



DOCUMENT AUTOMATION SOFTWARE

ACTIVEDOCS SHAREPOINT INTEGRATION MODULE

Prepared by: Martin Srubar
Product Manager

Audience: ActiveDocs Evaluator, SharePoint Architect, Process Optimization Specialist

Abstract: Microsoft® SharePoint® 2016, 2013 and 2010, and SharePoint Online (Office 365) platform value can be significantly increased implementing ActiveDocs product with ActiveDocs SharePoint Module as a tool for automated document creation within document-centric processes.

OVERLAND PARK

Southcreek Office Park
7301 West 129th Street
Suite 160
Overland Park, KS 66213, USA
Ph +1 913 888 1999

LONDON

199 Bishopsgate
London
EC2M 3TY
United Kingdom
Ph +44 20 3290 1788

AUCKLAND

Level 6, 27 Gillies Avenue
Newmarket, Auckland 1023
Post: PO Box 289
Auckland 1140, New Zealand
Ph +64 9 520 5650

BRISBANE

192 Ann Street
Brisbane, QLD 4000
Post: PO Box 604
Paradise Point QLD 4216,
Australia
Ph +61 7 3040 6616



Copyright

Information in this document is subject to change without notice. Companies, names, and data used in examples herein are fictitious unless otherwise noted. No part of this document may be reproduced or transmitted in any form or by any means, electronic or mechanical, for any purpose, without the express written permission of ActiveDocs Limited.

Copyright © ActiveDocs™ Limited. All rights reserved.

Microsoft is a registered trademark and Microsoft SQL Server, Microsoft Access, Microsoft Outlook, and Microsoft Windows are trademarks of Microsoft Corporation in the United States and/or other countries.

Other product and company names herein may be the trademarks of their respective owners.

Disclaimer: While ActiveDocs has taken care to ensure the accuracy and quality of this document, all content including fitness for a particular purpose are provided without any warranty whatsoever, either expressed or implied. In no event shall ActiveDocs, or its employees, be liable for any direct, indirect, incidental or consequential, special or exemplary damages resulting from the use of this document or from the use of any products described in this guide. Any persons or businesses mentioned within this document are strictly fictitious. Any resemblances to existing or deceased persons, or existing or defunct businesses, are entirely coincidental. This document will be updated regularly and changes will be included in later versions. If you experience any discrepancies in the content of this document, please e-mail info@activedocs.com.



Contents

1	Summary	1
2	ActiveDocs SharePoint Module	2
2.1	Benefits	2
2.1	Deployment.....	2
2.2	Web parts	2
2.3	Workflows	4
2.4	Template management integration.....	5
2.5	Snippet storage in SharePoint	5
2.6	SharePoint data connectivity	5
2.7	Utilizing document properties	6
2.8	Document Sets.....	6
3	Additional SharePoint integration examples	8
3.1	ADP.....	8
3.2	On-demand document creation	8
3.3	Managing document delivery	8
3.4	Deep workflow integration	9
4	Comparison of ActiveDocs SharePoint Module functionality supported by Farm Solution and CSOM connector	10
5	Conclusion	11



1 Summary

Microsoft® SharePoint® 2013 and 2010, and SharePoint Online (Office 365) platform can be extended with a corporate grade document automation functionality of ActiveDocs through ActiveDocs SharePoint Module. The integrated functionality spans from interactive document creation, to template access management, to document and document set management, to deep integration with SharePoint workflows and other workflow engines. ActiveDocs SharePoint module has been designed as a ready-made product for rapid deployment of an integrated document automation solution on SharePoint platform that can meet the highest requirements without any need for custom programming.



2 ActiveDocs SharePoint Module

2.1 Benefits

- Rapid deployment through an installable and configurable SharePoint Solution
- Can be deployed across chosen SharePoint Web Applications and Sites
- Automated document creation functionality within an environment familiar to end users
- Template, document, and reusable content management on one platform
- Integration with SharePoint workflows and other workflow engines
- User experience fully customizable through a set of ActiveDocs Web Parts and ActiveDocs Document Library
- Access to automated Templates based on Windows authentication of SharePoint users, advanced Template and Template Set filters can be set up on the level of individual Web Parts
- Document metadata populated automatically and accurately
- Supports SharePoint® 2013 and 2010, and SharePoint Online (Office 365)

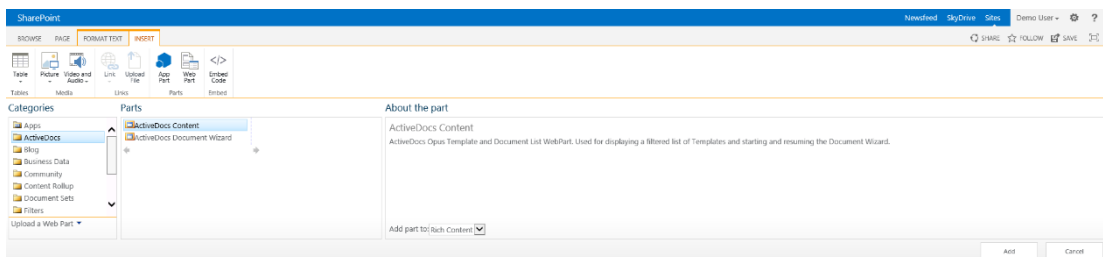
2.1 Deployment

ActiveDocs SharePoint Module is a combination of loosely coupled CSOM connector (installation required on SharePoint server or in SharePoint Online/Office 365) and an easy to deploy SharePoint Farm Solution. The Farm Solution can be deployed to the selected web applications and utilized within all SharePoint sites. The document automation functionality can be accessed through easy to use ActiveDocs SharePoint Module Web Parts and ActiveDocs Document Library. Automated document creation workplaces can be created within minutes and linked with existing Templates in ActiveDocs. ActiveDocs SharePoint module can be activated, or deactivated, for every single SharePoint site and mapped to an ActiveDocs Site, following the user access rights set within ActiveDocs. ActiveDocs Document library is made available and provides SharePoint users with document automation functionality of ActiveDocs.

2.2 Web parts

ActiveDocs SharePoint module deploys two Web Parts: (1) ActiveDocs Document Wizard Web Part, and (2) ActiveDocs Content Web Part. These can be utilized when SharePoint administrators design SharePoint pages.

FIGURE 1: ACTIVEDOCS WEB PART CAN BE USED TO CREATE WORKPLACES TO MATCH USERS' NEEDS

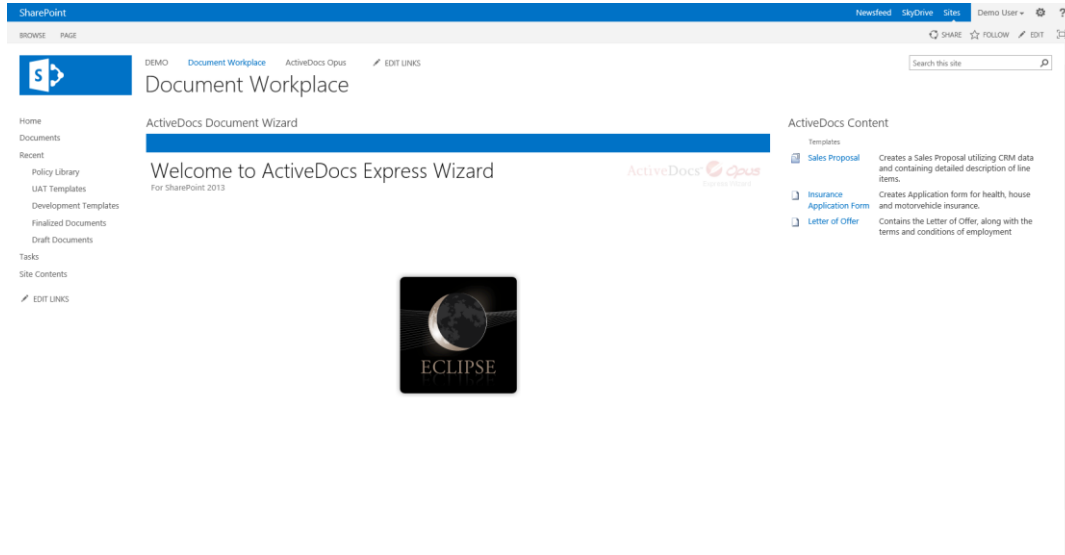




2.2.1. ActiveDocs Document Wizard Web Part

ActiveDocs Document Wizard Web Part is used for creating documents from ActiveDocs Templates in SharePoint environment. It is linked with ActiveDocs Content Web Part. It can be placed on the same SharePoint page as ActiveDocs Content Web Part or a separate page under the same SharePoint site. Web Part settings allow to customize size and appearance of the Web Part and a URL where users are redirected after completing document creation.

FIGURE 2: ACTIVEDOCS DOCUMENT WIZARD WEB PART (LEFT) AND ACTIVEDOCS CONTENT WEB PART (RIGHT)




2.2.2. ActiveDocs Content Web Part

ActiveDocs Content Web Part can display Templates and Template Sets that are available to SharePoint users. In addition, documents in progress can be displayed. SharePoint users can start a creation of a new document by clicking on a Template name. Document Wizard can start on the same page, or another SharePoint page within one SharePoint site. The Web Part's settings define whether Templates, Template Sets, Documents in Progress or any combination of the above will be displayed, allow to filter the Templates and Template Sets displayed in the Web Part by Template name or Category, customize appearance, and set the URL of the page with ActiveDocs Document Wizard Web Part where document creation process will take place.


FIGURE 3: MULTIPLE ACTIVEDOCS CONTENT WEB PARTS CAN BE UTILIZED ON ONE PAGE TO CREATE CUSTOMISED WORKPLACES

HR Self Service

These documents are available immediately

Templates	
	<p>Reference Letter Click to create a reference letter.</p>

These documents require manager's approval

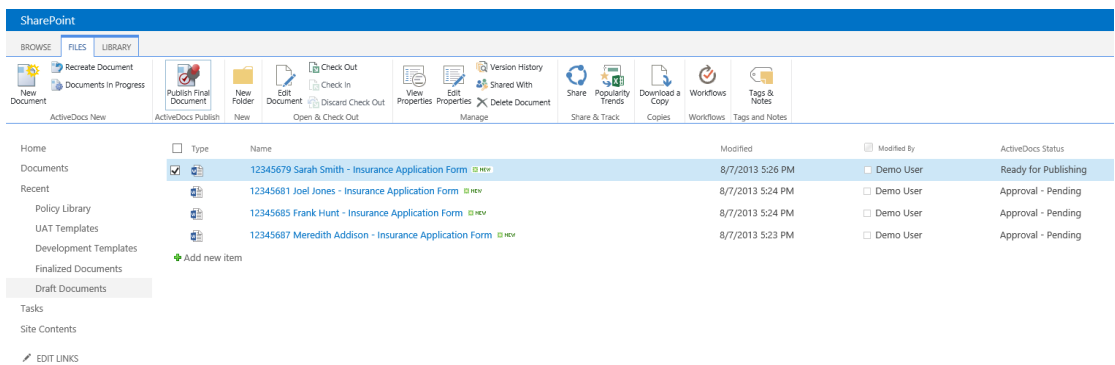
Templates	
	<p>Accident Declaration Click to create an accident declaration.</p>



2.3 Workflows

ActiveDocs SharePoint Module provides deep integration with SharePoint workflows. This includes workflows of other workflow engines (Nintex, K2, Skelta, Kofax, etc.) that interface with SharePoint workflows. Any SharePoint workflow can be associated with a document in ActiveDocs SharePoint Document library allowing ActiveDocs to track documents through workflow processes. If at any stage of a SharePoint workflow an ActiveDocs generated document is approved, following ActiveDocs actions can take place: (1) Document is published automatically, (2) Document is allowed to be published manually, (3) Document watermark is updated or removed, (4) Document is converted into another format, typically non-editable PDF, (5) Document is moved into another Document Library, folder, or another location outside of SharePoint, (6) Document is delivered to print, email, fax queue or any combination of the above, including multiple queues of the same type.

FIGURE 4: AN APPROVED DOCUMENT CAN BE PUBLISHED MANUALLY OR AUTOMATICALLY FROM ACTIVEDOCS DOCUMENT LIBRARY IN SHAREPOINT



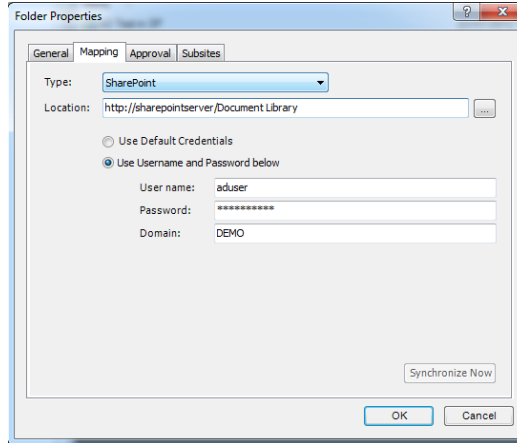
ActiveDocs SharePoint Module enriches SharePoint workflows with a corporate-grade document automation functionality allowing creation and subsequent editing and approval process to take place on a common platform.



2.4 Template management integration

ActiveDocs Templates can be stored in SharePoint Document Libraries. This provides a single platform and repository for generated documents and ActiveDocs automated Templates alike. ActiveDocs Templates in SharePoint are subject to SharePoint Document Management functionality. SharePoint gives ActiveDocs access only to the latest approved versions of Templates, giving an opportunity to establish Template approval and scheduled revision workflows in SharePoint.

FIGURE 5: SIMPLE MAPPING OF A SHAREPOINT DOCUMENT LIBRARY AS STORAGE FOR ACTIVEDOCS TEMPLATES



2.5 Snippet storage in SharePoint

Storing Snippets, reusable pieces of content, in SharePoint brings many benefits. These Snippets can range in size and complexity from a simple image or logo, to a business address or contact details, to a few hundred page long policy with dynamically generated content based on complex business rules. Snippets can be subjected to a rigorous content creation and approval process before they are made available for use in ActiveDocs automatically generated documents. If a change to a Snippet is required, a change workflow involving appropriate staff can be started. If a periodical review of a Template or Snippet is required a SharePoint workflow can be scheduled to run e. g. every year.

2.6 SharePoint data connectivity

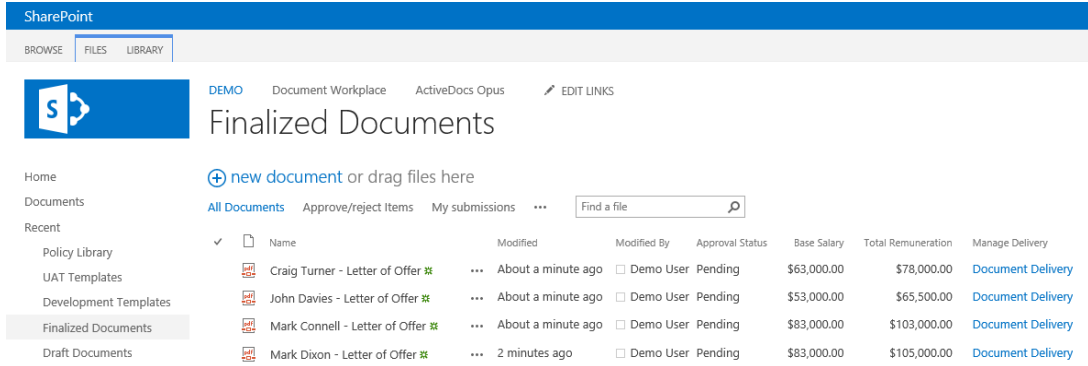
ActiveDocs Data Views can connect directly into any SharePoint List, including Document Libraries. The direct SharePoint connectivity functionality gives an opportunity to leverage all data repositories in SharePoint for document creation.



2.7 Utilising document properties

Document properties form a basis for reporting and content management in SharePoint. ActiveDocs can populate document properties automatically with accurate data on-the-fly during document creation, eliminating the need for time-consuming manual updating of metadata. Accurate metadata provides a reliable source of information that can be utilized within SharePoint Workflows, and business intelligence reports generated by MS Fast Search for SharePoint or other data analysis software.

FIGURE 6: ACTIVEDOCS UPDATED DOCUMENT METADATA IN SHAREPOINT, DOCUMENT DELIVERY CAN BE VIEWED AND MANAGED



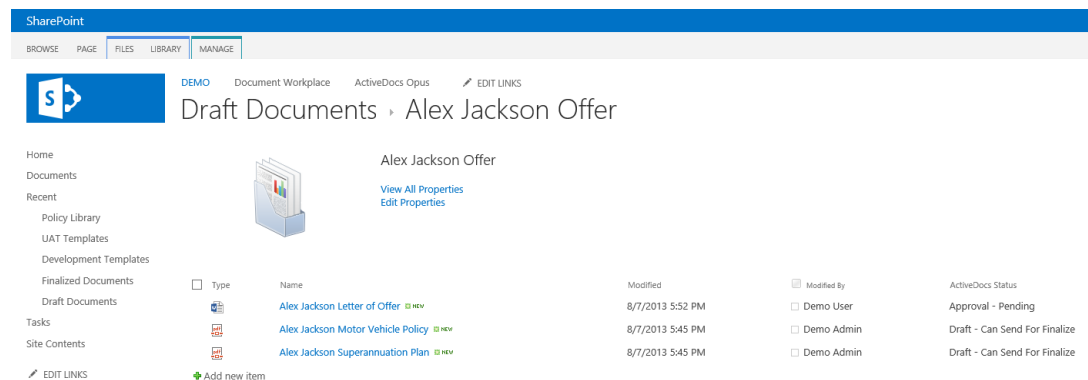
2.8 Document Sets

SharePoint Document Sets are leveraged in many business applications where more documents are linked to a process, creating a single deliverable or a work product. ActiveDocs provides a unique set of tools for creating, managing, approving and publishing document sets in SharePoint.

2.8.1. Document Set Creation

ActiveDocs can create a document set with a name generated dynamically based on standardized naming conventions, assigns document set metadata, populates the document set with generated documents and can start different workflows on each of the generated documents, as the business process requires.

FIGURE 7: DOCUMENT SET IN SHAREPOINT CREATED BY ACTIVEDOCS



2.8.2. Document Set Compliance and Consistency Management

Document compliance management often requires all documents in a document set to be created using the latest approved and published versions of their respective templates. ActiveDocs assures that only the latest up-to-date versions of templates are used and if one document in a set is re-created, ActiveDocs can automatically re-create all documents in the set. This guarantees that all documents in a set are always created using consistent versions of templates.



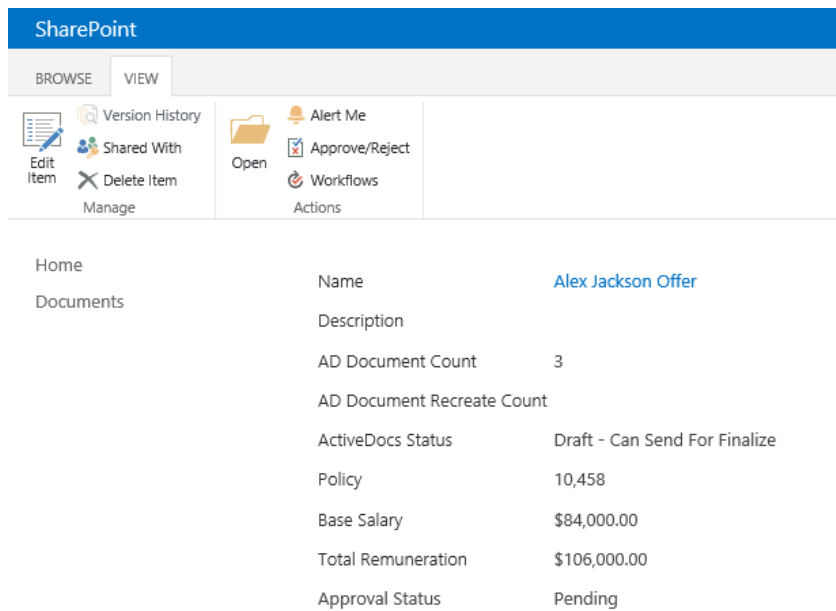
2.8.3. Document Set Approval and Workflows

An individual document can be subjected to a workflow that may differ from the ones of any other document in a set. ActiveDocs monitors the workflow and the approval status of the documents in the set and only once every document has been approved, the document set can be finalized. This functionality opens a host of opportunities for automating complex business processes on SharePoint platform that require input from many people, multi-stage approval for each document linked with the process, each document approved by a different set of people or entities.

2.8.4. Document Set and Document Metadata

Document set and document metadata can be populated by ActiveDocs using values generated dynamically during document creation processes. The accurate and up-to-date set of metadata can be utilized for reporting on and tracking progress of processes where completion of a document set is one of the deliverables.

FIGURE 8: VIEWING DOCUMENT SET PROPERTIES POPULATED BY ACTIVEDOCS





3 Additional SharePoint integration examples

3.1 ADP

SharePoint can be utilized as a platform to manage batch production of documents of an organisation. An easy to use environment allows only the users with appropriate privileges to create or edit a batch. Batches can be created in a user-friendly manner without a need for coding and are scheduled to run at specified time of a day with defined periodicity.

3.2 On-demand document creation

Documents can be created on-demand directly from SharePoint environment. This offers opportunities for creating self-service document portal where users can generate documents they need on-demand, by clicking a link or button in SharePoint.

3.3 Managing document delivery

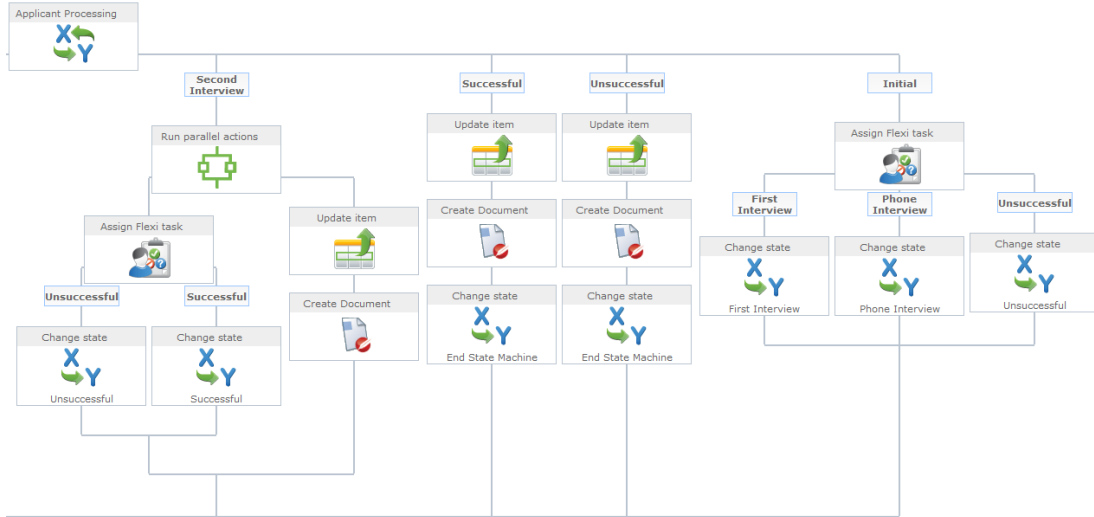
ActiveDocs routes created documents into the set delivery destination or destinations automatically. If document creators can have the choice to deliver documents manually, they can do so by clicking on a link next a document in a SharePoint Document Library.



3.4 Deep workflow integration

ActiveDocs API allows SharePoint workflows and other workflow engines to utilize access functionality of ActiveDocs on all levels of document automation: Automated Document Creation, Interactive Document Creation, Document Management, Document Approval process, Template Management, Template Approval process, and Interactive Data Collection. This functionality can be utilised at any step of a workflow. This greatly enriches the functionality of workflows - giving the option of producing and delivering personalized documents at any step of the business process.

FIGURE 9: A COMPLEX WORKFLOW IN SHAREPOINT BUILT IN A THIRD PARTY WORKFLOW ENGINE UTILISING ACTIVEDOCS DOCUMENT AUTOMATION FUNCTIONALITY





4 Comparison of ActiveDocs SharePoint Module functionality supported by Farm Solution and CSOM connector

Functionality	Deployment Type	
	SharePoint module with Farm Solution installed Typically deployed on SharePoint 2013 on premise, not supported in SharePoint Online/Office 365	SharePoint module without Farm Solution installed Typically deployed on SharePoint Online/Office 365, also supported on SharePoint on premise
	Technology	
	SharePoint Farm Solution and CSOM connector	CSOM connector
SharePoint UI integration (Document Wizard and Content Management Web Parts, ActiveDocs Document Library)	•	
SharePoint Workflow integration	•	•
Template management integration	•	•
Snippet storage	•	•
Retrieval of data from SharePoint Lists	• (supported via MS Access DB Engine)	
Document metadata population	•	•
Document Set and Folder creation	•	•
Document Set Metadata population	•	•
Document Finalization upon approval (format conversion, document processing, delivery)	•	•



5 Conclusion

ActiveDocs SharePoint Module is a ready-made integration product ready for rapid deployment without any need for custom programming. SharePoint administrators can create tailor-made document creation workplaces within minutes using standard SharePoint WYSIWYG page editor.

Microsoft SharePoint 2013, 2010, and SharePoint Online (Office 365) integrated with ActiveDocs can provide highly functional all-round document automation solution out-of-the-box. A single platform for Document, Template, and reusable content fragment management reduces costs of maintenance, simplifies deployment, and reduces the effort required for automation of existing document templates in SharePoint.