



ActiveDocs creates
efficiency, reduces template
maintenance at Finnish
Centre for Pensions.



DOCUMENT AUTOMATION SOFTWARE

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“We now have an overall solution where external processes, ActiveDocs, our Portal and Document Management are integrated. ActiveDocs fills well the role as the document creation, editing and template design & management solution.”

Hanna Holopainen, Project Manager - ETK

The Finnish Centre for Pensions (Eläketurvakeskus, or ETK) is a statutory co-operation body, expert and producer of joint services for the development and implementation of earnings-related pension provision. Its clients include pension providers in the private and public sectors, the Finnish Social Insurance Institution, authorities, decision-makers, researchers, educational institutions, and the media, as well as the insured and policyholders.

To achieve its goals ETK must create, manage, and distribute huge volumes of documents. Complex documents must be assembled using information from many different sources in many different formats. For example, document creation in just one business area was a manual task facilitated by hundreds of templates. Over time it became increasingly difficult for the business to enjoy the benefits of an efficient and adaptable document generation process.

THE SOLUTION

ActiveDocs Document Automation at ETK allows wizard-driven document creation in the browser from other systems with the integration of ActiveDocs web interfaces, including the Document Wizard. ActiveDocs provides direct integration with existing data sources to maximise efficiency and accuracy, and direct integration with ETK’s mission-critical document management systems. Within the Document Wizard’s automatic intelligent interview, the ActiveDocs Free Text Editor allows users to edit selected parts of the document directly in the browser.

ActiveDocs Template Management allows the number of templates in just one business area to be reduced from 400 to 10. This 97.5% improvement was achieved with the use of ActiveDocs Snippets for reusable content across multiple document types, ActiveDocs Data Views for

CUSTOMER
Finnish Centre for Pensions

INDUSTRY
Government Earnings-related Pension provision.

CHALLENGE
Government compliant and accurate pension documentation efficiently and with reduced maintenance costs.

SOLUTION
ActiveDocs Document Automation and Template Management integrated with existing portal and document management systems.

BENEFITS
97.5% reduction in templates and management effort; integration of wizard-driven document generation with existing systems; data integration and embedded business rules enhance document compliance and accuracy, minimise downstream costs.

standard and reusable access to existing data sources, and the ActiveDocs Rules engine that allows template content and Snippets to be selected automatically based on the context of each document created.

ActiveDocs permissions-based access and ActiveDocs Version Control provide the business with precise control over the maintenance, approval, and publishing, of template and snippet content.

THE BENEFITS

Integration with ETK's business process gives easy access to ActiveDocs Document Automation, creating immediate and downstream benefits as efficiency and accuracy are maximised.

The reduction in the number of templates and the consistent use of shared content and business rules facilitated by ActiveDocs Template Management allow the business to enjoy the benefits of an efficient and adaptable document generation process by significantly reducing the maintenance effort.

Permissions-based access, approval, and publishing allow subject matter experts to maintain, or approve the work of others on, template and snippet content related to their business areas and expertise.

Documents are created in standard Word format, readily consumed by other systems if required, and their variable content is available to other systems as easily-retrieved ActiveDocs Answer data.

HOW IT WORKS

A user selects a document type and starts a Document Wizard browser

session to enter or select the information from the current context. The Document Wizard knows the information requirements of the document type and how these may change in context. It implements business rules to change the questions, select content, and validate data items and relationships between data items.

ActiveDocs assembles the document using the template, business rules, and answers. Document, answers, and metadata are forwarded automatically to ETK's document management system eDocs which manages the rest of the document lifecycle.

"ETK carried out a short proof of concept (POC) evaluating the product and the suitability to our architecture" said Hanna Holopainen, Project Manager at ETK. "Since the POC we have been very happy with the ActiveDocs support. We now have an overall solution where external processes, ActiveDocs, our Portal and Document Management are integrated. ActiveDocs fills well the role as the document creation, editing and template design & management solution."

KEY FEATURES

Data and DMS integration improves efficiency, accuracy, compliance

Web integration provides easy & usable document automation from portals and other systems

Template Management reduces effort and complexity

COMPANY

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(Eläketurvakeskus)

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FOUNDED

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PRIMARY BUSINESS

Government Earnings-related
Pension provision

