

ActiveDocs superior Template Management, seamless integration, intelligent document assembly ease the pain of complex HR document creation at Shell.



DOCUMENT AUTOMATION SOFTWARE

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“Lack of automation to implement business rules... proliferation of hundreds of templates... business rules implemented as written instructions. ActiveDocs made it possible to enforce compliance and remove risk from complex HR transactions.”

Royal Dutch Shell is a top Fortune 500 global business employing more than 85,000 people around the world, with a high volume of employee transfers between Shell businesses and between the countries in which Shell operates. Each individual transfer case contract must comply with Shell's internal policies and with the legislative requirements of the countries involved. Shell's Human Resources operations must work with hundreds of business rules and apply them accurately, selecting and individualising from a vast array of potential content to ensure that every contract exactly meets the requirements of its circumstances.

A custom-built global transfer contract management system using SAP data allowed Shell HR to corral the information about each case, but the generation of the transfer contract documents was a manual task. For each case, the single applicable document type had to be picked out

of hundreds of non-automated templates. The HR case manager would then refer to the relevant business rules to identify the required content in the template, manually remove the unwanted content, and then painstakingly replace highlighted variable placeholders with case data. If a placeholder such as Employee Name occurred several times in the template, the HR case manager was obliged to find and replace each and every occurrence.

Template management was a separate but no less intensive challenge for Shell's Human Resources operations. Version control, publishing, and release of templates was a manual task and could not eliminate the risks of outdated versions being used from local or network folders. Lack of automation to implement business rules meant a proliferation of hundreds of templates, many with only minor variations, in which business rules could only be implemented as written

CUSTOMER

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INDUSTRY

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CHALLENGE

Enforce compliance, remove risk, and reduce the effort of template management from hundreds of high-maintenance non-automated templates for complex HR transfer contracts.

SOLUTION

ActiveDocs Document Automation integrated with incumbent transfer contracts system using SAP data for document creation, and ActiveDocs Template Management to control, automate, and serve templates.

BENEFITS

Superior ActiveDocs management and compliance auditing of all templates regardless of automation status; seamless integration with case management system; easiest possible document creation as intelligent document assembly checks and prompts only for missing data.

instructions and variable case-related items could only be implemented using highlighting.

THE SOLUTION

Shell selected ActiveDocs to address the document creation and template management challenges. To address the Template Management challenge, all of the existing templates were loaded into ActiveDocs so that that its superior Template Management and serving capabilities are applied to all templates. All templates, regardless of their automation status, came under the control of ActiveDocs Template Designers, Approvers, and Administrators, and ActiveDocs is the single source of templates. The templates were analysed and, to facilitate rapid deployment of the overall solution, those most often used were selected first for automation with ActiveDocs tools and technology, with the remainder being automated in a planned sequence to follow.

Document creation is enabled with a single button in the web-based case management system. The required ActiveDocs Template is selected automatically and the document generation request is sent to ActiveDocs Web Services. ActiveDocs matches the case data against the template's data requirements and generates the document automatically if the data is complete. If case data is missing, the user is informed. If non-case data is missing, the ActiveDocs Document Wizard is presented to the user, with the available case data loaded automatically. The user provides the missing data items and the document is generated.

THE BENEFITS

Template Designers, Approvers, and Administrators use the superior Template Design and Management capabilities of ActiveDocs, including common content, data, variables, and business rules that can be re-used across multiple document types.

Because all templates are stored and managed in ActiveDocs regardless of their automation status, document creators are always provided with the latest approved version. With the staged automation process, more and more of their document creation work is handled automatically by ActiveDocs.

HOW IT WORKS

Template Management is facilitated by ActiveDocs so that all templates, regardless of their automation status, remain under the control of ActiveDocs Template Designers, Approvers, and Administrator, and ActiveDocs is the single source of templates.

Document creation is enabled with a single button in the web-based case management system. When the HR case manager clicks the button, the required ActiveDocs Template is selected automatically and a single data value – the case reference – is passed to ActiveDocs Web Services. ActiveDocs automatically retrieves and validates the case data, and checks it against the template's data requirements. If the data is complete for the template, ActiveDocs assembles the document. If case data is required, the case manager is informed so that the case management system can be updated and document creation can be retried. If non-case data is required, the ActiveDocs Document Wizard is presented to the case manager, with the available case data loaded automatically. The case manager provides the missing data items and the document is generated.

The generated document is then automatically presented to the case manager in Microsoft Word on the desktop. If the template was automated then the document is complete and can simply be handled by the case manager according to the business process. If the template was among the dwindling number not yet

COMPANY

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PRIMARY BUSINESS

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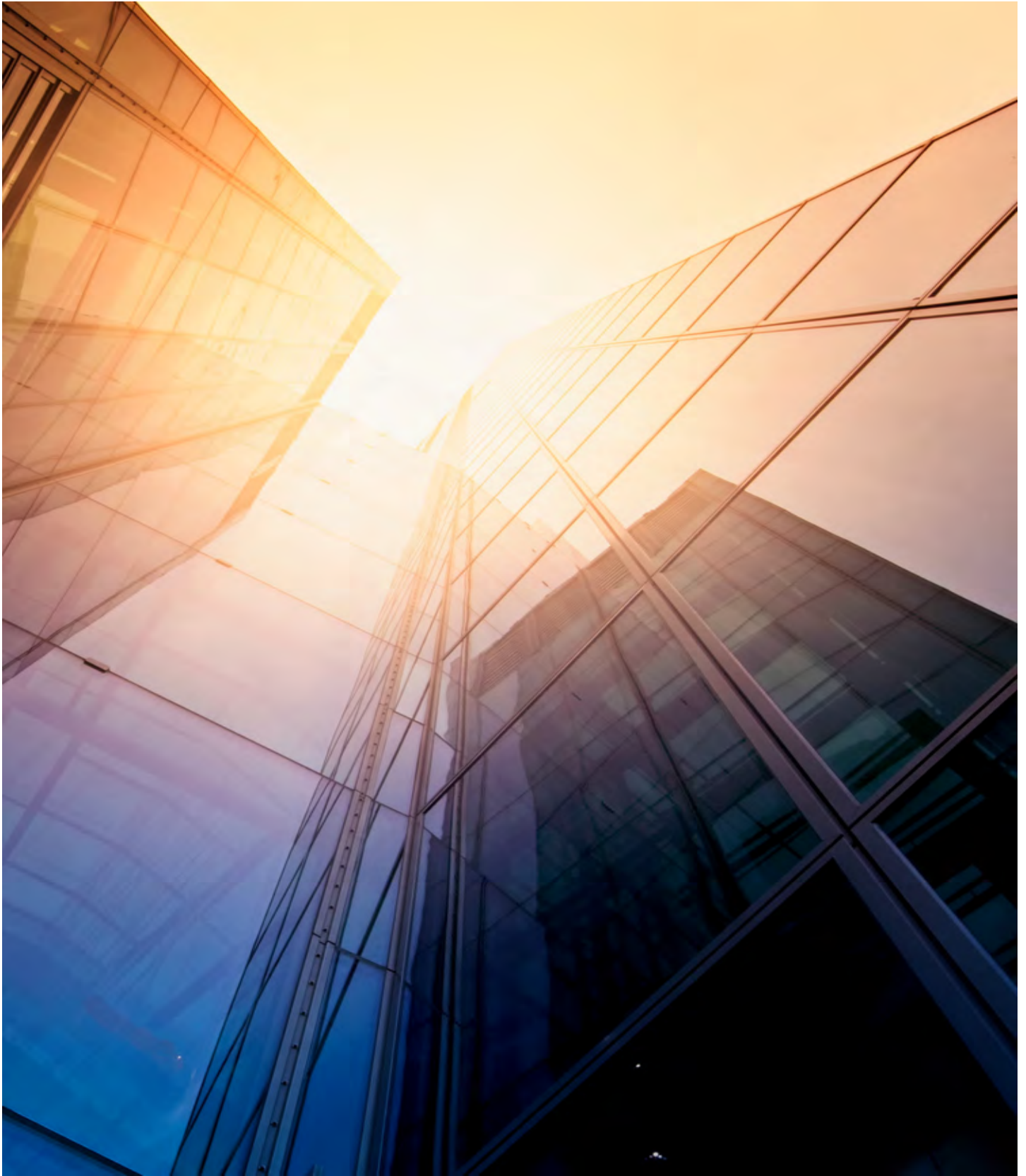
automated, then the case manager deals with it as before but with the added benefit of knowing that they have the correct and approved version.

KEY FEATURES

Template Management allows single point of access for all Design, Approval, Management, and serving of templates; includes management of non-automated templates allowing staged automation projects.

Superior integration allows seamless integration with case management system and use of data sourced from SAP.

Intelligent document assembly checks template data requirements against available case data, only prompts for what is needed, assembles document with least possible user interaction.



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