stored procedures. If the information is provided by employees of the company or a third party during interviews, I can add the information to the Wiki-Tool.

Note: The documentation of all stored procedures is a prerequisite for defining the priority of the parameter (access to database and knowledge about stored procedures is required).

Option 3:

I can propose also to take care about Categories of Parameters:

- Coordination/agreement about categories with stakeholders
- Setting up Categories on the Wiki-Tool
- Setting up Categories on Parameters

Validations of Parameters

Currently Parameters use 4 different statuses: „Not documented", „Documented", „More information needed", and „Validated". (…)

In order to validate a parameter there must be a validation from business point of view, technical point of view and logical point of view:

Business view: Is it described how the parameter impacts the business process? Does the documentation contain the standard business case in which the parameter is/should be used? Is it described why the parameter was created/the main purpose of the parameter? Is it described how the parameter impacts other parameters (interdependencies of parameters)? Are the local parameter names (country languages) described?

Technical view: Which countries use the parameter (at least one sub parameter value is different than the default value)?, Where exactly is this parameter used (e.g. procedures, functions)?, Is the link to the original analysis available (ticketing system or document)? Is it described how the parameter impacts other parameters (interdependencies of parameters)? Are there links to explanatory documents to describe terms that are not clear to newcomers (e.g. „second head", „attitude",…)? Is it clear if there is a difference in how it should work (initial request) and how it really works (e.g. partial implementations, stopped requirements, …)

Logical view: Are there inconsistencies between business and technical view? Is the parameter described in a comprehensible way? Is the parameter described extensively? Is all basic information extracted from the database:

- Parameter ID
- Parameter name
- Type of parameter
- (…)

Option 4:

I am able to validate parameters from business and logical point of view. In case this should be done, additional effort of ca. 1,5 hours per parameter must be considered. This is not included in the main proposal.

Prerequisites

In order to perform the tasks as described above, the following prerequisites must be fulfilled:

Software / Hardware

- Company Notebook + Phone
- VPN Access (Company Solution) - Status: Requested
- Remote Machine Login - Status: OK (to be tested once VPN is available)
- Access to backend software test environments (all countries) - Status: OK
- Access to internal Wiki-Tool - Status: OK
- Access to document management system - Status: OK
- Access to shared disk of a specific country - Status: OK

Other

- Support by company employees is crucial. Mainly the input from Business Analysts (first level) of Central Eastern Europe and some members of the Shared Service Center (IT Analysts) will be needed. For minor questions the availability of data administrators / portfolio managers in Central Eastern Europe could be requested.