

# Developing an In-house Document Sign-Off System



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# Agenda

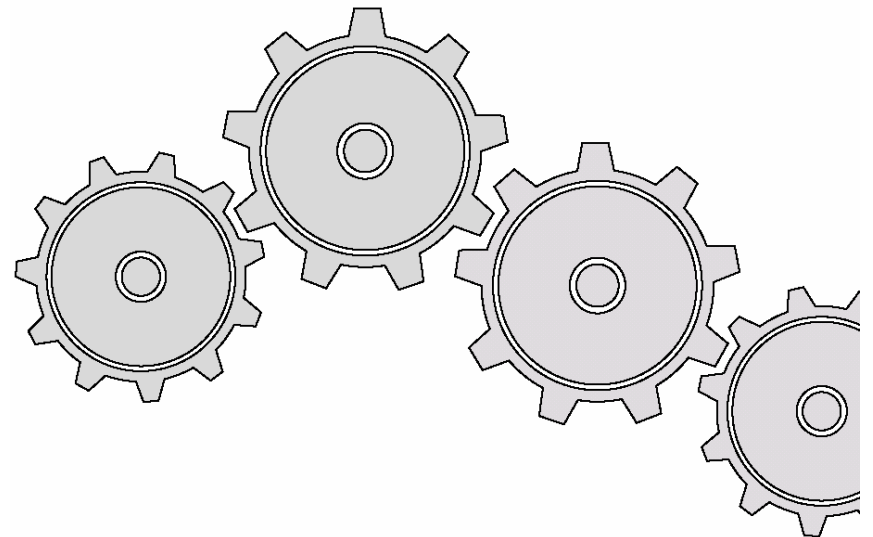
- Document Tracking – The Underlying Philosophy
  - Product Development View
  - Stakeholders View
- Technology
- Challenges
- Implementation
  - Strategy
  - Tracking/Reporting
- Future
- Q&A

# Problem and Need Analysis

- Sign Offs – A necessary formality
- Manual Tracking – Predictable but time consuming
  - Capture Red Flags
- Is this a “Value-add” activity ?
  - Efficient objective for different roles
  - Vs. existing system
- Systemic solution



Let's outsource this overhead to  
??



# Product Development and the Document Lifecycle Continuum



# Doc Lifecycle - Stakeholders

Feature-specific  
 Release Version  
 Media – PDF/HTML  
 Document Types  
 Editing

Context Sensitivity  
 Interfaces/Error Messages  
 Software Integration

Flow Methodology  
 Sample Data  
 Bug Fixes  
 Known Issues

Authors

R&D

PV



Program Mgmt

Marcom/AE

Release Mgmt

Customer



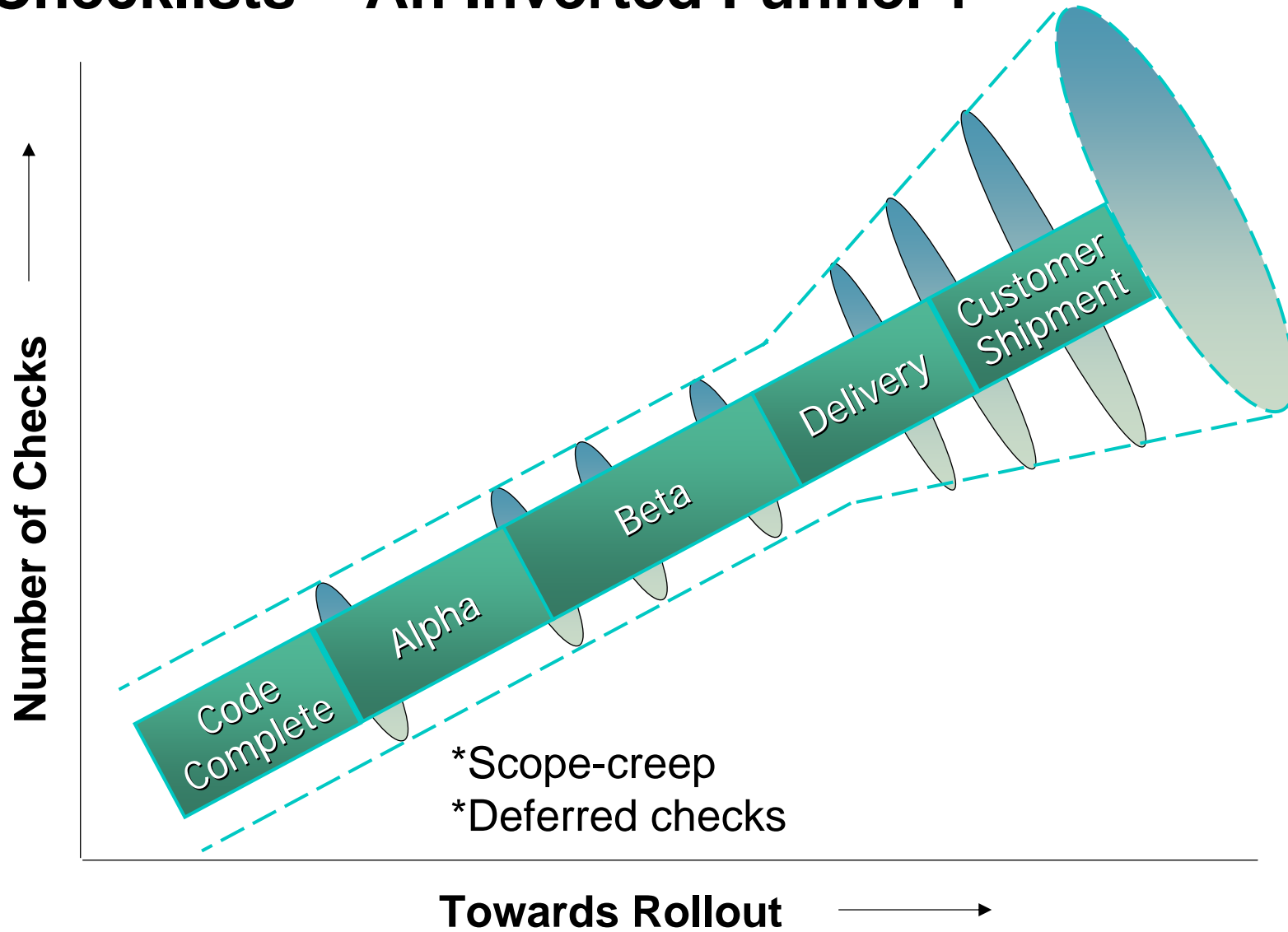
Release Milestones  
 Legal Checks

Branding  
 Product Evangelism  
 Customer Requests

Builds – Indexing  
 Doc Viewer

Help Control –  
 What, When, and How

# Checklists – An Inverted Funnel ?

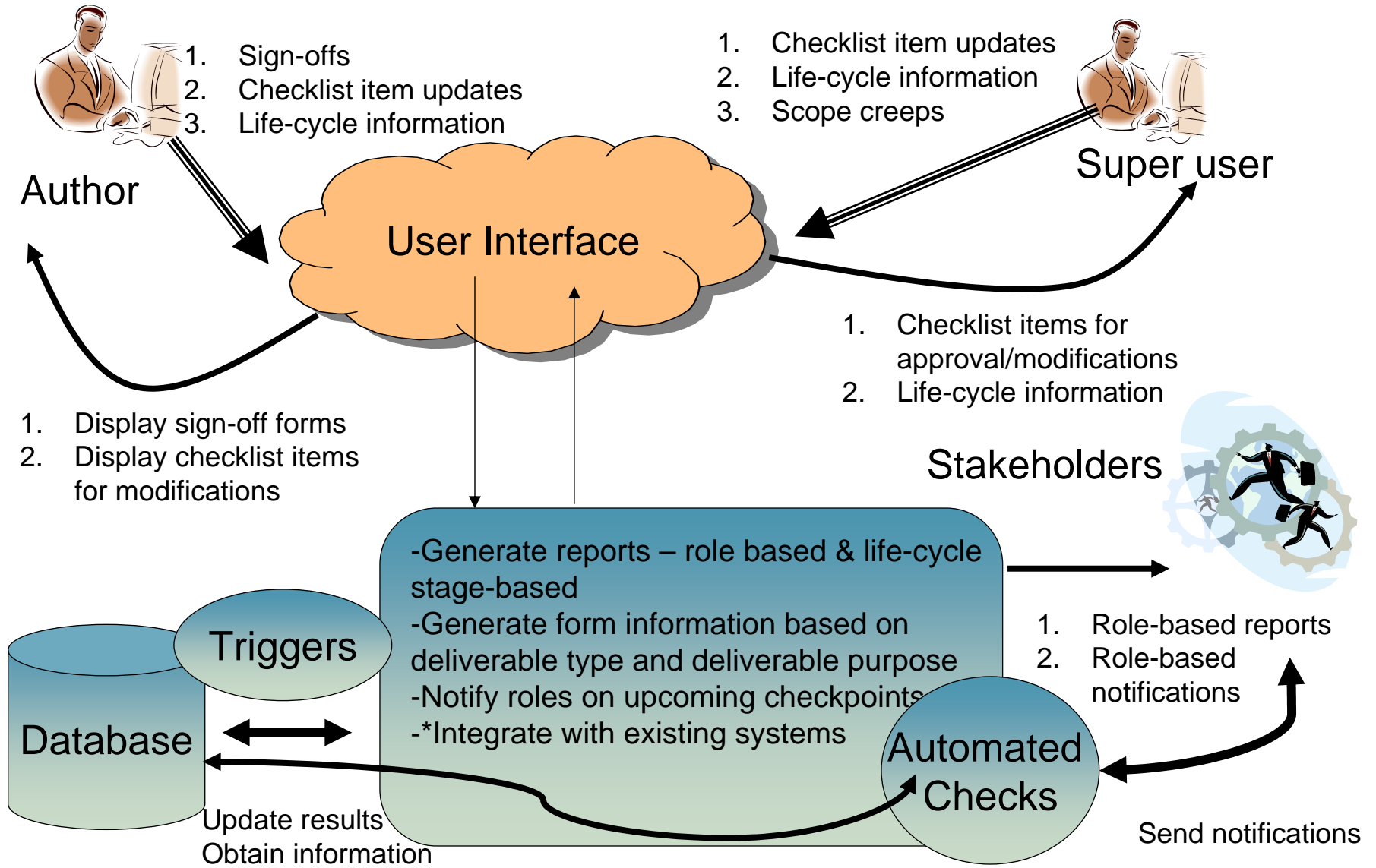


# Technology Considerations

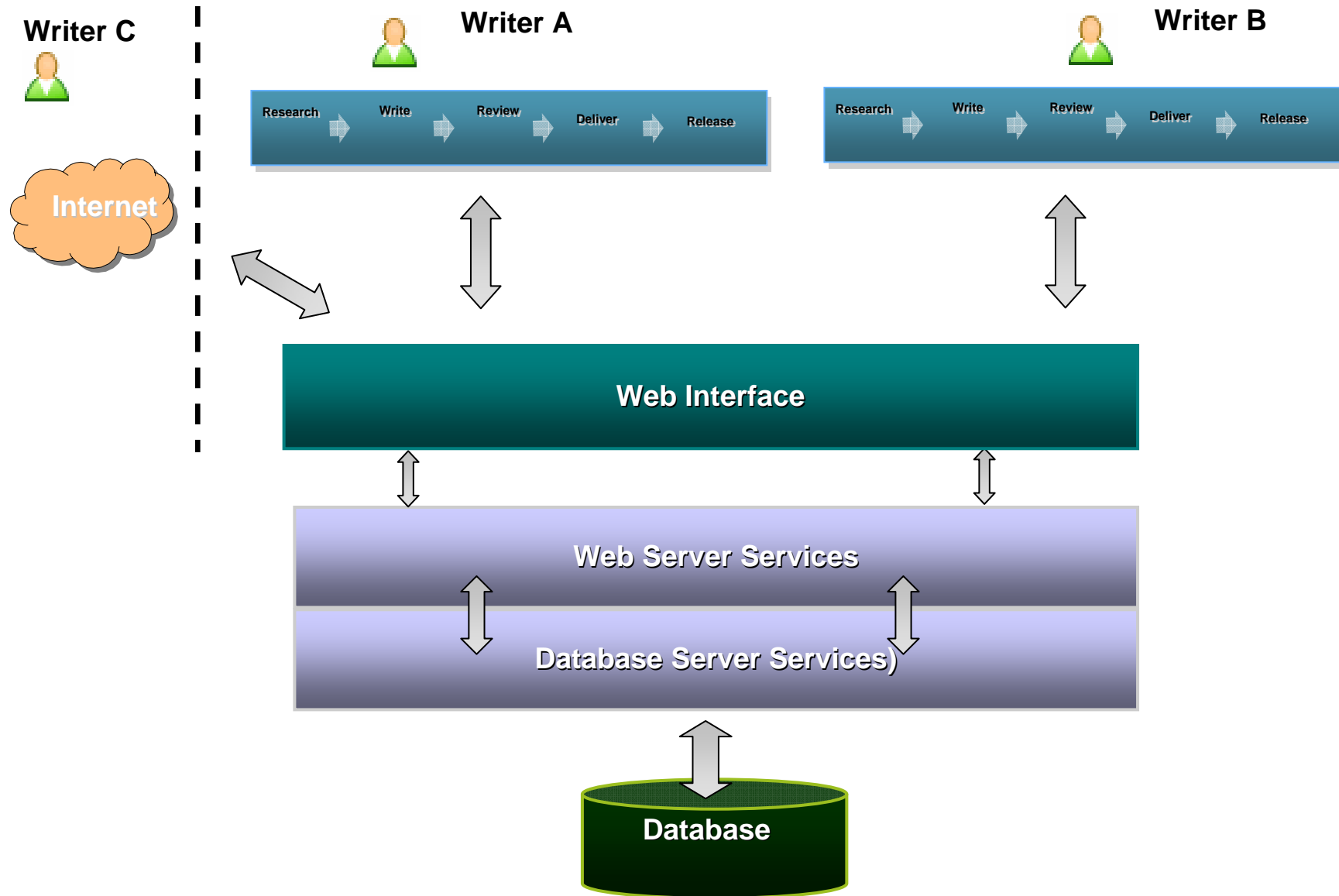
- Easy to Develop
- Cost Effective
- Non-Proprietary Technologies
- Ability to use existing skills repository
  - Minimal Training
- Extensible



# Application - How it Works

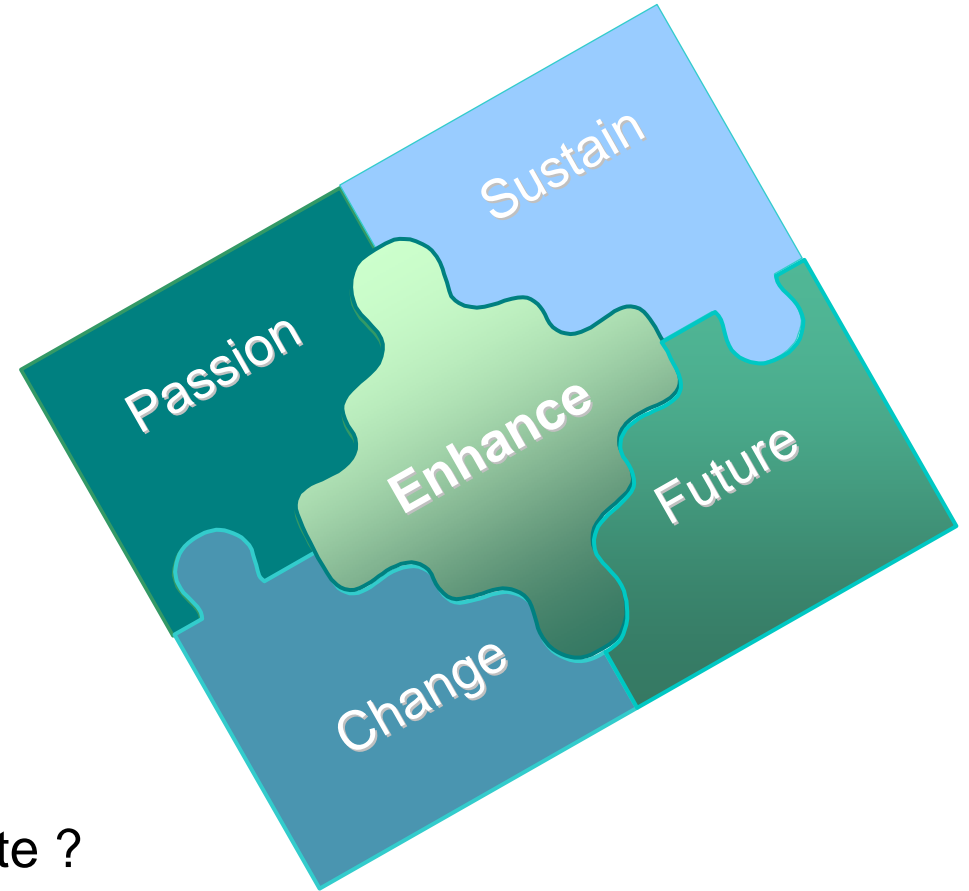


# Application Architecture - How it Works



# Challenges

- Where is the time spent?
- Efficient checklist items?
  - Define training needs
  - Enhance usability
  - Influence product adoption
  - Contribute to roadmap
- Passion and sustenance
  - More gray than black & white ?
  - Management/author commitment
- Future MBOs
- Defect-tracking vs an enabling system



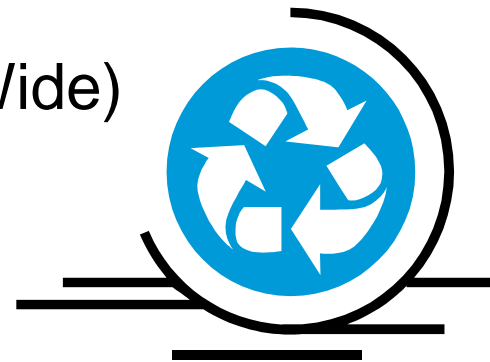
# Implementation Strategy

- Pilot System
- Slow Adoption
  - Multi-Phased
  - Assimilative (Bottoms-Up)
- Resource Allocation - Management Co-operation
- Involve cross-functional teams
  - Communicate the advantage
  - Documentation Mgmt - Reporting and Tracking



# Road Ahead

- Customer Focus
- Checklist Customization
- Multi-SBU Compatibility (Enterprise-Wide)
- Real-time Exception Catching
  - Triggered Notifications
- Advanced Reporting
  - Role-specific reports
- Integration
  - Legacy Document Management System
  - Product Tracking Systems



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