



ActiveDocs integrates with multiple systems to generate documents for 1100 frontline staff at a major Australian bank.



DOCUMENT AUTOMATION SOFTWARE

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“The powerful integration capability of ActiveDocs has resulted in an impressively smooth document generation process”

Our client has stores, express stores, and neighbourhood branches all over Australia. Across this vital network of customer facilities, more than 1100 customer-facing staff require responsive systems able to deliver almost any type of document in real time. For value-driven commercial activities such as credit cards, loans, and mortgages, this is doubly true.

The bank started with between 500 and 600 templates in a configuration that attempted to provide desktop functionality to users across all of its networks.

The logistics of managing such a large volume of templates and rolling out changes to the high number of users presented significant challenges. The implementation provided few tools for managing the templates, users, or documents.

**THE SOLUTION**

ActiveDocs was implemented for document generation, and integrated with the bank’s databases and banking applications, on a multi-server array designed for high performance with inbuilt redundancy to ensure consistent responsiveness and availability.

ActiveDocs integrates with multiple systems to generate documents for 1100 frontline staff at a major Australian bank.

ActiveDocs Designer provided a huge step-change in template design and maintenance with a central managed repository of templates and enhanced support for reusable elements for content and data integration.

**INDUSTRY**

Banking

**PRIMARY BUSINESS**

Personal and Business Banking, Insurance.

**CHALLENGE**

Provide high performance and resilient generation supporting hundreds of document types for more than 1100 users.

**SOLUTION**

ActiveDocs Server implemented to support end users via multiple high-performance server systems. ActiveDocs Designer supports business users in redevelopment and consolidation of templates.

**BENEFITS**

Seamless and responsive generation of documents with inbuilt service redundancy ensuring consistent availability. Reduction of template volume by more than 60%.

## THE BENEFITS

The implementation supports document creator end-users in customer-facing roles with seamless, responsive, always-available, wizard-driven generation of documents. Implementing ActiveDocs has also enabled the bank to realise a reduction of template volume of more than 60%.

## HOW IT WORKS

Implementing ActiveDocs enabled the bank to reduce template numbers by more than 60%, primarily by the “simple” expedience of identifying and eliminating minor differences between similar templates. In practice, this should be anything but simple, but business users have exploited ActiveDocs enhanced Rules Engine and ActiveDocs Designer’s ability to share data connectors (Data Views) and shared content (Snippets) across templates to achieve exactly this result. For document creation, the user works within the teller system and simply selects the type of document required. The solution generates an automatic user-friendly questionnaire derived from the document template’s data requirements. With a minimum of information from the user, the solution loads the necessary data from other systems, initiates any interaction necessary to elicit further information from the user, generates the document, and returns it to the user.

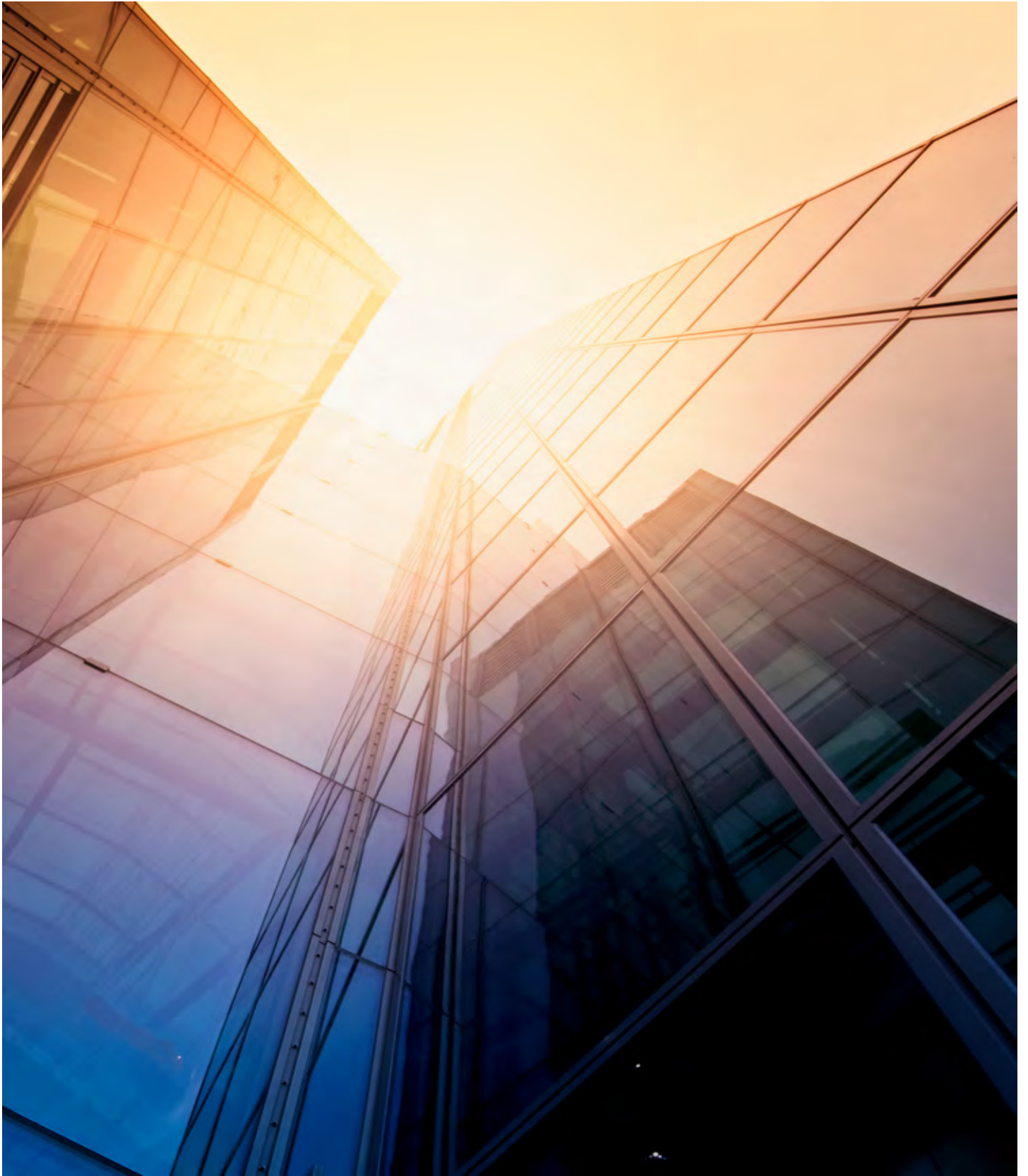
## KEY FEATURES

*ActiveDocs Composition Server* extensible via scale-up and scale-out for enhanced performance, throughput, and availability.

*ActiveDocs Designer* provides the means for the business to design, build, and manage its own templates without expensive IT resources, and to develop and implement sharing of common resources such as data connectors and common content.

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