

## Documenting Business Functions

### The Challenge

Learning through example is easier than learning through a book, but sometimes it's not possible. Our client needed to quickly and thoroughly document twelve different functions that consisted of both manual and systematic tasks. This documentation had to be both comprehensive and straightforward enough to be used for training.

LBi was the ideal choice because of our experience level. We had over ten years of experience with the Human Capital Management (HCM) and Corporate systems currently in use. In addition we had the functional business knowledge of the core processes.

### The Solution

LBi's approach was to create a "Procedures Guide" for each functional area requiring documentation. The process used to create each guide was to observe the users and create the document through an iterative feedback process:

First business analysts observed the day-to-day operations of each user. Then they documented each minute detail of the activities that were performed, collecting any screenshots, reports and forms along the way. The LBi team then put together a first draft of a Procedures Guide. This Procedures Guide contained step-by-step processes with all the required reference material embedded within the document.

Second, this draft was presented back to the subject matter expert for review and approval. This was a crucial step as many times the steps they'd done so automatically on a daily basis were often overlooked when explaining them to an "outsider".

Third, LBi analysts, users, and subject matter experts walked through the process using the Procedures Guide. This step was repeated depending on the success level.

The final Procedures Guides consisted of everything from system logon procedures to required levels of approval and email addresses, along with examples of every screen, form and document used. The Procedures Guide was provided in a fully indexed PDF along with all source material so that the client could maintain the Guide.

### The Benefits

The client has received a Procedures Guide for each functional area that is used as a valuable training tool to facilitate employee turnover and a complete reference document for SOX compliance. They also now have the ability to maintain this Guide.