

ActiveDocs supports
efficient, responsive
document generation
processes and template
maintenance at QBCC.



DOCUMENT AUTOMATION SOFTWARE

www.activedocs.com



“ActiveDocs provided business-friendly template management and supported the seamless integration of QBCC’s CRM, Salesforce, MS Outlook, email, print, and Meridio.”

QBCC, previously QBSA (Queensland Building Services Authority) is a statutory authority established to regulate the building industry in the Australian State of Queensland. QBCC manages licensing for trade and building contractors, maintains dispute resolution processes, and administers the Statutory Insurance Scheme between consumers and contractors.

A significant part of QBCC’s work involves the generation of letters and other documents for its clients – both consumers and contractors – to support its various service offerings. The primary challenge was to improve both efficiency and responsiveness (turnaround time) in the generation of letters and other documents for QBCC’s clients, while providing an improved user interface for QBCC users.

To support the generation of letters and other documents, the second challenge was to improve the efficiency and responsiveness (turnaround) in the creation and maintenance of the templates used to generate the letters and documents.

THE SOLUTION

QBCC’s users of ActiveDocs typically work within QBCC’s CRM interface, so the ActiveDocs document composition solution is integrated using out-of-the-box ActiveDocs integration capabilities.

The first element of the integration passes user and client details to ActiveDocs, providing the context for a list of available document types (Templates) presented to the user, and initial information for the document itself.

The next element of the integration has the ActiveDocs interface customized using standard theming to match QBCC’s CRM for a seamless user experience. Users select the required document type from the list, invoking the ActiveDocs Document Wizard which automatically renders the Template as a questionnaire with the client information preloaded.

Users then quickly and accurately generate the letters and other documents for their clients, adding

CUSTOMER

Queensland Building and Construction Commission (QBCC)

INDUSTRY

State, Government

CHALLENGE

Improve efficiency generating documents for QBCC’s clients, & creating & maintaining the Templates.

SOLUTION

ActiveDocs document composition integrates seamlessly out-of-the-box with QBCC’s CRM interface. Users select document type & generate documents using the Document Wizard. ActiveDocs supported custom buttons allow print, email, deletion, or submission of documents to Meridio DMS.

BENEFITS

Seamless integration of ActiveDocs and QBCC’s CRM supports improved efficiency of document generation. While ActiveDocs Designer improves the efficiency of template design and maintenance by replacing IT-intensive processes and applying embedded MS Word assets.

information from Salesforce where required using the standard ActiveDocs Salesforce connector. Document Wizard sessions can be paused, and work-in-progress documents are represented in a list in the CRM interface allowing the wizard to be restarted at the last point of use.

For completed documents, ActiveDocs supported custom buttons allow users to print the document to a printer selected from a smart list of available devices, create an Email using MS Outlook, submit the document and metadata to QBCC's Meridio DMS, or delete the document.

Template design and management, previously an IT-intensive process involving MS Word assets embedded in QBCC's CRM, is now handled through ActiveDocs Designer which integrates a management interface – ActiveDocs Content Manager – with Microsoft Word and the ActiveDocs Design Tools add-in allowing ActiveDocs functionality to be added to MS Word documents. Assets were transferred from QBCC's CRM directly into ActiveDocs Designer where their MS Word template functionality was migrated to ActiveDocs.

THE BENEFITS

QBCC's users now have an integrated and seamless process for efficient and accurate context-sensitive document generation utilizing the ActiveDocs Document Wizard.

All phases of the document lifecycle are supported by ActiveDocs integration including print and email delivery and submission of documents to QBCC's Meridio Document Management System.

Template design and management, previously an IT-intensive process involving application-embedded MS Word assets, is now business-friendly via the use of ActiveDocs Designer.

HOW IT WORKS

QBCC's users of ActiveDocs typically work within QBCC's CRM interface, where custom controls have been added to enable document generation.

Clicking the button causes information about the user and the current client, or case, or other relevant information to be passed to ActiveDocs. At the same time the user is presented with the ActiveDocs Express Wizard web interface, customized with standard theming techniques to match the interface of QBCC's CRM.

The passed information is used to present a customized and context-dependent list of the Templates that the user can execute to generate a range of document types.

When the user selects a particular Template (document type) the ActiveDocs Document Wizard is invoked. The wizard automatically renders the Template as a questionnaire with the client or other passed information pre-loaded. In the example of a particular client or case, only key ID information is passed; the wizard automatically retrieves the rest of the data from the originating application. Data can also be sourced from Salesforce using the standard ActiveDocs Salesforce connector.

The user then quickly and accurately generates the letter or other document. The wizard validates data based in business rules built into the Template. The user can discontinue the wizard session at any time, in which case the in-progress document is added to a list in the CRM interface which allows one-click resumption of the wizard session.

On completion of the wizard the document is automatically assembled and the user is redirected to the ActiveDocs Document Actions page where the document can be previewed or recreated, and custom buttons allow the document to be

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PRIMARY BUSINESS

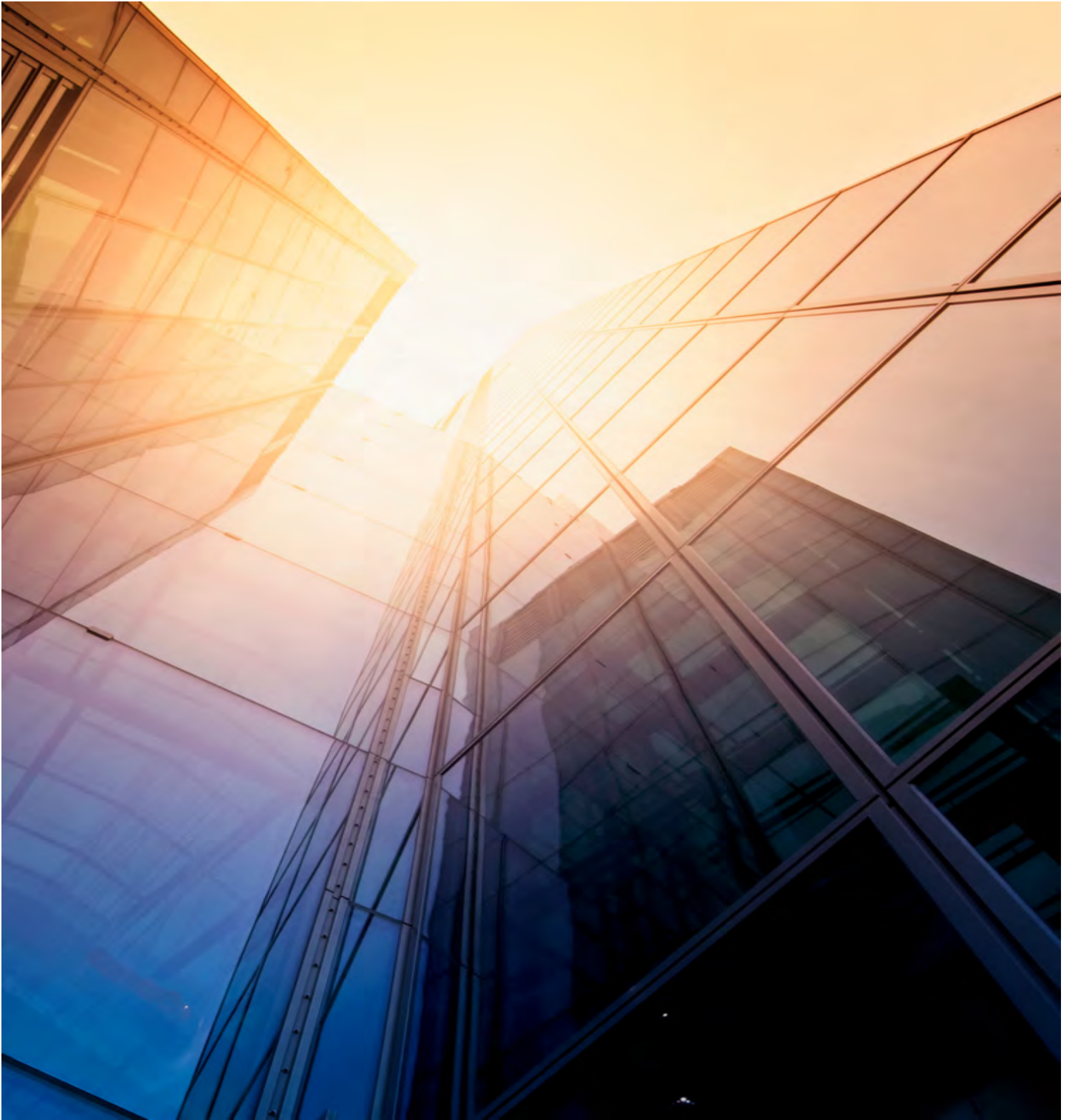
State Government Statutory Authority – Building Industry Regulation.

printed to a printer selected from a smart list of available devices, or emailed using MS Outlook, or submitted with metadata to QBCC's Meridio DMS, or deleted. All templates are designed and managed with ActiveDocs Designer, replacing an IT-intensive process involving MS Word assets embedded in QBCC's CRM. Designer integrates a management interface – ActiveDocs Content Manager – with Microsoft Word and the ActiveDocs Design Tools add-in allowing ActiveDocs functionality to be added to MS Word documents.

KEY FEATURES

Integration capabilities of ActiveDocs allow seamless user experience from existing systems to MS Outlook, use of existing data for document generation, and document routing for delivery and storage.

ActiveDocs Designer replaces IT-intensive management of app-embedded template assets with business-friendly Word-based Template Design.



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