ABB improves compliance of offer documents and processes in 90 countries with ActiveDocs.

ActiveDocs™

DOCUMENT AUTOMATION SOFTWARE

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ABB is a major global manufacturer and provider of power and automation technology products and services. Its in-house common configurator platform CCP makes resources from all over the business available globally for configuring and costing of Power Products solutions for internal and external customers.

In the creation of solution offer documents the business was challenged by the need to create large complex high-value documents with completeness and accuracy, incorporating specific requirements such as customer, product & service information data, and merging of external documents. High-maintenance templates with hard-coded data sources needed to be modified on-the-fly by expensive resources with constraining approval processes that made even the smallest content changes difficult.

ABB needed a global solution that enabled business units to maintain

Templates, allowed seamless integration with existing CCP interfaces, and provided easily-configured access to disparate data sources including Oracle databases. To build the high-quality documents required, the solution would have a Rules Engine that would automatically adapt and guide the document generation process in line with business rules and policies both global and local, local regulations and business culture, and customer preferences such as language and presentation.

THE SOLUTION

Following a short intensive Proof of Concept project ABB selected ActiveDocs as the solution to its document automation integration, template management, and business rules challenges.

ActiveDocs Template Management allows different areas of the business –

including IT where necessary – to create and manage the their own Templates as well as the shared content, variables, rules, and data access points, required for the generation of solutions offers. ActiveDocs Version Control provides Approval and publishing workflows to ensure that users and other systems always have access to the latest approved versions.

ActiveDocs is designed for integration, so adding a series of click-on document creation options in CCP to trigger ActiveDocs functions was simple. The implementation allows for document generation in both User-Driven (interactive) and Automated (program-driven) modes. In both modes, the completed documents are made available from the CCP interface via links, providing an up-to-date view of the documents that have been created.

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The solution has been deployed in 90 countries. The multi-language capabilities of ActiveDocs make it possible to generate documents in multiple languages.

THE BENEFITS

ActiveDocs Template Management allows business units to make their own changes to their own Templates and business rules; expensive and scarce IT resources are only involved if new data sources need to be allowed for.

CCP users easily and efficiently create case-related documents that are compliant and consistent with ABB's business policies and country- and customer- specific requirements. The seamless integration of ActiveDocs, especially the Document Wizard, into the CCP interface, and the automatic preloading of current case data, means that users don't need to switch into a different view and different ways of working and thinking for document creation.

HOW IT WORKS

A CCP is the working environment and the start point for solution cases. Customer and product & service details are loaded and saved against the case, together with relevant documents and any other content required.

Document creation is facilitated via click-on document creation options in CCP to trigger ActiveDocs functions. In User-Driven Mode the ActiveDocs Document Wizard is invoked with case data and document merge options preloaded, requiring a minimum of additional input. In Automated Mode, which can be invoked with clicks or automatically via triggers, the data goes directly to ActiveDocs' web services without further input from the user.

In both modes, the completed documents are instantly made available in the CCP interface via links, so that all users of the case can easily see what documents have been created.

For Template Management, selected business and technical users have permissions-controlled access to the Templates and shared content, variables, rules, and data access points for which they are responsible. ActiveDocs Version Control provides Approval and publishing workflows which can be configured against selected areas of content, so that modified content cannot be released until reviewed and approved by subject matter experts.

KEY FEATURES

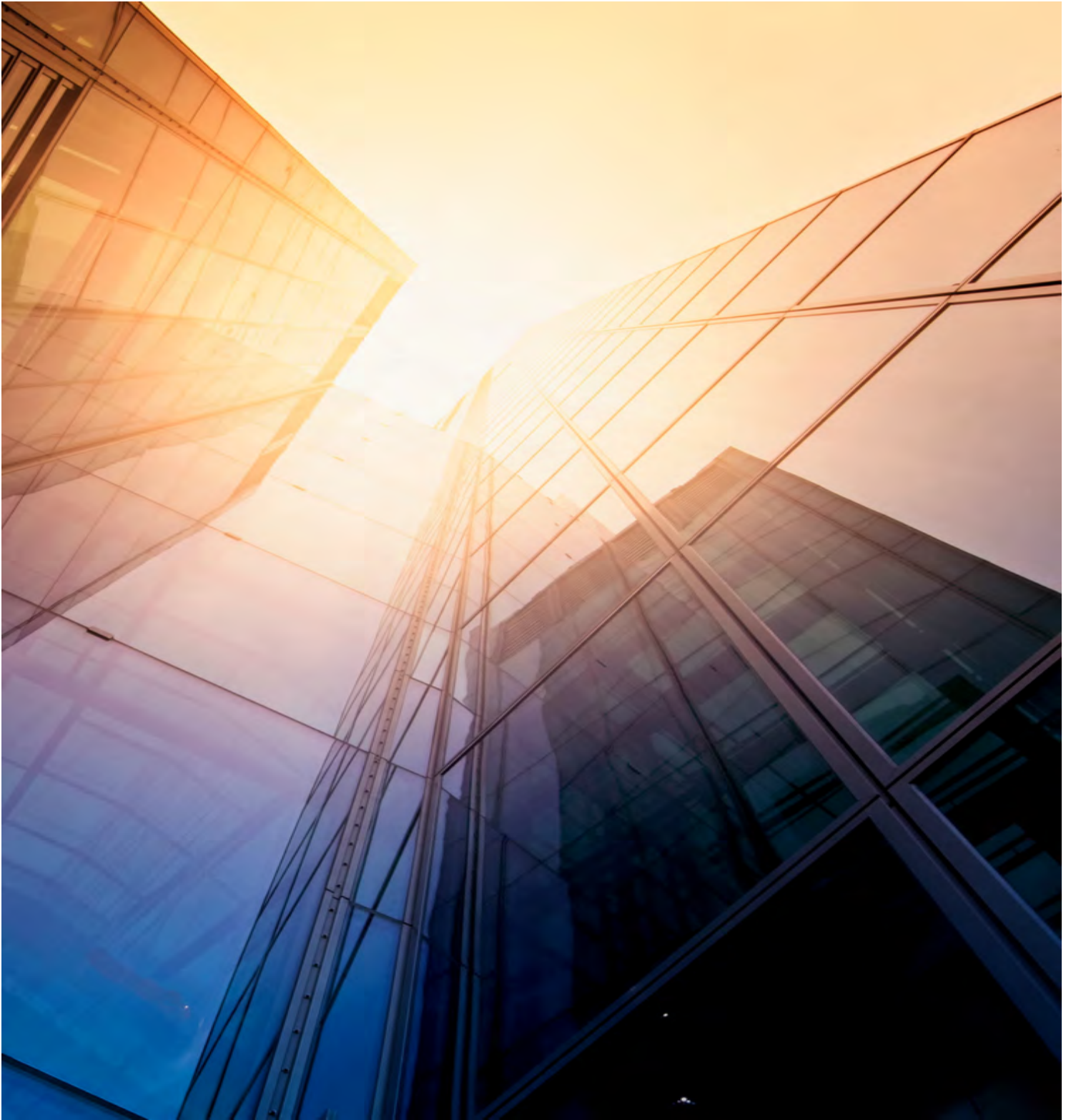*Integration with existing data sources* allows case-related customer, product, and service information to be retrieved

and added to wizard/document automatically.

Document merge allows existing case documents in multiple formats including technical diagrams, product specs, previous correspondence items etc., to be incorporated in output documents.

Exceptional integration capabilities of ActiveDocs allow seamless invocation of Document Wizard; existing information to be provided automatically to Document Wizard for partial completion of interview; automated/unattended document generation; retrieval of documents and document links.

Template Design and Management made easy with ActiveDocs' sophisticated dedicated features, allowing business users to maintain and manage templates and shared content, only using IT resources for data access points.

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