



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



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 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 +700 task instructions, with variations across the 21 sites, creating many thousands of documents with minor differences to be managed.

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 sync, with changes made to documents at some sites, but not to others.

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 functionality needed for centralized content management and auditability of changes. Several other products were evaluated, and ActiveDocs was selected.

Stewart Cowan, Enterprise Systems Manager, noted: *“The main reasons we selected ActiveDocs was the range of features and the tight integration with*

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

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

SharePoint, our enterprise content management system. 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 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 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 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. A change is made once, and automatically published into all relevant documents.

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

Silver Fern Farms can also utilize content that sits in their Microsoft Word documents. The existing work procedure documents are imported into ActiveDocs Content Manager without any loss of fidelity, applying automation for site-specific and document type specific variations. The tight integration of ActiveDocs with Microsoft Word means there is no compromise to the look-and-feel of documents. Compliance officers can automate documents without leaving Word's familiar environment.

IT is not involved in the automation of documents; this is performed by Compliance Officers, the subject matter experts.

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

ActiveDocs APIs has open up possibilities for utilization of the product in other areas of the business. For example, the 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.

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HOW IT WORKS

Silver Fern Farms were able to import their existing 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 the final product may differ depending on the equipment at each site, and the final temperature 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 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 documents.

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

KEY FEATURES

Template Management and Compliance Auditing centralizes content management, reporting, and provides the ability to regenerate relevant documents when content has been changed.

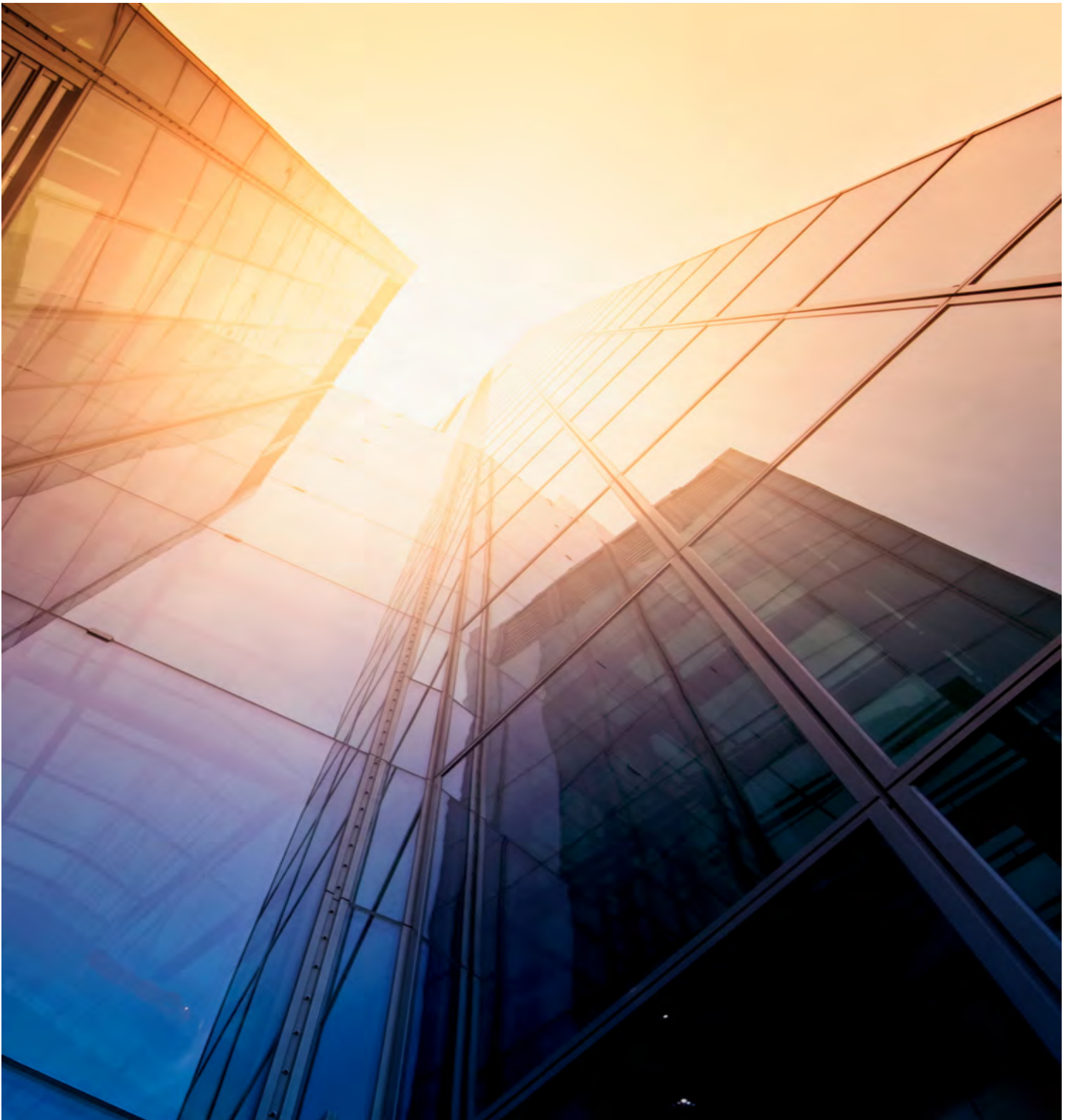
Microsoft Word Integration for easy import, fidelity, and automation of existing content.

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 enables business processes to utilize ActiveDocs automation and compliance capabilities.



“Template Management and Compliance Auditing centralizes content management”



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