



Government saves time,
money and effort replacing
manual document
production with ActiveDocs
automation.



DOCUMENT AUTOMATION SOFTWARE

www.activedocs.com



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Our client provides services to at-risk youth in one of Texas’ largest counties, which encompasses over 1.5 million and two major metropolitan centres.

Like many county agencies that relied on older technology, our client produced most of its documents manually. Staff drew information from a 20-year-old COBOL-based mainframe or a Microsoft Access database, and inserted it into document templates by hand. The templates themselves might have as many as 15 variations for each juvenile or court employee who produced documents.

Other important processes, such as assigning attorneys to juveniles, processing restitution checks and sending out hearing notices, were also performed manually. Probation officers, administrative assistants, court clerks and intake officers had to search the county database for information and copy it into document templates to produce notifications, letters, forms and other documents related to the juvenile system. For mass mailings, each entry had to be created separately.

With the volume of documents the department produced every day, its manual systems were a growing drain on resources. As an example, just compiling a list of juveniles receiving meals at the detention facility on a daily business was a time sink. Each day staff was required to manually enter every juvenile’s name, date of birth, address and school district into an Excel spreadsheet from another system so the facility could be reimbursed for meals by the school districts.

THE SOLUTION

Our client implemented ActiveDocs document automation software to streamline document production processes. ActiveDocs is integrated with data sources on the client’s network and with outside resources such as the state-wide juvenile justice database. ActiveDocs automates formerly manual functions such as searching for information, inserting it into templates, compiling them into documents and, if necessary, routing them for approval.

INDUSTRY

Government

CHALLENGE

Streamline production of juvenile justice and district court documents.

SOLUTION

Integrate ActiveDocs document automation software.

BENEFITS

Annual savings for one process alone totalled \$27,000, widespread elimination of manual processes and redundant document templates throughout the juvenile and court departments.

THE BENEFITS

ActiveDocs began paying for itself in saved labour immediately after it was implemented. It reduced overhead costs by enabling our client to centralize document template management. Before ActiveDocs, hundreds of document templates resided on desktops around the county. Individual staff members would create their own variations of documents. That complicated administrative processes by creating confusion and re-work to reconcile differences.

Centralised template management eliminated the confusion caused by multiple versions of documents. Local document templates were replaced with 43 centrally managed templates that compile documents from “snippets” of content on the Juvenile Services network. Re-using snippets for multiple documents also reduces administrative overhead because one version of a paragraph or legal boilerplate is easier to update than multiple copies stores throughout the network.

ActiveDocs has also made Juvenile Services processes faster. The process of compiling the juvenile detention meal distribution list, for example, was reduced to just a few key strokes. The IT department has also automated the process of notifying attorneys when they have been appointed to represent a youth.

As word spread about how ActiveDocs reduced the effort of producing documents, the county’s Clerk of Courts office decided to replace sending hard-copy notices for misdemeanour hearings to attorneys and bondsmen with an electronic system. The new ActiveDocs process saves the Clerk of Court’s office \$27,000 per year in materials, staff time and postage. It compiles a list of hearings based on data ranges selected by the users, and

automatically sends out emails and faxes to attorneys and bondsmen.

HOW IT WORKS

ActiveDocs works either as a wizard within Web-based applications or as an invisible part of workflows for performing other tasks.

The application for appointing attorneys to represent juveniles offers users a “notify attorney” option in the interface that pulls up the ActiveDocs document creation wizard. The user chooses a delivery mechanism: email, fax or Word document. ActiveDocs auto-populates the template with the youth’s name, charges pending, services required, and contact information, then assembles it into a document. The system matches the case’s requirements with the next attorney who meets the criteria and ActiveDocs creates the notification.

To compile the meals list for the juvenile detention facility, our client built an ActiveDocs template that extracts data on each youth from the detention database with just a few keystrokes. It automatically breaks the list down into age groups and alphabetises the sub-lists, all of which was done manually in Excel before ActiveDocs.

KEY FEATURES

Stored procedures, or pre-coded scripts for processes such as retrieving information, simplify embedding automated functions into templates.

User-friendly template design tools make creating, automating and updating templates fast and easy.

Microsoft NET framework plugs directly into the information system without custom coding.



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