

ENSURING ISO COMPLIANCE

A manufacturer of components for national defense systems was migrating from a variety of Business Collaboration Tools, including Lotus Notes and Domino, to Oracle Universal Content Management (UCM) to reduce their number of repositories. During their UCM implementation, the organization began to look for add-on components to extend UCM's core functionality to meet the needs of several business units. Fishbowl Solutions had a prevailing presence in the Oracle UCM component marketplace, with a number of different solutions the organization was interested in. "It was like being a kid in a candy store with all of Fishbowl's components," said a Lead Systems Engineer. One of the many components purchased from Fishbowl was Document Automation Suite.

The firm was concerned with ISO 9000 Certification - a group of standards for quality management systems that includes documenting processes, monitoring processes for accuracy, continually improving processes, and maintaining adequate records of processes. When auditors come in, the firm needs to demonstrate that all printed process documents match their online versions and that both versions have been updated within the required timeframe. To prove their compliance, the organization needs to show that metadata matches on both the printed and online versions of the document. Examples of this metadata include: Revision Number, Date, and Process Owner. If the printed and online versions do not match, the organization is not re-certified as ISO 9000 compliant and risks losing business.

Fishbowl's Document Automation Suite solution helps the company prove its compliance by taking key information from document metadata and updating native documents with this information. For instance, the cover sheet for a procedural document is automatically populated based on the content's check-in date, author, revision number and more. Auditors are able to see that users are working off the correct version and that those versions not only meet standards but are in synch with electronic copies. This automated process eliminates the opportunity for human error and reduces the need to enter the same information in both the native file and UCM system. The Lead Systems Engineer thought "automatically assigning metadata came out of the box." He was shocked when he learned it didn't. "I knew we would need [Document Automation] as soon as I saw it."

Currently six to eight departments within the organization are using Document Automation Suite. Without it, proving ISO compliance and keeping native and online processes up-to-date would require hours of manual updates all subject to human error, threatening ISO 9000 compliance. The Lead Systems Engineer thinks "[Fishbowl's components] are a great toolkit to have because they allow for a lot of flexibility and automation within the Enterprise. Being a customer of Oracle and Fishbowl, allows us to have staff who doesn't need to be developers and [we] can just plug in these solutions."

The company also uses PDF forms extensively for several of its line of business applications. They wanted a way to create a record that would be saved in UCM at the end of a transaction that would be both searchable and become permanent. Fishbowl Document Automation was used to update the forms with information from the process or workflow, like reviewer, approval date and so forth. Enterprise Batchloader was then used to automatically check the forms, once converted to "flat", uneditable PDF files, into UCM with the appropriate metadata from the system. The forms were now records in the system that could not be edited; they were fully searchable because the proper metadata was assigned; all of this occurring without user intervention. **Using Fishbowl's solutions, including Document Automation and Enterprise Batchloader, the company was able to fully automate this process, delivering business units the functionality they required.**