ActiveDocs generates task instructions that support safe work practices across the 21 production sites of Silver Fern Farms.

ActiveDocs™

DOCUMENT AUTOMATION SOFTWARE

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> "The implementation of our quality documents solution has shown that ActiveDocs is a key piece of our content management puzzle. It works seamlessly with the SharePoint and Nintex products. It's been gratifying to me that that it's worked so well, and this solution provides a good template for the future."
>
> –Stewart Cowen, Enterprise Systems Manager – Silver Fern Farms

Silver Fern Farms is a leader in New Zealand's red meat processing industry with 21 processing plants country-wide, and over 7,000 employees. The company exports meat and meat products world-wide.

Each task at any of the 21 processing plants is described in detail in a task instruction document that explains what procedures must be followed, and the steps that need to be applied in order to support safe work practices.

Each task instruction used to be managed as a separate document in a SharePoint Document Library even though the task instructions were essentially the same across different sites. There are around 700 different task instructions. With variations across the 21 sites, many thousands of documents with minor differences had to be managed. In addition, there are hundreds of other quality documents that need to be created and

maintained. It required a lot of maintenance effort to keep all documents up-to-date. There was a great risk of task instructions getting out of synchronisation where a change was made to documents for some sites, but not to others.

Silver Fern Farms looked for a solution that would satisfy the requirements for generation of quality documents. A proof-of-concept was run to determine whether SharePoint, as a standalone product, could satisfy the business requirements, but it was found that it couldn't deliver the needed level of functionality in the areas of centralised content management and auditability of changes. Several other products were evaluated and ActiveDocs was selected.

Stewart Cowan, Enterprise Systems Manager at Silver Fern Farms, noted: *"The main reasons we selected ActiveDocs were the range of features*

CUSTOMER

Silver Fern Farms Limited

INDUSTRY

Agriculture

CHALLENGE

Improve quality document processes to achieve better control, easier maintenance and management of task instructions that support safe work practices.

SOLUTION

Implement ActiveDocs solution integrated with SharePoint 2013 and Nintex Workflow 2013 for generation, ongoing updates, and maintenance of all quality documents and quality document templates.

BENEFITS

Centralised management of document content and quality document publishing ensures consistency across all production sites increases responsiveness to changing work procedures, while recognising specific differences between sites.

and the tight integration with SharePoint, which is our enterprise content management system. Additionally, it was the enterprise scale that ActiveDocs could bring to our company. ActiveDocs has proved itself with large international companies, with hundreds of thousands of complex documents being created annually. Some of the competitors we evaluated were much smaller, for instance a client PC based solution, rather than a server-side, proper three-tier solution.”

THE SOLUTION

Silver Fern Farms now stores and maintains content of all quality documents in ActiveDocs.

When a new quality document needs to be created, one of the company's compliance officers creates documents for all sites through a simple web-based questionnaire run in the ActiveDocs Document Wizard.

When the content of quality documents needs to be updated, the compliance officer can edit the text and graphics in one central location via ActiveDocs Content Manager, and the solution determines which documents are affected by the change. These are automatically updated to reflect the change to the content.

The draft quality documents are delivered automatically into a SharePoint Document Library in Word format, and their metadata is populated. Once the draft documents have been approved they are automatically converted to a PDF format and moved to a separate Document Library for viewing by site staff. Silver Fern Farms' employees in production plants have site-based access to the specific documents that they need.

THE BENEFITS

Manual management and updating of many thousands of permutations of

the 700 individual task instructions are replaced with a single central document compliance management platform for quality documents, where a change is only made once, and is automatically published into all relevant quality documents.

The automatic document update eliminates the risk that some quality documents could be forgotten and not kept up-to-date.

The ActiveDocs solution allows Silver Fern Farms to utilise the vast library of content that resides in their Microsoft Word documents. The existing work procedure documents can be imported into ActiveDocs Content Manager without any loss of fidelity, and the automation that accounts for site-specific and document type specific variations is then applied. The tight integration of ActiveDocs with Microsoft Word means that Silver Fern Farms didn't have to compromise on any aspects of the look-and-feel of their documents. Compliance officers can utilise their knowledge of Microsoft Word and automate the quality documents without leaving Word's familiar environment.

The IT department is not involved in automation of documents; this is performed by compliance officers who are subject matter experts, not IT experts.

ActiveDocs' seamless integration with SharePoint for document storage, sourcing of data from SharePoint Lists and Document Libraries, working with its version control, and metadata, as well as Nintex Workflows made it easy to deploy the solution within Silver Fern Farms SharePoint-based intranet.

In addition, the integration capabilities of the product, including the ease of access to ActiveDocs API, has opened vast possibilities for utilisation of the product in other areas of the business.

The automation and compliance functionality makes it suitable for generation of documentation that is mandated by government regulations

for the meat processing industry. These documents need to be periodically updated when the compliance requirements imposed by the Ministry for Primary Industries of NZ change. Silver Fern Farms plan to manage regulatory compliance of these documents using the same instance of ActiveDocs, following the major initial deployment for generation and management of safe work practice task instructions.

HOW IT WORKS

Silver Fern Farms were able to import their existing quality documents into ActiveDocs Content Manager and turn them into automated Snippets, Templates, and Template Sets. ActiveDocs Snippets are used where content is shared amongst many different documents and varies in some aspects between sites or customers. For example, the procedure of cooling of the final product may differ depending on the equipment each site has,

and the final temperature of the product may be determined by customer-specific requirements. Compliance officers can apply such rules in Snippets and Templates through natural language and the drag-and-drop interface. ActiveDocs Templates assemble the Template-specific content, rules, and data together with the relevant Snippets to create the task instruction, work procedure or other quality document. The Template Set feature enables creation of multiple quality documents in a single Document Wizard process.

ActiveDocs Data Views make it easy to source data from SharePoint Lists and Document Libraries, and use them to create the quality documents.

Once the document is created, ActiveDocs delivers it into the appropriate SharePoint Document Library, populates its metadata, and triggers a Nintex Workflow. The workflow guides the document through the approval and final publishing process using ActiveDocs integration API. Furthermore, Nintex Workflows might be triggered if the change is deemed significant enough to warrant re-training of the staff that is affected by the change, and notify the managers.

KEY FEATURES

Template Management and Compliance Auditing centralises content management, reporting, and provides the ability to regenerate the relevant documents when shared content has been changed.
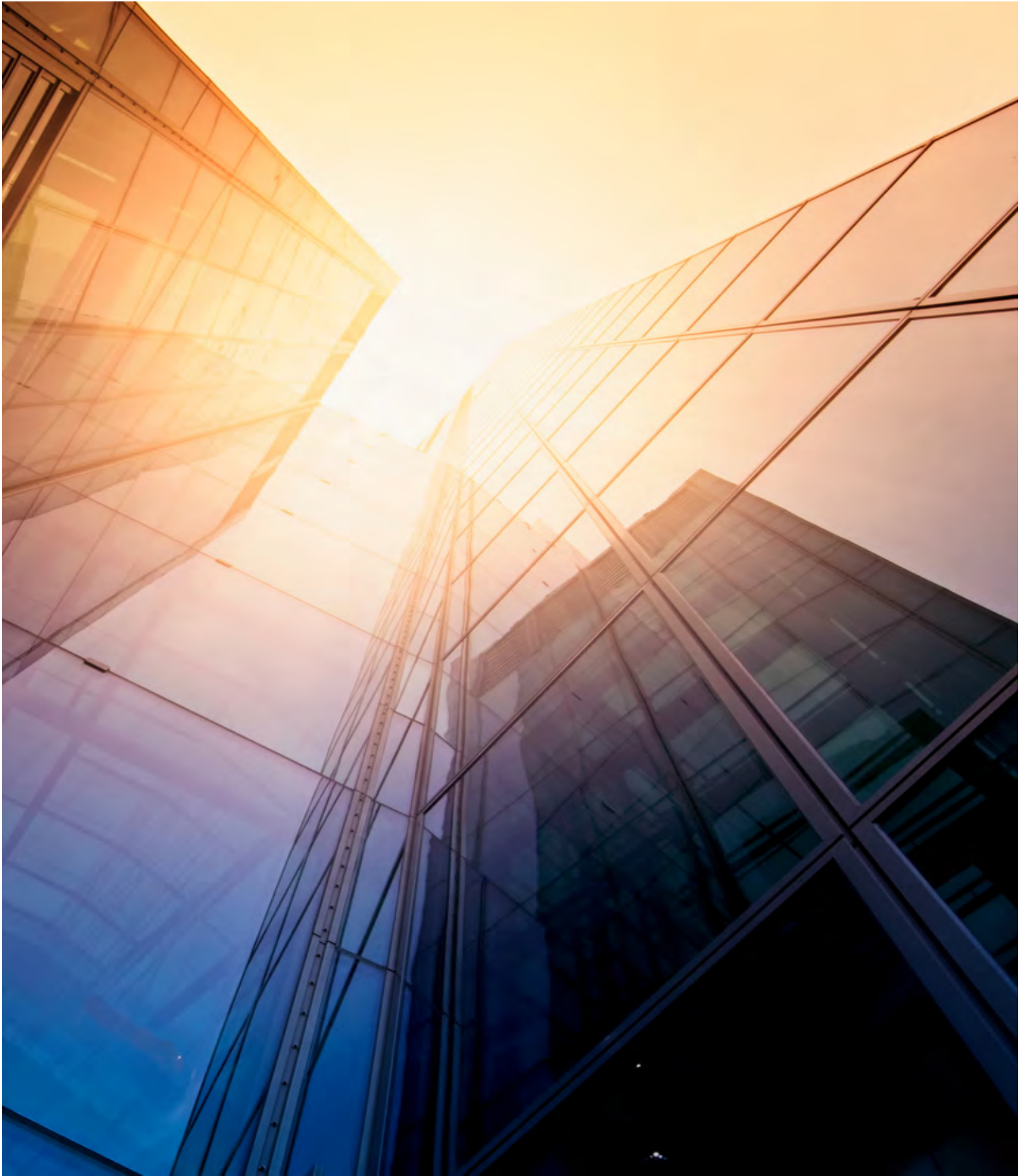
Microsoft Word Integration for easy import, fidelity, and automation of existing content in the familiar environment of the de-facto standard word processor.

Microsoft SharePoint Integration enables native connectivity into SharePoint Lists, Document Libraries for both reading data and storing documents, integrated with SharePoint document versioning.

Nintex Workflow Integration ensures that Silver Fern Farm's business processes can utilise ActiveDocs automation and compliance capabilities.

"Template Management and Compliance Auditing centralises content management"

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