

Graphical Quality Management System

EXECUTIVE SUMMARY
<p>PRIMILIS</p> <p>Quality management & business consultancy in Cambridge, UK</p>
<p>BUSINESS CHALLENGE</p> <p>A fully-integrated QMS with graphical user interface for high usability</p>
<p>SOLUTION</p> <p>Use of Web Archive (WA) document type to store and display HTML files comprising the QMS</p>
<p>RESULTS</p> <ul style="list-style-type: none"> ✓ Easy to use ✓ Easy to administer content ✓ Leverages CogniDox DMS ✓ Easy to integrate

For many companies, certification with a quality standard such as ISO 9001 or CFR21 is a critical part of business. Without it, they cannot be a supplier in their sector’s supply chains and they can miss an opportunity to manage their business more effectively.

Quality is demanding, and to become compliant a company has to invest not only in maintaining accurate operating procedures but also creating those procedures in the first place. A Quality Management System (QMS) can be a major investment.

Having made that investment, it’s dispiriting when the results “sit on the shelf” and are regarded as irrelevant procedures that no-one reads. It doesn’t augur well for maintaining the QA certificate either. Auditors are keen to the possibility that QA is just a certification “badge” and that there has been no real change towards quality assurance in the company.

It’s also the case that a company’s procedures can be complex. What starts as a simple “this is what we do when...” analysis can turn into a maze of exceptions, edge cases and if-then rules. The more complicated the documentation, the more likely it is to become shelfware.

It would be nice if these needs were met with a bespoke web design for a company Intranet that used an optimised combination of diagrams, graphics and text, but this requires skill and budget that may be in short supply and any such projects require a high degree of maintenance. Companies sometimes turn to Wiki-making at this point, but a QMS wiki can be hard to write and quickly becomes very text-based. Other solutions for QMS can turn out to be just templates for common procedures. Useful as they may be for kick-starting documentation, they don’t address the real business needs of the organisation.

The goal of every company is to build a fully-integrated QMS that provides a common user view of the business workflow processes. When the QMS user interface is as easy as surfing the web, it has done the utmost in improving accuracy and timeliness of information.

The Solution

CogniDox is often introduced at the same time as a company embarks on QA certification, so we were interested when a partner company (Primilis) started to leverage it as the basis for a graphical quality management system.

This is how Tom Gaskell, a director and principal consultant for Primilis, stated the need: “we were looking for cost-effective ways of delivering graphically-based, easy to use, interactive Quality Management Systems that avoided any need to use a bought-in Intranet system or complex web design or web-hosting solutions or other systems such as SharePoint”.

One of the lesser-known features of CogniDox is the Web Archive (WA) document type. It allows the user to upload a collection of HTML web files as a compressed (zipped) folder. As long as the zip contains an index file, the web site can be displayed within the browser. The feature is intended for marketing and design groups as a means of controlling self-contained packages of web content (e.g. a test web site). It enables them to have change control and to preview the site as it develops.

And this is the opportunity that Primilis spotted.

They figured that a complete graphical quality management system (‘G-QMS’) could be built as a web site run from within CogniDox. It could be itself stored as a managed, controlled document. More importantly, it could be opened as a mini web-site to provide an interactive way of browsing quality manuals and company procedures. A way of creating content was still required, and Primilis was able to harness the familiar Microsoft Office tools, Visio and Word, as the way to accomplish that. A few rules rounded out the solution: use PDFs if the content wasn’t editable; master files such as Word or Excel if it was. Primilis found that using specific CogniDox hyperlinks achieved that (it supports aliases such as `_pdf` and `_master` in the URLs that it uses). In combination with a simple, inexpensive, off-the-shelf WYSIWYG web page design tool to provide the outer shell of the system, Primilis had everything it needed to implement a graphical QMS as a web site.

The method is straightforward. There is a top level Master or home page plus a number of Departmental or Functional Master Pages. On each page content can be framed. This could be a flow chart procedure to follow, or simple business graphics to explain how the business works, or a word-based description. Generous use is made of hyperlinks to enable the user to follow the quality processes. Hyperlinks can be to other pages in the system, to a PDF for reading, or to a downloadable file for editing in e.g. Word or Excel. The built-in CogniDox support for hyperlink aliasing (e.g. “Latest”, “Approved”) can be used.

An example screenshot shows the results:

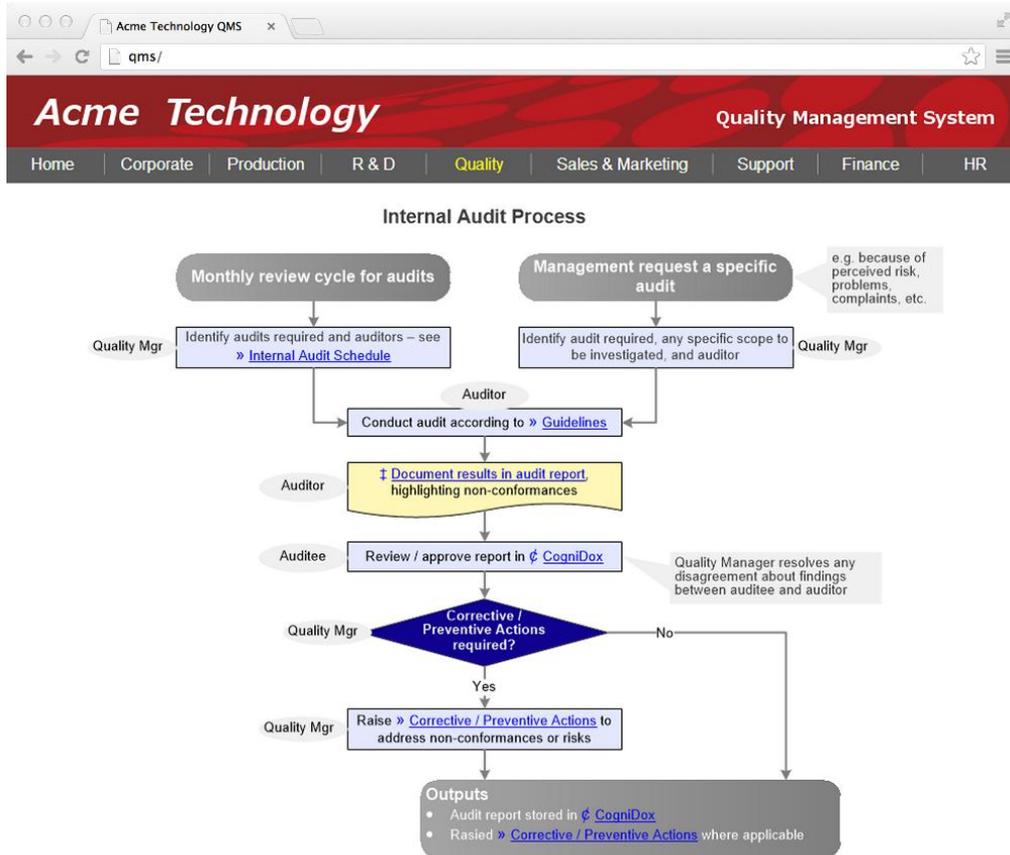


Figure 1: An example screen from G-QMS for an Internal Audit process

The Results

Primilis took their idea of a Graphically-based browser-delivered Quality Management System to two CogniDox-using clients, both of whom said “yes” to the new concept.

Company A is a market-leading manufacturing company who already had an ISO 9001-compliant QMS based on Word and Excel documents. These did not fully capture end-to-end processes across all their business and were not always well-controlled. This impacted operating effectiveness and resulted in errors and inefficiencies. G-QMS was used to capture processes and provide graphical interaction, while CogniDox solved the document control issues.

Company B is a high-tech start-up in the wireless telecoms market that required ISO 9001 to establish their maturity and credentials with blue-chip customers. They started by using a Wiki but switched to G-QMS with CogniDox for ease of capture and use. During their ISO

9001 audit their external auditor expressed the view that it was “one of the best systems I have seen”.

Characteristics of the G-QMS running on CogniDox:

Easy to use

- Provides full graphical navigation to your system – hyperlinks in drawings or flowcharts or other graphical or text-based documents lead the user from diagram to diagram and document to document, just like browsing the web
- Top-of-page menu buttons give the user quick access to the areas they need to visit
- Web-based, no application software to download and install
- Works in all major browsers

Easy to administer content

- Makes use of a simple, inexpensive, off-the-shelf WYSIWYG web page design tool ([Serif WebPlus](#), or any equivalent) to create the master web pages
- Uses Microsoft Office applications to create all the content pages – as you are probably already using for your business documents – i.e. Word, Excel, PowerPoint and Visio
- Fully-documented, 40+ page Administrator Guide with clear instructions is provided

Leverages CogniDox DMS

- Makes use of CogniDox for document control, management, and delivery to the user; can act as a graphical front-end for CogniDox
- The G-QMS is itself a group of controlled documents – for example version control, access rights, change history tracking and approval workflows are supported
- Ensures staff are using the most up-to-date approved versions of content

Easy to integrate

- Can incorporate other HTML pages (e.g. web pages or other websites) or PDF-format documents produced from any other applications
- Can re-use any existing or in-sourced graphical design elements

The key conclusion is that anyone with a little experience of business IT office tools such as Microsoft Office would have the ability to design, implement and maintain a Quality Management System or other Intranet solution using this system.

Companies can use separate and disconnected systems to manage the quality process, but the result is significant time investment by all staff to support the quality management initiative. The combination of CogniDox for document control and the Primilis G-QMS for ease of use is a far superior way to achieve the desired quality assurance results.

For More Information



Primilis is a business and technology consultancy that helps companies to become more successful by reducing cost and risk, improving quality, bringing products more quickly to market and increasing customer satisfaction.

The Primilis Graphical QMS is a simple but effective way of providing Intranet functionality for Quality Management Systems, Environmental Management Systems, or a host of other 'internal website' functionality.

For Quality Management Systems and Business Systems support and consultancy, contact Primilis <http://www.primilis.com>, email support@primilis.com, or call 0800 6126 593.

Smart Document Management

CogniDox helps teams in Engineering, Marketing, Sales, Operations and other departments to capture, share and publish product and design documentation.

This easy-to-use tool helps break down the barriers to find information, share solutions and enjoy a faster, more productive development workflow inside your company. In addition, CogniDox will help you manage and publish documents and other content to licensed customers. It reduces technical support load and accelerates your customers' time to market.

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