ActiveDocs

DOCUMENT AUTOMATION SOFTWARE

ACTIVEDOCS

ENHANCING THE DOCUMENT LIFECYCLE

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Abstract: This document provides an overview of the document lifecycle and the opportunities for enhancing it by using ActiveDocs for document creation and automation.

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1   Introduction

Documents are the life-blood of many organizations. The information they capture and store is often vital to many functions – from producing sales quotes, to policy and procedure documents, to contractual agreements. The list is endless.

Although we may not realize it, when we produce a document, it goes through several different stages. Collectively, we refer to these stages as the document lifecycle.

In order to gain maximum benefits from documents throughout the document lifecycle, we can take advantage of technologies to not only assist with their management and archiving, but can also assist with, and automate, their creation.

2　The Document Lifecycle

All organizations produce documents, whether they are large or small, and regardless of the industry in which they operate; a manufacturer is just as likely to produce a quotation or a specification as a law firm is likely to produce a contract. Many of these organizations produce hundreds of such documents every day.

Although we may not realize it, when we produce a document, it goes through several different stages. Collectively, we refer to these stages as the document lifecycle.

These stages are characteristics of all documents, regardless of the type of document or the technologies involved. These characteristics are also common in most organizations, regardless of the organization's size or the industry in which it operates.
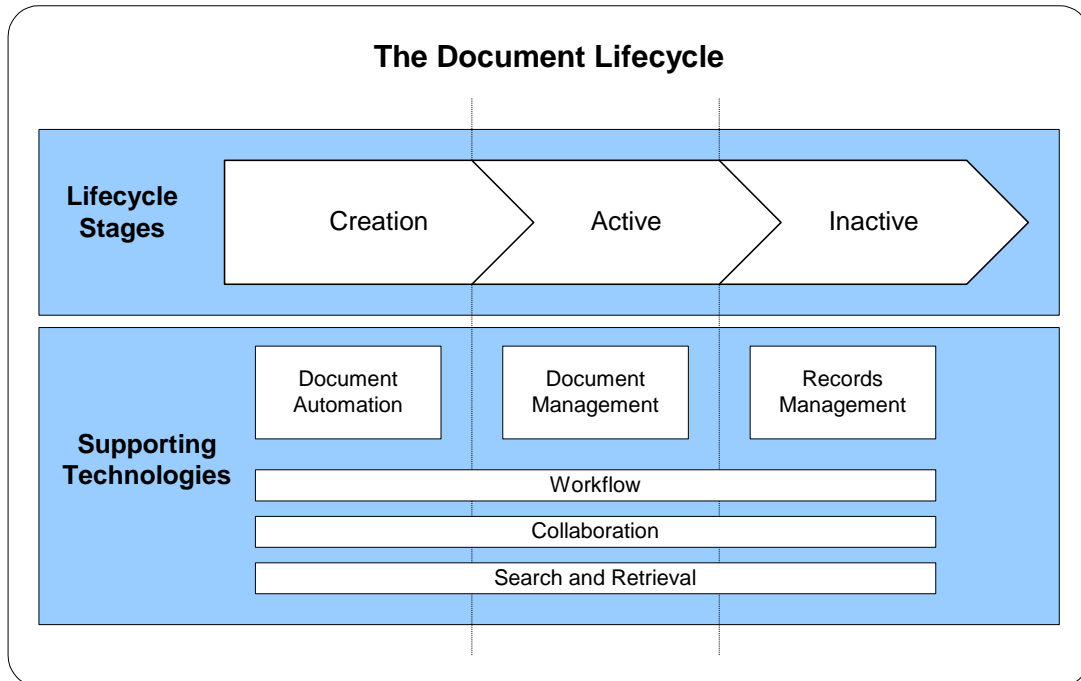
As an example, let us depict a common process in a standard, sales-focused organization. Sally the sales person from ABC Inc needs to send a basic sales quotation to a customer; these are the steps Sally performs:

- To prepare this quote, Sally opens Microsoft Word and starts typing the basic structure of the document she intends to send.

- She launches ABC's customer relationship management (CRM) system to locate the contact details of the customer, so she knows who to send it to and where to send it.

- Once she has these details, she adds these to the document. Then, in order to provide a price for the quote, Sally opens up ABC Inc's ERP system to get the latest price of the items for which she is providing the quote; she notes these and types them into her document.

- Once the document has been completed, Sally emails it to her manager, who makes some changes, and then saves the document to ABC's shared network drive.

- Over time, as these documents increase in number, and the information becomes less useful, these documents are archived to tape or disc.

These steps are the same in all organizations, regardless of the technologies involved. Documents are created, they are stored (while they are "active" documents) and, once they near the end of their usefulness, they are archived for future reference (and become "inactive" documents).

The above example was a simple one, using some core enterprise technologies: a CRM and an ERP system. Many organizations often supplement these types of systems with their knowledge management initiatives.

The diagram below depicts the stages of a document's lifecycle in a large enterprise, equipped with knowledge management solutions. The same core principles apply to organizations without such technology: all documents are created, are stored in a location, and then are archived at the end of their useful life.

The Document Lifecycle

Lifecycle Stages	Creation	Active	Inactive

Supporting Technologies	Document Automation	Document Management	Records Management

Workflow

Collaboration

Search and Retrieval

Each of these lifecycle stages is described in more detail below.

2.1 Document Creation

The creation of a document is traditionally performed using tools such as Microsoft Office.

Varying amounts of time, effort and expense go into the creation of such documents, but, in the case of Microsoft Word, for example, documents are created from "scratch", by compiling a document using parts of other documents, or by utilizing templates to assist with the consistency of these documents.

2.2 Active Documents

Once a document has been created, its active life begins. The document will be accessed by other people, some of whom may want to make changes to it. People may also store the document along with other documents, and may want to be able to find these documents quickly and easily. Importantly, the author of the document may want to ensure that only those people who are entitled to view or change the document are able to do so.

Usually, such a document is stored within the user's - or organization's - file system or within a document management system. Such systems, particularly document management systems, enable organizations to store and manage their documents throughout this active stage of the lifecycle.

Typically, there are several core functions that a document management system can provide. These include:

- Version Control – Being able to refer to previous versions of a document, or being able to make a new version of a document available, while maintaining all other versions and providing an audit of such activities.

- Check In/Check Out – Ensuring users are not able to make changes to a document at the same time, therefore undermining the integrity of the document.

- Metadata – Providing users with the ability to profile, or describe, documents by attaching metadata to these documents, to ensure they are properly categorized and labeled. This data can then be searched on to attain more accurate search results.

- Security – Being able to ensure the users who can access and make changes to a document are entitled to do so.

2.3 Inactive Documents

Most documents only have a limited active life. The information contained in the document may be superseded by a new version, or another newly created document altogether.

Once a document – or version of a document - reaches the threshold of being a useful document to the organization; it becomes an inactive document. Tools such as records management systems ensure these documents are methodically archived, therefore protecting an organization's intellectual property into the future.

3   Supporting Technologies

Traditional knowledge management tools such as document and records management systems are being supplemented by a new wave of complementary tools.

Collaboration is becoming prevalent throughout the lifecycle of a document, as groups of people work together to create a document and evolve it through its active and inactive states.

Workflow tools also apply throughout the lifecycle, ensuring that an organization's rules and processes apply. Such tools ensure, for example, that document approval policies are adhered to before a document is published; critical in larger organizations.

And once a document has been created, it is important that it's found again. Search and retrieval technologies have come into their own in recent times, enabling organizations to search for documents using a wide range of search techniques and criteria.

4   Enhancing the Document Lifecycle

As we have explained, the majority of traditional knowledge management solutions have focused mainly on managing documents while they are in the active and inactive stages of the document lifecycle.

For a number of reasons, the area of document creation has been ignored by mainstream technologies; in the past it has been difficult to improve the creation of documents. Organizations who have used macros in Microsoft Word, for example, have found these difficult to create and maintain, and the macros typically apply to only one type of document – if another type of document needs to be automated, more macros have to be developed.

While attempts have been made to automate the creation of documents, typically programmers are involved and the exercise is complex and lengthy. What's more, the weakness in this process is that the person who ends up designing and creating the document is a programmer; someone more versed with code than the intention of the document.

Despite the fact that content is often the most critical asset of an organization, in the past documents have been created using ad hoc, inconsistent means.

Document automation solutions have been designed to make the document creation process more efficient and consistent.

Control over the design of a document is put into the hands of the person who knows the most about the document: the document's author. No longer are programmers required to come in and design user interfaces to documents they don't understand. The document is created by the person who knows what the document needs to contain, and what it needs to look like.

ActiveDocs is a productivity toolkit designed to serve professional end users who use Microsoft Word as an integral part of their business process. The tool is particularly relevant where tasks are repetitive in nature; for example, where Word templates have been introduced to aid business applications.

ActiveDocs provides a secure, integrated Template design & management environment for Template designers and administrators. For end-users, ActiveDocs provides secure, controlled, browser-based access to their Templates, with a browser-based wizard that works with any ActiveDocs Template to elicit answers with which to build the document. Finally, completed documents are available from the browser and may be stored in a variety of repositories.

As well as providing efficiencies for the creation of documents, ActiveDocs also enhances the overall document lifecycle by ensuring the entire lifecycle of a document is continuous and consistent.

5   Increased Benefits

As well as enhancing the creation of a document, ActiveDocs can also help to maximize the benefits organizations get from their documents while they are in active and inactive states.

In order to take full advantage of a document management or search and retrieval system, users need to be disciplined in the way they create and store documents.

Typically, one of the biggest drawbacks for users of document management systems is the requirement to profile documents prior to storing them in the document management system. Information about the document, such as its subject, details about the author as well as specific keywords and categories under which the document may be classified, all need to be entered and stored alongside the document at the time at which it is entered in the system. If these disciplines are not adhered to, then the overall success of the system – and the organizations return on investment – can be affected.

Such disciplines affect how the organization makes use of these documents after they have been stored. While search and retrieval technologies can be used to index every word in every document, the accuracy of search results can be improved if documents are profiled and metadata about the document is stored alongside it.

During the creation of a document using ActiveDocs, knowledge workers not only capture and access the information they need to create their immediate task at hand – the creation of the document – at the same time they are able to capture the same metadata that is required by the document management system.

This same information can later be used to retrieve these documents based on the categories and keywords that have been applied to the document, therefore reducing the user's workload, ensuring consistency across the organization and helping to attain a return on the organization's investment in knowledge management.

6   Conclusion

As organizations continue to produce documents in large volumes, time and effort – and therefore money – are often expended performing repetitive document creation tasks.

ActiveDocs provides knowledge workers with the ability to create intelligent documents quickly, easily and consistently, using the world's most popular software application: Microsoft Word. Organizations can be assured the documents they produce are consistent and of a high quality, and adhere to all standards within the organization.

As organizations adopt knowledge management systems, and the disciplines associated with such systems, document creation plays an important role in the success of such systems. ActiveDocs can be used in conjunction with these systems to facilitate the capture of profiling and metadata information, therefore minimizing users' efforts and reducing the frustrations of using document management and search retrieval systems.