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Production Process Guide

version 1.0

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About this Document

This document is for Isiah.com Production personnel. It describes how to maintain the i-gift online gift certificate solution for Merchant Partner clients.

How this Guide Is Organized

This guide contains the following sections.

Section 1	New Partner Set Up Process
Section 2	Basic Site Maintenance
Section 3	New Mall Property Maintenance

Notational Conventions Used in this Guide

This guide uses the following conventions.

Convention	What It Means
Bold Text	Field or button names that appear on the interface of the software being referenced.
Italics	Special emphasis.
[*Brackets*]	Variable text, such as variable parameters in a filename, URL, formula or code string.
Vertical|Bars	Sub-menu options you should select in the sequence shown.

If You Discover Errors

Please describe any errors you find in an e-mail message and send it to **catherine@isiah.com**.

Terms Used in this Guide

The following terms are used throughout this guide.

Download • To copy files from the development or production servers.

Mall/Shopping District • The individual malls or downtown shopping districts owned by a Merchant Partner. Also known as *properties* or *mall properties*.

Merchant Partner • The mall groups/realtors who contract with Isiah.com to provide gift certificate services.

Property • An individual mall or shopping district.

Slick • A photographic print. If a partner provides printed property photos, these must be scanned to produce a digital graphics file.

Store • A retailer in one of the malls or shopping districts.

Template • The electronic file that contains instructions for how the gift certificate is to print. A template is created for every unique mall property and stock combination.

Upload • To copy files, particularly spreadsheet data and graphics, to the development or production servers.

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Section 1

New Partner Setup

Setup Process Overview

This section describes the process to use when setting up a new i-gift Merchant Partner.

Purpose

When i-gift contracts to provide gift certificate services for a new Merchant Partner, they need to be set up in our system so that they can be selected when customers seek to purchase certificates.

This involves:

- Populating the Production and Fulfillment servers with partner data and graphic files.
- Creating a certificate template and propagating it to all the Fulfillment cells.
- Testing that the web site works properly, certificates can be printed successfully, and funds are captured.

Who Is Involved

The set up process is performed by the:

- Production team members*
- Production Manager
- Graphic Designer
- System Administrator

* To be done correctly, at least **two** members of the Production team should be involved: the Production Manager and one other team member.

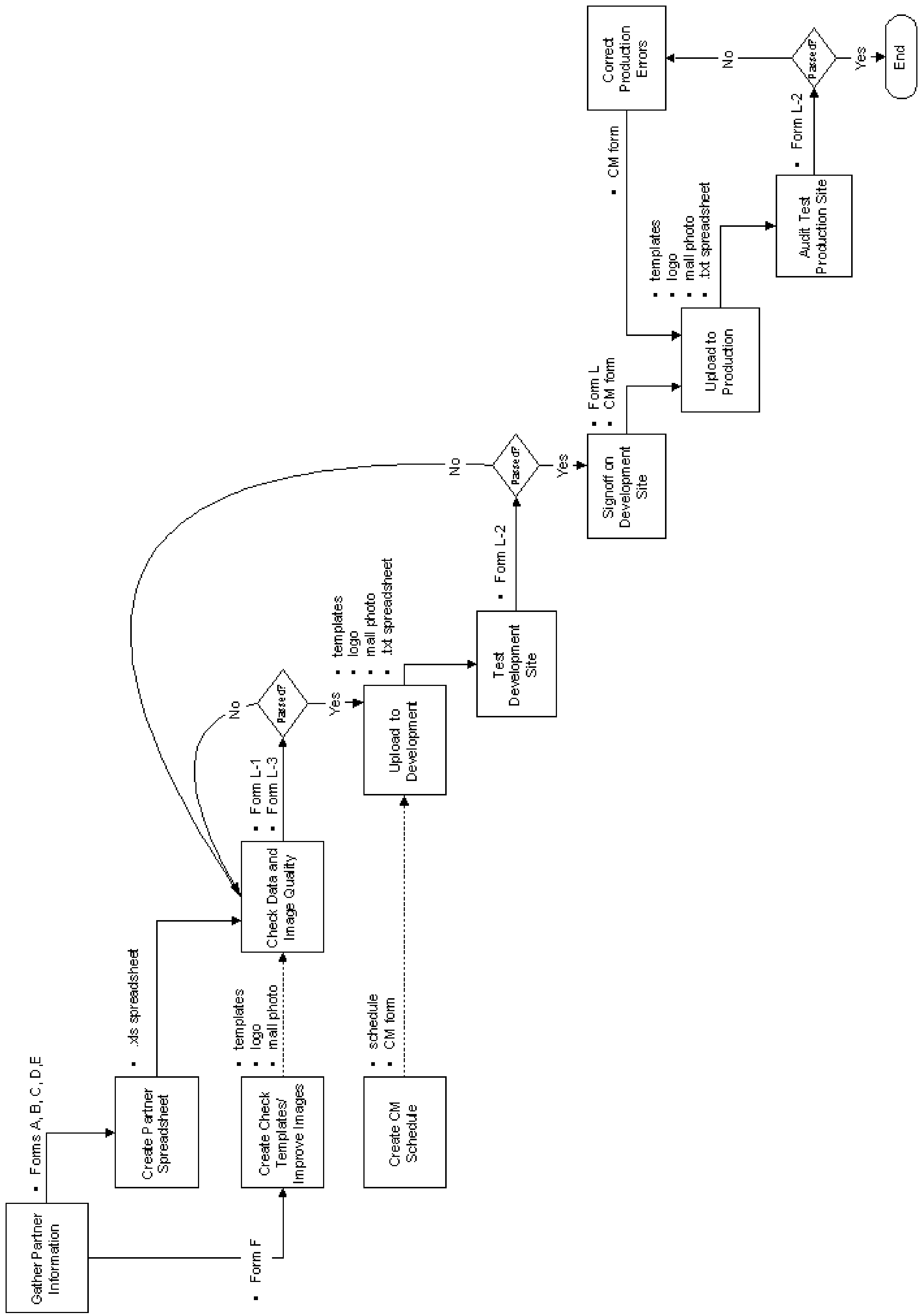
What You Need

To carry out this process, you'll need:

- An installed version of Netscape browser, version 4.5 or better.
- An installed version of Microsoft Excel®.
- Copies of Forms A to E completed by the Merchant Partner.
- Blank printed copies of Forms F, L, L-1, L-2, and L-3.
- Electronic copies of the Status Report document, and the Change Management Notice.

The Process Flow

The next page shows the setup process flow.


Gather Partner Information
Forms A, B, C, D,E
Create Partner Spreadsheet
.xls spreadsheet
Form F
Create Check Templates/ Improve Images
templates
logo
mall photo
Create CM Schedule
schedule
CM form
Check Data and Image Quality
Form L-1
Form L-3
Passed?
No
Yes
Upload to Development
templates
logo
mall photo
.txt spreadsheet
Test Development Site
Form L-2
Passed?
No
Yes
Signoff on Development Site
Form L
CM form
Upload to Production
templates
logo
mall photo
.txt spreadsheet
Audit Test Production Site
Form L-2
Passed?
No
Yes
Correct Production Errors
CM form
End

What Happens

The overall set up process is as follows.

Before You Begin

Before setup process begins, the Partner Sales Representative:

- Obtains a signed contract from the new Merchant Partner.
- Distributes Forms A, B, C, D, and E to the Merchant Partner.

Careful! Production work should **not** start before there is a signed contract with the Merchant Partner!

The Overall Steps

During the setup process:

1 Production team member:

- Collects Forms A, B, C, D, and E from the Merchant Partner and/or Partner Sales Representative.
- Collects mall graphic files and gives them to Graphic Designer for processing.
- Completes Form F and distributes it to the Graphic Designer and the System Administrator.

2 **A.** Production Team member creates a data spreadsheet for each mall.

2 **B.** Graphic Designer and the System Administrator create a template for each new certificate, and an electronic logo and graphics file for each mall.

3 **C.** Production Manager creates a Change Management schedule, and clears the dates with the System Administrator and any other developers working on the i-gift site.

3 Production team member checks that the mall data spreadsheets are correct, and that the graphic files and templates meet quality standards.

4 Production team member uploads the mall data spreadsheet and graphic files to the development server for testing.

5 Production team member tests the development site and corrects the mall data spreadsheets and graphic files (in conjunction with the Graphic Designer).

6 When the development site passes, the Production Manager signs off permitting the upload to the production server. *The Production Manager holds the upload if there is any conflict with the System Administrator or other developers.*

7 Production team member uploads the mall data spreadsheets and graphic files to the production server.

8 Production team member tests the production site end-to-end, to ensure that it performs as expected.

9 Any remaining corrections to the production site are made in conjunction with the Graphic Designer and System Administrator.

The Forms You'll Use

Here are the forms you'll use throughout the setup process. They provide a hardcopy reference of all the partner's information, and verify that testing is complete.

Completed forms should be kept in a hanging folder you set up for each partner and property.

- **Form A: Cover Form for Merchant Partner Information**
  This is a checklist of the forms necessary for setting up a Merchant Partner. File it in the partner's folder.
- **Form B: Merchant Partner Information**
  This form includes basic Merchant Partner information, including gift certificate stock information. File it in the partner's folder.
- **Form C: Mall/Shopping District Information**
  This form includes all information for each mall/shopping district, including mall description and the type of mall photo and logo sent. File it in the property's folder.
- **Form D: Store List**
  This form includes all store information for each mall/shopping district. Properties can also attach a pre-printed list of stores or provide a URL for their store list. File it in the property's folder.
- **Form E: Gift Certificate Stock**
  This form includes all gift certificate information when the partner is providing their own gift stock, or wants to use different stocks for different properties. File it in the partner's folder, *unless* they're using a different stock for different properties. In that case, file it in the property's folder.
- **Form F: Template Specification**
  This form instructs the Graphic Designer and the System Administrator how to create a new check template. Complete one form for each certificate, usually one per property. File it in the property's folder.
- **Form L: Go Live Authorization**
  This form authorizes the upload of a partner's data to the production server. It should have copies of Forms L-1, L-2, and L-3 attached. File it in the partner's folder.
- **Form L-1: Spreadsheet Checklist**
  This form lists things to check on the partner's setup spreadsheet. It should be checked and signed by the tester. File it in the partner's folder.
- **Form L-2: Testing Checklist**
  This form lists things to test after data has been uploaded to the development or production servers. It should be checked and signed by the tester. File it in the property's folder.
- **Form L-3: Template Checklist**
  This form lists things for the Graphic Artist and System Administrator to test when creating a new template. It should be signed by both. File it in the property's folder.

1. Gathering Partner Information

The first step of the New Partner Setup process is gathering information from the Merchant Partner, and routing it to the correct person to begin the actual setup.

To Start, You'll Need:

Evidence of a signed contract from the Partner Sales Representative. This may be done verbally, but at some point, you should confirm that the contract was signed.

Careful! Production work should **not** start before there is a signed contract with the Merchant Partner!

Here's What to Do:

1 Create a new electronic folder for the partner, and insert a folder in it for each property.

Important: Create a folder in i-gift/Production/Mall Partners/*partnername/propertyname* for each property.

2 Create a hanging file for the *partner* information, to hold the contract, Forms A and B, stock samples, etc.

3 Create file inserts for each *property* that belongs to that partner, to hold store lists, pictures, logos, Forms C, D, and E, etc.

4 Obtain Forms A to E, logo files, and property photos from the Partner Sales Representative, or from the Merchant Partner if you're in direct contact with them.

5 If the Merchant Partner is using custom certificate stock, obtain at least 15-25 samples from them, as well.

Check: Graphics meet the specification. Photo(s) should be full color and 300 dpi. Logo must be in .eps file format.

6 Complete the **For Office Use Only** boxes on forms A to E.

7 Complete one Form F: Template Specification *for each different certificate* you're providing for that partner. See the Merchant Partners stock choice(s) listed on Form B.

- Send a copy of Form F with a stock sample (if custom stock), the property photos, and logos to the Graphic Designer as soon as possible.
- Save the original Form F for your files.
- Confirm that the Graphic Designer has received Form F, and record that date on your copy of Form F.

At the End, You Should Have:

- Completed versions of Forms A to E.
- Template in production.
- Mall photos and logos in production.

2A. Creating the Data Spreadsheet

In this step, all of the Merchant Partner and property information collected on Forms A to E is entered into an Excel spreadsheet file.

There are two main procedures:

- Saving the spreadsheet.
- Populating the spreadsheet.

To Start, You'll Need:

Completed Forms A to E.

Saving the Spreadsheet

1 Download the most recent Merchant Partner spreadsheet from the development site:

- Open the Netscape browser and enter the URL **http://166.90.248.170:2080/cgi-bin/protected/malldata?partner=*[partnername]*.**

Example: To download Somerset, enter:
http://166.90.248.170.2080/cgi-bin/protected/malldata?partner=somerset.

See Table A for a list of possible URLs.

- Enter the username **mdata** and the password ********.
- Select **File|Save As**. The filename appears as malldata.html.
- Under **Save In**, select the new folder you created for this partner.
- Change the filename to something specific to the new Merchant Partner, (e.g. *newpartner*_data.html), and click **Save**.

2 In Excel, open the .html file you saved in the Merchant Partner folder.

3 Add gridlines by selecting **Tools|Options**. On the **View** tab, click the **Gridlines** checkbox.

4 Delete any data ***except*** for the column headings.

5 Select **File|Save As** and save the file as an Excel (.xls) spreadsheet file.

6 Follow the "Populating the Spreadsheet" procedure below.

Populating the Spreadsheet

How the Spreadsheet Is Organized

There are three levels to each Merchant Partner data spreadsheet:

Level 1: Group Level Information is the information pertaining to the Merchant Partner, usually the property management company that manages or owns the mall or shopping district.

This level of information goes in the first row of the spreadsheet.

Level 2: Property Information is the information pertaining to the individual malls or shopping districts managed by the Merchant Partner.

Complete one row of property level information for each property. In cases where the mall/shopping district is the same name as the Merchant Partner, you still need to have both levels of information.

Level 3: Store Information is the information pertaining to each store within a mall or shopping district. Each store is assigned a row in the spreadsheet.

All of the rows of property level information are listed before *any* of the rows of store level information. Store information is ***not*** listed immediately beneath the row for the property where its located.

Examples of Spreadsheet Organization

Type of Merchant Partner	Order of Rows
Merchant Partner with one mall housing 72 stores.	**Row 1:** Merchant Partner information. **Row 2:** Mall information. **Rows 3-75:** Store information
Merchant Partner that is a Shopping District with 300 stores.	**Row 1:** Shopping district management information. **Row 2:** Shopping district information. **Row 3-302:** Store information.
Merchant Partner with three separate malls, each housing 100 stores.	**Row 1:** Merchant Partner information **Row 2:** Information for Mall One. **Row 3:** Information for Mall Two. **Row 4:** Information for Mall Three. **Rows 5-105:** Store information for Mall One. **Rows 105-205:** Store information for Mall Two. **Rows 205-305:** Store information for Mall Three.

Here's What to Do:

1. Open the Excel spreadsheet file you saved in the Merchant Partner's folder.
2. Referring to **Form B: Merchant Partner Information**, follow the instructions in this table to complete all the columns of row one.

Column:	**Instructions:**
A (Action)	Enter an A. **Tip**: It's easier if you use Excel's data entry box, just below the toolbar.
B (Group ID)	Enter the number from **Form B, Box B**. You can also get this number by downloading all the partner data from development. Find the Merchant Partner with the highest Group ID and add one. This will be the new Merchant Partners Group ID number.
C (Property ID)	Leave blank.
D (Store ID)	Leave blank.
E (Name)	Enter the Merchant Partner name from **Form B, Box E**.
F (Address)	Enter the Merchant Partners office street address from **Form B, Box F**.
G (City)	Enter the Merchant Partner office city from **Form B, Box G**.
H (State)	Enter the Merchant Partner state from **Form B, Box H**.
I (Zip)	Enter the Merchant Partner zip from **Form B, Box I**.
J (Description):	Leave blank.
K (URL)	Enter the URL from **Form B, Box K**. If the URL isn't in the box, create an i-gift inbound URL for the Merchant Partner by using this formula: */partnername* (e.g. /somerset). Be sure to enter the new URL on the form.
L (Contact)	Enter the Merchant Partner contact info from **Form B, Box L**.
M (E:mail) through Q (Keywords)	Leave blank.
R (GC Name)	Enter the Merchant Partner gift certificate ID from **Form B, Box R**.
S (GC Value/Min)	Enter the amount from **Form B, Box S**. Do **not** use a $ before the amount.
T (GC Value/Max)	Enter the amount from **Form B, Box T**. Do **not** use a $ before the amount.
U (GC Value/Inc.)	Enter the amount from **Form B., Box U**. Do **not** use a $ before the amount.

Column:	Instructions:
V (GC Discrete Values)	Enter the amount from **Form B, Box V**. Do **not** use a $ before the amount. **Note:** If columns S-U are filled in, do **not** fill in column V.
W (Bank Name)	Enter Wells Fargo, <u>unless</u> another bank is being used.
X (Bank Account)	Enter 4296901432, <u>unless</u> they're using another bank besides Wells Fargo. (Michigan National is 6633005977).
Y (Routing Number)	Enter 122000247, <u>unless</u> they're using another bank besides Wells Fargo. (Michigan National is 072000805).
Z (Check Last) through AB (Check Max)	Leave blank. (Very important!)
AC (Active_Inbound)	Enter 1.
AD (Active_Search)	Enter 1.
AE (Active_Fulfillment)	Enter 1.
AF through AJ (Banking ID)	Leave blank. **Note:** If you're sharing bank accounts for multiple merchant partners, make sure the Banking ID field for those accounts is identical (i.e. use BNK0000000000 for all Wells Fargo partners but BNK0729803250 for Michigan National).

3 Referring to **Form C: Mall/Shopping District Information**, follow the instructions in this table to enter the property level data.

4 You should have one row of data *for each property* when you're done.

Column:	Instructions:
A (Action)	Enter an A. **Tip**: It's easier if you use Excel's data entry box, just below the toolbar.
B (Group ID)	Enter number from **Form B, Box B**.
C (Property ID)	Enter the number from **Form C, Box C.**
D (Store ID)	Leave blank.
E (Name)	Enter the property name from **Form C, Box E**.
F (Address)	Enter the property street address from **Form C, Box F**.
G (City)	Enter the property city from **Form C, Box G**.
H (State)	Enter the property state from **Form C, Box H**.
I (Zip)	Enter the property zip from **Form C, Box I**.
J (Description):	Enter a description of the property using the information from **Form C, Box J**. This should read like ad copy. Use mall descriptions for current live partners as models. The description should be proofread by another Production team member.

Column:	Instructions:
K (URL)	Enter the URL from **Form C, Box K**. If the URL isn't in the box, create an i-gift inbound URL for the property by using this formula: */partnername/propertyname* (e.g. /somerset/somerset). Be sure to enter the new URL on the form.
L (Contact)	Leave blank.
M (Email)	Enter the e-mail address from **Form C, Box M**.
N (Valence)	Enter the valence from **Form A**. If not shown, contact the Partner Sales Representative and record it on the form.
O (Altname)	Enter Altnames from **Form C, Box O**. Separate each altname with a semi-colon only; don't use any spaces. If no alternative names are listed, create them by thinking of every possible misspelling of the property name. Record these altnames on the form.
P (Categories)	Leave blank.
Q (Keywords)	Enter the keywords from **Form C, Box Q**. Separate each keyword with a semi-colon only; don't use any spaces. If no keywords are listed, enter the state, state abbreviation, zip code, major metropolitan area where the property resides, and predominant features of the property.
R (GC Name) through AB (Check Max)	Leave blank.
AC (Active_Inbound)	Enter 1.
AD (Active_Search)	Enter 1.
AE (Active_Fulfillment)	Enter 1.
AF through AJ	Leave blank.

5 Referring to **Form D: Store List**, follow the instructions in this table to enter the store level data.

6 If the Merchant Partner sent a pre-printed store list, use it to gather the names and assign a number to each store in order.

7 You should have one row of data *for each store* when you're done.

Column:	Instructions:
A (Action)	Enter an A. **Tip**: It's easier if you use Excel's data entry box, just below the toolbar.
B (Group ID)	Enter the number from **Form B, Box B**.

Column:	Instructions:
C (Property ID)	Enter the property number from **Form C, Box C**.
D (Store ID)	Enter the store number from **Form D, Box D**.
E (Name)	Enter the store name from **Form D, Box E**.
F (Address) through O (Altname)	Leave blank.
P (Categories)	Enter the store category from **Form D, Box P**.
Q (Keywords)	Enter the keywords from **Form D, Box Q**. Separate each keyword with a semi-colon only; don't use any spaces. If no keywords are listed, use or modify suggested keywords from **Attachment D-2: Keywords**.
R (GC Name) to AB (Check Max)	Leave blank.
AC (Active_Inbound)	Enter 1.
AD (Active_Search)	Enter 1.
AE (Active_Fulfillment)	Enter 1.
AF through AJ	Leave blank.

8 When you've entered the data, do the following to the text within each cell:

- Run the spellchecker.
- Take out any line returns.
- Replace all uppercase **I**s in i-gift with lowercase **i**.
- Replace all apostrophes with **'** (include semi-colon).
- Replace all e acutes (as in café) with **é** (include semi-colon).
- Replace all em-dashes with **—** (include semi-colon).

9 Select **File|Save As** and save the spreadsheet with the three-part filename *partnername*_dev_*date*.xls. This lets you know which version of the spreadsheet you're looking at.

10 Select **File|Print** and print the spreadsheet.

At the End, You Should Have:

- An Excel spreadsheet file containing all three levels of data.
- A printed copy of the spreadsheet ready to be checked.

2B. Creating Templates and Graphics

In this step, the Graphic Designer and the System Administrator:

- Process the graphic files for each property.
- Create and propagate the certificate templates. There should be a unique template for each property and stock combination.

Graphic Designer:

To Start, You'll Need:

- For ***each*** property: a full-color print of the property at least 300 dpi, or a digital image higher than 72 ppi resolution. Larger images are best, since there's more area to select from and generally higher resolution.
- For ***each*** property: a logo in .eps file format.
- For ***each*** template: Form F: Template Specification
- Samples of gift certificate stock (if using a custom stock).
- Blank copy of Form L-3: Template Checklist.

Processing the Graphic Files

For ***each*** property:

1. Take all steps necessary to convert the mall photo to a **200x200 pixel .jpg file @ 72 ppi** image resolution.
    - If necessary, scan the file.
    - Select an area slightly larger than what you want to save and crop the image. Seek an area with interesting matter, and a good overall balance.
    - Resize the image to 200x200 pixels.
    - In PhotoShop, open this file and a previously processed mall photo.
    - Duplicate the mask layer from the processed image to your new file. This adds the softened edges to the image.
    - Save the file in the property's folder with the name **photo.jpg**.
2. For the web site logo, convert the logo .eps file to a **78x78 pixel .jpg file @ 72 ppi** image resolution and save it in the property's folder with the name **logo.jpg**.
3. For the template logo:
    - If using i-gift stock, save the image as a **2 ½ x 2 ¼ Adobe Illustrator .eps file**.
    - If using custom stock, measure the area where the logo will be placed and resize the image to whatever works best.
    - Save the file **logo_[*property*].eps** in the property's folder.

Creating the Certificate Template

Referring to the information on Form F and any stock samples, create a template for each certificate to specify the placement of all the check elements on the stock.

1. If using i-gift stock, in Adobe Illustrator:
   - Open an existing template file.
   - Save the template as a Postscript file named **chk*[abbreviated property name]*** in the new property's folder.
   - Replace the logo and the text with the correct information from Form F.
2. If using custom stock:
   - Measure the stock to determine the placement of all the elements.
   - In Adobe Illustrator, create an image the size of the stock that contains the logo and text elements in the correct places. Use the information from Form F.
   - Save the template as a Postscript file named **chk*[abbreviated property name]*** in the new property's folder
3. Test print the template on the MICR printer using the stock samples.

> **Important:** Contact the System Administrator for exact instructions on how to print to the MICR printer from your system.

4. Using Form L-3, check that all the items pertaining to the Graphic Designer are correct.
5. When everything checks out, sign and date your section of Form L-3: Template Checklist and return it to the Production Manager. Save a copy for your files.
6. Send a copy of the template Postscript file to the System Administrator to propagate on the Fulfillment Cells.
7. Inform the Production Manager that the template is done and has been sent to the System Administrator for propagation.

Production Manager:

1 When the Graphic Artist informs you the template is done and sent to the System Administrator, confirm that the System Administrator has received it, along with a sample of the stock, and record the date on your copy of Form F.

2 If within a few days you haven't received a completed Form L-3 from the System Administrator, check with him/her on the template progress, and help to resolve any problems that are holding up completion of the template.

Important: Make sure you contact the Fulfillment Manager, so that the fulfillment server and cell are configured to handle the new certificate's template. The Fulfillment Manager needs to:

- Log into the fulfillment manager's tool on the fulfillment server, and on the **Check Type** page, set up the new template.
- On the fulfillment server's **Cell** page, configure one or more cells to be able to print the new certificate template.

System Administrator:

To Start, You'll Need:

- Form F: Template Specification and a copy of the template file from the Graphic Designer
- Samples of any custom certificate stock
- A blank copy of Form L-3: Template Checklist

Here's What to Do:

For each template sent:

1 Edit the Postscript template file.

2 Verify the key integrity.

3 Index the template.

4 Run the cell in ghost view to verify that keys are correctly detected and swapped.

5 Propagate the indexed template to the host.

6 Propagate the indexed template to the cells.

7 Add new the template to the fulfillment server database.

8 Test the template by printing from a Fulfillment cell.

9 When everything checks out, complete your section of Form L-3: Template Checklist and return it to the Production Manager, along with a test printout. Save a copy for your files.

At the End, You Should Have:

For ***each*** property:

- Completed Form F: Template Specification.
- Completed Form L-3: Template Checklist with sample printout attached.
- Certificate templates propagated on the Fulfillment cell machines.
- Logos and mall photos saved in the properties' electronic folders, and in the Zope folders on the development server.

2C. Creating the Production Schedule

To facilitate the uploads, the Production Manager creates a production schedule/status report as soon as a go--live date has been determined. This document sets target dates for each step of the production process, and allows the Production Manager to track progress and status.

The Production Manager also creates a Change Management Notification for the development upload and e-mails it to the System Administrator and other developers to alert them to the nature of the change and the anticipated change date.

To Start, You'll Need:

- A signed contract and completed Forms A through E.
- Spreadsheet, templates, and graphics in production.

Creating the Status Report:

1. Open the most recent production schedule document under a folder titled **production schedule**.
2. At the top of the spreadsheet, add a row for the new merchant partner. Fill in all the columns of information.
    - Use the go-live date on Form A, unless it has been changed.
    - Use the status column to note any outstanding issues or missing information.
3. E-mail a copy of the status report to David Bloom. David will broadcast the production schedule to the production staff, fulfillment and system administration.
4. Update the report once a week, checking to see if outstanding issues have been resolved.

Creating the Change Management Notification:

1 Create an e-mail message with Change Management Notification in the subject line and send it to the System Administrator, and all other developers. State:

- The name of the server being updated (development)
- That this is a new partner setup, ***not*** a change to existing data
- The name of the Merchant Partner and properties involved in the upload
- The filenames of logos and mall photos involved and what Zope directories they reside in (if known)
- Any work left for the System Administrator to do (such as adding the property ID data)
- Any problems you noticed with the spreadsheet you downloaded to populate.
- **Request that everyone reply with their go-ahead, or state reasons why the upload should be held.**

2 Copy yourself on the message so you have a record for your files.

3 Send this message to the System Administrator developers, the System Administrator, and any other developers working on the site.

At the End, You Should Have:

- A Change Management Notification sent to the development teams.
- A Status Report ready to be updated weekly.

3. Checking the Data and Images

In Step 3, a second Production team member checks that the Merchant Partner data spreadsheet is correct, and that the graphic files meet quality standards.

Important: Its best if testing is not done by the same person who created the spreadsheet. Errors are difficult to find if the material is not "fresh" to your eyes.

To Start, You'll Need:

- A printout of the finished Excel spreadsheet with three levels of partner data.
- Completed logo.jpg and photo.jpg files.
- A blank copy of Form L-1: Spreadsheet Checklist.

Here's What to Do:

1. Open the graphic files in the Netscape browser and check that the:
   - Image displays at the right size
   - Image is clear and readable (not grainy or "pixelated")
   - Color registration looks good (no fading or strange palette shifts)
   - Edges have been masked
2. Using Form L-1: Spreadsheet Checklist and the printed spreadsheet, check each item on the spreadsheet that is correct. Leave unchecked any items that are ***not*** correct.
3. If there are any errors to be fixed:
   - Return Form L-1 and the spreadsheet to the person who created it to correct the errors.
   - Recheck all the open items on the new spreadsheet.
   - Repeat this step until all the errors are corrected.
4. Open the finished Excel spreadsheet, and save it as a tab-delimited text (.txt) file (not required if you've been working in a text file all along). Change the date in the filename to reflect the new save date.
5. Send Form L-1 to the Production Manager.

At the End, You Should Have:

- A tab-delimited text file with all the corrected spreadsheet data
- Completed Form L-1: Spreadsheet Checklist

4. Uploading Data to Development

In this step, the data text file and the graphic files are uploaded to the development server for online testing.

To Start, You'll Need:

- A tab-delimited text file containing the corrected spreadsheet data
- Processed graphic files

Uploading the Spreadsheet

1 Open the Netscape browser and enter the URL: **http://166.90.248.170/exnet-ar/partners2/import.html**

2 Enter the username **mdata** and the password ********.

3 A huge white screen appears with a field box in the top left corner. The word Browse is to the right and the word Import is below it.

4 Click **Browse.**

5 Locate the tab-delimited file in the Merchant Partner's folder.

6 Erase the first part of the pathname so that only the filename is visible.

> **Example:** If you see igift/Production/tab delimited/oakland_new_1221.txt, erase everything except oakland_new_1221.txt

7 Click **Import.**

If the screen remains blank, the import was successful. If there are problems, the screen displays an error message for each line in the spreadsheet where there were problems.

8 If you receive error messages for any lines:

- Click your browser's print button to print the error log.
- Correct the errors indicated on the log.
- Recheck the spreadsheet data using a clean copy of Form L-1.

9 When you've made the corrections, repeat Steps 3 through 7.

10 When the upload is successful, enter the URL **http://166.90.248.170/igift** to open the development site in the browser, and check that the new properties appear on the development site.

11 If you can't see the properties on development, and you haven't found anything wrong with the spreadsheet data, contact the System Administrator for assistance.

Uploading the Graphic Files

1 Open the Netscape browser and enter the URL **http://166.90.248.170/manage**.

2 Enter the username **Superuser** and the password **********.

3 If the new partner and property folders are not available in Zope, create them:

- In the left frame, select the top-level folder inside which you want to place the partner folder.
- In the right frame, from the **Available Objects** drop-down, select **Folder**.
- Clear the **Create Public Interface** and **Create User Folder** checkboxes.
- Enter the partner name in the **ID** field and click **Add**.
- Select the new partner folder, and repeat these steps to add the property folder inside it.
- Copy the file **Index_html** from another partner's folder to the new partner folder.

4 Select the property folder.

5 From the **Available Objects** drop-down, select **Images**.

6 Click **Browse** and locate the graphic file on your system.

Important: Since all the graphics have the same name, be careful to select the files from the correct property folder on your system.

7 Click **Add** and wait while the file is uploaded to Zope.

8 Click the filename in the right frame.

9 Select the path and filename in the **Title** field and click **Delete**.

10 Enter the filename in the **ID** field.

11 Click **Change**, then **OK**.

12 Repeat Steps 4 through 11 for each graphic file you want to upload to Zope.

13 When you're done, you should have the correct logo.jpg and photo.jpg in each property's Zope folder, and the file Index_html in the partner's Zope folder.

14 Inform the Production Manager that the images are done and have been uploaded.

To Replace Uploaded Images:

1 In Zope, display the contents of the property folder, and check the box for the file you want to replace.

2 Click the **Upload** tab, then click **Browse** and locate the new file on your system.

3 Click **Change**, then **OK**.

At the End, You Should Have:

New property data on the development server.

5. Testing the Development Site

In this step, the Production staff tests that the new partner data appears and works as it should on the development site.

There are two procedures:

- Testing Online
- Correcting Errors

It's best if they're performed by two different team members.

To Start, You'll Need:

- New partner data uploaded to the development server.
- A blank copy of Form L-2: Testing Checklist for ***each*** new property.

Testing Online:

1. Open the Netscape browser and enter the URL **http://166.90.248.170/igift** to display the development site.
2. Create an account **Tester *[yourlastname].***

   This allows you to create low-cost certificates for testing.
3. For ***each*** new property: refer to Form L-2: Testing Checklist, and check each item on the list that is correct. Leave unchecked any items that are ***not*** correct.
4. For ***each*** new property: test print a certificate using the **Tester** account.

Important: Remember to test the inbound URL for each property by leaving the development site, and entering the URL in your browser's Go line. If the URL is correct, you will go directly to the second Order page with the property already selected.

5. Give Form L-2 to the person who will correct the errors.
6. When the errors are corrected, repeat Steps 1 to 3 until all the items check out.
7. Sign Form L-2 and return it to the Production Manager.

Correcting Errors during Testing

There are several types of errors that may need to be corrected, depending on what the development site testing reveals:

- Graphic errors, such as missing logos or incorrect sizing
- Gift certificate template errors, such as when the certificate prints incorrectly or doesn't print
- Data errors, such as inaccurate text or links

Graphic Errors (Logo Missing or Wrong Size)

1. Reconfirm that the graphic files were uploaded to the property's Zope directory.
2. Consult with the Graphic Designer about fixing problems with the images and replacing the files on Zope.

Template Errors (Certificate Misprints or doesn't Print)

Consult with the Graphic Designer and System Administrator on fixing the problems with the certificates.

Important: Make sure you contact the Fulfillment Manager, so that the fulfillment server and cell are configured to handle the new certificate's template. The Fulfillment Manager needs to:

- Log into the fulfillment manager's tool on the fulfillment server, and on the **Check Type** page, set up the new template.
- On the fulfillment server's **Cell** page, configure one or more cells to be able to print the new certificate template.

Spreadsheet Errors (Wrong Text or Links)

1. In Netscape, download the property's data from the development site.
   - Enter the URL **http://166.90.248.170:2080/cgi-bin/protected/malldata?partner=*[partnername]***
   - Enter the username **mdata** and the password **********.**
   - Save the file in the partner's folder as ***[partnername]*_dev.html**.
2. Open the .html file in Excel and save it as an Excel (.xls) spreadsheet file. You can choose to overwrite the *[partnername]*_dev.xls (or .txt) file already saved there.
3. Correct all the items left blank on Form L-2.
4. For every row you change, add, or delete, change the action code in **Column A (Action)**:
   - For every row where you changed any cell, enter **E**.
   - If you added a row, enter **A**.
   - To delete a row, enter **D**.

Careful! Don't delete any rows by cutting them from the spreadsheet. Put a D in Column A, and the line will be deleted when you upload.

5. Save the corrected spreadsheet as a tab-delimited text file (unless it's already a text file). You can choose to overwrite the ***[partnername]*_dev.txt** file already saved there.
6. Repeat the "Uploading to Development" procedure using the new file.
7. Return Form L-2 to the team member who is testing.

At the End, You Should Have:

New property pages tested and working on the development site.

6. Signing Off on the Development Site

When everything is tested, and the graphics and templates are done, the Production Manager signs off on the data, authorizing the upload to the production server.

To Start, You'll Need:

- A completed Form L-1: Spreadsheet Checklist
- A completed Form L-2: Testing Checklist
- A completed Form L-3: Template Checklist

Here's What to Do:

1. Collect all the testing checklists from the Production staff, and verify that all of the items are checked and the forms signed.
2. Verify that the updated data text file resides in the Merchant Partner's electronic folder, and the graphics reside in the properties' Zope folders.
3. Complete and sign Form L: Go Live Authorization.
4. If possible, have the Partner Sales Representative review and approve the development site, and sign the authorization on Form L.
5. Send an e-mail message with Change Management Notification in the subject line to the System Administrator and other developers notifying them of:
   - The name of the server being updated (production)
   - That this is a new partner setup, ***not*** a change to existing data
   - The name of the Merchant Partner and properties involved in the upload
   - The filenames of graphics involved and what Zope directories they reside in
   - Any work left for the System Administrator to do (such as entering the last five rows of ID data and the check mix/max numbers)
   - Any problems you noticed with the spreadsheet you downloaded to populate.
   - Request that everyone reply with their go-ahead, or state reasons why the upload should be held.
6. **Only when the upload is cleared by all the developers:** notify Production team members to upload the data text file to production, or perform the production upload yourself.

At the End, You Should Have:

- All checklists and authorizations completed
- All data residing in the correct folders

7. Uploading Data to Production

In step 7, upload the tested data and graphics to the production server.

Careful! Never perform this procedure until you've received authorization from all the developers.

Also **never** perform this procedure if you're changing data that already exists on production. For that, follow the "Correcting Production Errors" procedure, or if you're maintaining an existing partner, follow the procedures in Section 2, Site Maintenance.

To Start, You'll Need:

- Completed Form L: Go Live Authorization
- E-mail authorization from all developers (especially the System Administrator)

Special Note

If there is any difference between the development and production databases or servers due to rolling development, the spreadsheet formats may not be in sync. In such a case, you won't be able to upload the same text file you tested on development.

In that case, follow the second procedure below to download a similar spreadsheet from ***production*** this time, then populate it with the new data. This keeps the spreadsheet format in sync with what works on the production server.

Always confirm the status of the servers and any special steps with the developers before doing the production upload.

Here's What to Do:

1 If you haven't already done so, notify the System Administrator to update the production Zope folders with the graphic files on development.

2 The graphics should be in the production Zope folders before you upload the data.

Careful! If you aren't certain that the **[*partnername*]_dev.txt** is the most recent version, download the most recent data from development by refering to 2. Creating the Data Spreadsheet, Saving the spreadsheet, Steps 1-3.

3 Delete all the data in the **Check Last, Check Min and Check Max columns (currently Z-AB)** and delete all the data in **the last five columns of ID information (currently columns AF-AJ: PARTNERID, PARENTID, LOCATIONID, GCINFOID, and BANKINGID).** Do not delete any headers or any other data.

4 Enter **A** on every row of **Column A (Action).**

5 Change all the flags in Column AC-AE (Active_Inbound, Active_Search and Active_Fulfillment) from 1 to **0**.

6 Insert the **BANKING ID** info for the appropriate bank in column **AJ** (use BNK0000000000 for all Wells Fargo partners but BNK0729803250 for Michigan National partners).

7 Save the file and close it.

8 Open the Netscape browser and enter the URL: **http://www.i-gift.com/exnet-ar/partners2/import.html**

9 Enter the username **mdata** and the password ********.

A huge white screen appears with a field box in the top left corner. The word Browse is to the right and the word Import is below it.

10 Click **Browse.**

11 Locate the tab-delimited file in the Merchant Partner's **/production** folder.

12 Erase the first part of the pathname so that only the filename is visible

Important: If you see igift/Production/Mall Data/[partnername]_prod_1221.txt, erase everything except [partnername]_prod_1221.txt

13 Click **Import.**

If the screen remains blank, the upload was successful. If there are problems due to the format, the screen displays an error message.

14 If you receive an error message, use the following procedure to upload to production.

If the Upload Is Rejected:

1 Download a similar spreadsheet from production. See Table B for possible URLs:

- Enter the URL **http://www.i-gift.com:2080/cgi-bin/protected/malldata?partner=*[partnername]***
- Enter the username **mdata** and the password ********.
- Save the file ***as is*** to the **/production** folder of the new partner you're trying to upload.

2 In Excel, open the .html file you just downloaded from production and save it as **[*partnername*]_prod_[*savedate*].txt** in the **/production** folder.

3 Add gridlines by selecting **Tools|Options**. On the **View** tab, click the **Gridlines** checkbox.

4 Delete all of the data in the spreadsheet *except for* the column headings.

5 Open the **[*partnername*]_dev.txt** file containing the new partner data you want to upload.

Careful! If you aren't certain that the **[*partnername*]_dev.txt** is the most recent version, download the most recent data from development by refering to 2. Creating the Data Spreadsheet, Saving the spreadsheet, Steps 1-3.

6. Switching between the two files in Excel, *carefully* copy and paste the partner data into the empty production spreadsheet. Leave blank the Check Last, Check Min and Check Max columns and the last five columns of ID data.
7. Enter **A** for all rows in **Column A (Action).**
8. Change the flags in columns AC-AE (Active_Inbound, Active_Search and Active_Fulfillment) from 1 to **0**.
9. Save and close the spreadsheet.
10. Repeat the first procedure in this topic to upload the new text file you created to the production server.
11. If you still can't upload the file, or the properties don't appear on the production web site, contact the System Administrator immediately and work to resolve the problems.
12. If you can see the text but not the images on the production web site, confirm with the System Administrator that the production Zope directories have been updated, and work with them to resolve any problems.
13. Inform the System Administrator of any columns of data missing from the production spreadsheet that they should complete (such as the IDs and the check mix/max data).

At the End, You Should Have:

All new Merchant Partner's properties appearing on the production web site.

8. Audit Testing the Production Site

After the upload to production, the repeat the same testing done to the development site on the production site, to be sure everything still works properly on production.

To Start, You'll Need:

- All data and graphic files uploaded to the production server.
- A blank copy of Form L-2: Testing Checklist for each property.

Here's What to Do:

1. Open the Netscape browser and enter the URL **http://www.i-gift.com** to display the production site.
2. Create an account for **Tester *[yourlastname].***

   This lets you view production data for testing, without it being visible to the public.
3. For ***each*** new property: refer to Form L-2: Testing Checklist, and check each item on the list that is correct. Leave unchecked any items that are ***not*** correct.
4. For ***each*** new property: create a test order using the **Tester** account. Confirm with Fulfillment that certificates print correctly. Attach a sample print-out to form L-2.
5. If there are any text errors, follow the procedure for "Correcting Production Errors."
6. If there are graphic or printing errors, work with the Graphic Designer and the System Administrator to resolve the problems.
7. If everything checks out, sign and date Form L-2, and send it to the Production Manager.

Production Manager

When you receive a completed and signed copy of Form L-2, review the production site yourself. If you feel it's ready to go live, inform the System Administrator to change the flags so the properties are visible to the public.

At the End, You Should Have:

- All new partner properties working on the production web site
- All new certificates printing correctly

9. Correcting Production Errors

Once data is uploaded to production, you follow a slightly different procedure to make corrections than is used on development.

You can skip testing the development site and continue to test on production until all the problems are resolved. However, you must duplicate any changes you made on production after the initial upload on development, to keep the two servers in sync.

To Start, You'll Need:

- All data and graphic files uploaded to the production server.
- A copy of Form L-2: Testing Checklist showing the outstanding errors.

Correcting Production:

1. Download the new partner's data from production:
   - Enter the URL **http://www.i-gift.com:2080/cgi-bin/protected/malldata?partner=*[partnername]***
   - Enter the username **mdata** and the password ********.
   - Change the filename to ***[partnername]*_prod_*[savedate]*.html** and save it in the partner's **/production** folder.
2. In Excel, open the .html file you just downloaded from production.
3. Add gridlines by selecting **Tools|Options**. On the **View** tab, click the **Gridlines** checkbox.
4. Referring to Form L-2: Testing Checklist, review all the unchecked items, and make any corrections indicated.

Careful! Do **not** touch the last five columns of ID data or the Check Last, Check Min, Check Max columns. These must remain exactly as the System Administrator entered them.

Also, don't manually delete rows of data. Enter a D in Column A (Action).

5. For every row you changed, added, or deleted, enter one of the following in **Column A (Action)**:
   - **E** if you changed data in any cell.
   - **A** if you added a that row of data.
   - **D** if you want to delete that row of data.

Important: If you're adding a store, be sure to include all the required columns of data.

Also, be sure to replace apostrophes, quotes, hyphens, em-dashes and e acutes with html code.

6 Save the file as a tab-delimited text (.txt) file.

7 Follow the "Uploading Data to Production" procedure to upload the new ***[partnername]*****_prod_*****[savedate]*****.txt** file.

8 In the Netscape browser, enter the URL **http://www.i-gift.com/** to display the production web site.

9 Log on as **Tester *[yourlastname]***, and referring to Form L-2, continue testing.

10 Repeat Steps 1 through 9 until everything checks out. Check all the lines on Form L-2, sign it, and send it to the Production Manager.

Duplicating Changes on Development

1 In Excel, open the partner's most recent ***[partnername]*****_dev.txt** file. This should be the one you last uploaded to development.

2 Open the ***[partnername]*****_prod_*****[savedate]*****.txt** file you just uploaded to production.

3 *Carefully* copy and paste the new data from the production spreadsheet into the development spreadsheet. You only need to edit cells that have changed.

Careful! Do **not** touch the last five columns of ID data or the check min/max column on the development spreadsheet. These must remain exactly as entered.

Also, don't manually delete rows of data. Enter a D in Column A (Action).

4 For every row in the development spreadsheet where you changed, added, or deleted data, enter one of the following in **Column A (Action)**:

- **E** if you changed data in any cell.
- **A** if you added a that row of data.
- **D** if you want to delete that row of data.

5 Save and close both files.

6 Repeat the "Uploading Data to Development" procedure to upload the new development text file.

At the End, You Should Have:

- All new partner properties working on the production web site
- All new certificates print correctly

Table A: URLs for Downloading Production Data

Enter one of these URLs when you want to download a partner's data from the development server to edit it.

Mall	Development Download URL
All malls	http://166.90.248.170:2080/cgi-bin/protected/malldata.
NBA	http://166.90.248.170:2080/cgi-bin/protected/malldata?partner=nba
Somerset	http://166.90.248.170:2080/cgi-bin/protected/malldata?partner=somerset
Birmingham	http://166.90.248.170:2080/cgi-bin/protected/malldata?partner=birmingham
Grosse Pointe	http://166.90.248.170:2080/cgi-bin/protected/malldata?partner=village
Westgate	http://166.90.248.170:2080/cgi-bin/protected/malldata?partner=property
Royal Oak	http://166.90.248.170:2080/cgi-bin/protected/malldata?partner=royal

Table B: URLs for Downloading Production Data

Enter one of these URLs when you want to download a partner's data from the production server to edit it.

Mall	Production Download URL
All malls	http://www.i-gift.com:2080/cgi-bin/protected/malldata
Somerset	http://www.i-gift.com:2080/cgi-bin/protected/malldata?partner=somerset
NBA	http://www.i-gift.com:2080/cgi-bin/protected/malldata?partner=nba
Birmingham	http://www.i-gift.com:2080/cgi-bin/protected/malldata?partner=birmingham
Grosse Pointe	http://www.i-gift.com:2080/cgi-bin/protected/malldata?partner=village
Westgate	http://www.i-gift.com:2080/cgi-bin/protected/malldata?partner=property

Table C: URLs for Uploading Data

Enter one of these URLs when you want to upload data to a server.

Server	Upload URL
Development	http://166.90.248.170:2080/exnet-ar/partners2/import.html
Production	http://www.i-gift.com/exnet-ar/partners2/import.html

Section 2

Basic Site Maintenance

Basic Maintenance Process Overview

This section describes the process to use when making simple changes for an i-gift Merchant Partner who is already in production.

Purpose

Merchant Partners who are already set up in our system frequently need to change their data, particularly the lists of stores associated with properties. Occasionally, they may want to introduce a new stock, change their logo, or add or remove entire properties.

This involves:

- Populating the Production and Fulfillment servers with updated data and graphic files.
- Testing that the web site works properly, certificates can be printed successfully, and funds are captured.

Who Is Involved

The maintenance process is performed by the:

- Production team members*
- Production Manager
- Graphic Designer
- System Administrator

* To be done correctly, at least **two** members of the Production team should be involved: the Production Manager and one other team member.

What You Need

To carry out this process, you'll need:

- An installed version of Netscape browser, version 4.5 or better.
- An installed version of Microsoft Excel®.
- If changing store lists or other partner data: Copies of Form B-Ch, Form C-Ch, or Form D-Ch completed by the Merchant Partner.
- Blank printed copies of Forms F-Ch, L, L-1, L-2, and L-3.
- Electronic copies of the Status Report document, and the Change Management Notice.

Maintenance Process Flow

During the maintenance process:

1 Production team member:

- Collects Forms B-Ch, C-Ch, or D-Ch, from the Merchant Partner and/or Partner Sales Representative.
- Collects any new graphic files and gives them to Graphic Designer for processing.
- If the certificate template is changing: completes Form F-Ch and distributes it to the Graphic Designer and the System Administrator.

2 **A.** Production Team member downloads the partner's data from the production server and makes the necessary corrections.

2 **B.** If necessary, the Graphic Designer and the System Administrator create update the certificate template or graphics.

2 **C.** Production Manager creates a Change Management schedule, and clears the upload date with the System Administrator and any other developers working on the i-gift sites. *The Production Manager holds the upload if there is any conflict with the System Administrator or other developers.*

3 Production team member uploads the data and graphic files to the production server for testing.

4 Production team member tests the production site end-to-end and makes any remaining corrections in conjunction with the Graphic Designer and System Administrator.

5 Repeat Steps 2 through 4 until everything is absolutely perfect.

6 When the production site passes, the Production team member duplicates the changes made to production on the development site.

The Forms You'll Use

Here are the forms you'll use throughout the simple maintenance process. They provide a hardcopy reference of all the partner's information, and verify that testing is complete.

Completed forms should be kept in a hanging folder you set up for each partner and property.

- **Form B-Ch: Merchant Partner CHANGE Form**
  This form shows what Merchant Partner information is changing, including gift certificate stock selection. File it in the partner's folder.

  If a new stock is being introduced, complete a copy of Form E: Gift Certificate Stock.
- **Form C-Ch: Mall/Shopping District CHANGE Form**
  This form shows what mall/shopping district is changing, including the mall photo and logo used. File it in the property's folder.
- **Form D-Ch: Store List CHANGE Form**
  This form shows what stores are being added or deleted. Properties can also attach a pre-printed list of stores or provide a URL for their store list. File it in the property's folder.
- **Form F-Ch: Template CHANGE Form**
  This form instructs the Graphic Designer and the System Administrator how to change an existing check template, such as changing the logo or bank information. Complete one form for each certificate, usually one per property. File it in the property's folder.
- **Form L-1: Spreadsheet Checklist**
  This form lists things to check on the partner's setup spreadsheet. It should be checked and signed by the tester. File it in the partner's folder.
- **Form L-2: Testing Checklist**
  This form lists things to test after data has been uploaded to the development or production servers. It should be checked and signed by the tester. File it in the property's folder.
- **Form L-3: Template Checklist**
  This form lists things for the Graphic Artist and System Administrator to test when creating a new template. It should be signed by both. File it in the property's folder.

1. Gathering Partner Information

The first step of the simple site maintenance process is gathering information from the Merchant Partner, and routing it to the correct person to begin the actual changes to the site.

To Start, You'll Need:

You'll need detailed information for the changes to be made. Has a mall property's store list changed? If so, what are the new stores? Did we set up a new mall partner with a less-than-ideal photo? If so, you'll need the scanned file of the better quality photo. Fill out the appropriate forms for the changes you want to make:

Here's What to Do:

1 Collect appropriate change forms: B-Ch, C-Ch, D-Ch or F-Ch

2 Collect any new graphics

Check: Graphics meet the specification. Photo(s) should be full color and 300 dpi. Logo must be in .eps file format.

3 If the Merchant Partner is using new custom certificate stock, obtain at least 15-25 samples from them.

At the End, You Should Have:

- Completed change forms B-Ch, C-Ch, D-Ch and/or F-Ch.
- New graphics if necessary.
- New certificate stock if necessary.

2A. Download and Change Partner Data from Production

In this step, the production manager updates the merchant partner data spreadsheet using the all information collected from Change Forms B-Ch, C-Ch, an/or D-Ch.

There are two main procedures:

- Downloading the correct partner data spreadsheet from production.
- Editing the partner data spreadsheet.

To Start, You'll Need:

Appropriate completed change forms; B-Ch, C-Ch, and/or D-Ch.

Downloading the Partner Data

1 Download the most recent Merchant Partner spreadsheet from the production site:

- Open the Netscape browser and enter the URL **http://www.i-gift.com:2080/cgi-bin/protected/malldata?partner=*[partnername]*.**

Example: To download Somerset, enter: http://www.i-gift.com:2080/cgi-bin/protected/malldata?partner=somerset.

See Table B for a list of possible URLs.

- Enter the username **mdata** and the password **********.
- Select **File|Save As**. The filename appears as malldata.html.
- Under **Save In**, select the production folder you created for this partner.
- Change the filename to something specific to the Merchant Partner and the date, (e.g. *somerset*_0115.html), and click **Save**.

2 In Excel, open the .html file you saved in the Merchant Partner production folder.

3 Add gridlines by selecting **Tools|Options**. On the **View** tab, click the **Gridlines** checkbox.

4 Referring to the change forms, make the corrections as indicated.

Careful! Do **not** touch the last five columns of ID data or the Check Last, Check Min, Check Max columns. These must remain exactly as the System Administrator entered them.

Also, don't manually delete rows of data. Enter a D in Column A (Action).

5 For every row you changed, added, or deleted, enter one of the following in **Column A (Action)**:

- **E** if you changed data in any cell.
- **A** if you added a that row of data.
- **D** if you want to delete that row of data.

6 When you've finished making changes, do the following to the text within each changed or added cell:

- Run the spellchecker.
- Take out any line returns.
- Replace all uppercase **I**s in i-gift with lowercase **i**.
- Replace all apostrophes with **'** (include semi-colon).
- Replace all e acutes (as in café) with **é** (include semi-colon).
- Replace all em-dashes with **—** (include semi-colon).

7 Select **File|Save As** and save the spreadsheet as a tab-delimited text file with the three-part filename *partnername*_prod_*date*.txt. This lets you know which version of the spreadsheet you're looking at.

At the End, You Should Have:

A tab-delimited file with all the necessary changes.

2B. Modifying Templates and Graphics

In this step, the Graphic Designer and the System Administrator:

- Process the updated graphic files for each property.
- Create and propagate the new or modified certificate templates.

Graphic Designer:

To Start, You'll Need:

- For ***each*** graphics modification: Completed Form C-Ch for Graphics Replacements and all graphics for replacement. For ***each*** property: a logo in .eps file format.
- For ***each*** template modification: Completed Form F-Ch: Gift Certificate Template CHANGE Form.
- Samples of gift certificate stock (if using new custom stock).
- Blank copy of Form L-3: Template Checklist.

Processing the Graphic Files

For ***each*** graphic:

1. To modify graphics files, refer to Creating Templates and Graphics in Section 1.
2. Save new graphics files to property graphics folder with date of modification.

Modifying the Certificate Template

Referring to the information on Form F-Ch and any new stock samples, modify the template as specified.

1. If modifying an existing template, in Adobe Illustrator:
   - Open the existing property template file named **chk[*abbreviated property name*]** in the property's folder.
   - Make necessary modifications as specified in Form F-Ch.
   - Save over existing Postscript file.
2. If Merchant Partner is providing custom stock:
   - Measure the stock to determine the placement of all the elements.
   - In Adobe Illustrator, create an image the size of the stock that contains the logo and text elements in the correct places. Use the information from Form F.
   - Save the template as a Postscript file named **chk*[abbreviated property name]*** in the property's folder

3 Test print the new template on the MICR printer using the stock samples.

Important: Contact the System Administrator for exact instructions on how to print the revised template to the MICR printer from your system.

4 Using Form L-3, check that all the items pertaining to the Graphic Designer are correct.

5 When everything checks out, sign and date your section of Form L-3: Template Checklist and return it to the Production Manager. Save a copy for your files.

6 Send a copy of the template Postscript file to the System Administrator to propagate on the Fulfillment Cells.

7 Inform the Production Manager that the template is done and has been sent to the System Administrator for propagation.

Production Manager:

1 When the Graphic Artist informs you the template is done and sent to the System Administrator, confirm that the System Administrator has received it, along with a sample of the stock.

2 If within a few days you haven't received a completed Form L-3 from the System Administrator, check with him/her on the template progress, and help to resolve any problems that are holding up completion of the template change.

3 When you've received verification that the template change was implemented, sign off on Form F-Ch to confirm template changes were made.

Important: Make sure you contact the Fulfillment Manager, so that the fulfillment server and cell are configured to handle the modified certificate's template. The Fulfillment Manager **may** need to:

- Log into the fulfillment manager's tool on the fulfillment server, and on the **Check Type** page, set up the modified template.
- On the fulfillment server's **Cell** page, configure one or more cells to be able to print the adjusted certificate template.

System Administrator:

To Start, You'll Need:

- Form F-Ch: Gift Certificate Template CHANGE Form and a copy of the modified template file from the Graphic Designer
- Samples of any new custom certificate stock
- A blank copy of Form L-3: Template Checklist

Here's What to Do:

For each new/modified template sent:

1. Edit the Postscript template file.
2. Verify the key integrity.
3. Index the template.
4. Run the cell in ghost view to verify that keys are correctly detected and swapped.
5. Propagate the indexed template to the host.
6. Propagate the indexed template to the cells.
7. Add new the template to the fulfillment server database.
8. Test the template by printing from a fulfillment cell.
9. When everything checks out, complete your section of Form L-3: Template Checklist and return it to the Production Manager, along with a test printout. Save a copy for your files.

At the End, You Should Have:

For ***each*** template change:

- Completed Form F-Ch: Gift Certificate Template CHANGE Form.
- Completed Form L-3: Template Checklist with sample printout attached.
- New/modified certificate templates propagated on the Fulfillment cell machines.
- New/modified logos and mall photos saved in the properties' electronic folders, and in the Zope folders on the development server.

2C. Creating the Status Report and Change Management Notification

To facilitate the uploads, the Production Manager creates a status report whenever significant changes have been made to any merchant partners.

The Production Manager also creates a Change Management Notification for the production upload and e-mails it to the System Administrator and other developers to alert them to the nature of the change and the anticipated change date.

To Start, You'll Need:

Completed change forms.

Creating the Status Report:

1 Open the most recent production schedule document under a folder titled **production schedule**.

2 Find the row for the merchant partner being modified. Fill in necessary columns of information.

- If a new store is being added or deleted, change the number in the # of stores column and indicate the change in the status column.
- If a photo, logo or template is being changed, note the change(s) in the photo, logo and or template columns, then note the change in the status column.
- Use the status column to note any outstanding issues or missing information.
- Put all changes in bold.

3 E-mail a copy of the status report to the **[Project Manager, ?]. [Project Manager]** will broadcast the production schedule to the production staff, fulfillment and system administration.

Creating the Change Management Notification:

1. Create an e-mail message with Change Management Notification in the subject line and send it to the System Administrator, and all other developers. State:
    - The name of the server being updated (production)
    - That this is a change to existing data
    - The name of the Merchant Partner and properties involved in the upload
    - The filenames of revised logos and mall photos involved and what Zope directories they reside in (if known)
    - Any problems you noticed with the spreadsheet you downloaded to make changes.
    - **Request that everyone reply with their go-ahead, or state reasons why the upload to production should be held.**
2. Copy yourself on the message so you have a record for your files.
3. Send this message to the System Administrator developers, the System Administrator, and any other developers working on the site.

At the End, You Should Have:

- A Change Management Notification sent to the development teams.
- A Status Report ready to send to **[Project Manager]**.

3. Uploading Modified Data and Graphics to Production

In step 3, upload the modified data and graphics to the production server.

Careful! Never perform this procedure until you've received authorization from all the developers.

To Start, You'll Need:

- Completed Form L: Go Live Authorization
- E-mail authorization from all developers (especially the System Administrator)
- The tab-delimited text file containing the corrected spreadsheet data
- Processed new graphics files

Here's What to Do:

1. If you haven't already done so, notify the System Administrator to update the production Zope folders with the graphic files on development.
2. The graphics should be in the production Zope folders before you upload the data.
3. Open the Netscape browser and enter the URL: **http://www.i-gift.com/exnet-ar/partners2/import.html**
4. Enter the username **mdata** and the password ************.

   A huge white screen appears with a field box in the top left corner. The word Browse is to the right and the word Import is below it.
5. Click **Browse.**
6. Locate the tab-delimited file in the Merchant Partner's **/production** folder.
7. Erase the first part of the pathname so that only the filename is visible

Important: If you see igift/Production/Mall Data/[partnername]_prod_1221.txt, erase everything except [partnername]_prod_1221.txt

8. Click **Import.**

   If the screen remains blank, the upload was successful. If there are problems due to the format, the screen displays an error message.
9. If you receive an error message, use the following procedure to upload to production.
   - Click your browser's print button to print the error log.
   - Correct the errors indicated on the log.
10. Once the upload is successful, enter the URL **http://www.i-gift.com** to open the live web site on the browser, and check that the site reflects the changes made.

11 If it appears the changes didn't go through,a nd you haven't found anything wrong with the spreadsheet data, contact the System Administrator for assistance.

4. Testing the Live Web Site (Production)

In this step, the Production staff makes sure the modified partner data appears and works as it should on the live web site.

There are two procedures:

- Testing Online
- Correcting Errors

It's best if they're performed by two different team members.

To Start, You'll Need:

- Modified partner data uploaded to the production server.
- Completed change forms.
- A blank copy of Form L-2: Testing Checklist for each modified property.

Testing Online:

1. Open the Netscape browser and enter the URL **http://www.i-gift.com** to display the live web site.
2. If you've modified spreadsheet data, check that all the changes appear on the live web site. If the changes didn't go through, repeat steps in **Download and Change Partner Data from Production**.
3. If you've modified graphic files , check that they appear on the live web site. Consult with the Graphic Designer about fixing and remaining problems with the images.
4. If you've modified a template, test print the new certificate using the **Tester** account. If there are any problems, consult the Graphic Designer and the System Administrator.
5. Fill out Form L-2 to make sure no new errors were introduced . If there are errors, repeat the steps under **Download and Change Partner Data from Production**.
6. When the errors are corrected, repeat Steps 1 to 3 until all the items check out.
7. Sign Form L-2 and return it to the Production Manager.

At the End, You Should Have:

- Modified Merchant Partner data and graphics appearing on the web site.
- Modified template printing correctly

5. Uploading Modified Data to Development

In step 5, duplicate all changes to the production server on the development server.

To Start, You'll Need:

- All data and graphic files uploaded to the production server.
- Completed change forms.

Here's What to Do:

1 Download the merchant partner malldata from the development server:

In Netscape, download the property's data from the development site.

- Enter the URL **http://166.90.248.170:2080/cgi-bin/protected/malldata?partner=*[partnername]***
- Enter the username **mdata** and the password **********.**
- Save the file in the partner's folder as *[***partnername]***_dev.html**.

2 Open the .html file in Excel and save it as an Excel (.xls) spreadsheet file. You can choose to overwrite the *[partnername]*_dev.xls (or .txt) file already saved there.

3 Make all the changes you made to the production spreadsheet based on the change forms.

4 For every row you change, add, or delete, change the action code in **Column A (Action)**:

- For every row where you changed any cell, enter **E**.
- If you added a row, enter **A**.
- To delete a row, enter **D**.

Careful! Don't delete any rows by cutting them from the spreadsheet. Put a D in Column A, and the line will be deleted when you upload.

5 Save the corrected spreadsheet as a tab-delimited text file (unless it's already a text file). You can choose to overwrite the ***[partnername]*_dev.txt** file already saved there.

6 Repeat the "Uploading to Development" procedure using the new file.

At the End, You Should Have:

All new Merchant Partner's data appearing on the development site.

Table A: URLs for Downloading Production Data

Enter one of these URLs when you want to download a partner's data from the development server to edit it.

Mall	Development Download URL
All malls	http://166.90.248.170:2080/cgi-bin/protected/malldata.
NBA	http://166.90.248.170:2080/cgi-bin/protected/malldata?partner=nba
Somerset	http://166.90.248.170:2080/cgi-bin/protected/malldata?partner=somerset
Birmingham	http://166.90.248.170:2080/cgi-bin/protected/malldata?partner=birmingham
Grosse Pointe	http://166.90.248.170:2080/cgi-bin/protected/malldata?partner=village
Westgate	http://166.90.248.170:2080/cgi-bin/protected/malldata?partner=property
Royal Oak	http://166.90.248.170:2080/cgi-bin/protected/malldata?partner=royal

Table B: URLs for Downloading Production Data

Enter one of these URLs when you want to download a partner's data from the production server to edit it.

Mall	Production Download URL
All malls	http://www.i-gift.com:2080/cgi-bin/protected/malldata
Somerset	http://www.i-gift.com:2080/cgi-bin/protected/malldata?partner=somerset
NBA	http://www.i-gift.com:2080/cgi-bin/protected/malldata?partner=nba
Birmingham	http://www.i-gift.com:2080/cgi-bin/protected/malldata?partner=birmingham
Grosse Pointe	http://www.i-gift.com:2080/cgi-bin/protected/malldata?partner=village
Westgate	http://www.i-gift.com:2080/cgi-bin/protected/malldata?partner=property

Table C: URLs for Uploading Data

Enter one of these URLs when you want to upload data to a server.

Server	Upload URL
Development	http://166.90.248.170:2080/exnet-ar/partners2/import.html
Production	http://www.i-gift.com/exnet-ar/partners2/import.html

Section 3

New Mall Property Maintenance

New Mall Property Maintenance Process Overview

This section describes the process to use when making major changes for an i-gift Merchant Partner who is already in production.

Purpose

Merchant Partners who are already set up in our system frequently need to change their data. Occasionally, they may need to add or remove entire properties.

This involves:

- Populating the Production and Fulfillment servers with updated data and graphic files.
- Creating a certificate template for any new properties and propagating it to all the Fulfillment cells.
- Testing that the web site works properly, certificates can be printed successfully, and funds are captured.

Who Is Involved

The maintenance process is performed by the:

- Production team members*
- Production Manager
- Graphic Designer
- System Administrator

* To be done correctly, at least **two** members of the Production team should be involved: the Production Manager and one other team member.

What You Need

To carry out this process, you'll need:

- An installed version of Netscape browser, version 4.5 or better.
- An installed version of Microsoft Excel®.
- If changing store lists or other partner data: Copies of Form B-Ch, Form C-Ch, or Form D-Ch completed by the Merchant Partner.
- If adding new properties: Copies of Forms C to E completed by the Merchant Partner.
- Blank printed copies of Forms F, L, L-1, L-2, and L-3.
- Electronic copies of the Status Report document, and the Change Management Notice.

New Mall Property Maintenance Flow

During the maintenance process:

1 Production team member:

- Collects Forms B-Ch and C to F from the Merchant Partner and/or Partner Sales Representative.
- Collects any new graphic files and gives them to Graphic Designer for processing.

2 **A.** Production member downloads the appropriate Merchant Partner spreadsheet from development. (See Table A for URLs) and adds new property information following Populating the Spreadsheet in Section 1, Step 2A.

2 **B.** Production team follows Step 2B in Section 1 to add and test new data and images on development.

2 **C.** Production team completes Steps 2C through 6, in Section 1. Production Manager creates a Change Management schedule, and clears the upload data with the System Administrator and any other developers working on the i-gift sites. *The Production Manager holds the upload if there is any conflict with the System Administrator or other developers.*

3 Production team member checks that the mall data spreadsheets are correct, and that the graphic files and templates meet quality standards.

4 Production team member uploads the mall data spreadsheet and graphic files to the development server for testing.

5 Production team member tests the development site and corrects the mall data spreadsheets and graphic files (in conjunction with the Graphic Designer).

6 When the development site passes, the Production Manager signs off permitting the upload to the production server. *The Production Manager holds the upload if there is any conflict with the System Administrator or other developers.*

7 Production team member uploads the mall data spreadsheets and graphic files to the production server.

8 Production team member tests the production site end-to-end, to ensure that it performs as expected.

9 Any remaining corrections to the production site are made in conjunction with the Graphic Designer and System Administrator.

The Forms You'll Use

Here are the forms you'll use throughout the simple maintenance process. They provide a hardcopy reference of all the partner's information, and verify that testing is complete.

Completed forms should be kept in a hanging folder you set up for each partner and property.

- **Form B-Ch: Merchant Partner CHANGE Form**
  This form shows what Merchant Partner information is changing, including gift certificate stock selection. File it in the partner's folder.

  If a new stock is being introduced, complete a copy of Form E: Gift Certificate Stock.

- **Form C: Mall/Shopping District Information**
  This form includes all information for each mall/shopping district, including mall description and the type of mall photo and logo sent. File it in the property's folder.

- **Form D: Store List**
  This form includes all store information for each mall/shopping district. Properties can also attach a pre-printed list of stores or provide a URL for their store list. File it in the property's folder.

- **Form E: Gift Certificate Stock**
  This form includes all gift certificate information when the partner is providing their own gift stock, or wants to use different stocks for different properties. File it in the partner's folder, *unless* they're using a different stock for different properties. In that case, file it in the property's folder.

- **Form F: Template Form**
  This form instructs the Graphic Designer and the System Administrator how to create a check template. Complete one form for each certificate, usually one per property. File it in the property's folder.

- **Form L: Go Live Authorization**
  This form authorizes the upload of a partner's data to the production server. It should have copies of Forms L-1, L-2, and L-3 attached. File it in the partner's folder.

- **Form L-1: Spreadsheet Checklist**
  This form lists things to check on the partner's setup spreadsheet. It should be checked and signed by the tester. File it in the partner's folder.

- **Form L-2: Testing Checklist**
  This form lists things to test after data has been uploaded to the development or production servers. It should be checked and signed by the tester. File it in the property's folder.

- **Form L-3: Template Checklist**
  This form lists things for the Graphic Artist and System Administrator to test when creating a new template. It should be signed by both. File it in the property's folder.

1. Gathering Partner Information

The first step to adding a mall property to an existing merchant partner is to gather property information from the Merchant Partner and/or Partner Sales Representative and routing that information to the appropriate people.

To Start, You'll Need:

Confirmation that a merchant partner wants to add a property.

Here's What to Do:

1. Create a new electronic folder for the new property under the merchant partner folder.
2. Obtain Forms B-Ch, and C to F, logo files, and property photos from the Partner Sales Representative, or from the Merchant Partner if you're in direct contact with them.
3. If the Merchant Partner is using custom certificate stock, obtain at least 15-25 samples from them, as well.

Check: Make sure graphics meet the specification. Photo(s) should be full color and 300 dpi. Logo must be in .eps file format.

4. Complete the **For Office Use Only** boxes on forms C to E.
5. Complete Form F: Template Specification for the new property certificate template. See the Merchant Partners stock choice(s) listed on Form B.
    - Send a copy of Form F with a stock sample (if custom stock), the property photos, and logos to the Graphic Designer as soon as possible.
    - Save the original Form F for your files.
    - Confirm that the Graphic Designer has received Form F, and record that date on your copy of Form F.

At the End, You Should Have:

- Completed versions of Forms C to E.
- Template in production.
- Mall photos and logos in production.

2A. Adding New Property Data to Development Spreadsheet

Once you have all the forms for the new merchant partner property, edit the existing merchant partner spreadsheet on development.

To Start, You'll Need:

Completed forms B-Ch, and C-E.

Here's What to Do:

1 In Netscape, download the merchant partner's data from the development site.

- Enter the URL **http://166.90.248.170:2080/cgi-bin/protected/malldata?partner=[partnername]**

Example: To download Somerset, enter: http://166.90.248.170.2080/cgi-bin/protected/malldata?partner=somerset.

See Table A for a list of possible URLs.

- Enter the username **mdata** and the password **********.**
- Save the file in the partner's folder as ***[partnername]*****_dev.html**.

2 Open the .html file in Excel and save it as an Excel (.xls) spreadsheet file. You can choose to overwrite the *[partnername]*_dev.xls (or .txt) file already saved there.

3 Refer to **Populating the Spreadsheet** in Section 2 for instruction for adding data for a new property and affiliated stores.

4 When you've entered the data, do the following to the text within each cell:

- Run the spellchecker.
- Take out any line returns.
- Replace all uppercase **I**s in i-gift with lowercase **i**.
- Replace all apostrophes with **'** (include semi-colon).
- Replace all e acutes (as in café) with **é** (include semi-colon).
- Replace all em-dashes with **—** (include semi-colon).

5 Select **File|Save As** and save the spreadsheet with the three-part filename *partnername*_dev_*date*.xls. This lets you know which version of the spreadsheet you're looking at.

6 Select **File|Print** and print the spreadsheet.

7 Check the spreadsheet using Form L-1: Spreadsheet Checklist. When all the steps are checked off, save the spreadsheet as a tab-delimited file.

At the End, You Should Have:

- A tab delimited text file for the Merchant Partner containing the new property information.
- A completed Form L-1.

2B. Creating Templates and Graphics for the New Property

In this step, the Graphic Designer and the System Administrator:

- Process the graphic files for each new property.
- Create and propagate the new certificate templates.

To Start, You'll Need:

- A full-color print of the property at least 300 dpi, or a digital image higher than 72 ppi resolution. Larger images are best, since there's more area to select from and generally higher resolution.
- A logo in .eps file format.
- Form F: Template Specification
- Samples of gift certificate stock (if property is using a custom stock).
- Blank copy of Form L-3: Template Checklist.

Here's What to Do:

Follow all the steps under **Creating Templates and Graphics** in Section 1, Step 2B.

Important: Make sure you contact the Fulfillment Manager, so that the fulfillment server and cell are configured to handle the new certificate's template. The Fulfillment Manager needs to:

- Log into the fulfillment manager's tool on the fulfillment server, and on the **Check Type** page, set up the new template.
- On the fulfillment server's **Cell** page, configure one or more cells to be able to print the new certificate template.

At the End, You Should Have:

- Completed Form F-Ch: Gift Certificate Template CHANGE Form.
- Completed Form L-3: Template Checklist with sample printout attached.
- New/modified certificate templates propagated on the Fulfillment cell machines.
- New/modified logos and mall photos saved in the properties' electronic folders, and in the Zope folders on the development server.

2C. Creating the Production Schedule

To facilitate the uploads, the Production Manager creates a production schedule/status report as soon as a go--live date for a new property has been determined. This document sets target dates for each step of the production process, and allows the Production Manager to track progress and status.

The Production Manager also creates a Change Management Notification for the initial development upload and e-mails it to the System Administrator and other developers to alert them to the nature of the change and the anticipated change date.

To Start, You'll Need:

- A signed contract and completed Forms A through E for the new property.
- A tab-delimited text file containing the corrected spreadsheet data.
- Processed graphic files.
- Check the data and images.
- Upload the data to the development site, test the development site, and sign off on the development site.

Here's What to Do:

1. Open the most recent production schedule document under a folder titled **production schedule**.
2. Find the row for the merchant partner to which you're adding a property. Fill in necessary columns of information.
   - Use the go-live date on Form A, unless it has been changed.
   - Use the status column to note any outstanding issues or missing information.
   - Put all new property information in bold.
3. E-mail a copy of the updated production schedule to the **[Project Manager, ?]. [Project Manager]** will broadcast it to the production staff, fulfillment and system administration.

Creating the Change Management Notification:

15 Create an e-mail message with Change Management Notification in the subject line and send it to the System Administrator, and all other developers. State:

- The name of the server being updated (development)
- The name of the Merchant Partner affected and the new property being added in the upload
- The filenames of the logos and mall photos involved and what Zope directories they reside in (if known)
- Any problems you noticed with the spreadsheet you downloaded to add the new property
- **Request that everyone reply with their go-ahead, or state reasons why the upload to development should be held.**

16 Copy yourself on the message so you have a record for your files.

17 Send this message to the System Administrator developers, the System Administrator, and any other developers working on the site.

At the End, You Should Have:

- A Change Management Notification sent to the development teams.
- A Status Report ready to send to **[Project Manager]**.

3. Checking the Data and Images

In Step 3, a second Production team member checks that the Merchant Partner data spreadsheet is correct, and that the graphic files meet quality standards.

Important: Its best if testing is not done by the same person who created the spreadsheet. Errors are difficult to find if the material is not "fresh" to your eyes.

To Start, You'll Need:

- A printout of the finished Excel spreadsheet with the added new property data.
- Completed logo.jpg and photo.jpg files for the new property.
- A blank copy of Form L-1: Spreadsheet Checklist.

Here's What to Do:

1. Open the graphic files in the Netscape browser and check that the:
   - Image displays at the right size
   - Image is clear and readable (not grainy or "pixelated")
   - Color registration looks good (no fading or strange palette shifts)
   - Edges have been masked
2. Using Form L-1: Spreadsheet Checklist and the printed spreadsheet, check each item for the ***property and store levels only*** on the spreadsheet that is correct. Leave unchecked any items that are ***not*** correct.
3. If there are any errors to be fixed:
   - Return Form L-1 and the spreadsheet to the person who created it to correct the errors.
   - Recheck all the open items on the new spreadsheet.
   - Repeat this step until all the errors are corrected.
4. Open the finished Excel spreadsheet, and save it as a tab-delimited text (.txt) file (not required if you've been working in a text file all along). Change the date in the filename to reflect the new save date.
5. Send Form L-1 to the Production Manager.

At the End, You Should Have:

- A tab-delimited text file with all the corrected spreadsheet data
- Completed Form L-1: Spreadsheet Checklist

4. Upload the New Property Data to Development

In this step, the new property data text file and the graphic files are uploaded to the development server for online testing.

To Start, You'll Need:

- A tab-delimited text file containing the corrected spreadsheet data for the new property
- Processed graphic files for the new property

Here's What to Do:

Follow steps for uploading data spreadsheet and graphics under Section 1, **4. Uploading Data to Development**.

5. Testing the New Property on Development

In this step, the Production staff tests that the new property data appears and works as it should on the development site.

There are two procedures:

- Testing Online
- Correcting Errors

It's best if they're performed by two different team members.

To Start, You'll Need:

- New property data uploaded to the development server.
- A blank copy of Form L-2: Testing Checklist for the new property.

Here What You Do:

Follow all steps in Section 1, **5. Testing the Development Site**.

6. Signing off New Property on Development

When everything is tested, and the graphics and templates are done, the Production Manager signs off on the data, authorizing the upload to the production server.

To Start, You'll Need:

- A completed Form L-1: Spreadsheet Checklist
- A completed Form L-2: Testing Checklist
- A completed Form L-3: Template Checklist

Here's What to Do:

1. Collect all the testing checklists from the Production staff, and verify that all of the items are checked and the forms signed.
2. Verify that the updated data text file resides in the Merchant Partner's electronic folder, and the graphics reside in the properties' Zope folders.
3. Complete and sign Form L: Go Live Authorization.
4. If possible, have the Partner Sales Representative review and approve the development site, and sign the authorization on Form L.
5. Send an e-mail message with Change Management Notification in the subject line to the System Administrator and other developers notifying them of:
    - The name of the server being updated (production)
    - That you're adding a new property to an existing partner
    - The name of the Merchant Partner and new property involved in the upload
    - The filenames of graphics involved and what Zope directories they reside in
    - Any work left for the System Administrator to do (such as entering the last five rows of ID data and the check mix/max numbers)
    - Any problems you noticed with the spreadsheet you downloaded to populate.
    - Request that everyone reply with their go-ahead, or state reasons why the upload should be held.
6. **When the upload is cleared by all the developers:** notify Production team members to upload the data text file to production, or perform the production upload yourself.

At the End, You Should Have:

- All checklists and authorizations completed
- All data residing in the correct folders

7. Uploading New Property Data to Production

In Step 7, you'll upload the tested data and graphics for the new property to the production server.

To Start, You'll Need:

- All data and graphic files uploaded to the development server.
- Completed Form L: Go Live Authorization for the new property.
- Go ahead from System Administration for uploading to production.

Here's What to Do:

1 Download the partner's data from production:

- Enter the URL **http://www.i-gift.com:2080/cgi-bin/protected/malldata?partner=*[partnername]***
- Enter the username **mdata** and the password ********.
- Change the filename to ***[partnername]*_prod_*[savedate]*.html** and save it in the partner's **/production** folder.

2 In Excel, open the .html file you just downloaded from production.

3 Add gridlines by selecting **Tools|Options**. On the **View** tab, click the **Gridlines** checkbox.

Careful! Do **not** touch the last five columns of ID data or the Check Last, Check Min, Check Max columns. These must remain exactly as the System Administrator entered them.

Also, don't manually delete rows of data. Enter a D in Column A (Action).

4 For every row of new property information you added to development, add to the production spreadsheet, entering an **A** in **Column A (Action)** for each new row.

5 Insert the **BANKING ID** info for the appropriate bank in column **AJ** (use BNK0000000000 for all Wells Fargo partners but BNK0729803250 for Michigan National partners).

6 Save the file as a tab-delimited text (.txt) file.

7 Follow the "Uploading Data to Production" procedure in Section 1, Step 7, to upload the new ***[partnername]*_prod_*[savedate]*.txt** file.

8 In the Netscape browser, enter the URL **http://www.i-gift.com/** to display the production web site.

9 Log on as **Tester *[yourlastname]***, and referring to Form L-2, continue testing.

10 Repeat Steps 1 through 8 until everything checks out. Check all the lines on Form L-2, sign it, and send it to the Production Manager.

At the End, You Should Have:

- All new partner properties working on the production web site
- All new certificates print correctly

8. Audit Testing the New Property on Production Site

After the upload to production, the repeat the same testing done to the development site on the production site, to be sure everything still works properly on production.

To Start, You'll Need:

- All data and graphic files uploaded to the production server.
- A blank copy of Form L-2: Testing Checklist for each property.

Here's What to Do:

Follow the steps in Section 1, **8. Audit Testing the Production Site**.

Production Manager

When you receive a completed and signed copy of Form L-2, review the production site yourself. If you feel it's ready to go live, inform the System Administrator to change the flags so the properties are visible to the public.

At the End, You Should Have:

- All new partner properties working on the production web site
- All new certificates printing correctly

9. Correcting Production Errors

Once the new property data is uploaded to production, you follow a slightly different procedure to make corrections than is used on development.

You can skip testing the development site and continue to test on production until all the problems are resolved. However, you must duplicate any changes you made on production after the initial upload on development, to keep the two servers in sync.

To Start, You'll Need:

- All data and graphic files uploaded to the production server.
- A copy of Form L-2: Testing Checklist showing the outstanding errors.

Correcting Production and Duplicating Changes on Development:

Follow the steps in Section 1, **9. Correcting Production Errors**.

At the End, You Should Have:

- All new partner properties working on the production web site
- All new certificates print correctly

Table A: URLs for Downloading Production Data

Enter one of these URLs when you want to download a partner's data from the development server to edit it.

Mall	Development Download URL
All malls	http://166.90.248.170:2080/cgi-bin/protected/malldata.
NBA	http://166.90.248.170:2080/cgi-bin/protected/malldata?partner=nba
Somerset	http://166.90.248.170:2080/cgi-bin/protected/malldata?partner=somerset
Birmingham	http://166.90.248.170:2080/cgi-bin/protected/malldata?partner=birmingham
Grosse Pointe	http://166.90.248.170:2080/cgi-bin/protected/malldata?partner=village
Westgate	http://166.90.248.170:2080/cgi-bin/protected/malldata?partner=property
Royal Oak	http://166.90.248.170:2080/cgi-bin/protected/malldata?partner=royal

Table B: URLs for Downloading Production Data

Enter one of these URLs when you want to download a partner's data from the production server to edit it.

Mall	Production Download URL
All malls	http://www.i-gift.com:2080/cgi-bin/protected/malldata
Somerset	http://www.i-gift.com:2080/cgi-bin/protected/malldata?partner=somerset
NBA	http://www.i-gift.com:2080/cgi-bin/protected/malldata?partner=nba
Birmingham	http://www.i-gift.com:2080/cgi-bin/protected/malldata?partner=birmingham
Grosse Pointe	http://www.i-gift.com:2080/cgi-bin/protected/malldata?partner=village
Westgate	http://www.i-gift.com:2080/cgi-bin/protected/malldata?partner=property

Table C: URLs for Uploading Data

Enter one of these URLs when you want to upload data to a server.

Server	Upload URL
Development	http://166.90.248.170:2080/exnet-ar/partners2/import.html
Production	http://www.i-gift.com/exnet-ar/partners2/import.html