

# ActiveDocs™ Opus

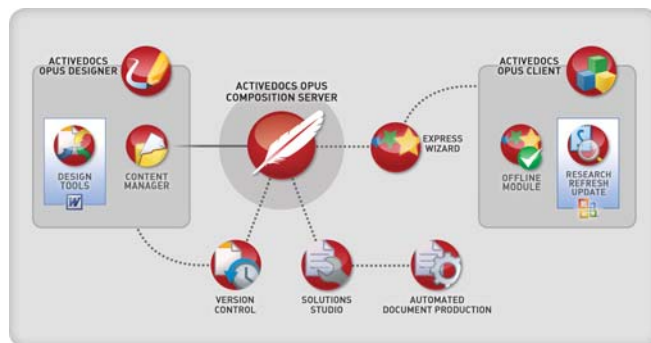
DELIVERING SCALABLE, AFFORDABLE, HIGH PERFORMANCE DOCUMENT AUTOMATION SOLUTIONS

ActiveDocs Opus is the third generation of the ActiveDocs solution. ActiveDocs Opus automates the design and production of customized business communications across your enterprise. Examples include loan documents, sales proposals, contracts, insurance policies, general correspondence, legal documents, statements, and billing, for delivery across multiple channels - print, fax, and email.

## KEY BENEFITS

- ▶ Easy to install
- ▶ Easy to automate
- ▶ Centralized content control
- ▶ Scale-up and scale-out topologies supported
- ▶ Configures for specific requirements
- ▶ Create documents in multiple languages
- ▶ Deliver by print, fax, email, directory
- ▶ Easy integration with existing applications
- ▶ No customization required to start using
- ▶ Efficient control of content
- ▶ Update templates in minutes
- ▶ Leverage existing Microsoft® Word skills
- ▶ Format and insert logos and graphics
- ▶ Dynamic template control
- ▶ Configure user access to over 40 system functions
- ▶ Customized audit reporting of document creation and delivery
- ▶ Integration with existing DMS/ECM applications
- ▶ Simple end user interface for creating complex documents
- ▶ Leverage multi-CPU, multi-server topology

## THE COMPONENTS



## WHY DOCUMENT AUTOMATION WITH ACTIVEDOC'S OPUS?

Document Automation starts with templates. Without them, document creators in your business must create every new document from nothing, or modify an existing document. The inevitable mistakes, from non-standard branding to poor messaging and inaccurate content, could involve your business in problems ranging from embarrassment to expensive legal action. Templates allow you to begin standardizing documents by providing a convenient starting point for document creation using corporate standards. But your document creators still need to find and use them easily, and there are issues with functionality, maintenance and version control that you must address. ActiveDocs Opus addresses the issues by giving you the tools to easily create and use great templates.

## A TOTAL DOCUMENT SOLUTION

ActiveDocs Opus is built on Microsoft® .NET V3 framework and leverages the power of Microsoft® Word. The power of ActiveDocs Opus to automate complex and critical business documents creates efficiency and gives your business total control over document templates and content via our Content Manager application. Content Manager gives Template Designers a clear graphical visualization of the linkage of rules and business logic across hundreds or thousands of templates. Your Template Designers can make changes to critical content (e.g. a legal clause) that will dynamically update that content in any linked templates. Content Manager significantly simplifies the management and change control of literally thousands of business templates.

## KEY FEATURES

- ▶ Component based architecture
- ▶ XML support
- ▶ Real-time and high volume processing
- ▶ Document Wizard
- ▶ Built on Microsoft® .NET V3
- ▶ Multiple document formats (OOXML, ODF, XML, DOC, PDF)
- ▶ Integrated Content Management
- ▶ Multi-language support
- ▶ Full API support
- ▶ Multi-channel delivery
- ▶ Data Access (ODBC, OLE-DB, Web Services)
- ▶ Supports WebDAV and SharePoint
- ▶ Image support for all standard formats
- ▶ Design from within Microsoft® Word
- ▶ Content reuse (Templates, Snippets, Fields, Rules, Data Views)
- ▶ User Access Control
- ▶ Management and ad-hoc reporting
- ▶ Scale-up, scale-out architecture
- ▶ Free Text
- ▶ Graphical Data
- ▶ Dynamic Data Sources



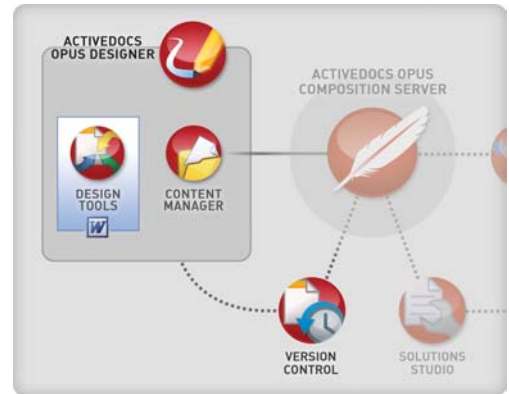
# ActiveDocs™ Opus

INTEGRATED TEMPLATE DESIGN & MANAGEMENT FOR DOCUMENT AUTOMATION

## ACTIVEDOCS OPUS DESIGNER


Automation is incorporated into Microsoft® Word templates using a modular building process in ActiveDocs Opus Designer. Design Tools enable you to add ActiveDocs Opus technology to templates using Microsoft® Word. Content Manager allows your business to centrally manage modular Design Components such as Templates, Snippets, and Data Views. Content Manager provides relationship reporting and management for all Design Components ensuring Templates are appropriately and accurately updated across your business.


Designers can work in their language of choice as all ActiveDocs Opus user interfaces support multi-language presentation. ActiveDocs Opus Template design features allow multi-language support for both the document creator and for the document recipient.





## ACTIVEDOCS OPUS DESIGN TOOLS


Design Tools enable you to add ActiveDocs Opus intelligence to templates using Microsoft® Word, retaining all of Word's functionality and leveraging your Word skills base.


 **Active Field** – Active Fields are placeholders for data and include type (text, number, date, image, etc), validation, and data linkages. Active Field values may be pre-calculated from constants and from other Active Field values.


 **Group** – Designers can organise the Template's Active Fields into related Groups, which in turn determine the presentation in the Document Wizard.

 **Rules** – Rules compare Active Fields with fixed values or other Active Fields, to provide Conditional Content in the output document and Conditional Data Capture in the Document Wizard.

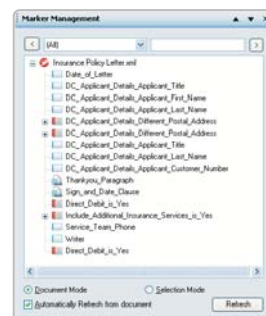
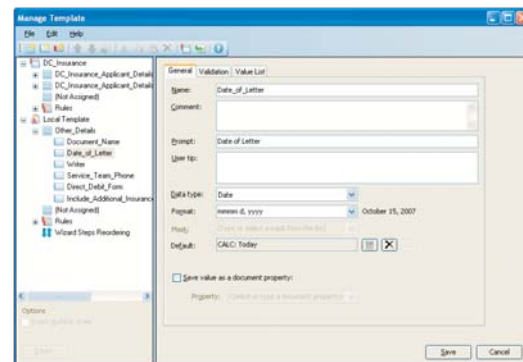
 **Graphical Data** – The ability to present data in a graphical format such as a pie chart or bar graph.


 **Free Text** – Allows the Template Designer to include Free Text markers in the Template, and optionally specify a Snippet to provide starter text. The Document Wizard provides a Free Text Editor to allow the capture of formatted content.

 **Snippet Link** – A Design Item used in a Template to link to the contents of a Snippet, ensuring that the most recent version of the Snippet is used when the Document Wizard is run.

 **Repeating Item** – A collection of Active Fields used to populate tables and other multiple-instance constructs.

 **Manage Template** – Allows Designers to manage Active Fields, Groups, and other Design Items used in the Template. General Template properties and aspects of the Document Wizard behaviour can also be set.



 **Marker Management** – A floating pane which visually displays all of the Design Items used in a Template, allowing direct access to their properties and click-through navigation around the Template.



## ACTIVEDOCS OPUS CONTENT MANAGER

Content Manager allows your business to centrally manage Design Components such as Templates, Snippets, and Data Views. Content Manager provides relationship reporting and management for all Design Components ensuring Templates are appropriately and accurately updated across your business.

**Catalogs** – Repositories for storing and managing Design Components. Content Manager provides a Local Catalog for storing and managing personal Design Components and supports connection to multiple Remote Catalogs on ActiveDocs Opus Composition Servers. Access to Remote Catalogs can be restricted by applying User Permissions.

**Templates** - The Template is the prime Design Component for creating documents. Designed with the full Microsoft® Word feature set, the Template may contain its own Active content and may also utilise other ActiveDocs Opus Design Components like Data Views, Design Item Sets, and Snippets.

**Template Sets** - A Template Set is composed of multiple Templates and is designed to allow the creation of separate or combined output documents. Within the Template Set, individual Templates may be optional or fixed, and may be repeated.

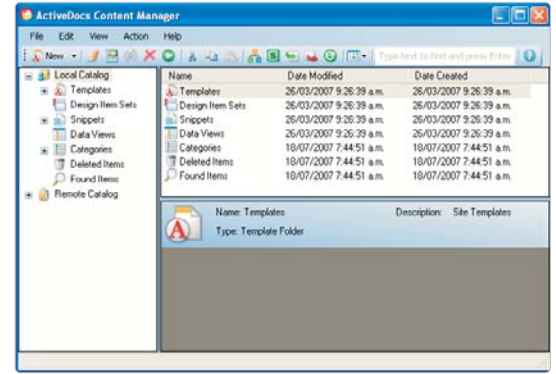
**Snippets** – Design Components that may include text, tables, graphics and Design Items. Snippets are managed through the Content Manager and are created and modified in a similar manner to a template.

**Design Item Sets** – Contain Groups, Active Fields and Rules. Design Item Sets are then incorporated into other Templates making Template Design simpler and ensuring consistency across templates. Modifications made to the Design Item Set will automatically reflect in Templates that use the Design Item Set.

**Data Views** – Allow data to be selected from other business systems, reducing duplicate data entry and transcription errors. Data Views can connect to any ODBC or OLE-DB data source and to Web Services matching the ActiveDocs specification, with support for SQL, advanced calculations, joins and dynamic filtering. Data access is securely managed through setup and design.

**Categories** – Used to organize Design Components, which can be assigned to a number of Categories and easily modified from within a Category.

**Design Approval** – Optional Design Component Approval supports the requirement for pre-publication validation by requiring one or more Approvers to signify approval of a modified Template or Snippet before it can be published.



Content Manager Interface



## ACTIVEDOCS OPUS VERSION CONTROL

ActiveDocs Opus Version Control enables complete version control of Design Components via the ActiveDocs Opus Content Manager interface. Version Control features include:

- ▶ Integration with ActiveDocs Opus Content Manager's standard automatic check-out
- ▶ Extended check-in with Draft, Publish Now, and Deferred Publishing options
- ▶ Previous version promotion
- ▶ Previous version copy
- ▶ Integration with the Design Component Approval process

Version Control provides an option to recreate documents using the original Design Components with which the documents were created, even if the Design Components have since been superseded. Recreating documents through the ActiveDocs Opus Express Wizard uses the ActiveDocs Opus Document Wizard, so all of the variable information is updatable.

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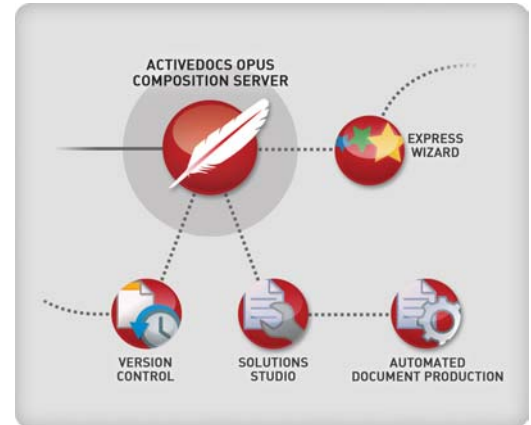
# ActiveDocs™ Opus

INTEGRATED SERVER TECHNOLOGY FOR DOCUMENT AUTOMATION

## ACTIVEDOCS OPUS COMPOSITION SERVER

ActiveDocs Opus Composition Server is the core component of the ActiveDocs Opus Suite and functions as the basis for:


- ▶ User management and access control
- ▶ User-Driven Mode document creation
- ▶ Automated Mode document creation
- ▶ Template and document storage and management including integration with other applications and web services
- ▶ Integrated delivery
- ▶ Integrated Security




## ACTIVEDOCS OPUS EXPRESS WIZARD

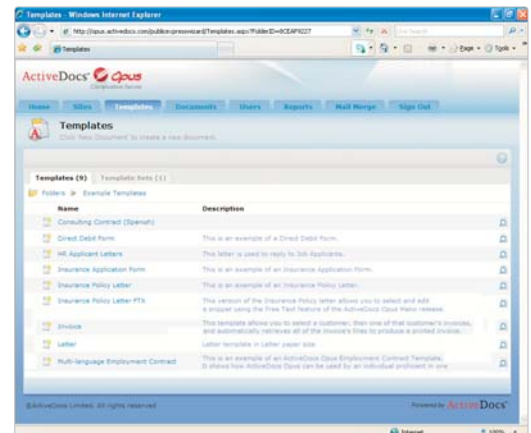
ActiveDocs Opus Express Wizard is the browser-based interface for Document Creators and other end users. Through the Express Wizard's easy user interface, users can:

- ▶ Locate Templates through a folder-based structure
- ▶ Run Templates and Template Sets using the ActiveDocs Opus Document Wizard to create documents
- ▶ Access and manage the documents that they create
- ▶ Perform post-creation actions on their documents:
  - ▶ Download the document and the Answers used to create the document
  - ▶ Upload the document
  - ▶ Recreate the document using current Design Components, or using original Design Components via ActiveDocs Opus Version Control
  - ▶ Deliver the document through the Print, Fax, or Email channels configured in ActiveDocs Opus Composition Server
  - ▶ Reassign the document to another user
  - ▶ Delete the document

 **Document Approval** – Optional Document Approval supports the requirement for post-creation validation by requiring one or more Approvers to signify approval of a new or modified document before it is delivered.

 **Subsites** - Express Wizard and Document Wizard users are assigned to roles and subsites within the ActiveDocs Opus Composition Server site. Subsites support varying themes, time zones, languages, and shared or common Template collections.

Express Wizard and Document Wizard users can work in their language of choice as all ActiveDocs Opus user interfaces support multi-language presentation. ActiveDocs Opus Template design features allow multi-language support for both the document creator and for the document recipient.





## ACTIVEDOCS OPUS DOCUMENT WIZARD

The ActiveDocs Opus Document Wizard works automatically with any ActiveDocs Opus Template or Template Set, assisting the document creator through an interview-style process to acquire the Answer data required for the document. Designers are not required to develop the end-user interface of the Template. The Document Wizard follows the Designer's group and order structure, provides the required access to external data sources, and enables other functionality such as date picking, Image acquisition and the Free Text Editor.

The Document Wizard is invoked automatically when an end-user clicks on a Template or Template Set name in the ActiveDocs Opus Express Wizard. The ActiveDocs Opus Solutions Studio Module enables the Document Wizard to be invoked from other applications, with the option of using predetermined Answer data. As an example, the Document Wizard could be invoked from a CRM application, using a Customer Letter Template with some Answers preset using Customer information from the CRM.

Applicant Details

Customer Number: 12345684

Title: Mr

First Name: Don

Last Name: Parker

Street Address: 50 Moore Street

Suburb: Glenfield

City: Auckland

Country: New Zealand

Does the Applicant have a different Postal Address?  Yes  No

Phone - Home: 09 555 0007

Phone - Business: 09 555 1007

Facsimile: 09 555 1017

Navigation: Back Next Close



## ACTIVEDOCS OPUS SOLUTIONS STUDIO

ActiveDocs Opus Solutions Studio is the toolkit for developers to integrate ActiveDocs Opus functionality into document based solutions, systems and processes. Solutions Studio enables developers to:

- ▶ Integrate the ActiveDocs Opus Document Wizard with existing applications for User-Driven document creation
- ▶ Implement customized functionality within the Document Wizard via Step Event Handling
- ▶ Prepare and use preset Answer data in the Document Wizard
- ▶ Use ActiveDocs Opus Composition Server's Web Service and the Automated Document Production module for Automated Mode document creation



## ACTIVEDOCS OPUS ADP (AUTOMATED DOCUMENT PRODUCTION)

In conjunction with the ActiveDocs Opus Solutions Studio module, the ActiveDocs Opus ADP Module enables unattended programmatic generation of documents, allowing other applications to use the power and flexibility of ActiveDocs Opus Templates for on-demand or batch-mode Automated Document Production.

In the Automated Document Production process, systems can easily create the documents required by passing to ActiveDocs Opus Composition Server's Web Service an XML stream specifying the templates, data, output formats, and delivery instructions for the documents being created. Composition Server processes the XML stream, merging the supplied answer data with the requested templates, and then generates documents to the volumes, formats, and delivery requirements specified. The Automated process can be manually and automatically invoked, and is the ideal solution when the source information comes from a line of business system and requires no additional user input.

In Automated Mode, ActiveDocs Opus can output over 150,000 documents per hour.



## ACTIVEDOCS OPUS VERSION CONTROL

ActiveDocs Opus Version Control provides an option to recreate documents using the original Design Components with which the documents were created, even if the Design Components have since been superseded. Recreating documents through the ActiveDocs Opus Express Wizard uses the ActiveDocs Opus Document Wizard, so all of the variable information is updatable.

For Designers, Version Control enables complete version control of Design Components via the ActiveDocs Opus Content Manager interface.

Version Control features include:

- ▶ Integration with ActiveDocs Opus Content Manager's standard automatic check-out
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- ▶ Integration with the Design Component Approval process

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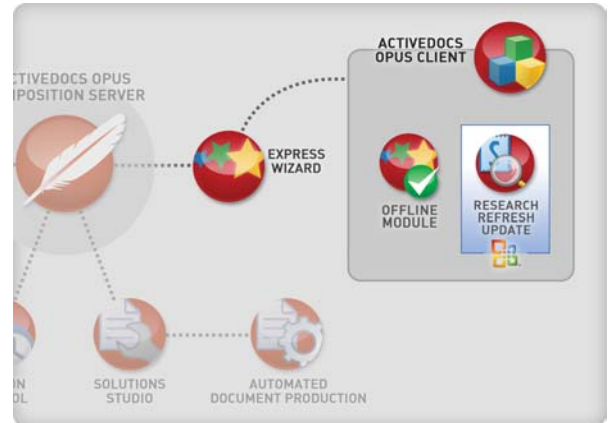
INTEGRATED END USER SERVICES FOR DOCUMENT AUTOMATION



## ACTIVEDOCS OPUS DOCUMENT CREATION

ActiveDocs Opus offers an exclusive range of options and services for document creators and other end users, including:

- ▶ Web-based document creation and post-creation processing including approval, reassignment, and delivery
- ▶ Integration with other applications for running templates, accessing data sources, document storage, and delivery
- ▶ Secure access to the right templates, right now
- ▶ Offline document creation
- ▶ Post-creation editing, updating, and refreshing of documents
- ▶ Wide reuse of common content as ActiveDocs Opus Snippets through Microsoft® Office Research for ad-hoc documents, emails, and presentations



## ACTIVEDOCS OPUS CLIENT

ActiveDocs Opus Client provides enhanced functions for document creators and other end users of ActiveDocs Opus Composition Server. It provides significant additional features and local support for the Express Wizard Offline Module.

**Design Approval** – Optional Design Component Approval supports the requirement for pre-publication validation by requiring one or more Approvers to signify approval of a modified Template or Snippet before it can be published. ActiveDocs Opus Client provides access for Design Component Approvers.



## ACTIVEDOCS OPUS OFFLINE MODULE

ActiveDocs Opus Offline works with the ActiveDocs Opus Express Wizard and ActiveDocs Opus Client modules to enable your users to create documents when not connected to the ActiveDocs Opus Composition Server.

Users working at remote locations, on commercial aircraft, or anywhere else out of contact with your office systems, have access to their usual templates for document creation with ActiveDocs Opus Offline.

New or modified documents are uploaded to ActiveDocs Opus Composition Server on network synchronization.

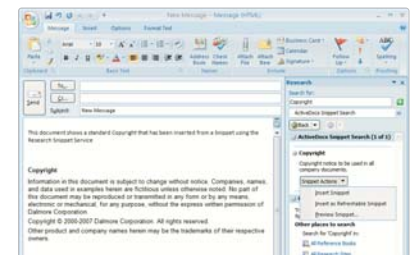


## ACTIVEDOCS OPUS RESEARCH REFRESH UPDATE

**Snippet Research Service** – Provides the ability to search for and use Snippets via the Microsoft® Research Service. This feature can be used within other Microsoft® Office applications - for example Microsoft® Outlook - allowing a snippet to be nested into the document.

**Refreshable Snippets** – ActiveDocs Opus allows the inclusion of refreshable regions within a document, enabling the region to be refreshed at any time with the latest Snippet content.

**Document Updater** – Provides the ability to automatically save documents that have been opened and edited from ActiveDocs Opus Express Wizard.



Research Snippets



## ACTIVEDOCS OPUS EXPRESS WIZARD

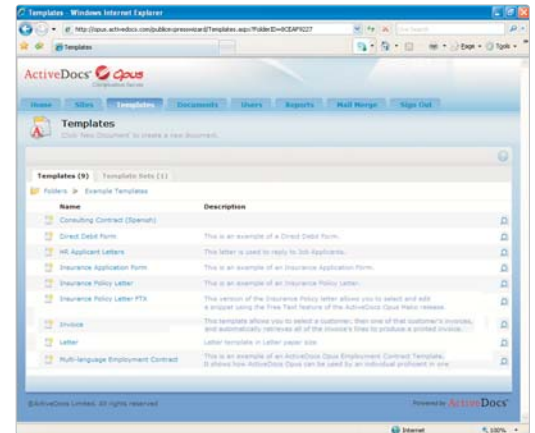
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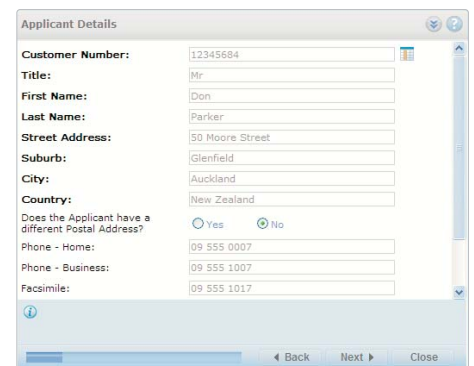


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The Document Wizard is also invoked automatically for Active Snippets used in the ActiveDocs Opus Client's Research and Refresh functions.



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