

ELIMINATING ERRORS BY AUTOMATING REPETITIVE WORK

Setting clear expectations with a customer is critical to a project's success. At Fishbowl Solutions, Statements of Work play a vital role in setting those expectations for all of our projects. These documents detail the solution that will be delivered during a customer engagement. As a project is being scoped and defined, a Statement of Work can go through several revisions until the customer is satisfied they will have the solution that they need.

Fishbowl Solutions' consulting team creates a Statement of Work for every project we work on, requiring several statements of work to be created each week. Because Statements of Work are specific to a project, there is always custom information in each document. However that same custom information exists on every Statement of Work, in this case: Author, Release Date, Document ID, Created For, and Document Title. This same information is entered as metadata for the document when it is checked into Oracle UCM. Entering duplicate information is not only time consuming but also leaves room for error. Fishbowl saw an opportunity to automate the replication of this content so users can save time by entering content only once and ensuring information on the native file and in UCM match.

Fishbowl Solutions leveraged the open UCM architecture to develop Document Automation Suite, a suite of UCM custom components. The three components are: Metadata Parser, Native File Updater, and Document Compare. The combination of these three utilities allow users to automatically extract information from a Word, Excel, PowerPoint, or PDF document to populate Oracle UCM metadata; pull Oracle UCM metadata into a native document; and compare changes in two revisions of content leveraging the Track Changes technology to specify each difference.

Fishbowl is currently leveraging Document Automation by using Metadata Parser to pull Created For, Prepared For, Prepared By, Date of Preparation, Proposal Expiration, Work Order, Revision Number, Company Name, Document Title, and Status from the Statement of Work Word document and using this information to automatically populate the UCM metadata fields upon check-in. Fishbowl then uses Native File Updater to populate footer information in the native Statement of Work Word document to include: Revision, Company Name, Document Title, and Work Number, all taken from the metadata fields updated by Metadata Parser when the Statement of Work is checked into UCM. Document Compare is leveraged during the Statement of Work workflow process. Reviewers are able to compare changes from different revisions of the same document just as they would if they were using "track changes" in Word in order to focus efforts on reviewing only the parts of a document that have changed.

The combination of utilities in Document Automation Suite saves the Fishbowl Solutions' consulting team many hours each week from entering duplicate information in multiple places and has eliminated the opportunity for UCM and the native file to have out-of-synch information, reducing confusion and ensuring consultants and customers are always working off the latest and same iteration of the Statement of Work. Document Automation has also improved the Statement of Work workflow process by allowing reviewers to view and compare all versions of the document and what specific changes were made. With a more efficient Statement of Work process, our consultants can more quickly understand customer expectations and focus more time on delivering outstanding solutions in a timely manner, allowing us to continually exceed our customers' expectations.