



SHORT WHITE PAPER

DOCUMENT MANAGEMENT AND
DOCUMENT CREATION

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DOCUMENT MANAGEMENT AND DOCUMENT CREATION

THERE IS A DIFFERENCE

The differences between Document Management and Document Creation are rarely considered within the business process. Many organizations assume that the two functions are essentially one and the same; this is incorrect. Whilst they are indeed closely related, each performs a different (and equally important) function. It is because of this inaccurate assumption that many organizations fail to address the document chaos issue. In fact, most never realize they have a document creation and management problem at all! Many organizations merely accept that a certain level of document chaos is “normal” and unavoidable.

SO WHAT IS DOCUMENT MANAGEMENT?

Document Management Systems (DMS) are essentially computer systems (or a set of programs) used to track and store electronic documents and/or images of paper documents. The term somewhat overlaps the similar concept of Content Management Systems (CMS).

Document Management is often viewed as an element of enterprise content management (ECM) systems and are related to digital asset management, document imaging, workflow systems and records management systems. In essence, the term “Document Management” can range from a small filing cabinet all the way through to an ECM; they are designed to assist in the indexing, storing, structuring and versioning of documents.

Many organizations are unaware they have a document management problem; however, when analyzed, the difficulties become obvious. Leading Analyst group Gartner highlight that the consequences of failing to implement an automated document factory (ADF) or Automated Document Assembly system are high (Weilerstein, 2008)¹. Content Management Systems, regardless of the size of the organization, have the potential to experience a myriad of implementation problems:

- Managing documents can be extremely time-consuming and costs in staffing are substantial
- In large organizations, keeping templates up-to-date and ensuring all staff are using the latest document is almost impossible
- Incorrect document filing or poor document classification often results in lost files; consequently, consistency and retrieval issues are both common and costly
- Ensuring that all legal requirements are adhered to and that documents include any recent legislative changes, is again time-consuming and prone to human error
- Never to be underestimated in value – branding is becoming relevant to virtually every organization and sector; the importance of sending consistent brand messages to the audience/clients is becoming increasingly important
- Multiple users results in untraceable changes and inaccuracies within documents
- Repeatedly using multiple templates adds to the problem and equates to a snowball effect of considerable proportions

Clearly, Document Management Systems are intended to assist with the “management of documents”, however, the issues related to the document management process are considerable and all too often encumber the operations of the systems intended function –document management.

What if these issues could be remedied? Better yet, what if these problems could be prevented? These issues can easily be avoided by incorporating an effective Document Assembly system.

¹ Refer to Gartner Hype Cycle for Content Management, 2009”, & MarketScope for Automated Document Factory 2.0 Software

AND WHAT IS DOCUMENT ASSEMBLY?

Document Assembly is a relatively new field within software development. It is the first, vital step in the document lifecycle. If documents are created accurately, the main functions of Document Management; indexing, storing, structuring and versioning, become considerably easier. As the primary management problem is addressed at document conception, many Document Management issues are avoided- before they even eventuate.

The automation of Document Assembly was designed to replace the tiresome manual completion of repetitive documents. Document Assembly software has the ability to automatically fill in the correct document variables based on transaction data.

Document Assembly software typically is a web-based application, in which a user answers software-driven interview questions and provides the Document Assembly software with document-specific inputs. This information is used within the document and is combined with existing data, such as legal or reporting requirements, to populate the final content. The resulting document is then generated by the software and sent via the preferred channel. These multi-channel outputs can include email, PDF, printer, a print queue or an email gateway.

INTELLEDOX ENTERPRISE

Intelledox Enterprise is a leader in the emerging field of automated document creation and Document Output Management (DOM) software. Forrester defines DOM as “software that creates formats, personalizes and distributes content to improve the customer experience” (Le Clair, 2008). The easy to use Intelledox Enterprise integrates seamlessly with existing line-of-business applications extends the use and effectiveness of Document Management Systems. Users can publish templates and centralize the automation and generation of documents and, as there are no scripting requirements, the need for IT support in document creation is eliminated.

As part of the document building process, Intelledox Enterprise creates a record in the Enterprise Content Management System (SharePoint, TRIM, etc) and pushes the output document into the system – with metadata (referencing keywords) wrapped around the result. This ensures the easy retrieval of all documents and allows organizations to make the most of their existing systems.

Using a web form interface (a webpage allowing the collection of data from the public), Intelledox facilitates and automates easy data capture. The Intelledox Engine handles the complex decision trees associated with QA logic processing, while allowing for the automation and customization of complex business rules. The easy template development system is easy to learn using a simple drag and drop method.

Performance analytics then captures the document generation statistics – allowing for full reporting and auditing of document generation.

Intelledox Enterprise increases efficiency and staff productivity, lowers costs, increases output, assures compliance and enables centralization of information; therefore adding real value to an organization.

SUMMARY

The first step in overcoming document chaos is the acknowledgement of a document problem. It is obvious that the most cost effective and efficient way to overcome a problem is through the implementation of preventative measures.

Through the process of addressing the document creation problem, organizations eliminate human error, streamline systems and vastly improve the standard of document creation. Consequently, organizations will experience easy management, storage and retrieval of documents; resulting in more productive employees and providing the opportunity to do more – with less.

REFERENCES

Le Clair, C., (2008)., Market Overview: Document Output Management, For Information and Knowledge Professionals., Forrester Research: USA.

Weilerstien, K., (2008). MarketScope for Automated Document Factory 2.0 Software, Gartner Research: USA.

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Phillip Williamson is a software entrepreneur with a talent for seeing emerging trends in technology, and extensive experience in the IT industry in Hong Kong and South-East Asia. He founded bespoke software development company DPM Consulting which created [Capabiliti LMS](#), learning management software used by hundreds of thousands information workers around the world. Phillip now runs Intelledox, a leader in the emerging market of automated document creation & assembly. Phillip has a Bachelor of Science (Hons) degree from the Australian National University.

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