ActiveDocs

DOCUMENT AUTOMATION SOFTWARE

USING ACTIVEDOCS IN USER-DRIVEN MODE

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Abstract: This document provides an overview of the use of ActiveDocs in User-Driven interactive mode.

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1 Introduction

ActiveDocs is the third generation of ActiveDocs' document automation products, and the second generation of ActiveDocs' server-based products.
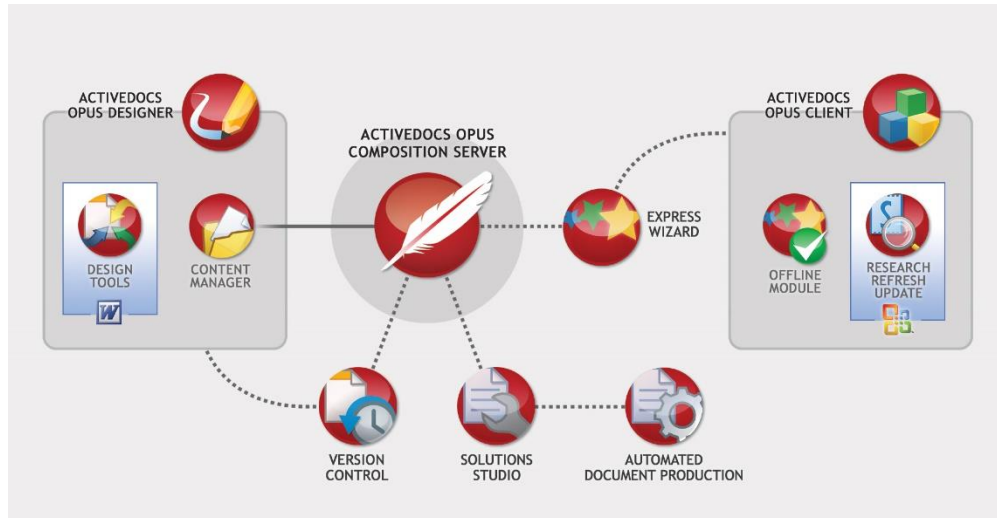

FIGURE 1: ACTIVEDOCS COMPONENTS

ActiveDocs creates documents by inserting data into specified markers in Templates. This simple concept is enabled through two core technologies. The first is ActiveDocs Designer which provides a rich environment for the design and management of Templates and other Design Components. The second is ActiveDocs Composition Server which provides a powerful XML-based document assembly engine, the Document Compiler, designed to insert data into Templates to create documents.

ActiveDocs provides two methods for supplying data to the document assembly engine. The first method is the web-based ActiveDocs Document Wizard which provides an interactive user interface to elicit from an end user (Document Creator) the data required for any ActiveDocs Template. The second method permits the unattended or Automated supply of data in an XML stream called Job XML from another application via the ActiveDocs Solutions Studio integration module.

This document outlines the use of ActiveDocs to create documents using the first method, in User-Driven or Interactive mode. This document also covers the use of ActiveDocs in "Offline" mode, and explores the use of ActiveDocs Snippets via the Research Service in Microsoft Office.

2   Templates

The use of ActiveDocs Designer to create and manage Templates and other Design Components is well-documented elsewhere. For the purposes of this white paper it is necessary only to consider the end product of the Template design process.

An ActiveDocs Template consists of fixed content and variable content. The variable content is a collection of ActiveDocs markers representing Design Items like Snippet Links, Selection Lists, Repeating Items, and Active Fields.
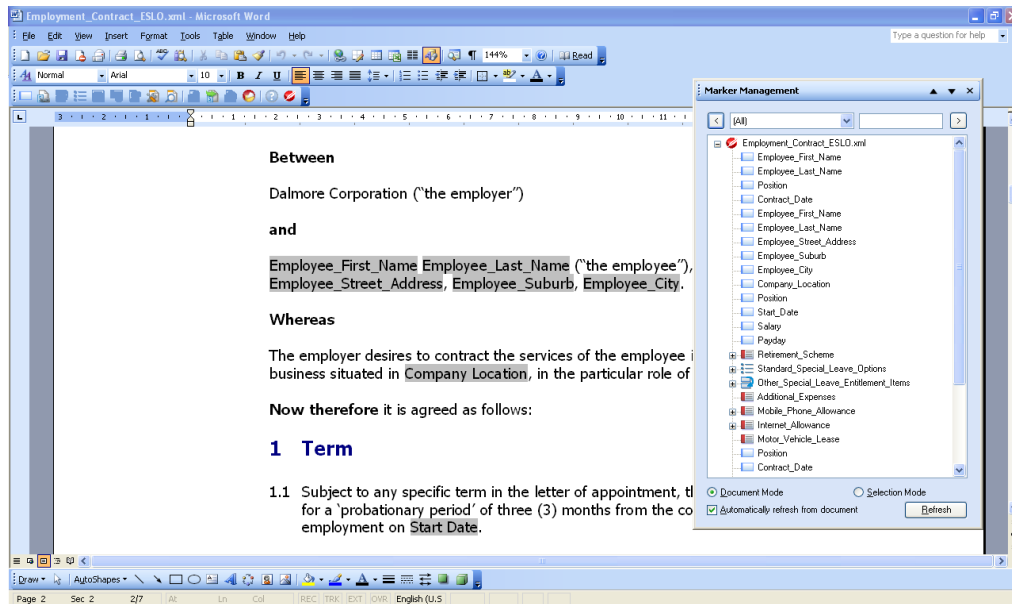

FIGURE 2 AN EMPLOYMENT CONTRACT TEMPLATE AND MARKER MANAGEMENT PANE

Active Fields, shown as shaded markers above, are essentially placeholders for the data required to create the finished document. Whether documents are created in User-Driven Mode or Automated Mode, data needs to be supplied for the Active Fields.

In User-Driven mode, data is acquired from the Document Creator (or derived from other data) via the ActiveDocs Document Wizard.

In Automated Mode, data is supplied in an XML stream called Job XML which is passed to ActiveDocs Composition Server's Document Compiler via a web services interface.

Any ActiveDocs Template developed for User-Driven Mode can also be used in Automated Mode.
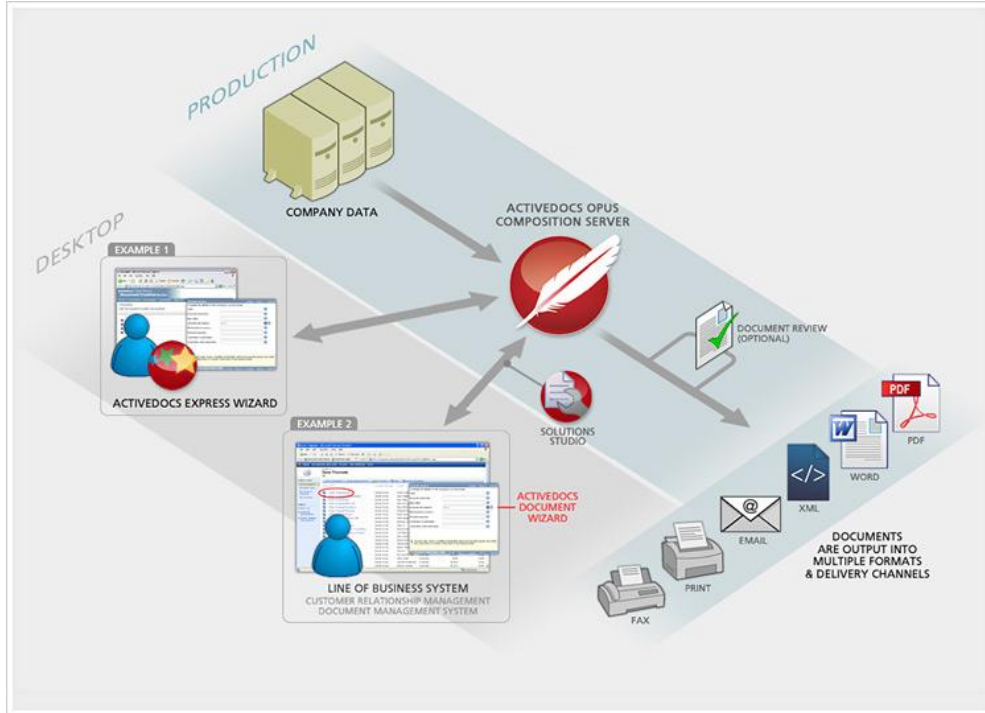
3 User-Driven Mode

FIGURE 3 ACTIVEDOCS USER-DRIVEN EXAMPLES

There are two scenarios in which User-Driven mode is used. Both use the ActiveDocs Document Wizard. In the first scenario the wizard is invoked from ActiveDocs Express Wizard which is ActiveDocs Composition Server's built-in browser-based interface (Example 1, above). In the second scenario the wizard is invoked from another application like Microsoft SharePoint (Example 2, above).

In both scenarios the ActiveDocs Document Wizard works the same way: by parsing a specified ActiveDocs Template and prompting the user (the Document Creator) for the required information (Answer data) to populate the Active Fields in the template.

The output document is assembled from the Template and Answer data by the ActiveDocs Document Compiler.

3.1 From ActiveDocs Express Wizard

ActiveDocs Express Wizard is the built-in user interface for ActiveDocs Composition Server. It provides access to Templates and Documents. ActiveDocs Composition Server may be configured to store Templates and Documents in external locations – see the companion white paper on ActiveDocs Integration for more information – while still retaining access via the ActiveDocs Express Wizard.

To use a Template, the ActiveDocs Express Wizard user navigates to the Templates page and from there to the required Template folder. A list of the folder's Templates is then displayed.
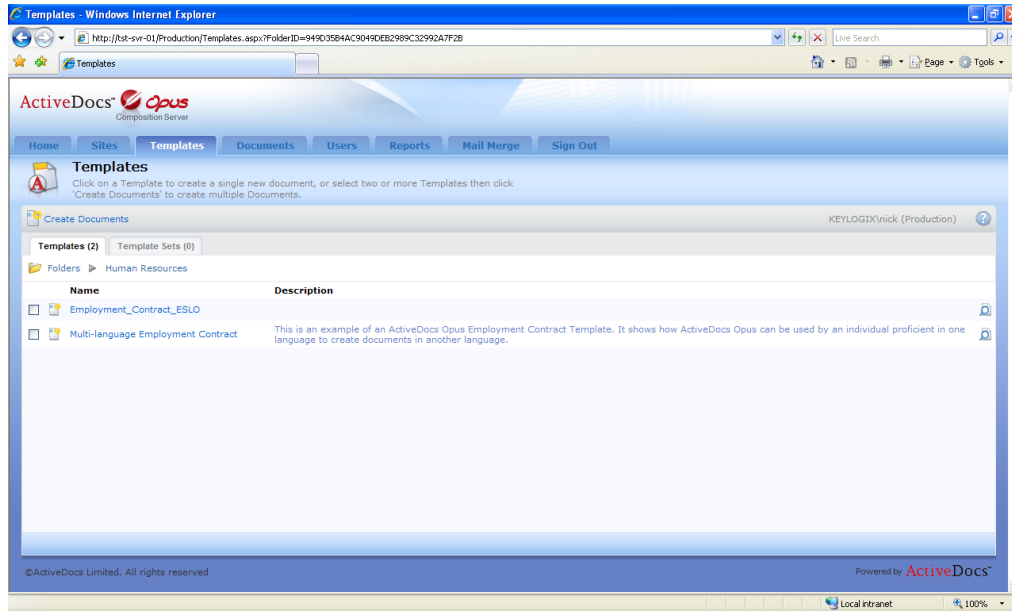

FIGURE 4 ACTIVEDOCS EXPRESS WIZARD TEMPLATES PAGE (HUMAN RESOURCES FOLDER)

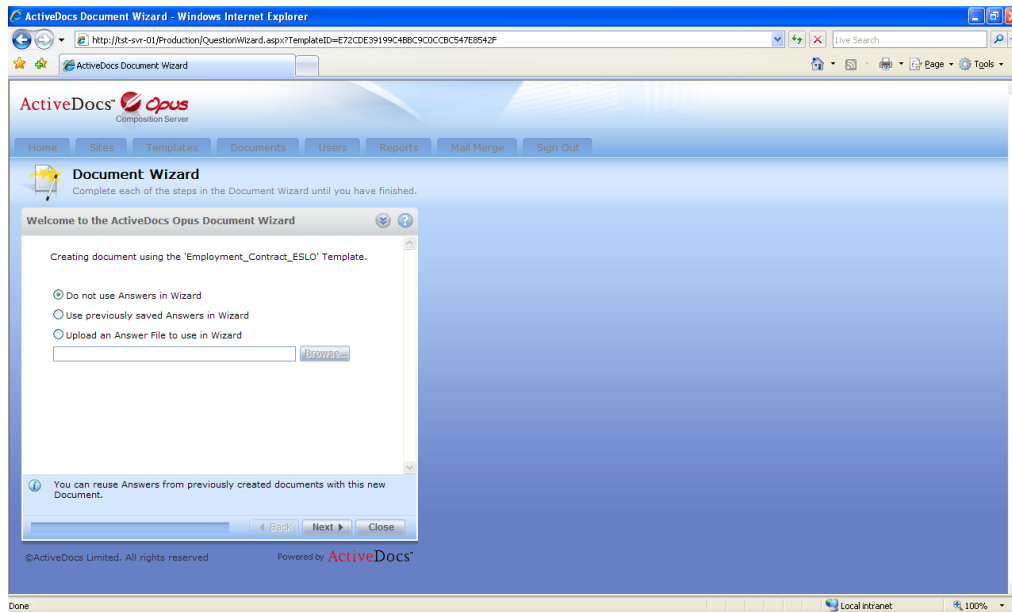The user clicks on a Template name to invoke the ActiveDocs Document Wizard.

FIGURE 5 THE FIRST PAGE OF THE ACTIVEDOCS DOCUMENT WIZARD

The first page of the ActiveDocs Document Wizard allows the user to select whether or not to use previously saved Answers. If 'Use previously saved Answers' is selected, the user is given a list of previous Answer sets to choose from. The example will continue on the basis that this option was not selected.

By pressing the Next button, the first group of required Active Fields is displayed. Grouping is determined by the Template Designer and is usually done on the basis of keeping logically-related fields together.
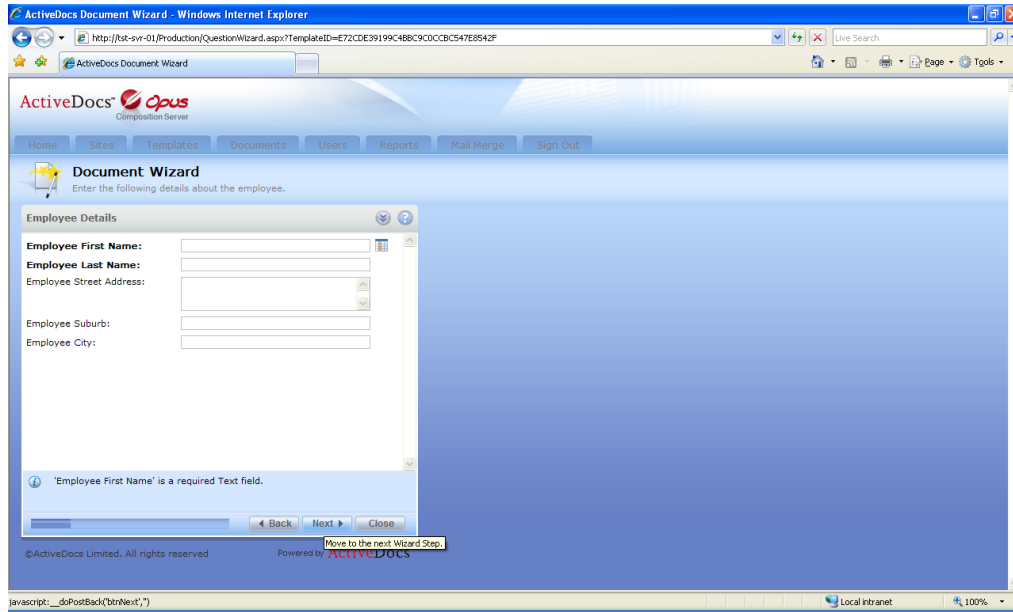

FIGURE 6 ACTIVEDOCS EXPRESS WIZARD - EMPLOYEE DETAILS GROUP

The employee details fields are acquired from an external data source, signified by the 'table' icon next to the first field. Clicking on the table icon invokes data selection.
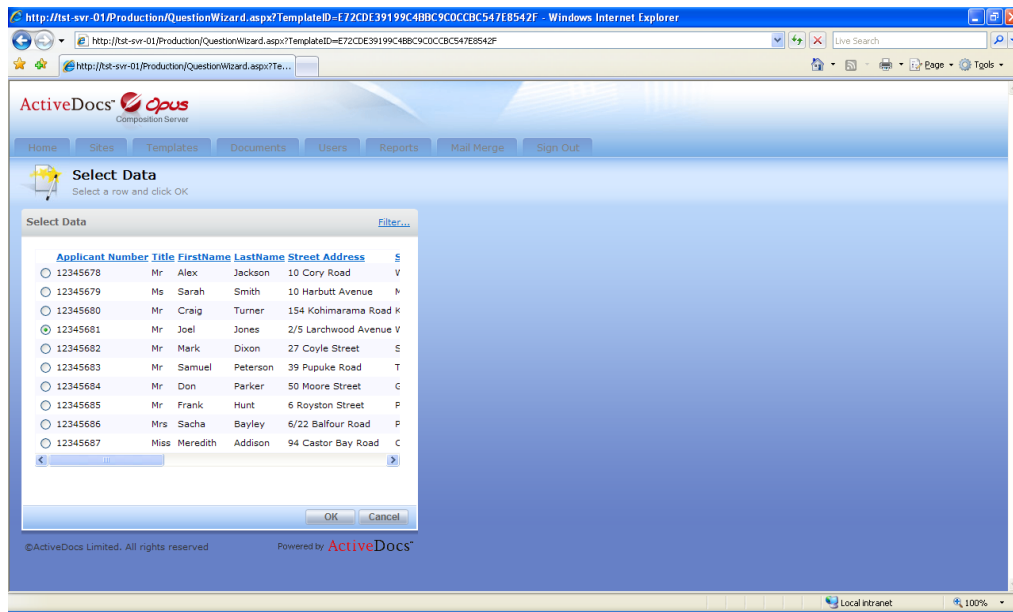

FIGURE 7 ACTIVEDOCS DOCUMENT WIZARD DATA SELECTION SHOWING ONE ROW SELECTED

The user clicks on the selected row and clicks the OK button to populate the Active Fields.
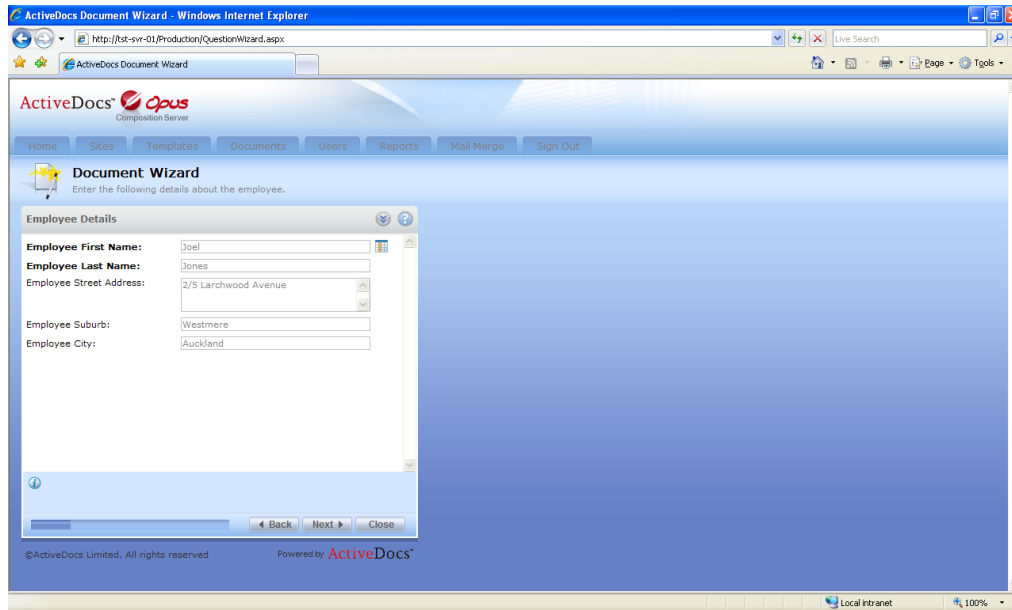

FIGURE 8 ACTIVEDOCS DOCUMENT WIZARD SHOWING ACTIVE FIELDS POPULATED FROM SELECTED EXTERNAL DATA

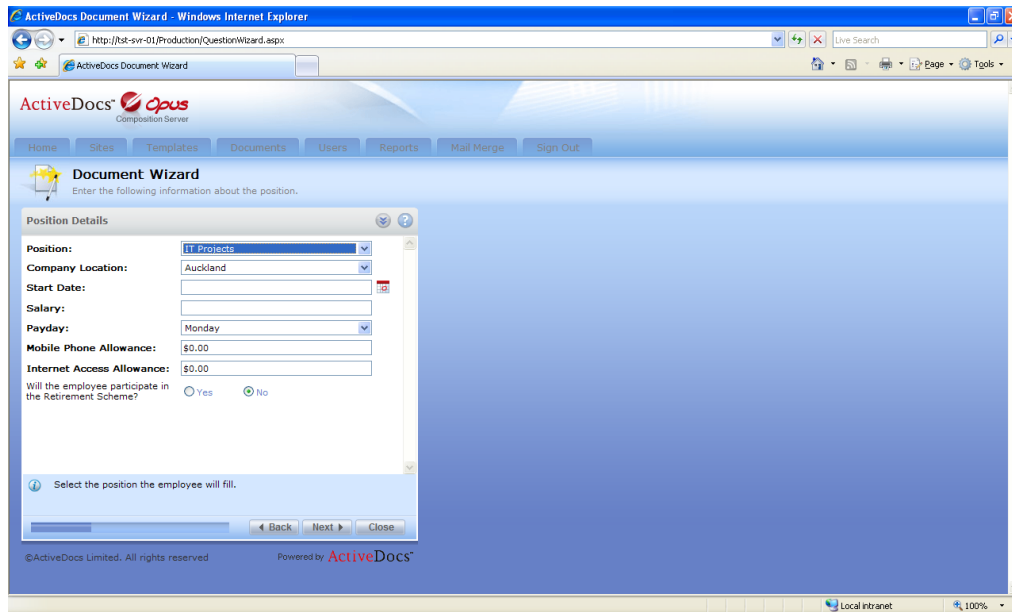By pressing the Next button, the data is accepted and the next group (Position Details) is displayed.

FIGURE 9 ACTIVEDOCS EXPRESS WIZARD - POSITION DETAILS GROUP

The Position Details group is not populated from an external data source. Some of the fields use drop-down lists; there is a date field which can be entered manually or populated from a date picker (via the calendar icon); some fields clearly require currency values; and there is a Yes/No field referring to the Retirement Scheme.

Two other controls on the Document Wizard are of interest. The first is the Help icon which invokes contextual help about the Document Wizard.
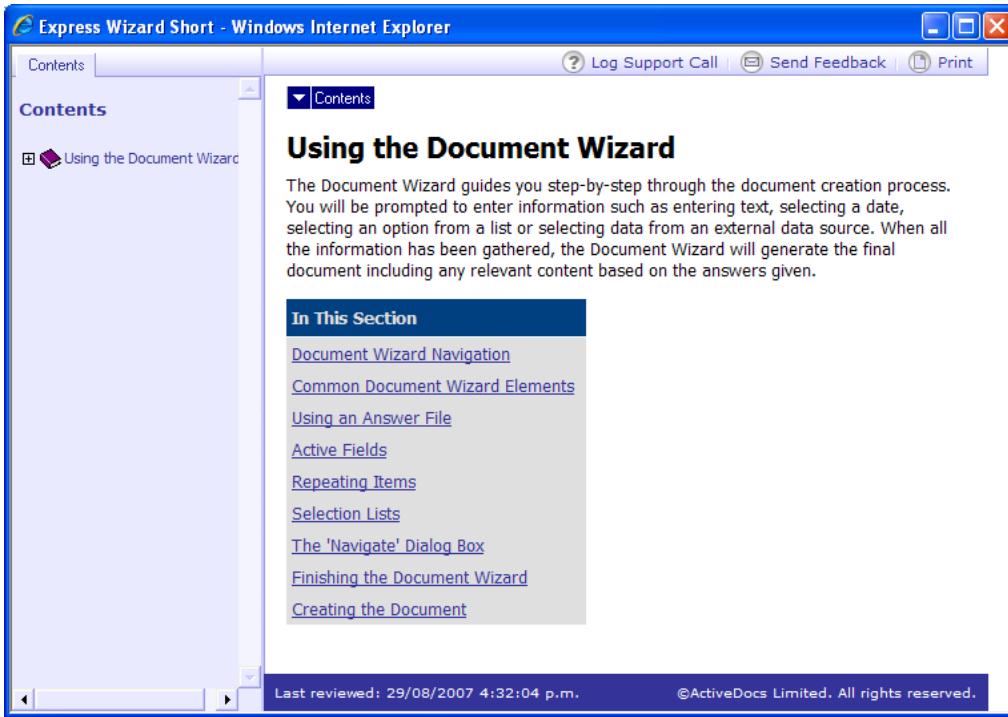

FIGURE 10 ACTIVEDOCS DOCUMENT WIZARD HELP WINDOW

The second is the Navigation control next to the Help button. This enables the user to navigate through the field groups and other data requirements in the Template.
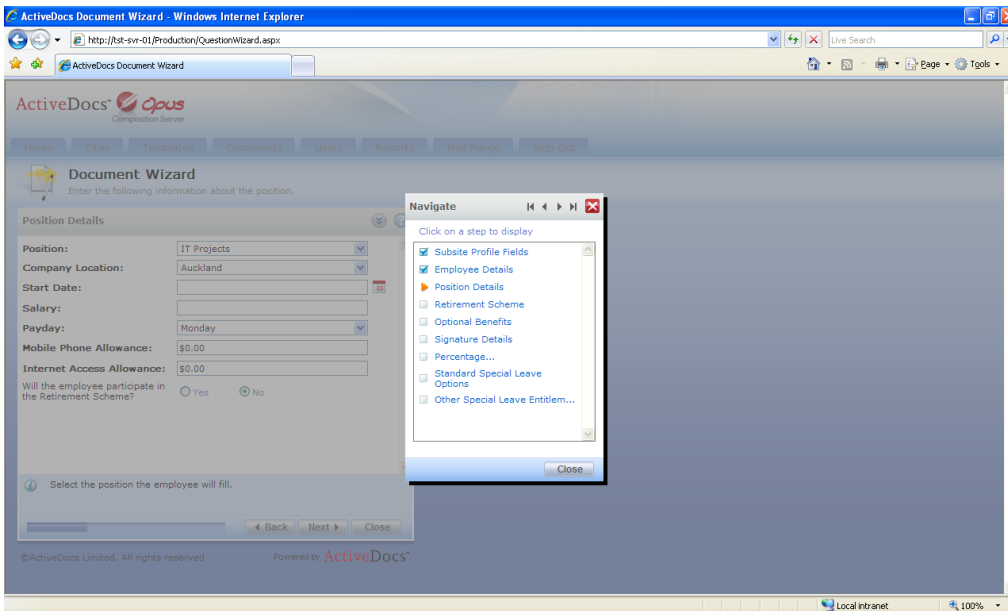

FIGURE 11 ACTIVEDOCS DOCUMENT WIZARD NAVIGATION FORM

The Template Designer decides on the default order of the groups but the user can navigate independently, provided that there are no uncompleted mandatory fields between the current group and the desired destination group. The navigation form shows which groups are complete (blue tick) and the current group (orange arrow). The navigation facility is especially useful when reviewing a nearly completed session or when previous Answers have been selected and the user wants to change a small number of them.

The user progresses through the various groups and reaches the final page of the wizard where the document name is presented. If the ActiveDocs Composition Server is configured to create documents in multiple output formats, the output format can also be chosen on this page.
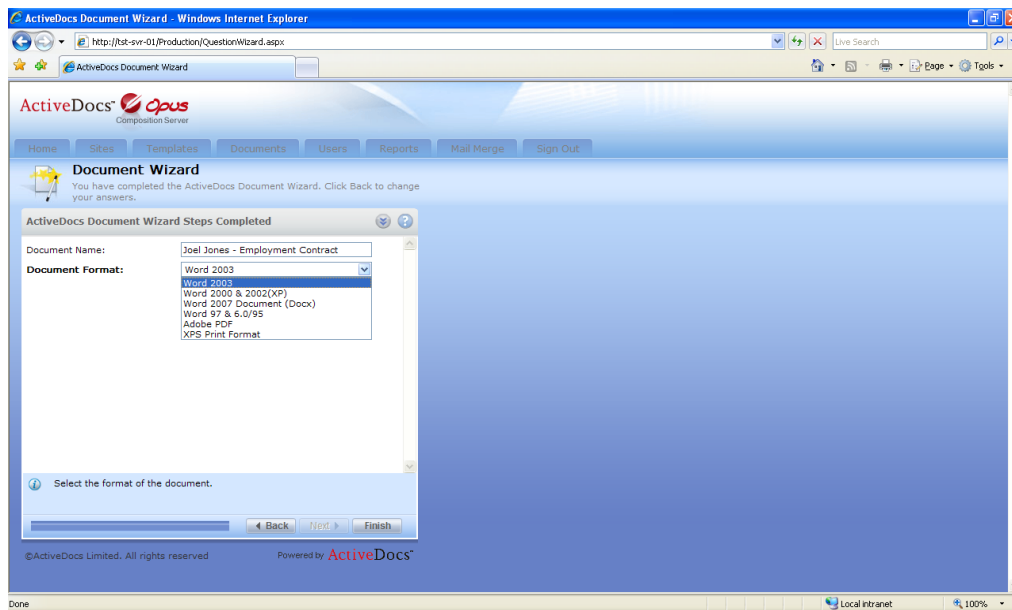

FIGURE 12 ACTIVEDOCS DOCUMENT WIZARD - FINAL PAGE

When the user clicks Finish, the ActiveDocs Document Wizard is complete and the document is generated by the ActiveDocs Composition Server Document Compiler; the document is saved; and the Answers are saved. While this short process completes, the animated compiler icon displays on the screen.
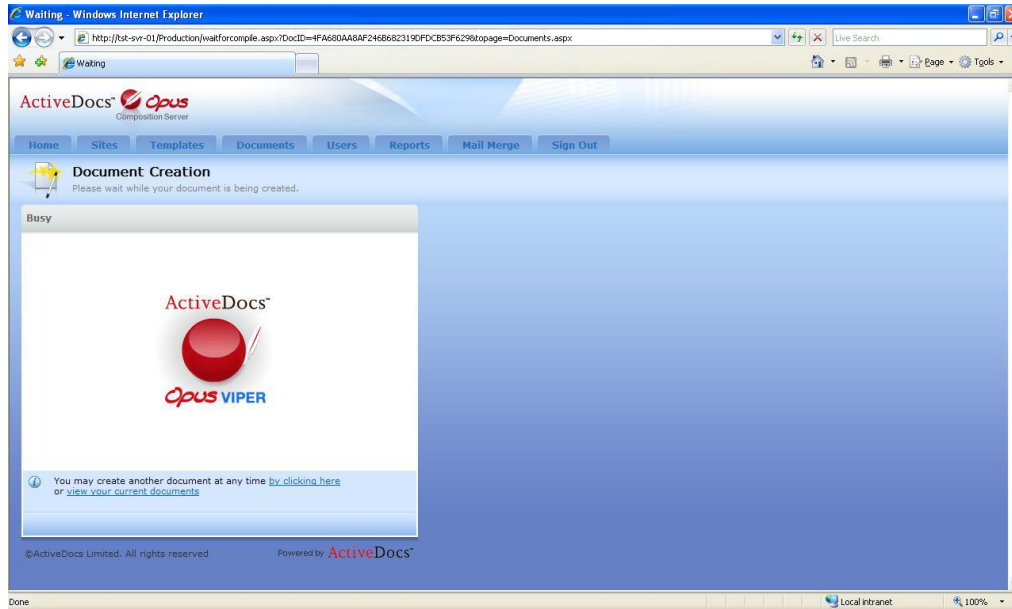
FIGURE 13 ACTIVEDOCS DOCUMENT COMPILER

The user is now directed automatically to the ActiveDocs Express Wizard's Documents page where the list of the user's documents is shown with the new document at the top of the list.
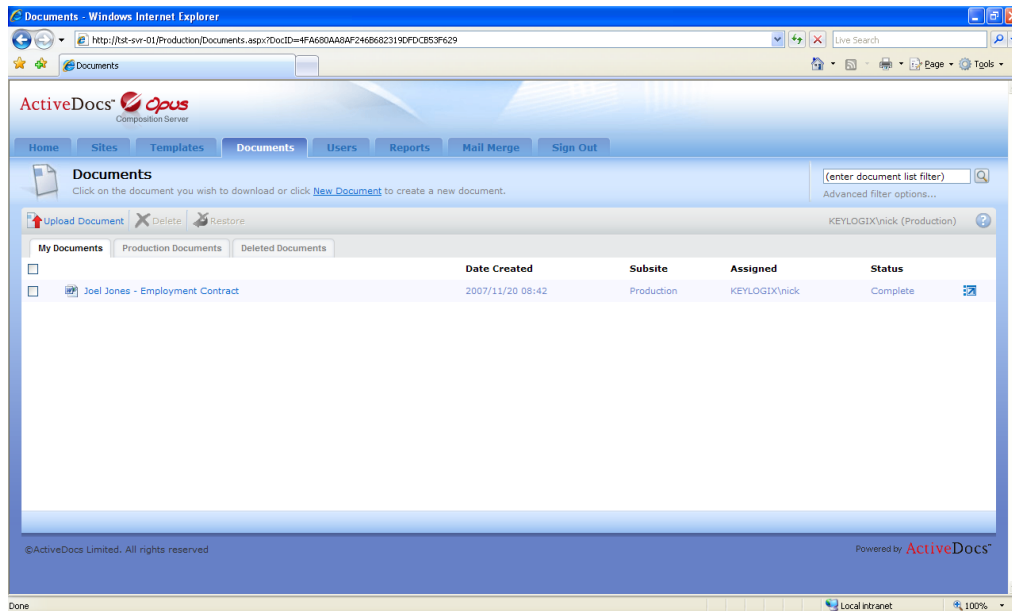
FIGURE 14 ACTIVEDOCS EXPRESS WIZARD DOCUMENT PAGE

By clicking on the document's entry in the list, the user opens the document directly in Microsoft Word (or in Adobe Reader if the document was generated in PDF).

If the document is opened in Microsoft Word, it can be modified and saved back to ActiveDocs Express Wizard if the user is a Template Designer or has the ActiveDocs Client software installed and licensed on the local machine. This feature is covered in more detail in the Post Creation section of this white paper.

3.2   From another application

ActiveDocs Express Wizard is a simple and easy product to use, but many organizations prefer not to ask their Document Creators to learn and use yet another interface. In this case, ActiveDocs provides the ability to run the ActiveDocs Document Wizard from almost anywhere – in fact, anywhere that a URL can be specified.

The URL typically specifies the name of the ActiveDocs Composition Server site and the name or ID of the required template. It may also contain optional information such as the web page to go to on completion of the ActiveDocs Document Wizard, and even the name of an Answer file which can be pre-populated with some or all of the Answers required to populate and produce the finished document.

This style of integration allows the power and flexibility of ActiveDocs Templates to be used to create documents via the ActiveDocs Document Wizard from just about any application in the organization's Information Technology suite.

Allowing the Document Wizard to be invoked from another application, and/or programmatic creation of Answer files, requires a licensed copy of ActiveDocs Solutions Studio and some customization of the other application. The degree of such customization depends on the required functionality.

In this example, an ActiveDocs template folder has been mapped to a SharePoint Document Library so any ActiveDocs Templates will appear as entries in the Document Library. The Document Library's Context Menus have been customized so each Template can used via the ActiveDocs Document Wizard.
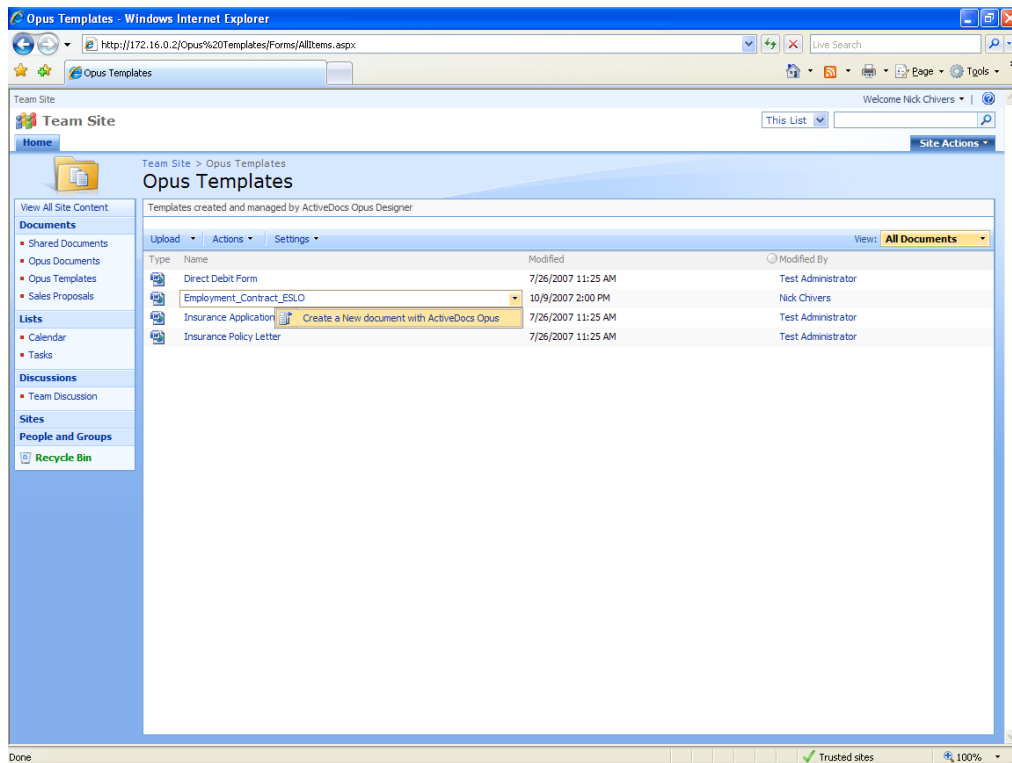

FIGURE 15 ACTIVEDOCS TEMPLATES IN A MICROSOFT SHAREPOINT DOCUMENT LIBRARY WITH MODIFIED CONTEXT MENUS

The ActiveDocs Document Wizard has in this case been set up to run in its own window.
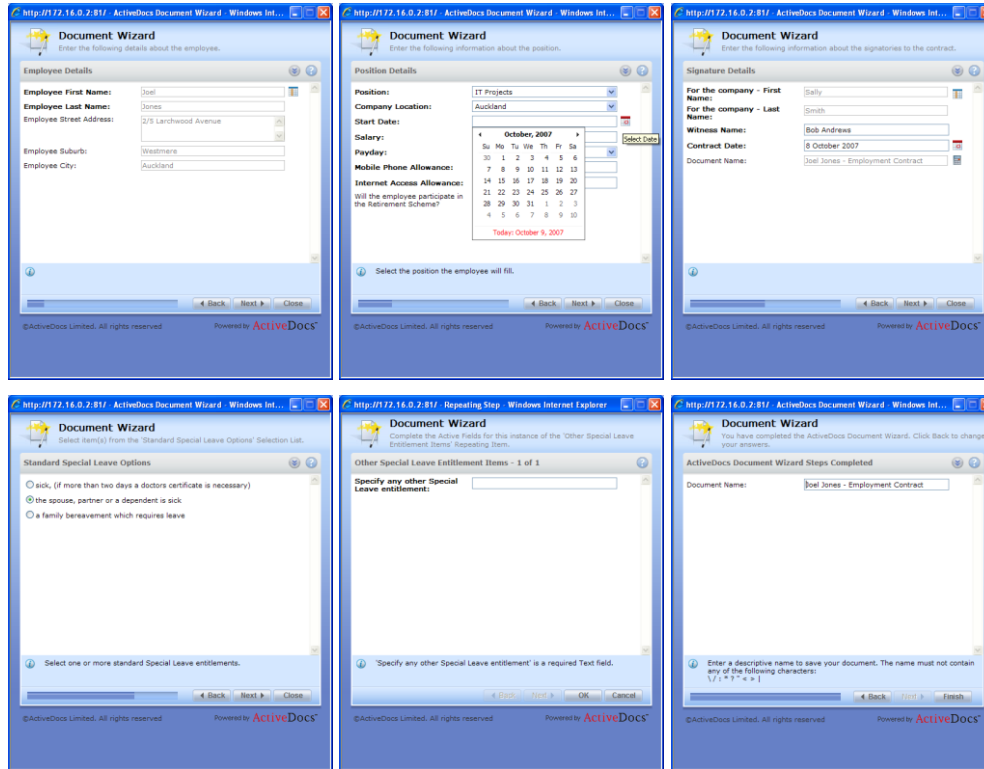

FIGURE 16 THE EMPLOYMENT CONTRACT TEMPLATE IN THE ACTIVEDOCS DOCUMENT WIZARD INVOKED FROM A MICROSOFT SHAREPOINT DOCUMENT LIBRARY

At the completion of the wizard, the document is created and the user is redirected to the completion page specified in the URL, or the wizard window simply closes.

The above example is just one of many possible integration scenarios for the ActiveDocs Document Wizard. Further integration possibilities are discussed in a companion white paper, "ActiveDocs Integration".

4   Additional Server Features

ActiveDocs Composition Server supports progressive completion of documents and a range of actions on documents through the ActiveDocs Express Wizard and ActiveDocs Document Wizard browser interfaces.

4.1   Progressive Completion of Documents

ActiveDocs supports a common scenario in which a Document Creator cannot complete a document during a single session of the ActiveDocs Document Wizard.

As an example, the Document Creator gets to the "Position Details" stage of the ESLO Employment Contract:
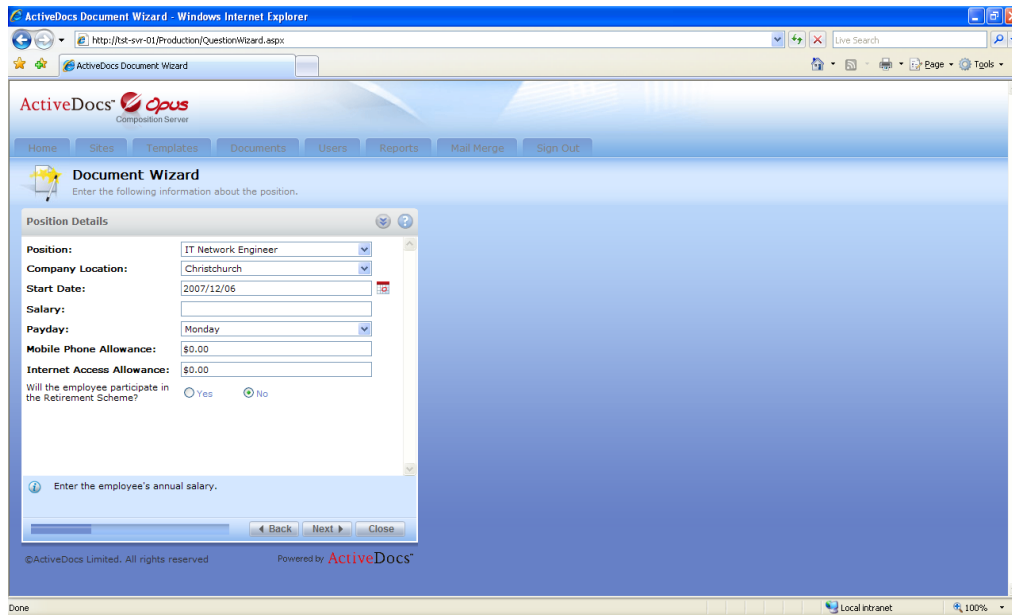
FIGURE 17 ESLO EMPLOYMENT CONTRACT, POSITION DETAILS GROUP

The Document Creator realizes that the Salary information isn't available until tomorrow. The session will have to be closed until then, by clicking the Close button:
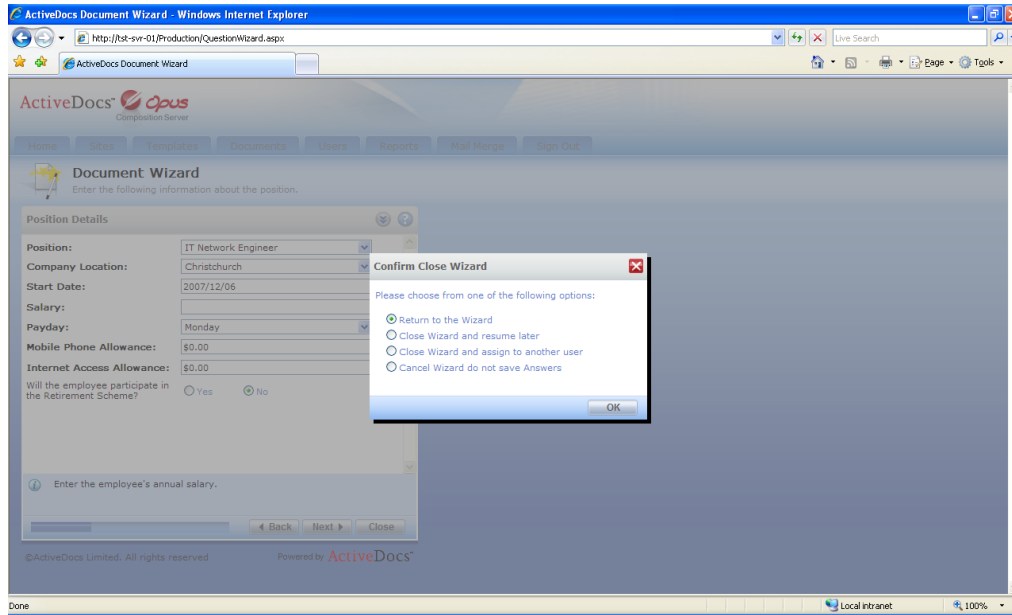
FIGURE 18 CLOSE WIZARD OPTIONS

The Document Creator may resume the wizard session, close the wizard and resume later, close the wizard and assign the document to another user, or cancel the session. The first option is ruled out by circumstances and the fourth will mean discarding all of the work done so far. The Document Creator elects the second option to allow the work to resume later.

On the ActiveDocs Express Wizard's Documents page, the partially completed document is shown in the Document Creator's "My Documents" tab, with a different icon:
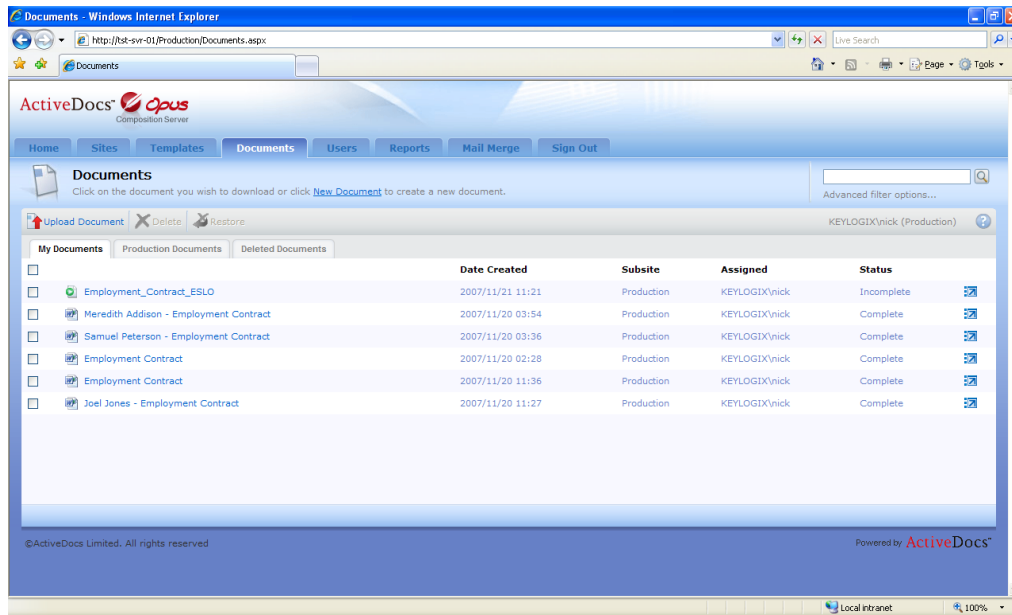
FIGURE 19 DOCUMENTS PAGE SHOWING A PARTIALLY COMPLETED DOCUMENT

Simply clicking on the icon will restart the wizard – at the group where the previous session was stopped:
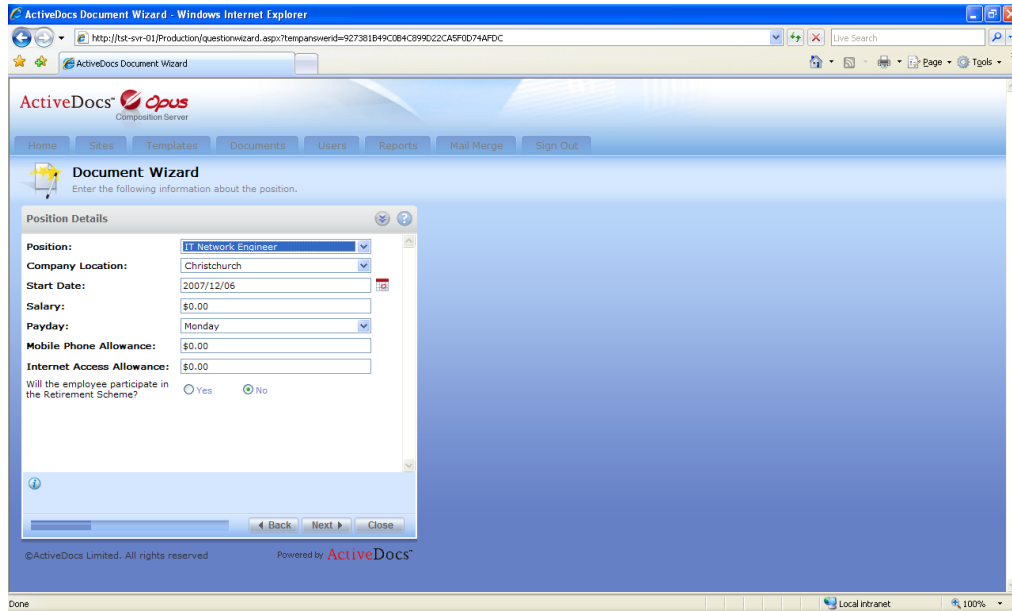

FIGURE 20 DOCUMENT WIZARD RESTARTED AT POSITION DETAILS GROUP

Suspending and restarting the ActiveDocs Document Wizard in this way can be repeated any number of times. If the "assign to another user" option is chosen, a user must be nominated and the partially completed document appears in the same way in that user's "My Documents" tab on the ActiveDocs Express Wizard's Documents page.

4.2 Other Document Actions

On the ActiveDocs Express Wizard's Documents page there is an Upload Document control which allows other documents to be uploaded by the user. This allows ActiveDocs to be a repository for more documents than are created through the ActiveDocs Composition Server.
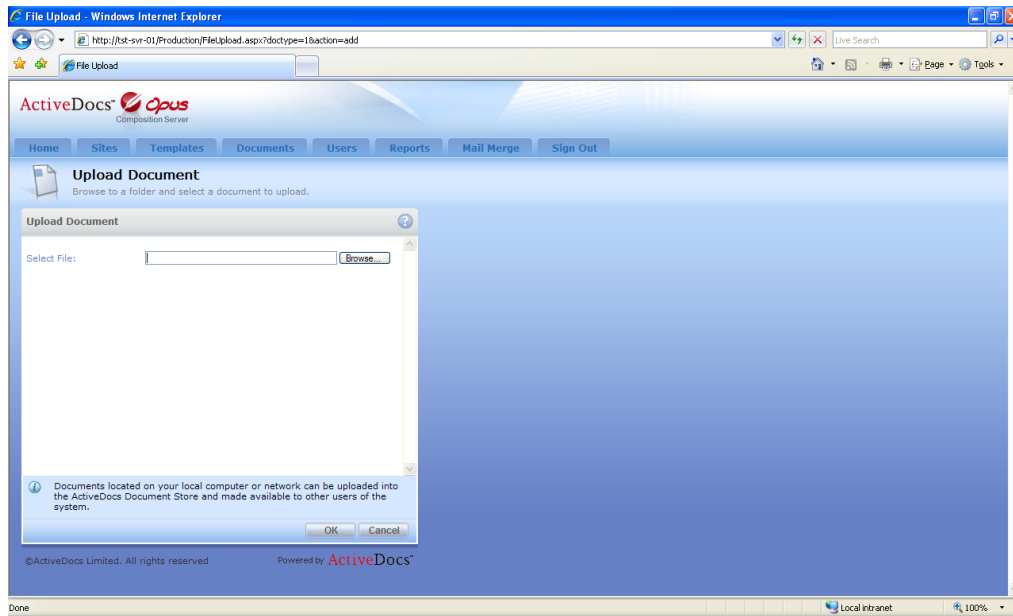

FIGURE 21 UPLOAD DOCUMENT DIALOG

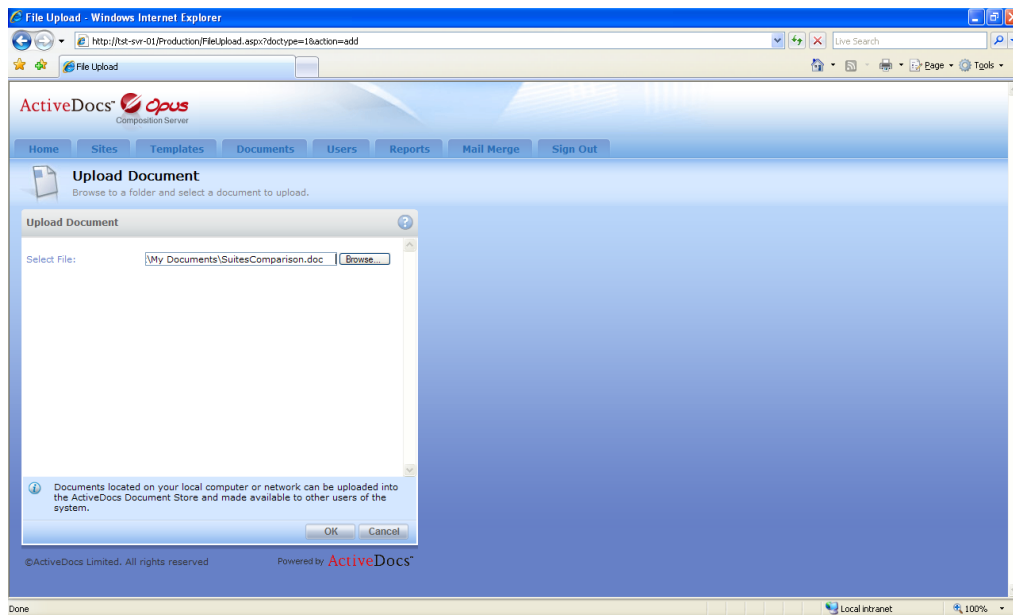The Upload Document dialog allows the document to be selected via the Browse button.
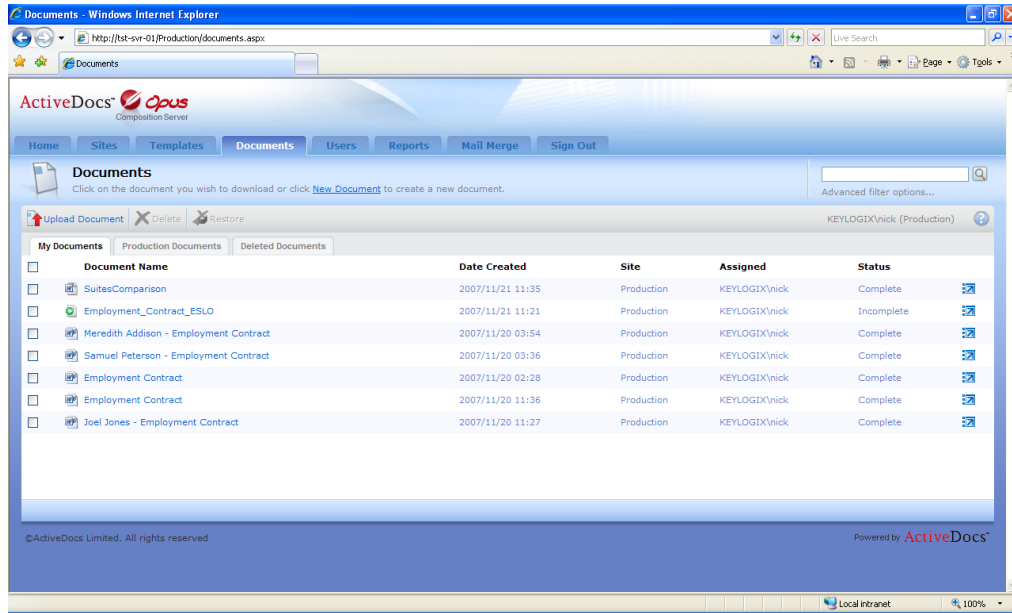

FIGURE 22 UPLOAD DOCUMENT

FIGURE 23 DOCUMENTS PAGE SHOWING UPLOADED DOCUMENT

On each document's entry on the Documents page there is a Document Actions button on the right, which invokes a page for the document:
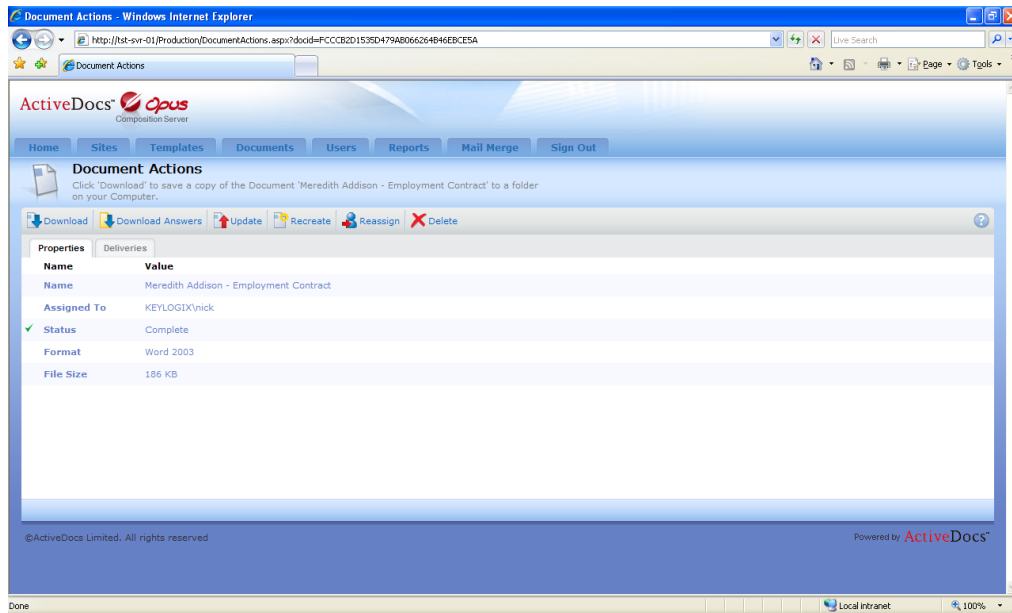

FIGURE 24 DOCUMENT ACTIONS PAGE

From the Document Actions page, the document and/or its Answers can be downloaded. The document can also be updated (overwritten) by a selected file, recreated using the original answers via the Document Wizard, reassigned to another user, or deleted. ActiveDocs employs a two-stage deletion mechanism, whereby deleted documents are moved to the Deleted Documents tab of the Documents page from where they can be restored or purged completely.

5   Post Creation on the Client

After the document has been created, and depending on the features specified in the ActiveDocs Template, ActiveDocs supports a range of operations through the licensed ActiveDocs Client.

The post-creation operations featured here depend on the user's client machine having Microsoft Word Professional 2007 installed, together with a copy of ActiveDocs Client or ActiveDocs Designer which must be appropriately licensed. The Document Updater does not require a license.

5.1   Edit and Save (Document Updater)

Any Word document listed on the ActiveDocs Express Wizard Documents page can be edited directly in Microsoft Word simply by clicking on the document name.
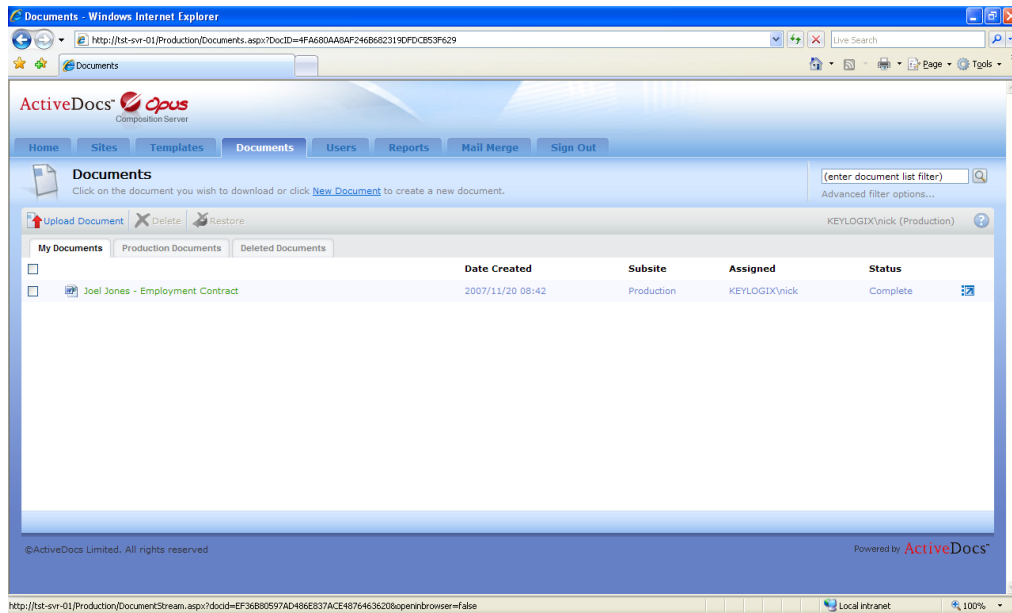

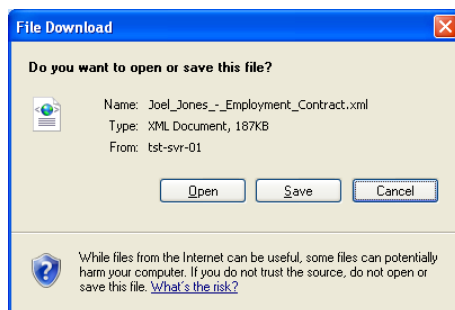FIGURE 25 ACTIVEDOCS EXPRESS WIZARD DOCUMENTS PAGE SHOWING THE DOCUMENT LIST
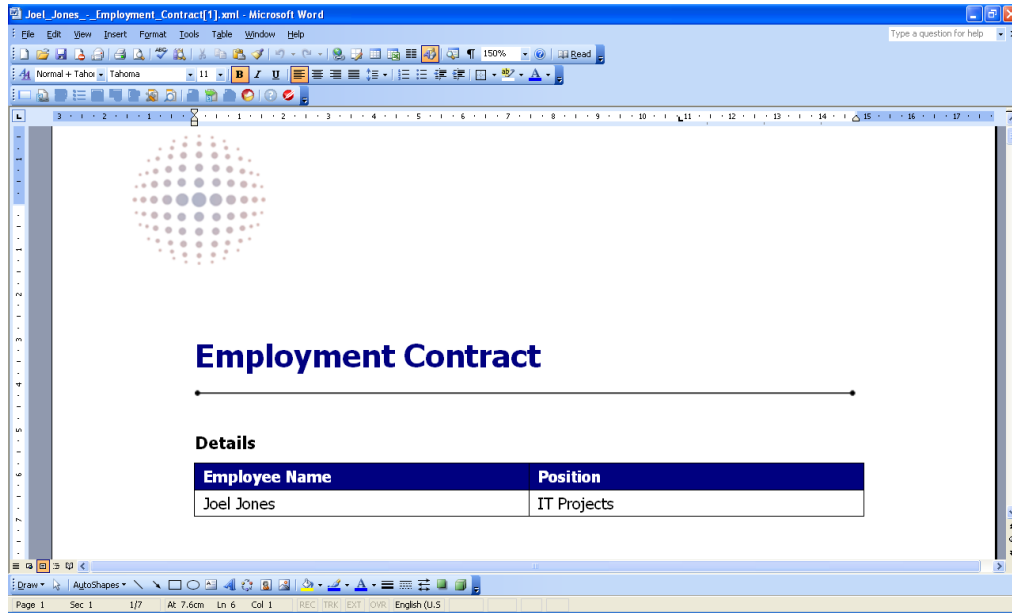

FIGURE 26 FILE DOWNLOAD DIALOG

FIGURE 27 EMPLOYMENT CONTRACT DOCUMENT OPENED IN MICROSOFT WORD

The edited document can be saved back to ActiveDocs Express Wizard.
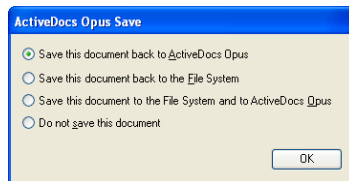

FIGURE 28 ACTIVEDOCS SAVE DIALOG (MICROSOFT WORD)

The updated document is then available directly from the ActiveDocs Express Wizard.

5.2   Refreshable Snippets

An ActiveDocs Snippet is much like a Template, with fixed and variable content. Snippets are intended to be used in multiple Templates to ensure that standard clauses and other standard or repetitive content are used wherever they are applicable while only needing to be changed in one place if such a requirement arises.

Naturally, standard clauses and other standard content may change with time, and the need may arise to update an existing document to reflect those changes. If the document was created with a suitably-designed ActiveDocs Template then such an update might be achieved with little more than a couple of mouse-clicks.

The process starts with the design of the Template. In this example, the Designer has decided that the "whereas" paragraph of the ESLO Employment Contract Template (as used above) will work better as a Snippet. The paragraph has been reproduced, complete with its Active Fields, as a Snippet called "ESLO Whereas Clause":
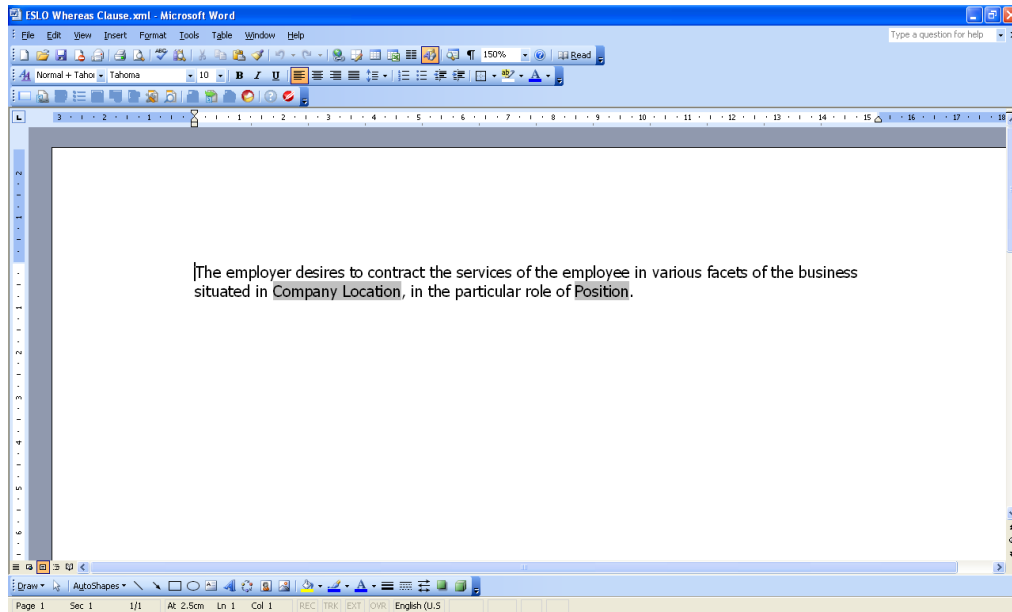

FIGURE 29 THE WHEREAS CLAUSE AS A SNIPPET

The Template Designer then replaces the paragraph in the Template with a Snippet Link to ensure that the paragraph, contained in the Linked Snippet, is included in the output document.
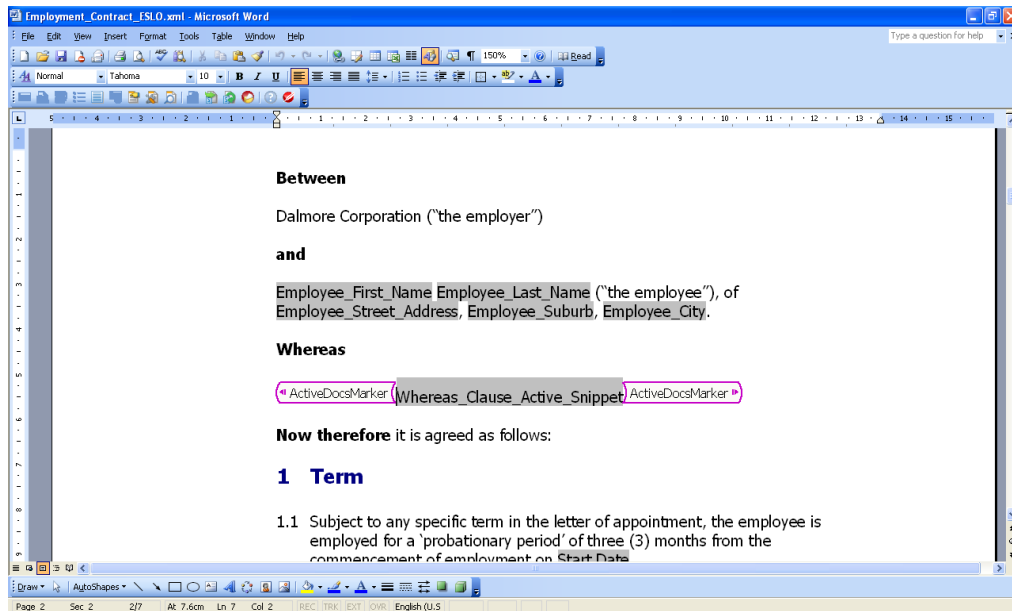

FIGURE 30 ESLO EMPLOYMENT CONTRACT TEMPLATE SHOWING 'WHEREAS CLAUSE' SNIPPET LINK

The Template Designer specifies that the Snippet Link is refreshable.
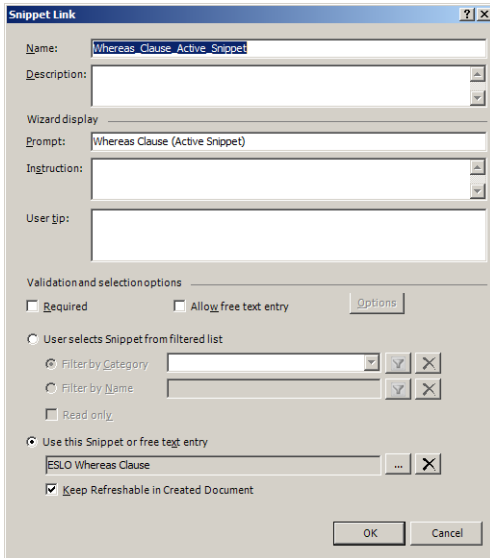

FIGURE 31 SNIPPET LINK SPECIFICATION INCLUDING 'REFRESHABLE' OPTION SWITCHED ON

When the Template is used to create a document, the current version of the Linked Snippet is used. Because the Active Fields in the Snippet belong to a Group that also exists in the Template, the appearance of the relevant Document Wizard page doesn't change.
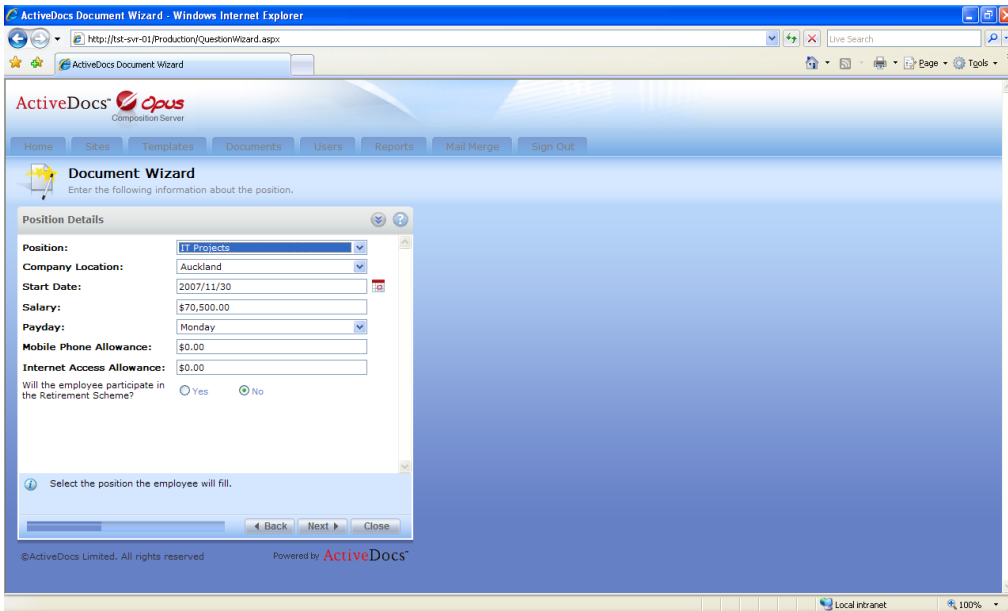

FIGURE 32 ACTIVEDOCS DOCUMENT WIZARD PROMPTING FOR THE SNIPPET'S ACTIVE FIELDS AS PART OF A GROUP.

The created document contains the text of the Snippet with the relevant Answer data incorporated.
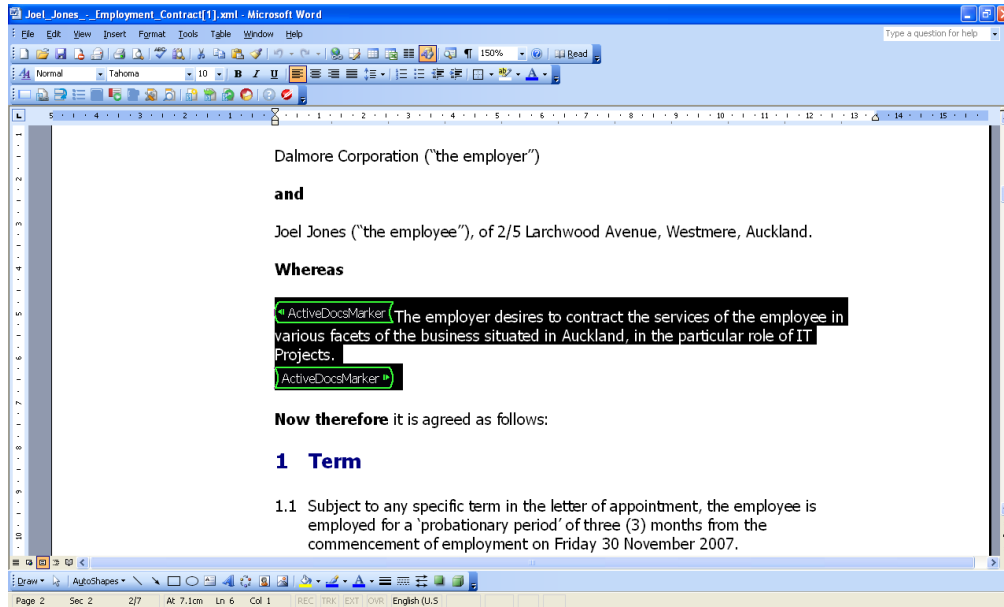

FIGURE 33 COMPLETED DOCUMENT, SNIPPET-ORIGINATED PARAGRAPH HIGHLIGHTED

A few days later, a revised Whereas paragraph is decided on and the Snippet is updated as shown:
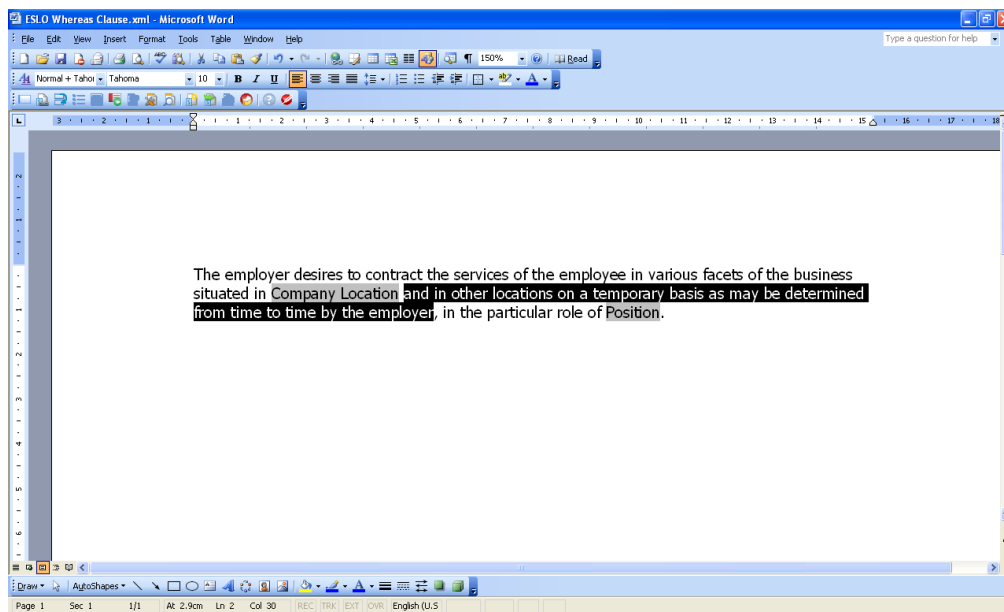

FIGURE 34 MODIFIED SNIPPET

At this stage none of the documents created with that Snippet are updated. It is not always appropriate to do so as the documents may have already been sent to customers or other recipients.

An ActiveDocs Express Wizard user identifies that the document created above can be updated, and opens it from the Documents page as described above. In Microsoft Word, the user clicks the Refresh Snippet Regions button on the ActiveDocs Toolbar.
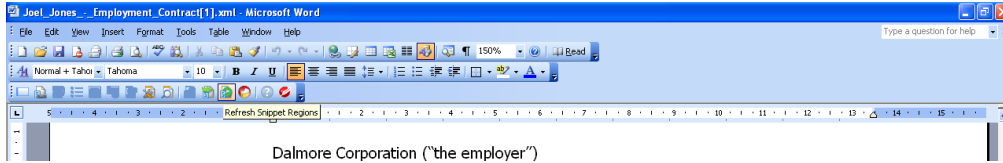
FIGURE 35 'REFRESH SNIPPET REGIONS' BUTTON ON THE ACTIVEDOCS TOOLBAR IN MICROSOFT WORD

The 'Refresh Document Regions' dialog appears, showing the list of refreshable regions; in this case, the 'ESLO Whereas Clause' clause Snippet.
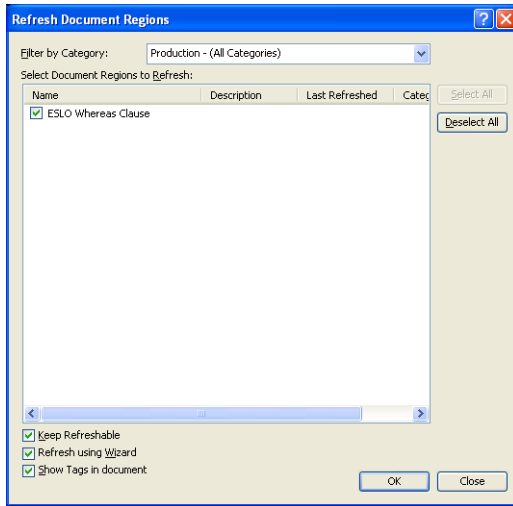

FIGURE 36 REFRESH DOCUMENT REGIONS DIALOG WITH 'ESLO WHEREAS CLAUSE' CHECKED ON

When the user clicks the OK button to close the Refresh Document Regions dialog, the ActiveDocs Document Wizard is invoked automatically to enable the Active parts of the Snippet to be refreshed along with the new text.
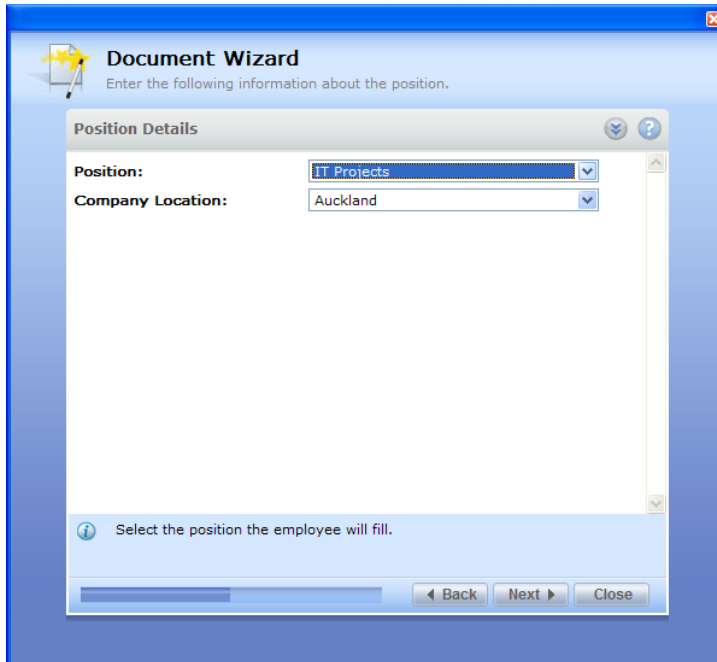

FIGURE 37 ACTIVEDOCS DOCUMENT WIZARD INVOKED FOR REFRESHABLE SNIPPET

In this example, the answers are not changed, but the document is updated in place with the revised text from the Snippet.
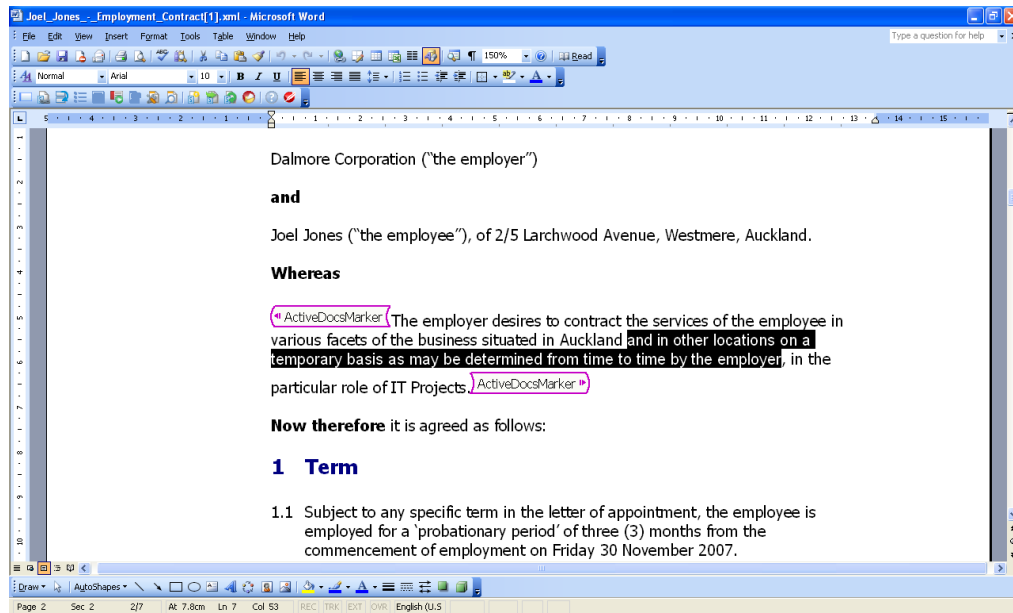

FIGURE 38 DOCUMENT WITH WHEREAS CLAUSE UPDATED FROM THE SNIPPET

6   Snippet Research

The most common uses of ActiveDocs Snippets are to contain standard text – like clauses, terms & conditions, and disclaimers – and standard formatting requirements – for example, customer name and address presentation – that are common to many documents throughout the organization.

ActiveDocs Design Tools provide the facility to deploy Snippets in Templates, but Snippets may be useful to the organization beyond those documents created with ActiveDocs Templates. If an organization's standard texts are captured and managed in Snippets then it makes sense to be able to use Snippets when creating other documents.

To support the wider use of Snippets, the ActiveDocs Client provides the ability to use ActiveDocs Snippets via the Research Service. This enables users of the ActiveDocs Designer and Client suites to find and use ActiveDocs Snippets when using products such as Microsoft Outlook, Microsoft PowerPoint, and even Microsoft Word.

A simple but useful example might be a standard paragraph requesting that some documents need to be signed and dated, and returned within a given number of working days (which must be within a standard range of values). Such a paragraph could be used in a Word document or an email. A suitable Snippet might look something like this:
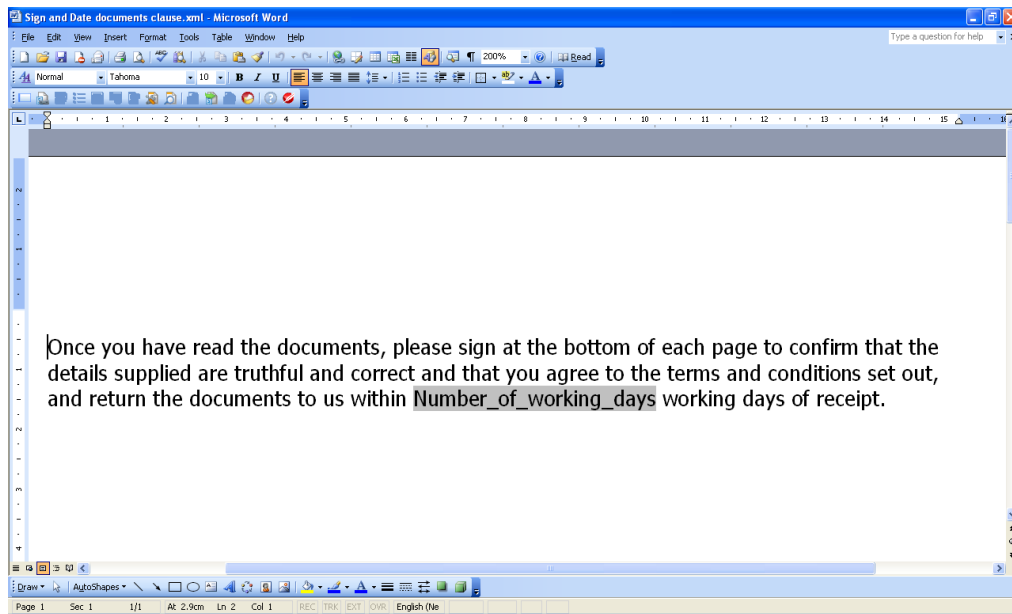

FIGURE 39 SNIPPET "SIGN AND DATE DOCUMENTS CLAUSE"

The shaded region labeled "Number of working days" represents an Active Field of the same name with the following validation specified, making it suitable for enforcing organizational standards.
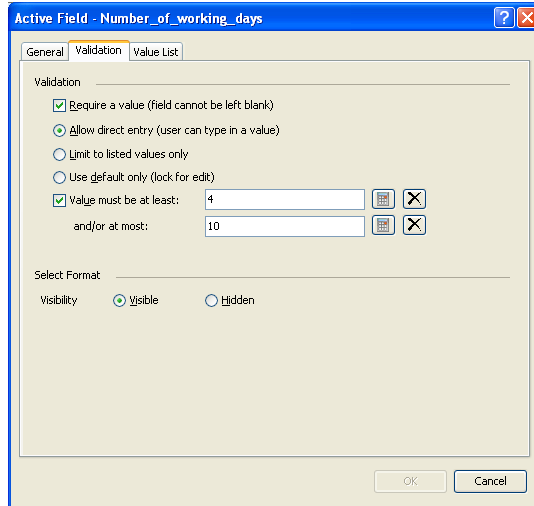
FIGURE 40 NUMBER OF WORKING DAYS - VALIDATION

A client user manually creates a Word document intended as a cover page for some documents being sent to a customer to be signed.
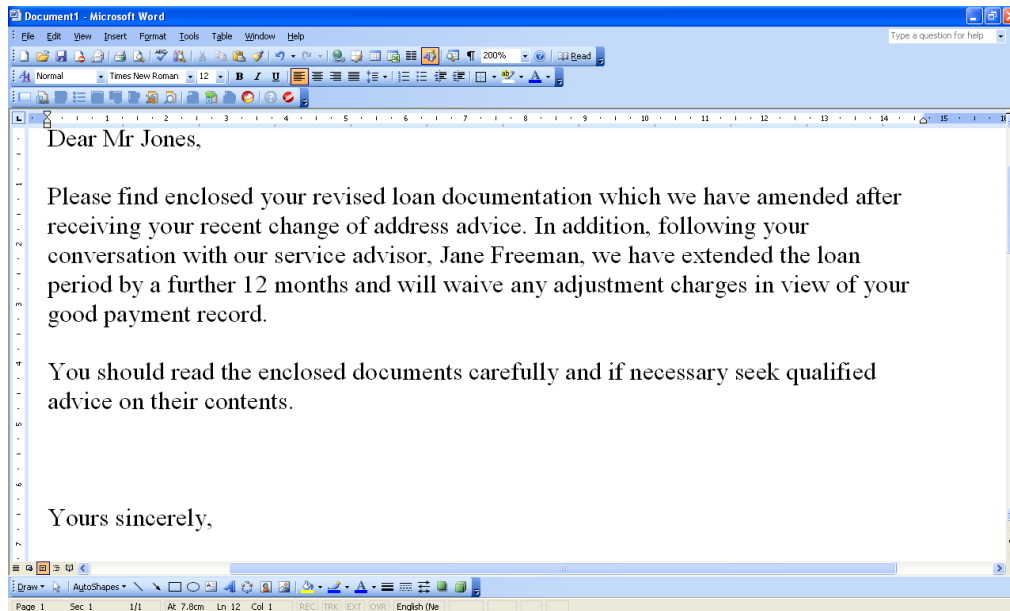
FIGURE 41 SAMPLE LETTER REQUIRING "SIGN AND DATE DOCUMENTS CLAUSE"

The document requires the organization's standard "Sign and Date documents clause" so the user invokes the Research service through Research option on the Tools menu.
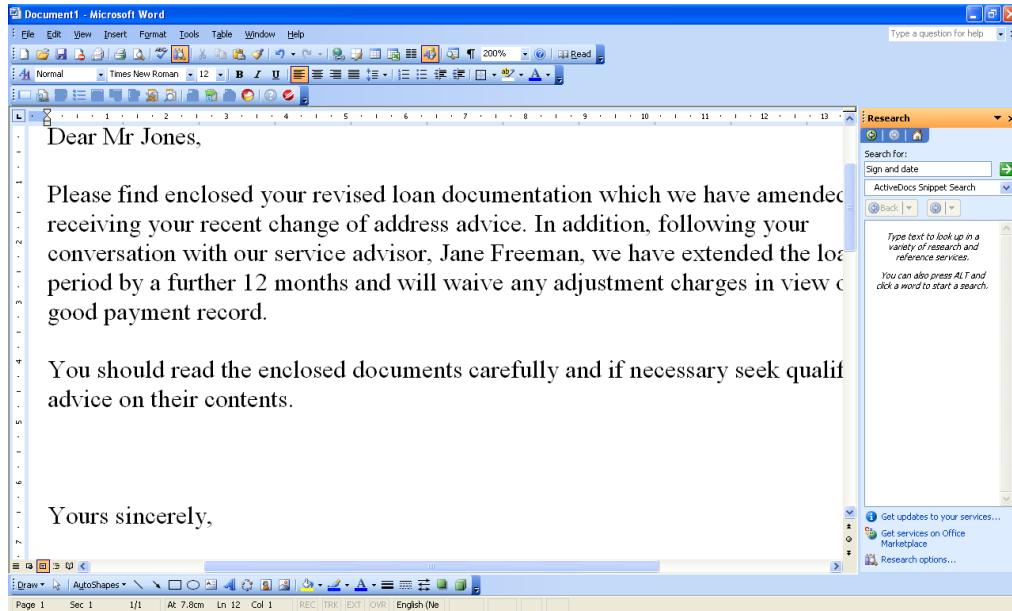

FIGURE 42 WORD DOCUMENT AND RESEARCH PANE

The user enters "sign and date" in the Search box, selects the ActiveDocs Snippet Search in the drop-down list, and presses the search button.
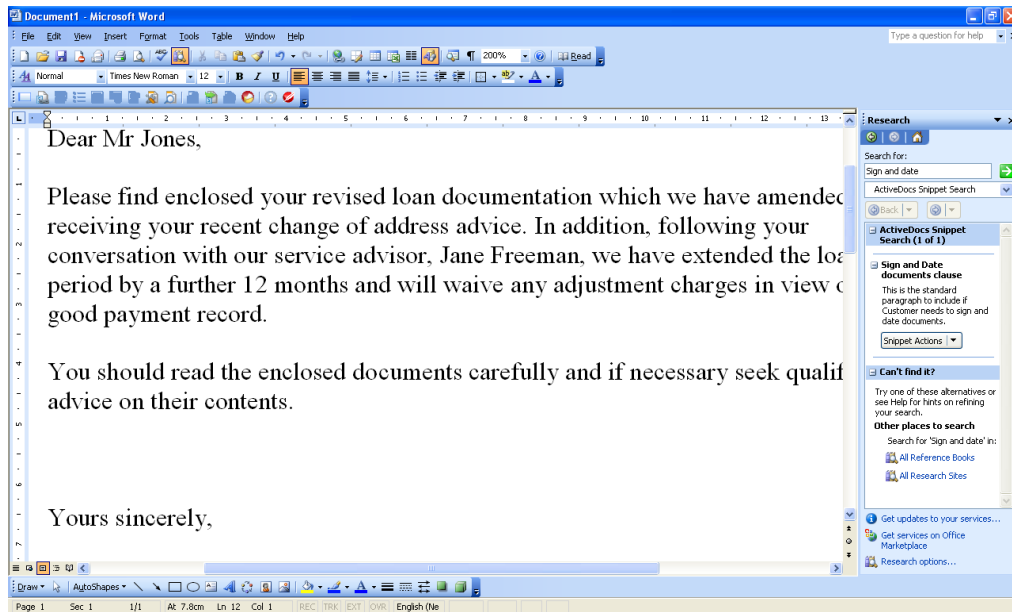

FIGURE 43 WORD DOCUMENT WITH SNIPPET RESEARCH RESULT

The Snippet Actions button provides a variety of options:

- Insert Snippet using Wizard: the ActiveDocs Document Wizard will be run automatically to prompt the user for any Answers required to populate the Snippet before it is incorporated into the document at the insertion point

- Insert Snippet: the ActiveDocs Document Wizard will not run and the Snippet will be incorporated into the document "as is".

- Insert as Refreshable Snippet: the user will be prompted to ask if the Document Wizard should be used – see the previous two options. The Snippet will be refreshable if the document is opened again after saving. An earlier section of this White Paper explains the functionality of Refreshable Snippets.

- Preview Snippet: the preview pane shows the basic content of the Snippet:
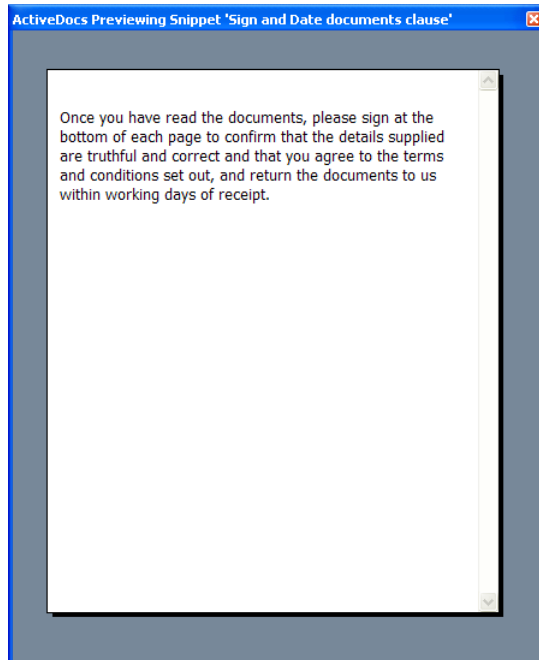
In this case it clearly makes sense to use the Document Wizard, which appears as a pop-up when invoked:
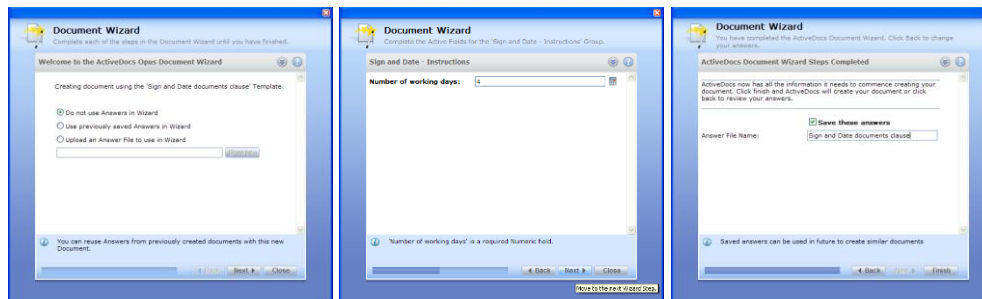
After the Finish button is clicked, the text is inserted into the document at the insertion point.
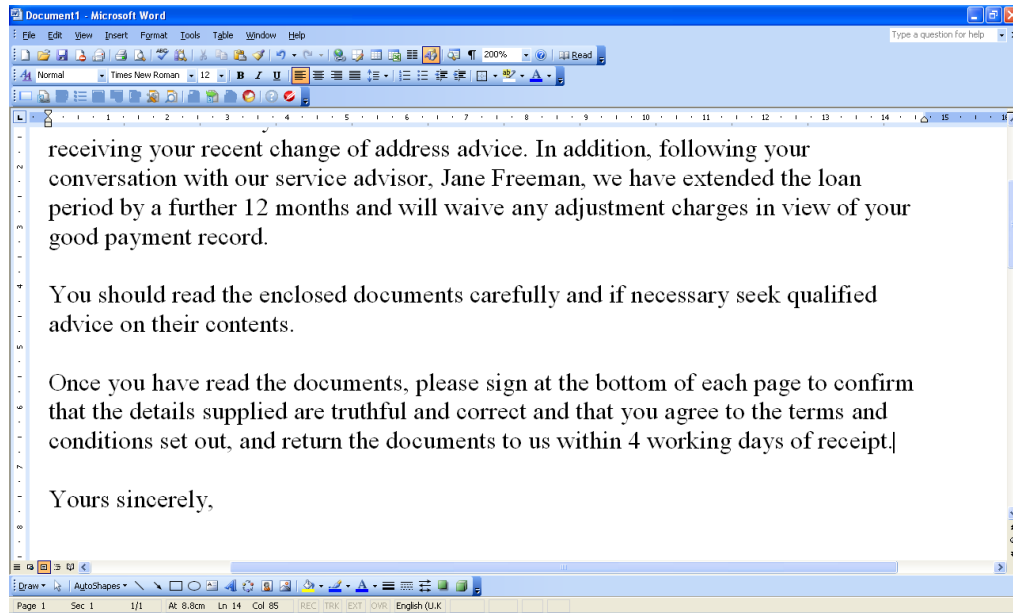

FIGURE 44 DOCUMENT WITH CLAUSE INSERTED (RESEARCH PANE CLOSED FOR CLARITY)

ActiveDocs Snippets can be used in this way wherever a suitable Research function is available.

7   Working Offline

Document Creators may need to create documents at times when they cannot connect to an ActiveDocs server, for example when connectivity is limited for reasons of security or lack of infrastructure. Site visits, travel, and home working are typical situations where the ability to create documents should not be limited by lack of connectivity.

ActiveDocs allows users with appropriate rights and licensing to continue to use it to create documents while not connected to their usual ActiveDocs Composition Server. This is called Working Offline, and has three simple elements:

- Prior to disconnecting from the network, the user selects their ActiveDocs Composition Server and synchronizes a local copy.

- While not connected, the user runs the local copy which provides the same familiar Templates and Document Wizard to allow Document Creation.

- When reconnected to the network, the user resynchronizes so that any documents created while in Offline mode are copied to the main server.

Licensing and rights: Working Offline requires the user's client machine to have a licensed copy of the ActiveDocs Client installed. The user must be an ActiveDocs Express Wizard user with Working Offline rights. By its nature, User-Driven Mode requires an Express Wizard license.

7.1   Synchronization

The user opens the Manage Offline dialog from the ActiveDocs Desktop WebServer icon in the task tray.
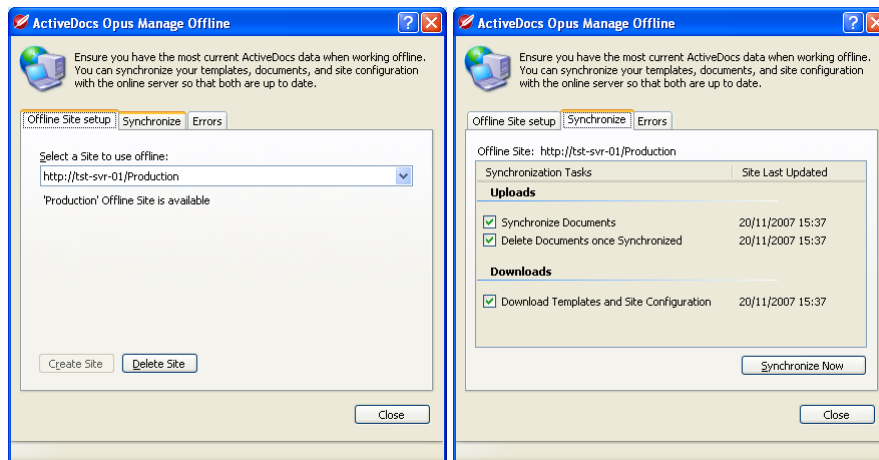
FIGURE 45 OFFLINE SETUP AND SYNCHRONIZATION

The "Synchronize Now" function works automatically in the required direction (local with main server, or main server with local). Synchronization is limited to the user's documents and any other documents to which they have access rights on the relevant server.

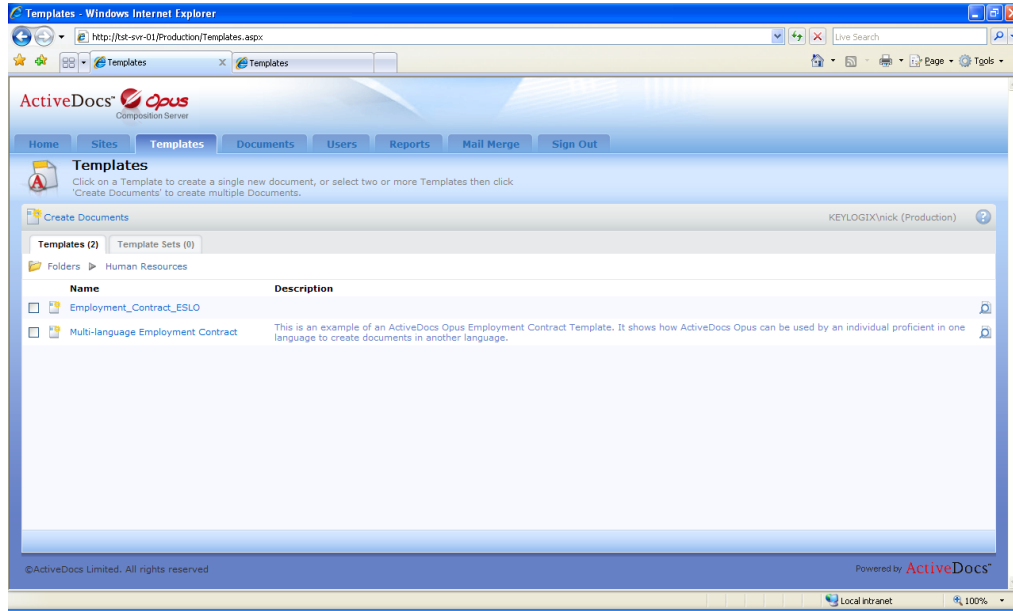An existing Composition Server Express Wizard site is replicated from the server…

FIGURE 46 SERVER SITE, SHOWING TEMPLATES

… to the local site (the only difference is the URL in the browser header):
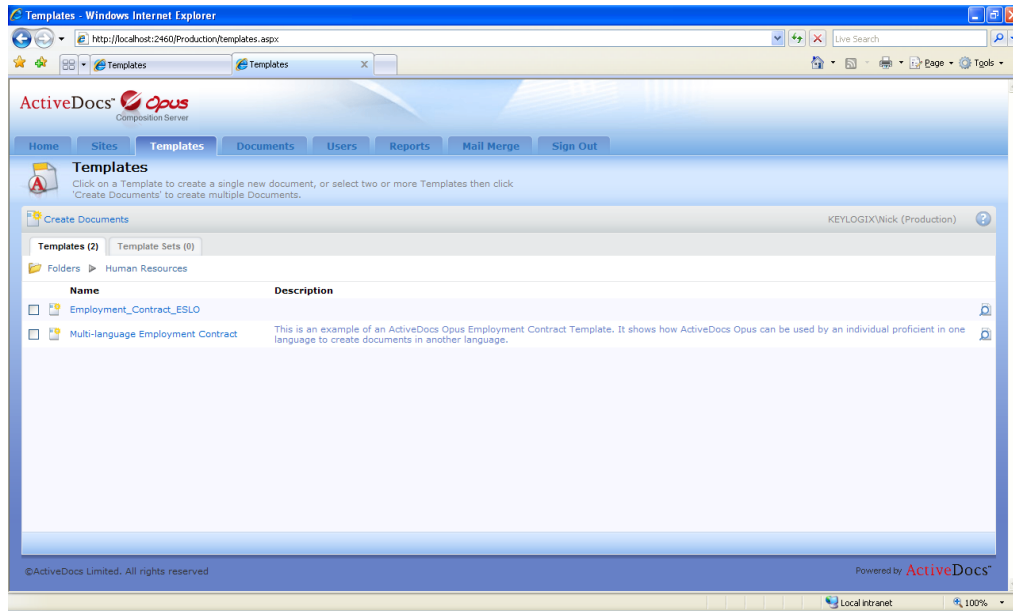

FIGURE 47 LOCAL SITE, SHOWING TEMPLATES

7.2 Using the Local Copy

The local copy looks exactly like the main site, as shown above. Templates are selected in the same way and the Document Wizard runs the same way. Completed documents are stored on and accessed from the local copy.
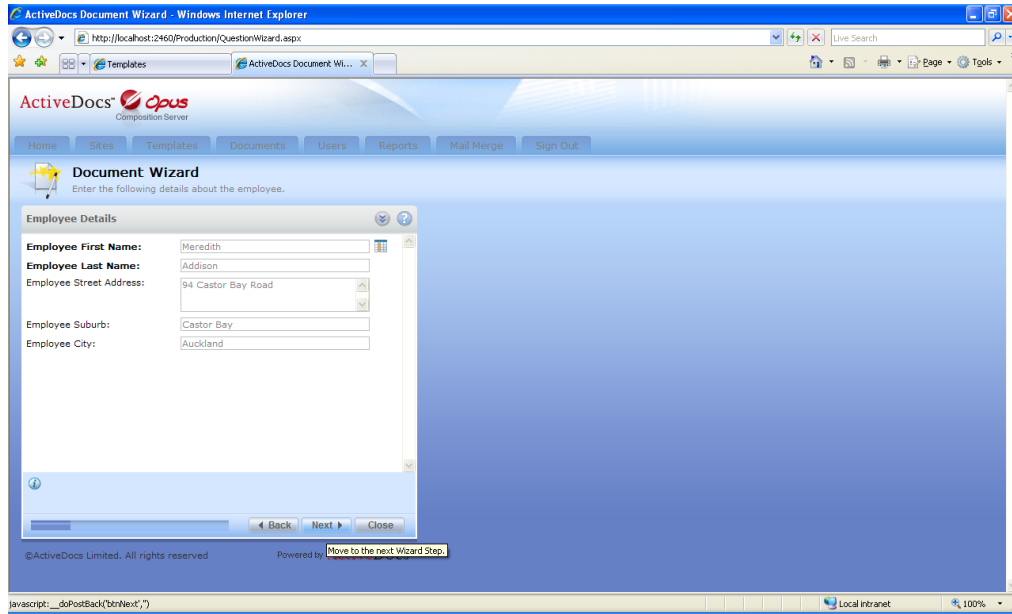

FIGURE 48 RUNNING THE DOCUMENT WIZARD LOCALLY
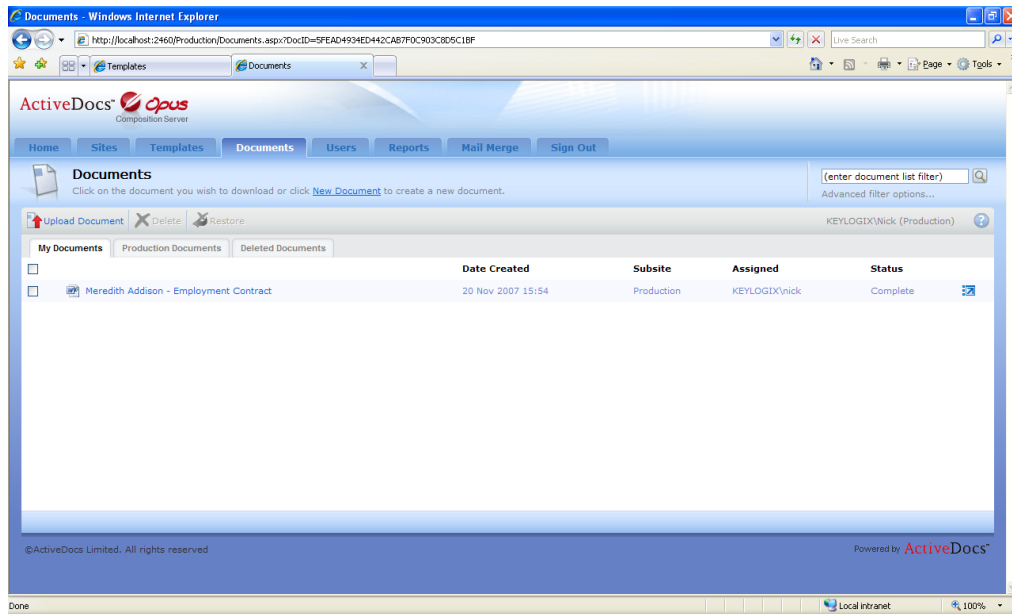

FIGURE 49 DOCUMENT CREATED LOCALLY

7.3 Resynchronization

When the user is connected to the main network, the Synchronize Now function is used again. Any new documents are removed from the local copy to the main ActiveDocs Composition Server.
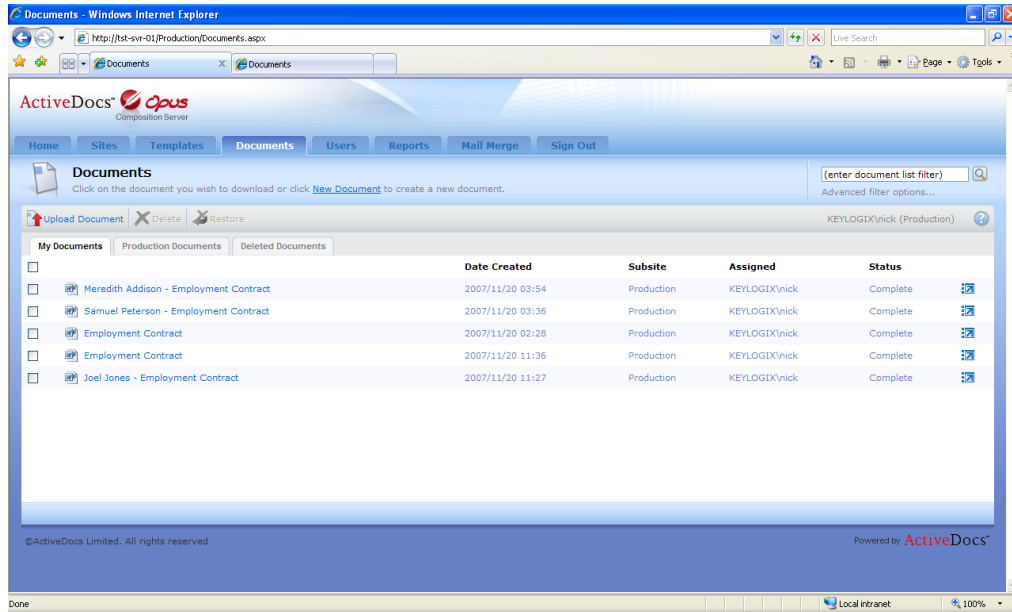

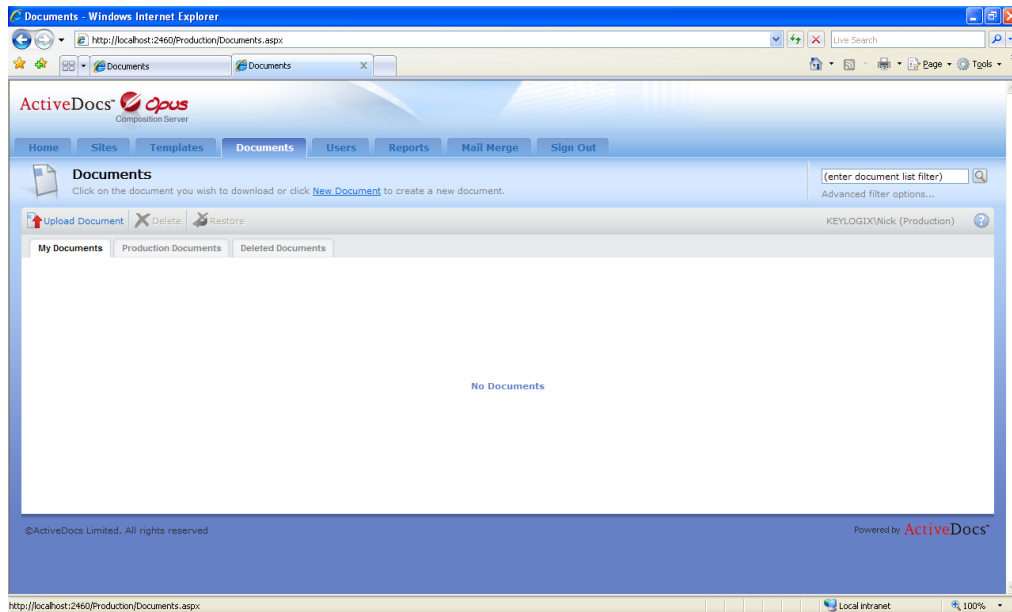FIGURE 50 MAIN SERVER SHOWING SYNCHRONISED OFFLINE DOCUMENT

FIGURE 51 LOCAL COPY SHOWING NO DOCUMENTS (REMOVED TO MAIN SITE)

8 Workflow for Approval and Finalization

8.1 Document Approval

Document Approval is a switchable feature that allows a nominated group of users, called Document Approvers, to be alerted by email when a document is created within their jurisdiction. Individual Approvers then log on to the system and give their approval, or disapproval, to the document. The original creator of the document can be automatically emailed about these responses.

The feature can be further configured so that approval must be given by all Approvers, or by just one Approver, before the document is considered approved. Documents which are pending approval, or for which approval is not granted, cannot be further processed in the system.

ActiveDocs server-based document automation solutions have always supported post-creation Approval processing of documents, whether generated in User-Driven Mode or Automated Mode. ActiveDocs Opus Viper significantly enhances the Document Approval feature providing options for:

- Nominating sub groups of Approvers
- Allowing the document creator to control the email notification to Approvers
- Allowing the document creator to choose the Approver
- Identifying a default Approver

A separate whitepaper, available on request, provides extended information about Document Approval and its optional integration with Document Finalization (see below) in ActiveDocs Opus Viper.

8.2 Document Finalization

Document Finalization is an ActiveDocs Opus Viper feature which optionally integrates with Document Approval (see above) and works with document creation in both User-Driven Mode and Automated Mode.

Briefly, Document Finalization allows documents to be automatically or manually finalized with a variety of options:

- Document Save locations
- Document Save formats
- Reassignment
- Notification

Finalization is integrated with new Draft options which allow selection of the Draft format, document versioning for recreation, selection and specification of a document property for the draft status, and Draft/Final watermarking.

A separate whitepaper, available on request, provides extended information about Document Finalization and its optional integration with Document Approval in ActiveDocs Opus Viper.

9   Conclusion

ActiveDocs User-Driven Mode is designed for enterprise-wide interactive document creation. By using ActiveDocs, the organization ensures that Document Creators have simple and direct access to the correct Templates.

The use of ActiveDocs Templates allows the organization to take full advantage of features like enterprise-wide standardized formatting and content, controlled access to data sources, and dynamic customization and personalization of documents.

Beyond creation of the document, ActiveDocs provides the Updater and Refreshable Snippet features to help ensure that document changes are shared and controlled. The Snippet Research feature allows the wider deployment of standard content, both active and passive. Away from the office, ActiveDocs in Offline Mode allows document creation without a connection to Composition Server.

ActiveDocs, used in User-Driven or Automated mode or a combination of both, provides the ideal enterprise-wide platform for document creation.