



Integrating ActiveDocs,  
Word, iManage, and Inprotech  
ensures compliance and  
consistency, provides easy  
user experience.



DOCUMENT AUTOMATION SOFTWARE

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“ActiveDocs provides a modern environment for our staff to create documents, without taking away our ability to control content. It is extremely intuitive and easy to use.”  
-Chief Information Officer

Our client is a specialist intellectual property legal firm working in the protection and enforcement of intellectual property rights.

With more than two hundred employees creating binding legal documents, manually monitoring the document generation process and applying quality control to the documents was not an option for the firm.

The firm needed to enforce proper document generation and management processes without imposing an onerous workload overhead on its employees.

Within the process itself, the firm needed to address underlying need for consistency and compliance in the presentation and content of documents.

**THE SOLUTION**

Our client addressed the ‘process’ challenge by integrating ActiveDocs with iManage, Inprotech, and MS Word in a way that ensured a consistent process for all documents while not impeding users.

Integrating ActiveDocs, Word, iManage, and Inprotech ensures compliance and consistency, provides easy user experience. ActiveDocs Templates, designed, built and maintained by the firm’s trained designers, control the presentation and content of the generated documents.

**THE BENEFITS**

A single process using ActiveDocs for all document generation activities

**INDUSTRY**

Law and Intellectual Property

**PRIMARY BUSINESS**

Lombard International

**CHALLENGE**

Generate multi-fund private placement and other insurance documents that comply with SEC rule 498, and simplify the document generation process.

**SOLUTION**

Implementation of ActiveDocs and creation of a Snippet library of reusable content together with merging fund prospectuses from external files.

**BENEFITS**

Private placement memoranda and other documents generated within minutes, including all fund descriptions and prospectuses.

provides an easy and consistent user experience.

Within the process, ActiveDocs templates ensure static and variable content are compliant with internal and external expectations.

## HOW IT WORKS

Most users of the process are legal secretaries creating client-facing documents. Users open MS Word, selecting 'new document' in the usual way.

Seamless integration between MS Word and ActiveDocs opens the web interface of ActiveDocs where the user selects the appropriate template for the document type.

The ActiveDocs Document Wizard starts automatically, prompting the user for a case number or other identifying information. The wizard retrieves all related data from the Inprotech IP case management system and prompts the user for any remaining information required for the document type.

ActiveDocs generates the document using the template, merging the data obtained in the wizard, and ActiveDocs Snippets for common content, and applying business rules as required.

The solution routes the generated document automatically to iManage, which uses the ActiveDocs- generated document metadata to profile and store the document automatically.

Finally, the document creation process reloads the document from iManage into MS Word where the process started.

Personnel design, build, and maintain the ActiveDocs Templates, Snippets, and Data Connectors that implement the branding and content rules required for each document type.

## KEY FEATURES

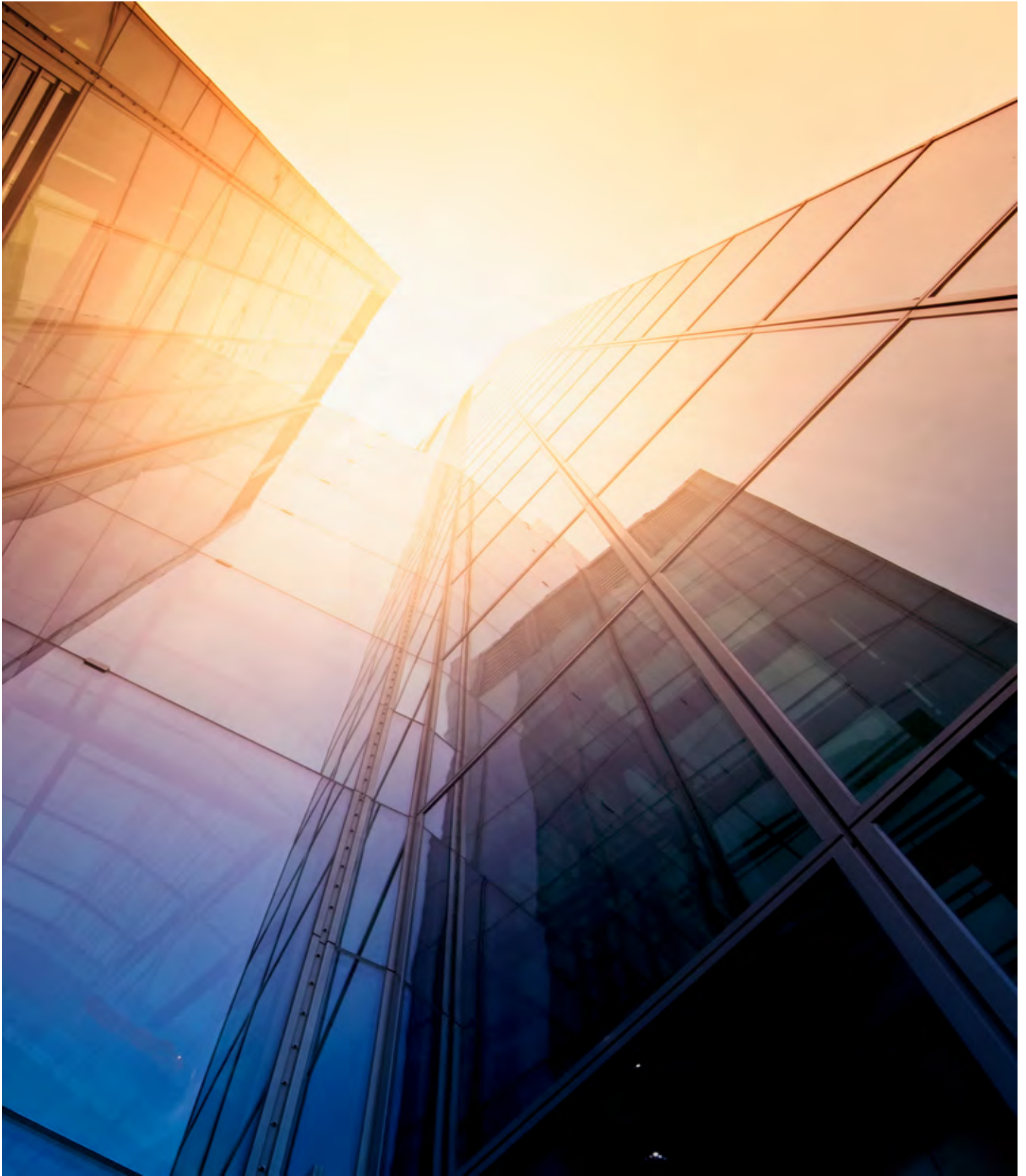
*Open architecture and design-for-integration* allow integration of ActiveDocs with other applications, using industry standards.

*Document metadata* is generated by ActiveDocs and passed with documents to receiving systems like iManage, allowing automatic profiling of documents without user effort.

*ActiveDocs Designer* provides template designers and managers with the tools for designing, building, and maintaining templates, snippets, and data connectors, to implement all of the business rules for consistent and compliant documents.

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