

### Storyline

The client is a Bangalore based Microfinance Institution (MFI). It offers a suite of credit, savings, and insurance products to the not fully serviced sector. The client has been continuously setting industry benchmarks in efficient processes and technology deployment in the industry.

The client engaged NCRCL<sup>®</sup> to prepare application user manuals in a simple, user friendly manner for three separate applications. The manuals helped in a smooth rollout of the three solutions in the client company.

### Once upon a time

The client had undertaken a major reengineering of its processes with help from NCRCL<sup>®</sup>. One of the key strategies involved adopting state-of-the-art technology solutions. Accordingly, the client had implemented the Flexcube Core Banking Solution (CBS), Smart Card solution from FINO and CRM solution from Salesforce.com.

However, the Management was facing difficulties in rolling out the solutions across the organization arising more from a lack of proper orientation to end users.

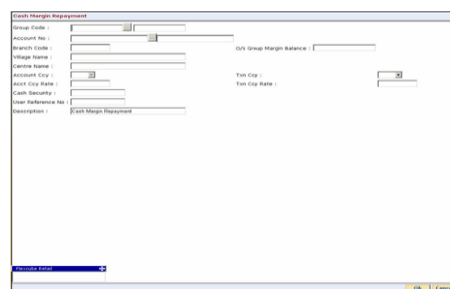
### Moving on

The first step was to gain an in-depth understanding of the three software applications. This involved studying the user guides which were supplied by the software vendors and actual walkthroughs with the software applications.

The team sat with the client staff and observed the entry of transactions, report generation and other activities. Having understood the functionality, the next task was to map the screens with the processes laid down in the process manual.

The challenge was to prepare a manual for a complex application like CBS in a manner easily understood by everyone.

All the three manuals followed a simple, uniform structure making them user friendly and contained links to the process manual which clearly showed the screens to be used for each process.



Simple icons for 'Steps for the user', 'Field description' and 'Notes' were used to make it easy for the user to retrieve information about a particular screen/feature. Narrative descriptions were provided wherever an explanation of concepts behind a particular feature was found necessary. A glossary of terms used throughout the manual was provided at the end for ready reference.

### Finally

There was a high degree of acceptability amongst the users since the manual was customized to their working. End user training became faster and more efficient after introduction of the manuals. The manuals were only a beginning to a series of initiatives by the IT department to create exhaustive documentation for all its activities. The client subsequently engaged NCRCL<sup>®</sup> for preparing an IT documentation framework for the organization as a whole. NCRCL<sup>®</sup> has helped the same client in reengineering of business processes, implementation of a credit scoring model and documentation of HR processes as part of different assignments.

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