

Oracle Makes Process Documentation Easier and More Secure

Company Profile

Oracle Corporation
Redwood Shores, CA
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Industry:
High Technology

Oracle Products & Services

- Oracle Tutor
- Oracle Files

Key Benefits

- Put management of process documentation in the hands of process owners
- Improved identification of risk and controls
- Reduced audit costs with uniform process documentation standards
- Reduced training time and expense
- Improved ability to manage and track business process evolution
- Improved business process execution

Oracle, the world's largest enterprise software company, faces the same vexing process and operational issues as any large, global organization. Constant pressures to streamline processes, ensure consistent operations in all locations, and meet new competitive and regulatory challenges are familiar to the business world.

Years ago, Oracle created process documentation to support its internal controls. Oracle used an outside consulting firm to write internal business process documentation using Word for the narrative description and Visio for the graphic depiction. However, maintaining this process documentation meant that multiple documents had to be updated whenever a single process changed. Once the analyst had created or updated the process documentation in Word and Visio, other people created an HTML or pdf version to be distributed via Oracle's intranet.

In 2000, with direction from Bret Fuller, SVP of IT Applications, Oracle's line of business managers started using Oracle Tutor to document procedures for its in-house implementation of a global single instance of the Oracle applications.

Oracle Tutor is well known to Oracle customers as a documentation and training tool associated with new application implementations. Oracle's IT and Finance operations staff became familiar with the Oracle Tutor method and tools as a result of the global single instance implementation. In 2003, the Sarbanes-Oxley Act turned documenting processes and internal controls from a sound business practice into a regulatory requirement for most firms traded on US exchanges.

Reacting quickly, Jennifer Minton, SVP of Finance and Operations, fine-tuned Oracle's documentation strategy to meet the new regulatory requirements by:

- realigning process ownership around key business flows
- appointing a vice president of global operations to direct the process owners in their documentation efforts
- assigning a document controller to manage the library of process document files
- endorsing the migration to Oracle Tutor to streamline the process document maintenance, reporting, and distribution activities
- supporting the use of Oracle Files to provide a secure and controlled environment to access the process document files

Why Oracle Tutor?

Oracle Tutor Author allows business process owners to maintain their own process documents using a single tool. In less than one minute, the process owner can edit a procedure and immediately

regenerate both the flowchart and HTML the document. When a single process changes, only one document is touched.. Oracle's process owners have consistently found Oracle Tutor Author easier to use than Visio.

Using Oracle Tutor Publisher users can publish desk manuals by job function as well as process documentation by process flow. Document controllers use Oracle Tutor Publisher to create cross-reference reports from the document content that help them easily maintain and clean up documentation. For example, a "where-used" report makes it easy to put documents in context. Other reports show which job functions use what screens in the procedures to help verify opportunities for segregation of duties.

Why Oracle Files?

Oracle Files is used to consolidate files into a single, sharable, and secure repository, granting access through the internet/intranet and promoting employee collaboration and facilitating management of multiple document versions as business processes evolve.

Leveraging Compliance

Oracle enlisted the required people resources and used its own tools -- Oracle Tutor and Oracle Files -- to make the ongoing process documentation effort more efficient for all involved.

Process documentation was once a one-time project. That's no longer the case. Sarbanes-Oxley makes it a continuous requirement with quarterly and annual check offs. With this level of effort, it's important to find new ways to gain additional benefits.

Consistent policies and procedures mean the business runs better. Employees unfamiliar with a system, for example, often try work-arounds when they don't receive the response they expect. Work-arounds can corrupt data and render reporting unreliable. But, with access to both process documentation and a wealth of application documentation, Oracle Tutor and Oracle Files put the relevant information in the hands of employees.

Standardized process documents make identifying risks and controls much easier. Tutor includes an email link that allows users to voice any concerns more quickly and directly to the business process owner for resolution.

Product Descriptions

Oracle Tutor, a business practice documentation tool, comprises three components:

- Model Documents provides more than 450 process documents and more than 600 Oracle courseware documents that offer a starting point for customized documentation. Document "owners" edit the models instead of creating documents from scratch.
 - Software Tools create, update, and distribute the documents
 - *Author* allows users to quickly and easily create and edit documents
 - *Publisher* helps users (1) ensure document

integrity with special cross-reference reports, (2) package and distribute procedures by job title (desk manuals), and (3) build student and instructor guides by topic or job title

- Methodology defines all aspects of the documentation process:
 - Layout and format of different document types
 - Content and relationship between documents
 - Process to create and maintain documents
 - Method to distribute documents for training or reference purposes

Oracle Files, a component of Oracle Collaboration Suite, uses the Oracle Database as a reliable, scalable, and secure place to store all content. Oracle Files is an easy-to-use content management system in which documents can be managed, versioned, and shared as needed throughout the enterprise. It enables organizations to consolidate scattered file servers into a single repository, and its enterprise collaboration features give users strong incentives to manage all their content in Oracle Files.

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