

Document Automation with ActiveDocs

ActiveDocs™

www.activedocs.com

Why ActiveDocs?

ActiveDocs is an enterprise document automation and compliance suite, available in the cloud or on-premise. It helps you create better documents faster.

Many medium and large organisations struggle with productivity when creating documents. The process is often repetitive and tedious. It drains energy. Endless revisions and reviews mean people can quickly lose focus on the task at hand. Accuracy and consistency are vital, but the checking and double-checking can work against these goals, especially when there are many contributors.

ActiveDocs simplifies the document production process. It uses automation to take the hard work and tedium out of the process, eliminating many of the repetitive tasks. ActiveDocs has integrated template design so you can be sure of consistency across all your documents.

Benefits include reduced risk, lower document production costs, and higher efficiency. Your business will have a better image with customers, employees, and partners as they'll see better quality output. You'll be able to comply more readily with regulatory requirements. ActiveDocs is flexible enough to change with your business needs.

Applications

ActiveDocs products are applicable across a range of disciplines. Document automation can help every part of every organisation, regardless of market or function.

You can use ActiveDocs to automate sales proposals or employment contracts. The suite will improve your invoicing and shipping documents. In finance, it can help produce better loan agreements or insurance policies.

In each of these examples, organisations have common, reusable content. It may be the small print at the bottom of a contract or it could be standard service conditions. Many companies have pre-written descriptions of products and services to slot-in to documents.

With ActiveDocs, you'll be able to maintain consistency in every document. The content will be correct and up-to-date every time. Where it's important, you can keep control of your brand and standardise terminology.

ActiveDocs allows you to produce documents in many languages, with location-specific content like legal clauses. If you serve global markets, you can ensure consistency everywhere you operate.

Applications: legal contract generation, customer bank statement generation, credit card statements, employment contract generation or building, RFP proposals, RFP automation, sales proposals and quotes, building reports, real estate contracts, land information reports, leasing contracts, legal documents, policy documents, complex document building, document compliance.

Users: Government, Insurance, Banking, Healthcare, Education, Corporate Legal departments, HR departments, Sales and Marketing departments.

Main users



GOVERNMENT



INSURANCE



BANKING



HEALTHCARE



EDUCATION



LEGAL DEPARTMENTS



HR DEPARTMENTS



SALES & MARKETING DEPARTMENTS

Integration

ActiveDocs integrates with almost every other system imaginable.

Data Views allow you to pull data from other business systems. The process is seamless. This means there is no need for duplicate data entry. ActiveDocs Data Views also mean no more transcription errors.

User-Driven Document Creation is an interactive way of combining user input with existing data. ActiveDocs prompts users to select data directly from other applications. So, they might select customer details from a CRM database while building a letter.

The **Solutions Studio Module** is an applications integration toolkit. It helps integrate ActiveDocs even more deeply into applications like CRM, finance systems and DMS.

ActiveDocs **Document Wizard** allows users to start document creation from other applications. The integration tools automate moving data from the application to a document. This helps accuracy. You can customise the Wizard's actions to your specific needs.

You can store documents using the ActiveDocs **Composition Server**. Each can be filed in the ActiveDocs database, on the file system, or elsewhere. The Composition Server works with Microsoft SharePoint and other WebDAV applications. You can use a web service to store them in other document management systems.

ActiveDocs **Automated Mode** allows other applications to use ActiveDocs by requesting single or batch document generation and other functions via web services, without user interaction.



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Document templates

ActiveDocs **Designer** is a comprehensive integrated tool for creating and managing ActiveDocs templates. It is made for everyday business users so there's no need to rely on IT specialists for template design. ActiveDocs is built on the Microsoft .NET framework. This means users can build their own document templates using Microsoft Word.

ActiveDocs Designer's **Content Manager** gives you total control over document templates. With Content Manager template, designers can create and automate complex business documents. They can see the rules and business logic linked across all documents. If you need to make a change in one place, say a legal clause, Content Manager updates the clause everywhere. This is automatic and dynamic, simplifying document management and increasing efficiency.

Designer allows you to create and maintain templates using Microsoft Word. ActiveDocs **Design Tools** extends its power and functionality.

Design Tools make it easy to add ActiveDocs intelligence to your templates. It does this with *active fields*, *repeating items*, *natural language rules*, *free text* and *snippet links*. These are

markers. They define where and how information is added to a document. **Data Integration** allows the use of data from external sources.

While the idea of templates is simple, in practice creating them is less straightforward. Complex business requirements often lead to a complex solution.

This may involve:

- links to external data sources
- data that occurs in many locations in the document
- repeating or tabular data where you cannot know the number of repetitions in advance
- optional content that depends on logic to rule it 'in' or 'out' of the final document
- calculations
- common content such as *terms and conditions* shared by more than one template
- areas of user-provided and free-formatted text
- strict validation
- dynamic tables, graphs, and charts
- variable header and footer content

ActiveDocs Designer simplifies all this complexity.

ActiveDocs allows you to create and maintain templates using Microsoft Word.





Workflow

ActiveDocs sits at the start of the document lifecycle.

It creates, stores and delivers business documents. These can come from interactive user-driven processes or from programmatic automated mode processes. Usually they are part of a wider business process.

There are times when create-store-deliver is enough to meet the needs of those business processes. Yet often businesses need more refinement and flexibility. This happens at the start of the document lifecycle.

Every document needs drafting and reviewing over and over until someone in charge approves them. At this point, they can be stored and delivered.

Some tasks are iterative. Not all tasks apply to every document. Decisions about where to store documents and how to format them can vary until final release. That last release stage may operate along different lines to everything that went before.

A small organisation may use manual processes to manage business requirements. This doesn't work in more complex organisations. To help manage these requirements, ActiveDocs includes workflow. ActiveDocs workflow has seamless integration with third-party workflow products.

ActiveDocs uses automation to take the hard work and tedium out of the process.

Output

ActiveDocs **Composition Server** integrates with your infrastructure to deliver documents in your choice of format and channel.



PRINT

ActiveDocs Composition Server's **Delivery Manager** works directly with your print devices. It allows users to queue documents to the printers themselves or printing may happen automatically. Users can configure queues for immediate print or print to a schedule.



EMAIL

You can use ActiveDocs Composition Server's **Delivery Manager** with your email services. Also as with print, you can send documents straight away or via scheduled delivery.



WEB SERVICES

ActiveDocs can send documents to web services. It can also retrieve documents from web services. Web services open up new possibilities for handling documents after creation.

There is huge potential for automation.

Web services can integrate with other applications and use document information to make intelligent decisions about the onward handling of the document.



FAX

Delivery Manager can use your fax service providers to send messages. It also allows you to build queues that use that service. Users can send fax messages or faxing may happen automatically. You can configure queues to send immediately or schedule faxes.

Storage

ActiveDocs can store documents in and retrieve them from locations other than its database. Options include:

- Web Services
- File system
- Microsoft SharePoint
- WebDAV-compliant applications



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MICROSOFT SHAREPOINT

Any accessible Microsoft SharePoint library can become a document repository. ActiveDocs Composition Server can send documents there automatically on completion.

Microsoft SharePoint will manage documents sent to it according to the library's configuration.



FILE SYSTEM

Any file system location accessible by the ActiveDocs Composition Server can become a document repository. You can automatically send completed documents there. Locations can be set and altered by workflows or when documents are generated in Automated Mode.

Using the file system as a repository opens up possibilities such as monitored "hot folders".



WEBDAV-COMPLIANT APPLICATIONS

Any accessible WebDAV-compliant application can be a document repository. You can send documents there automatically on completion. Documents sent to a WebDAV-compliant application are managed by that application.

Compliance

ActiveDocs includes features to support compliance and auditing enforcement.

COMPLIANCE ENFORCEMENT

Organisations need reliable compliance management to deal with regulatory demands and company policies. ActiveDocs supports this with compliance enforcement features:

CONTROLLED DOCUMENT CREATION

With ActiveDocs **User Privilege Management**, organisations can define who creates documents. It can restrict access to only the approved, latest, and appropriate communication templates.

You can segregate document and content creation duties, by defining who can contribute to each phase of the creation process.

An employee may input basic data where required and then re-assign the document to another person. Once the document, content, or communication is assembled, it may need approval. ActiveDocs allows strict control and definition of the duties of each person involved in the process. It eliminates gaps in the process and prevents unwanted cross-over of responsibilities.

BUSINESS RULES ENFORCEMENT

ActiveDocs **Rules Engine** lets you set simple or complex rules. Then you can apply them to automated processes. This includes:

- insertion or exclusion of clauses and content from documents;
- selection of templates used for document creation;
- conditional data validation criteria;
- rule-driven selection of delivery channels;
- the ability to select the most suitable approvers.

HUMAN ERROR ELIMINATION

ActiveDocs' automation of document and content processes can end human error. Templates containing the appropriate content and business logic help keep human document creators focused. Or, you can automate processes using the Automated Document Production and Solutions Studio modules.

COMPLIANCE CONTROL AND AUDITING

ActiveDocs helps managers control and audit compliance. You can check template management, data security, document quality and conduct internal audits.



TEMPLATE MANAGEMENT AND COMPLIANCE AUDITING

The ActiveDocs **Template Management and Compliance Auditing** controls documents' output parameters. This reduces the risk of releasing incorrect or incomplete documents. You can approve template workflows containing business logic, content inclusion and exclusion rules, data use options, and user input collection parameters. This makes it possible to test all automation parameters before users get the solution.

SECURITY OF DATA AND DOCUMENTS

ActiveDocs **Data Views** enable control over the data available to end-users and template designers. Template Designers in non-production environments can have test data access. Templates in use may be connected to live data, and only show the data a specific

user needs. The ActiveDocs Data View Web Service supports more data access tracking and auditing capabilities.

ActiveDocs **Document Management and Delivery** services send documents to recipients and storage locations. User privileges control access to documents with high granularity.

Automatic control of delivery and access management reduces the risk of delivering documents to the wrong person.

QUALITY MANAGEMENT AND INTERNAL AUDIT

ActiveDocs **Reporting** supports document quality management and internal audit with built-in customisable reports showing document creation, template usage, and performance statistics. Running these reports is a simple one-click operation, and they can be

exported to Excel and PDF formats.

The integration capability of ActiveDocs means organisations often choose to integrate reporting data straight into their existing BI platforms and dashboards. This provides decision makers with an accurate up-to-date data-driven representation of the automated processes.

STRENGTHENING YOUR ORGANISATIONAL DEFENCES

The ActiveDocs compliance feature set allows organisations to meet changing legal requirements and business demands. Users can define the desired compliance behaviour without in-depth IT knowledge. This helps organisations respond rapidly and maintain compliant status.

INPUT

Multi-source integration of organisational data, content & information



OUTPUT

Fast & efficient automated document generation

About ActiveDocs

ActiveDocs is a document automation specialist. It develops high quality enterprise template management and document automation software. ActiveDocs' tools help medium and large organisations automate and standardise documents bringing together dynamic personalised and repeatable information.

By automating document production, organisations reduce risk and lower costs. This leads to fewer customer complaints or legal challenges, and a freeing up of resources to work on higher value tasks.

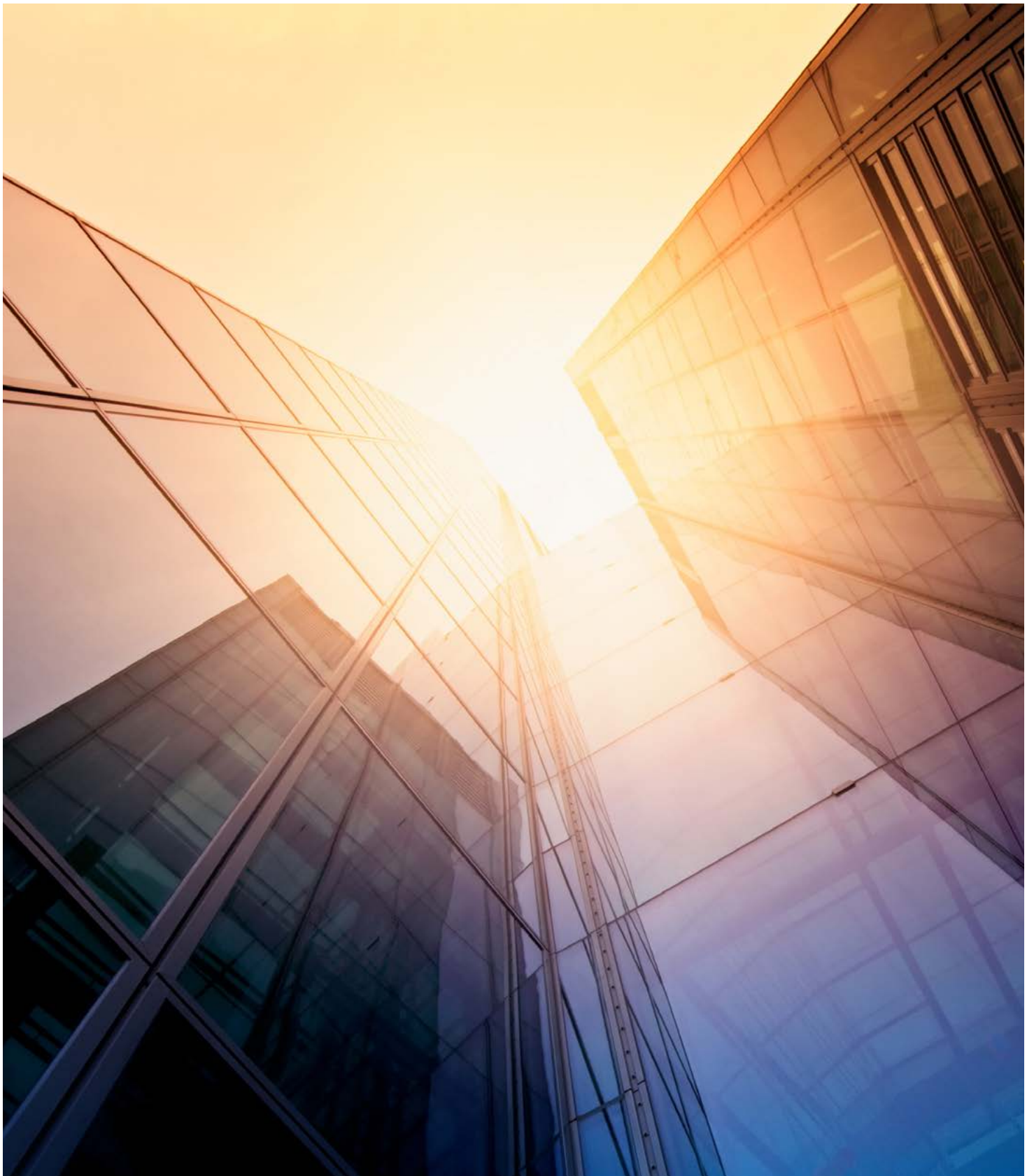
ActiveDocs is a mature business which has been trading since 1992. Customers include many of the world's most prestigious companies. They include Royal Dutch Shell, BP, Bayer and ABB.

As a Microsoft Gold Partner, ActiveDocs is committed to innovation. It will continue to develop its product suite as the worldwide standard for document automation.

ACTIVEDOCS PRODUCTS

ActiveDocs is an enterprise document automation solution, available in the cloud or on premise. ActiveDocs is built on Microsoft® Office and Microsoft Windows Server technology. It supports industry standard integration with data sources and document storage and handling applications. ActiveDocs uses templates designed with Microsoft Word and built from reusable components.

ActiveDocs has built-in management and deployment tools to allow Templates to be used for User-Driven (interactive) and Program-Driven (automated) document creation.



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