The ActiveDocs Guides Series:

Introduction to Document Automation

A detailed guide that will enable you to understand document automation and avoid common pitfalls.

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ActiveDocs™

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KEY TO SUCCESSFUL DOCUMENT AUTOMATION PROJECTS: KNOWING WHEN AUTOMATION WORKS – AND WHEN IT DOESN'T

Consider a very common business – and personal – activity: flying with an airline. Everyone who does this uses a boarding pass to make their way through airport security, access the aircraft, and claim their seat. Regardless of whether they used a boarding pass on paper or one that appeared on the screen of a smartphone, this is an example of a miniature document that any document automation solution can create. But it almost never does. Why not?

Boarding passes are documents, but would anyone use a document automation solution to create them?

Boarding passes are too simple. They display details about the flight, seat, passenger name, and maybe the airline logo. Every passenger receives essentially the same boarding pass; only the passenger and flight data are different. This is an example of a very well structured document. There is no need for a document automation product. The flight number, time of departure, first name, and last name are always placed in the same location. Airlines' booking systems can easily do this work. Why waste time and resources on an automation solution?

Will a document automation solution ever be able to automate the writing of a novel? This seems unlikely. Even though the good automation solutions make it possible to implement elements of artificial-intelligence decision making, no automation solution can replace human creativity. Therefore, if a bulk of text to be written requires creative writing (it doesn't have to be a novel; perhaps it is the summary of an annual report), someone must write it.

Novels are documents, too.

At this point, it may be reasonable to ask of a document automation solution: "What exactly can it do?" On the simple side of the document automation spectrum are customer statements, non-negotiated legal documents, sales quotes, and everything else that has some data in it, as well as some degree of personalization, and where business logic controls what text is shown. Apart

from inserting information like the recipient and other details, it may be that a paragraph is inserted or removed based on simple rules.

The medium- to high-complexity band is where most automated documents are produced in. These may be insurance policies, mortgage or credit card documents, sales proposals, requests for proposals (RFPs) and responses to RFPs, negotiated legal documents, employment contracts, health and safety procedures, data-driven customer communication, and most other documents, emails, web content, and other communications that medium to large enterprises produce.

Good automation solutions also make it possible to work with sets of documents. One example is the creation of an employment contract as well as health and safety policy specific to the position, and motor vehicle use policy for a specific vehicle. It can also involve generating a PDF document, sending it out as an attachment to a customized body of an email, and simultaneously making the document content available as a web page.

On the extremely complex side of the spectrum of automated documents are data-rich reports with well-defined structures that appear as though they have been written by humans. Many reports on the stock market and individual stock performance are fully automated, and are indistinguishable from reports written by a reporter.

How does all of the above translate into the day-to-day reality of organizations that are considering implementing a document automation solution?

In a medium to large organization, there are typically hundreds of types of documents, website content, and emails that people use and create every day. Employees spend their time locating suitable content and styling for these documents, then create them, review them, peer-review them, submit them for approval, rework them, correct them, and ensure that they are delivered to the correct recipient and archived in the correct location. If it's possible to

Document Automation can be used for:

- Negotiated and non-negotiated legal documents
- Statements of Work
- Insurance policies
- Requests for proposals
- Sales quotes
- Sales proposals
- Employment contracts
- Customer statements
- HR communications
- Health and safety procedures and policies
- Work instructions
- Customer communications
- Data-rich reports
- Building reports
- Real estate contracts
- Email automation
- University syllabus publishing
- Land information reports
- Leasing contracts
- Credit card processing documentation
- Permit issuance
- Order processing
- Government pension documents
- Court documents
- Legal proceedings documentation

And many other document and communication types

identify which of those processes can be successfully automated, the outcome should be a project with a return on investment (ROI) in the area of 400%. This means the solution pays for itself in about three months. In some cases, the payback period can be less than two weeks.

For small business that utilize their intellectual property to create documents or content, document automation can become a means of scaling up their operations and reaching a much wider audience. For example, small legal firms can serve thousands of clients across the country, while niche health and safety experts can generate compliant work procedures quickly and update them effortlessly.

In summary, every organization has documents to automate.

In the next section, we will discuss why and to whom document automation is or should be important.

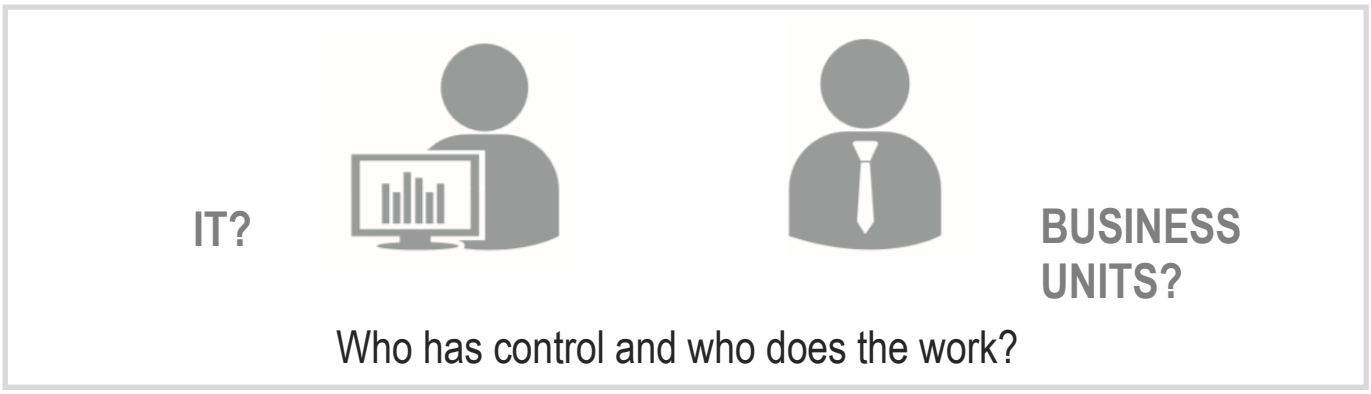
WHY IS DOCUMENT AUTOMATION IMPORTANT?

Many people consider document automation important. They are the ones whose businesses can't function without document automation, or whose businesses function better with it.

Some people are interested in document automation because their organizations have tasked them with researching the ways in which they can save time and money on resource-consuming document creation processes. Others must complete a project, and they recognize that they need an automation and compliance product to do so. Some build their businesses around delivering expert knowledge in the form of automated documents.

ActiveDocs has worked with small companies, multi-billion-dollar companies, and governments. They have all faced many problems and challenges related to the creation of documents. The process of creating simple documents with Word or mail-merge can become difficult when an increasing number of requirements comes into play.

One way to meet these never-ending and continually changing requirements is to introduce manual labor, copy-pasting, editing, and data lookup. It may involve working with basic catch-all, starter documents, annotated with instructions in terms of what to fill in, what to change, and what to remove (including the annotations) in any one of the myriad circumstances in which the document might get used.



Another method is to obtain help from IT experts who work with code, VBA macros, queries, etc. When a business unit wants to change content, modify a rule, or update styles, IT will assist as needed. However, if the business persists with inquiries, IT will eventually become disgruntled. Does IT really want to be involved in every change in business requirements? And wouldn't the business users, the subject matter experts, prefer to make the changes themselves, freed from the necessity of communicating change requirements to IT, not to mention from the time constraints resulting from IT's inevitable backlog and the processes that IT must go through to make any sort of change to business assets?

Imagine that these problems no longer exist. Documents are created automatically within seconds, and making changes to complex business logic and data connections is a simple

process. That is what document automation should do. However, even that is not good enough for organizations like Royal Dutch Shell, Liberty Mutual, Bayer and many of the other Fortune 500 companies ActiveDocs works with. These companies care about this above all: ACCURACY and COMPLIANCE.

They care about compliance with internal policies, industry regulations, state laws and federal laws. They care about the correct parameters being included in contracts and legal documents.

They can afford to hire a hundred people to produce thousands of documents every month. What they can't afford, however, is for a single document out of those thousands to be inaccurate and non-compliant. With ever more stringent legislation and industry regulations, every mistake, inaccuracy, outdated T&Cs, etc. exposes the organization to litigation or binds them to fulfil obligations they wouldn't normally agree to.

"Large enterprises care about this above all: ACCURACY and COMPLIANCE."

In extreme cases, a document's non-compliance with some legislation can result in jail time for the people involved. The penalty is up to 10 years in prison in both the US and the UK; the penalties in other countries are almost as severe. However, this punishment would be an exception to the rule; fining the party in breach is much more common, though the fines aren't insignificant.

This is why document automation is important for many people and many organizations. The savings in terms of time is a must, creating a more obvious return on investment. However, the part of the automation product that enforces accuracy and compliance is what ensures the organization will not waste resources on unnecessary loss, litigation and potentially paying business-damaging fines.

Accuracy and compliance is not something people generally think of when they seek ways to automate their documents. However, it is the secret of the Fortune 500 companies that collectively save billions of dollars in potential litigation costs as well as making their documents easier to create, quicker to deliver, and better looking.

In the next section we will consider an often-overlooked aspect of automation: document formats. When considering automating documents, an organization needs to consider the format of its documents before working on any automation solution.

DOCUMENT FORMATS – PDF, DOC(X), PROPRIETARY

What is the document format of your accurate and up-to-date, Gold Standard, content?

Before discussing the process of automating suitable documents, it is worth taking some time to consider different document formats and their relationship to document automation. The format of automated documents is important. The organization has invested its resources into the creation of existing documents, and will likely not want to discard all of this simply because the document automation system doesn't work with its types of documents.

In this context, the format of the documents is not necessarily the same as the format that is delivered to the customer, employee, or whomever is the ultimate recipient. It's the format in which the organization maintains its Gold Standard content, its templates; the format it uses for work-in-progress documents. The format with which the organization works on a daily basis is more important than, for example, the ultimate conversion to – and perhaps emailing of the document as – a PDF file.

Which file formats do you want to use and which formats do you need to use?

The first consideration is the format of existing documents and templates. If these use some version or form of Microsoft Word, an immediate advantage exists. Word is a ubiquitous word processor that allows for the easy formatting of text, insertion of graphics, and text editing. Word is a de-facto industry standard. However, if the existing content is in PDF or a proprietary format, automation will be slightly more difficult. PDF and most proprietary formats do not lend themselves to easy automation of more complex documents. The features that can be taken for granted in Word become major obstacles in PDF and most proprietary document formats.

If the document contains more text one time and less text another time (for example, if sometimes it consists of two pages and other times of three), Word will have no problem with this. The document re-flows automatically. However, in a PDF-based document this becomes a major problem, as PDF has no notion of paragraphs and paragraph flow. A PDF is effectively a collection of individual characters with a set position on the page. This fact is best illustrated by what

happens when one attempts to copy text from a PDF document and paste it elsewhere. In the best-case scenario it becomes a cluster of separate non-formatted paragraphs that don't resemble anything seen in the PDF itself.

Page numbering, renumbering of multi-level lists when a portion of the document is removed, table of contents generation and updating, reflowing of paragraphs when a picture is removed, and many other basic tasks become major difficulties in the automation of PDF-based documents and templates.

PDFs do have some advantages. They are more suitable for highly graphical documents that were originally created in a proprietary program such as Adobe InDesign or Illustrator, QuarkXpress, and others. This type of software is often favored by designers, because it provides more options for graphics manipulation.

The Microsoft Word document format – or OOXML (Office Open XML) – is an open format that any third-party application can fully support. The format itself supports advanced text and graphics formatting. While no professional graphics designer would create magazines in Word, it would be possible, and there are many examples of beautiful MS Word documents. Often it is easier to create and maintain good-looking documents in Word than it is in professional graphic design software products or proprietary document editing software. When a document must be modified and documents and templates are in a Word format, all that is required to complete the task is someone who can operate Microsoft Word.

Both PDF and DOCX (the OOXML family - DOCM, DOTM) are open and standardized formats that any document automation solution can fully support.

When considering a document automation solution, many organizations retain the document format they already use instead of transitioning to another format. Thus, if an organization already uses Word documents and templates, it may choose a Word-based automation solution. If the organization uses primarily PDF documents, it may choose a PDF-based automation solution because of that existing choice.

Some automation solutions use their own proprietary formats and provide import tools that make it possible to load existing documents into the product. The downside of this approach is that the

fidelity of the import is not always acceptable for documents with any degree of rich formatting, dynamic numbered lists, tables of contents, and non-text elements such as floating images, shapes, and diagrams. Upon import, documents typically lose all or some of those rich or dynamic or floating or positional attributes, along with their margins and other layout features. Hence, there is a massive post-conversion task to identify losses of fidelity and, if the new tool permits it, to make amendments. An additional challenge in terms of proprietary formats can arise with the emergence of differences between the way documents look in the template editing environment and the actual generated documents, whereas WYSIWYG (What You See Is What You Get) is now taken for granted with world-class products like Word.

This doesn't mean that everything about proprietary automation formats is problematic. However, there are inherent differences between the Microsoft Word document format and any proprietary format. To ensure that an imported document looks the same in another format is nearly impossible. For example, Microsoft has been working on PDF import into Word for years, and even though this feature is now quite usable, the imported documents still lack fidelity and require attention to make them acceptable. Keep in mind that this is the product of a company with nearly unlimited resources and access to some of the best developers in the world.

When an importation process results in a real-life document with 100% fidelity, it is a sign that the underlying format is the same before and after import. It may still be a Word document into which automation can now be incorporated, or it may still be a PDF that can now be embellished with automation.

Unless a need exists to switch document formats, to avoid re-work, the organization should choose the document automation solution that works with its existing document formats.

In the next section we consider various means of document automation, noting that the organization may already have everything it needs to automate its documents.

WHAT IS NEEDED TO AUTOMATE DOCUMENTS?

Consider the stack (virtual or real) of documents and communications that the organization wants to automate. How does the process start? What tools and techniques are needed?

The first step is to take a critical look at the documents themselves. How complex are they? What types and volumes of business rules must be evaluated and executed? Do people need to look up data when they create the documents and, if so, how many different data sources do they use? How do similar documents differ, and can the differences be managed from a single origin by using business rules? Is there a need to create multiple documents that form a set? How much document content should be available for reuse across different documents? (This content is typically terms and conditions, as well as common clauses, but it is not unusual to find commonality in aspects of the content of generally different documents. These aspects include headers and footers, document introductions, company descriptions, product descriptions, service overviews, etc.).

The mail-merge functionality in Word is good enough for many

If the organization's core Gold Standard content has always been in PDFs, some type of automation software will be needed regardless of the simplicity of the automation requirements. However, if the core documents and templates are based on any type of Microsoft Word document or template, there are many more options. The remainder of this section will assume that the content is Word-based, or that the ultimate aim of a document automation project is to move to one of the Microsoft Word formats.

Word mail-merge is sufficient for many. If the requirement is simply to populate a few fields in a Word document, and perhaps to use a single data source for document data (typically an Excel worksheet or an Access database), it's probable that there is no need to look further. Word mail-merge is usually sufficient under the following conditions:

- Simple fields are populated in a single document (not multiple documents with the same values).
- If a data source is required, it is sufficient to use only one data source (e.g., all data can reside in one Excel sheet).
- Centralized management of content is not required.
- The number of templates is low, typically fewer than ten (no template management capabilities required).

- Web interface is not required (every document creator needs access to a desktop computer with MS Word where the mail-merge is set up).
- No calculations with field values need to be performed (concatenation, mathematical operations).
- Document content doesn't have to be conditionally included or excluded via rules.

Some of these requirements can be satisfied through the use of VBA macros, but this approach takes the automation of documents out of the realm of MS Word users because the involvement of skilled programmers becomes necessary.

Use of Microsoft SharePoint can address the requirement for a web interface. Some calculated fields can be created in SharePoint Document Libraries, and used in SharePoint-automated documents. While this requires basic knowledge of SharePoint, it can often be achieved without technical programming skills.

Almost every organization that runs on Microsoft has SharePoint. What may surprise those organizations is the possibility that Word and SharePoint may become a solution for their document automation needs. This is more likely to be the case if the document automation is to work as a point-solution. If the organization's requirements are contained to a few documents/templates that don't change often (realistically, once a year at most), and that aren't very variable, this can be a good path to explore.

However, if automation is intended to work on an organization-wide or even a business-unit-wide scale, or if even just one of the above outlined limitations is not acceptable, a proper document automation software product should be considered.

Document automation software companies like ActiveDocs maintain decades of expertise and experience. They have leaped all the automation hurdles that companies large and small have ever encountered, and have found solutions to the problems they had to tackle along the way. Opting for an automation product means that the organization will automatically be able to tap into the knowledge of hundreds of other customers who have already encountered the same problems, and who have found the solutions. Quality automation products have capabilities that extend beyond the basic automation of documents; they can manage templates and their compliance, help handle multiple documents in sets, create large batches of documents, create documents on demand from other applications, source data from multiple disparate data sources, easily apply business rules, and integrate with existing systems (for data, BPM, CRM, etc.).

In the next section we consider the level of document automation that is appropriate to the organization's needs.

CHOOSE THE APPROPRIATE LEVEL OF DOCUMENT AUTOMATION

Documents can be automated in different ways. While there are many approaches to automation, there are three levels to consider:

1. Automated – Documents are created with no user intervention at all. The content and type of generated documents is driven only by the template(s), available data, and defined business rules.
2. User-driven – Creation of documents requires input from a human user. A decision about the content must be made that can't be translated into a set of business rules based on data. The user's input is required even though most of the document's content may be driven by data and business rules.
3. Hybrid – Documents are created automatically based on data and business rules unless some data is missing or falls outside set boundaries.

The three scenarios are not mutually exclusive. Most organizations combine at least two.

Does every document require human judgement and expertise?

Which type of automation is most suitable for your company will depend on how many of the decisions made by current document creators when producing a document can be transformed into intelligent information-driven decision-making by automated templates.

The process of automating documents, and the degree to which they can be automated, depend on the answers to the following questions:

- Is data used to determine what content goes into documents? If so, is the data available in a repository such as SQL Server, Oracle, SharePoint, XML stream, CSV, Excel, Access, application layer web services, or text files (e.g., AS/400 output)?
- Is the judgment of human users relevant to what goes into the documents? Do the users decide which documents are generated?
- If human users make decisions about document content, are those decisions based on the data (as described in point 1) or on a wider context that considers their knowledge and non-quantitative data (e.g., personal experience with a customer/supplier, aesthetics, etc.)? Another way of expressing this is: is it reasonable to say that the decision-making process can't always or necessarily be reduced to a set of strict business rules?

Often, when organizations start with document automation, they want to replace existing manual processes. Because a manual process is being replaced, a tendency may exist to keep the user engaged in the creation of documents. Thus, the user-driven mode is chosen, and a “plug-and-play” document creation solution replaces the existing manual processes. Later, when the entire process is under review, a decision may be made to proceed with the automated or hybrid mode.

In automated mode, there are many scenarios. The solution may create batches of thousands or millions of documents. The solution may simply create one document when someone clicks a button in the CRM system or other application, or on another trigger (e.g., a payment is overdue by four days).

In hybrid mode, the solution may automatically send welcome kits to all new customers, but when data elements are missing or don’t match validation rules, the solution may create a task for a customer service officer to resolve in terms of providing the correct values.

Which is the correct mode for your business? Automated, user-driven, or hybrid?

In the next section we consider the use of, and integration with, the organization’s existing systems and data sources.

DATA, CONTENT, APPLICATIONS, AND DOCUMENTS

One of the major benefits of effective document automation solutions is that they work with the organization's data and other content, as well as with its existing applications.

Salespeople may be working in their CRM system, entering the details of what they sell, to whom they sell it, and for how much. To get this information to the customer, they must create a quote or a sales proposal. To do this, they must get all that information about the customer, the product(s), the pricing, the line items, etc. out of the CRM and into a proposal by copying and pasting or via manual transcription. There may also exist a need to incorporate or attach external documents, such as product brochures.

How much better – in other words, how much easier, more accurate, and less time-consuming – would it be to simply click on a button in the CRM and have the document automatically generated, using the data and other content that resides in the CRM or other systems?

Most organizations have HR systems, contract management systems, underwriting systems, etc. to support related business processes as appropriate. However, when it comes to the creation of the documents that those business processes must naturally produce, they often start from scratch, requiring significant manual work and modification to obtain accurate documents.

Document automation solutions rarely work as standalone systems. This is a small sample of applications and services which document automation products may need to integrate with.

Only rarely would an organization run a document automation product as a standalone system. For that reason, it is essential that document automation solutions maintain the ability to be integrated with existing systems, and with existing data and content repositories.

The range of existing applications, data, and content sources can be wide. Some are built on modern technologies, while some, by virtue of their longstanding and critical necessity to the

business, may be legacy systems. Integration with modern technologies using standard interfaces is very much taken for granted, but it is critical to also consider whether the document automation solution can support integration with legacy systems that will be a necessary part of the creation of documents.

It is also important for an automation solution be able to utilize multiple data and content sources to generate a single document. Customer details may come from the customer database. Branch address details may come from a SharePoint List. Product parameters may need to be retrieved from an ERP system. The automation solution is the glue that makes it possible to assemble data from different and very disparate sources, then generate the document in a single process with no manual data lookups, and no copying and pasting.

Additionally, business process management systems and other workflow applications are often the software that drives document processes. Documents require approvals, or even multi-stage approvals, and different sections of the document may need to be reviewed by different people. There may also be tasks in these workflows that require someone to create a document, send an email, create web content, etc. It should be possible to replace these tasks with the document automation solution, which can integrate with BPM or workflow systems.

A similar scenario would apply to any other system which the document automation solution is required to integrate with. When choosing a document automation solution, therefore, it is necessary to ensure that it provides an open interface on all required levels of functionality. At the very least it must have a comprehensive API for document creation (both automated and user-driven), template management, document management, data integration, application security, and reporting. These API capabilities become especially important if the document automation solution is envisaged as an enterprise-wide solution, which can be accessed by many different areas of the business using a range of applications, data and content sources, and access methods.

One useful approach is to involve the organization's IT team in reviewing the product's integration capabilities. The IT team will usually have a solid understanding of the applications that are used organization-wide, and will be able to accurately judge whether the integration capabilities of the automation solution will work across the organization.

In the next section, we will review how well templates need to be managed, considering the varying number of templates and people who need to access them.

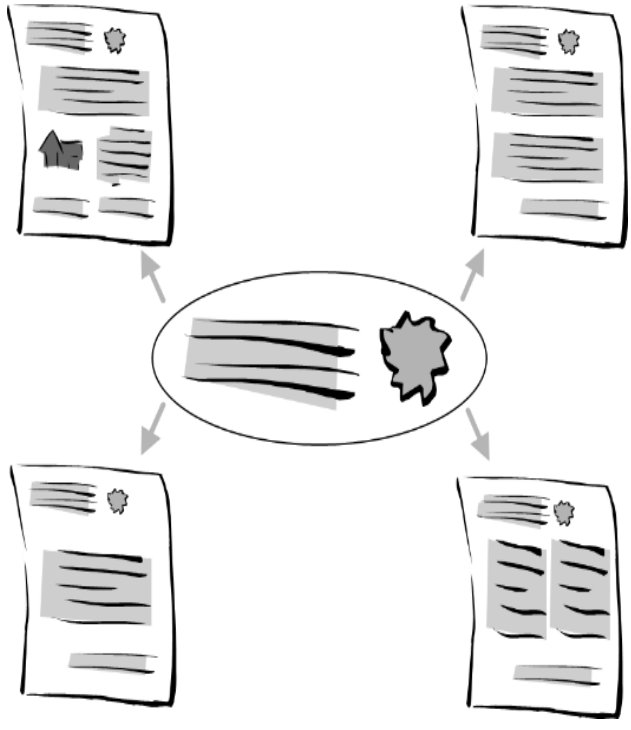
MANAGING YOUR TEMPLATES AND SHARED CONTENT

Depending on how many templates your organization has, you may or may not need to worry about Template Management. The more templates you have and the more people need access to them, the more sophisticated system you'll need to put in place to control who can edit what, who can use each template and how, and to track the history of changes. If you have two or more templates, you may need the ability to share content among your templates so that you only make a change once.

What happens when you have fifty templates that all share one logo, address block and the terms and conditions? Do you need to make the same changes fifty times?

Some organizations have just one template, while some can have thousands. Even if you manage only one template, it is important to control and track who can make changes and what these are. That applies not only to content – which can be tracked and compared using standard document comparison tools, such as the document compare in MS Word or other, more specialized tools – but also to changes to business logic and data sources. In automated templates, business logic determines the language ultimately included in produced documents. If rules are modified, entirely different sections may end up in the produced document. Similarly, if someone changes the data source that a template is connected to, you may end up with different data flowing into templates. This can result in unexpected content shown in the documents.

The reality of many organizations is that templates are stored in shared network folders. These rarely provide good versioning, and very little to facilitate tracking of changes or access by multiple users. Even the basic check-in and check-out functionality is missing. Network folders can work when there are very few templates, and only one or very few people have access to the templates, and the ability to make changes. To prevent the use of incomplete, "work-in-progress" templates, these often need to be published in another location.



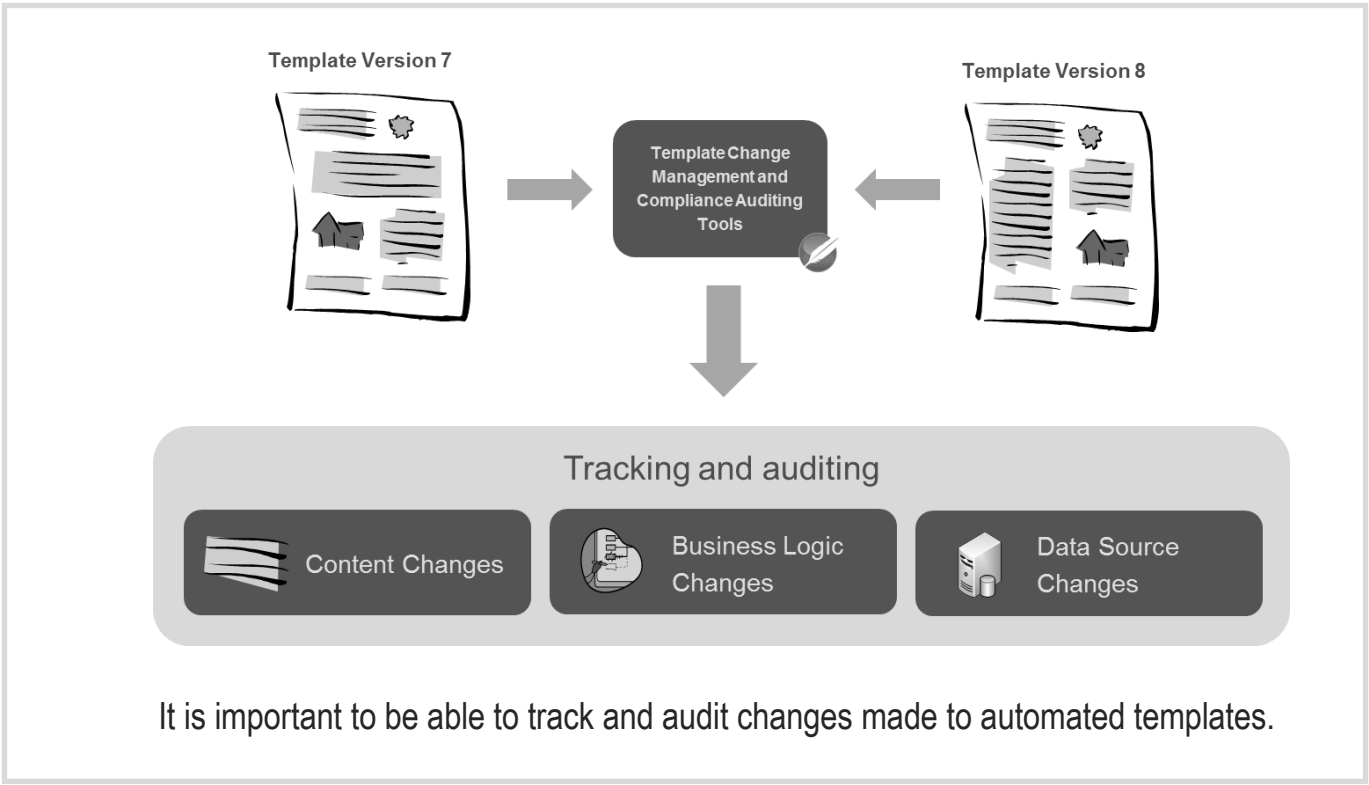
Multiple templates use one piece of content. How many times does it need to be edited?

The growing number of templates, and an increased turnover of users and editors, present additional challenges, as network folders lose the ability to cope with these demands. Where traditional document management systems can no longer cater to these needs, specialized template management capabilities are required. These typically include:

- Tracking high number of versions in the perpetual process of template development and improvement
- Ability to track content changes
- Ability to identify changes to business logic
- Ability to identify changes to data sources
- Support publishing, deferred publishing, and template obsolescence
- Support check-in and check-out of templates and multiple people accessing templates simultaneously
- Ability to maintain content that is shared by multiple templates and maintain/modify it in one place
- Ability to centrally manage business rules and data structures and make them available to multiple templates
- Ability to track template usage

Enterprise-scale document automation software comes with template management abilities. These support creation, maintenance and usage of many templates by many people and, with equal importance, enable templates to share content, business rules, and data structures.

Making traceable updates to the logo, address, and Terms and Conditions across fifty documents can be easy. A traceable, accurate and efficient change which can be made and applied in a single step.



It is important to be able to track and audit changes made to automated templates.

The practical results of leveraging good template management practices can be impressive. One of ActiveDocs' clients, Cobank, a major US wholesale bank, reduced the number of their templates from 350 down to 83. This significantly decreased the effort needed to make template modifications (see case study). Another client, New Directions Behavioral Health, a major behavioural health care provider, started with ninety templates. After the deployment of ActiveDocs Opus, they ended up with three (see case study).

In the next section we'll have an in-depth look at a few more real-life uses for document automation, referencing client deployments of various sizes.

USE CASES FOR DOCUMENT AUTOMATION

It is not easy to understand or appreciate the full potential of a document automation solution until the organization starts using it, and starts using it intensively.

No expert can estimate the extent of the opportunity for automation in an organization, if the expert does not maintain intimate knowledge of the organization's environment. The organization's processes, systems, data, and content form the framework in which the automation solution is deployed. This framework defines the opportunity for automation. Typically, there is plenty.

The path to document automation for most organizations is:

1. They have a very specific document creation/automation/compliance issue.
2. They start looking for an automation solution.
3. They either find a point solution (maybe a custom Word mail-merge/VBA template, or a simple document automation solution) and their journey ends, or…
4. They find an enterprise-scale solution and deploy it to fix the document issue at hand.
5. They roll out the proven existing document automation solution into other parts of the business.

There is nothing wrong with a point solution if there is no chance that an enterprise-scale automation solution would produce an acceptable return on investment in the project at hand. However, often a few teams from different parts of the organization put together two or more projects to create a proper return on investment for the organization. Later, this foresight is a boon for other business users, because they can deploy the automation solution to other areas of the business at little or no extra cost.

To return focus to the use cases, these are some of the bigger customers which ActiveDocs has worked with.

Shell (the world's largest company) generates thousands of HR documents for global transfers of its employees (some seventy thousand of them) with a hybrid automation system. This means that if the data is in Shell's repositories, all documents are created without human intervention; if it isn't, an HR officer is prompted to fill in the missing details. See case study.

Cigna (one of world's largest insurers) generates client communication, insurance policies and related documents. See case study.

ABB (one of the world's largest engineering companies) generates complex technical proposals and product description documents in user-driven and automated modes. ABB has two different systems for different use scenarios. See case study.

Finnish Centre for Pensions (Eläketurvakeskus) produces large volumes of accurate and compliant pension documentation. This means that most people in Finland receive communication produced by ActiveDocs. See case study.

Bayer (one of the world's largest pharmaceutical companies) generates complex contractual documents globally, integrating with SharePoint and Nintex workflows. See case study.

Australian Retail Bank

All tellers of a major Australian retail bank use ActiveDocs to produce documentation for their clients. These may be credit card contracts, mortgage documentation, and other banking documents. See case study.

Canadian Cable TV and Network Provider

A Canadian Cable TV and Network Provider generates client contracts and ad-hoc communication from their service centers. See case study.

Texas Conference of Urban Counties runs production of all documents in their Juvenile Justice System on ActiveDocs Opus. See case study.

ActiveDocs works with smaller organizations as well:

- A boutique legal firm serves thousands of customers with its documents-as-a-service solution. Customers create their legal documents online and pay for them with a credit card.

- An emergency response planning firm that serves many large companies from the Fortune 500 automated creation of response plans. For implementation in user-driven mode, it connected its templates to fifteen data sources and automated its documents – which are of significant size and complexity – in two weeks.
- A health and safety business automated the creation of health and safety procedures, so that it can serve more customers and produce documents more efficiently and accurately.

If there are any communications that an organization finds time-consuming to create and/or sensitive to inaccuracies, there is a good chance that document automation will be able to help.

As an example of a higher-end use-case, document automation can enable a user to take photos on their smartphone and write a description, then retrieve the images and descriptions from a cloud repository, insert them into a report, use the GPS coordinates of the location where the photos were taken to insert location maps into the report, generate QR codes that can be scanned, ask a few complementary questions, allow for the attachment of additional PDF files, retrieve data from several sources, generate the custom report document, send it for approval, and, after approval, insert signatures, then dispatch the document via email or print. Finally, it can be sent for storage in a document management system.

You can learn more about document automation use cases in the case study section of our website.

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to request a demonstration and to learn more about how our document automation and compliance solution ActiveDocs Opus might help your organization.

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