

DO YOUR SHAREPOINT USERS NEED DOCUMENT COMPOSITION?

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Date: November, 2011

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Introduction

SharePoint has earned favor as an environment for enterprise collaboration, document management and information storage for processes such as loan origination, claims processing, invoice processing and new account enrollment. Some of these tasks depend on complex variable documents, compliance-regulated content, and dynamic correspondence.

At the same time, other technologies have enabled interactive, personalized document composition to drive efficiency across many lines of business. For example, insurance agents can complete a new policy application using an interactive, menu-driven template that automatically pulls the appropriate content modules. Both agent and client benefit from greater speed and accuracy.

“Until recently, SharePoint users haven’t been able to take direct advantage of the powerful correspondence automation to build these timesaving, interactive communications. Various document composition applications and technologies have co-existed with SharePoint, but these loosely coupled arrangements don’t capture the full potential of SharePoint, and can be harder to manage,” says Leon Pillich, CEO of Aia Software.

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More Productivity in Your Document Workflow

With each new SharePoint release, users gain more capabilities, and adoption grows. SharePoint 2010 brought improved functionality for creating and managing business documents, but one key link was still missing: a true document composition component.

Do your SharePoint users still lack an integrated, repeatable process to create personalized, customer-facing correspondence efficiently in controlled conditions? If so, efficiency and productivity could suffer, but that problem can be solved by a robust, proven document composition solution.

A tightly integrated document composition tool can enhance SharePoint as an enterprise platform for information applications. Document creation and management can be centralized and streamlined. Furthermore, directly integrating document composition with SharePoint 2010 encourages the transition to electronic document management and away from labor-intensive, error-prone paper-based processes.

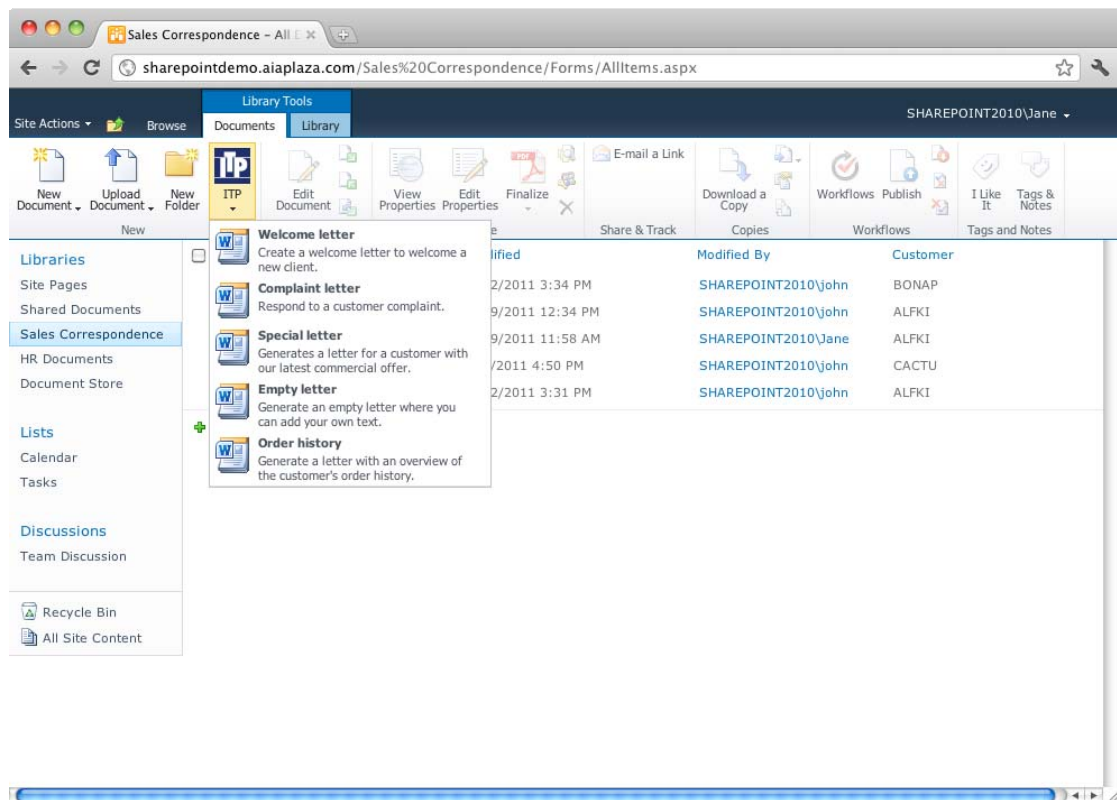


Figure 1 – Document composition directly from within SharePoint



Types of Document Output and Customer Communications Management

Almost all types of business documents can be created and managed with a customer communications platform: policies, statements, notices, letters, contracts, proposals and certifications are just a few examples. Your customers may already have numerous templates for document output, but few if any are currently created and managed as efficiently as they could be.

CCM document applications can be classified by the manner in which they are prepared:

- Structured – batch output, usually automated to a regular schedule: renewals, statements, tax notices. Batches are typically run outside SharePoint but may still store generated documents in SharePoint for follow-up processing and workflows.
- On demand – real time document generation triggered by an application event: a customer visits a web site for an online quote, which is processed in the back office and instantly produces a policy or proposal. On demand document generation may be triggered from SharePoint applications and workflows where no user interactivity is required. Resulting documents would typically be stored in SharePoint.
- Interactive – correspondence built from merging structured template and ad hoc data input by a live person: an agent creates a letter regarding an insurance claim for example. The interactive document generation process can be triggered from within SharePoint document libraries, lists or web parts. Interactive dialogues run entirely within the SharePoint UI. The user will not have to leave his familiar SharePoint working environment.

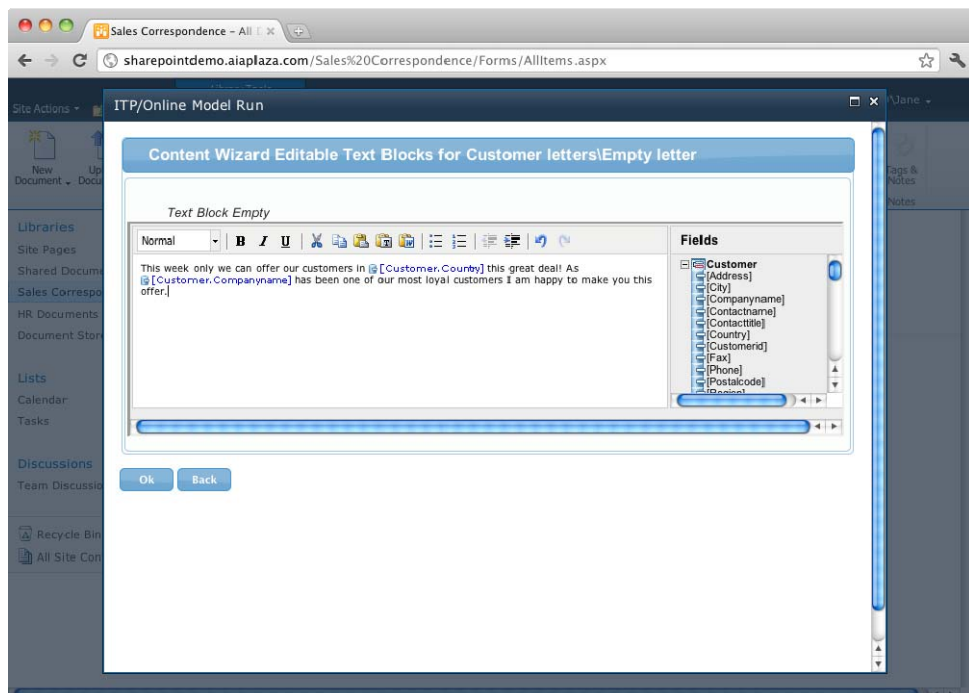


Figure 2 - Integrated interactive document composition



SharePoint and Office based solutions: will it do?

Out of the box SharePoint and Microsoft Office Word offer a variety of ways to make document related processes more efficient. Different methods provide different levels of automation. Each method has its advantages and disadvantages.

However, a complete correspondence solution such as the ITP Document Platform, will always be the best solution as the next comparison table shows:

| Solution Description | Word templates | DOCX with XML | Word Automation | ITP |
|----------------------|--|--|--|---|
| Pros & Cons | Using Microsoft Word templates; document libraries with content types that are tied to specific Word document templates + Simple solution + Good integration + Out-of-the box - Limited functionality - No content management for templates and template elements (text blocks) - Poor interfacing with external data sources - Limited capabilities to optimize and automate document generation | 'Mail merge' in DOCX with Content Controls being populated with variable data from XML files + More powerful than Word templates + 'Out-of-the box' - Programming is required to get a decent solution - Limited functionality for business logic - No content management for templates and template elements - No nested data | Using SharePoint's Word Automation Services and the Open XML SDK + Powerful + 'Everything' goes - Programming is required for everything - High cost of maintenance - No content management for templates and template elements | using a standard web-based Correspondence solution: the ITP Document Platform + Powerful capabilities: <ul style="list-style-type: none"> ▪ Business rules, interfacing with data sources ▪ Content Wizards for document composition + Control over Corporate Identity + Excellent technical and UI integration + No programming required + Excellent performance + Extensive post processing capabilities + Template design & content management repository + Highly complex nested data structures |

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Apply this Document Composition Checklist

- First, there has to be a requirement to actually generate documents, not to just organize them efficiently.
- You probably need composition tools if your organization sends customizable business correspondence and communications that involve modular standard text components like product descriptions, customer service messages or disclaimers.
- Your business uses a variety of documents that are content-rich communications. This means correspondence that goes beyond simple letters to complex contracts, legal notices, proposals and more.
- You have at least 10 users who would benefit from the productivity of a document composition tool. If you have fewer users doing basic, low volume documents, a specialized, powerful document composition wouldn't be the most effective approach.
- Your documents are part of repeatable business processes, such as HR paperwork related to new hires, or banking workflow for opening new accounts. Modular content and automated composition make sense in these situations and can boost productivity and accuracy.

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Document Output: Most Critical, Most Neglected.

Document output may be the last piece in the corporate value chain, but it's the piece the customers hold in their hands, read and keep.



Does the Tool Fit?

There are many document composition solutions on the market, and many are quite good at their particular niche. However, just because software does document composition doesn't mean it's a good fit for your SharePoint environment. What should you know before choosing document composition software to integrate with SharePoint?

- Can the tool leverage Microsoft Office and in particular, Microsoft Word for creating documents? A tool based on a proprietary revisable or on a non-revisable format (only PDF, for example) is not good enough, because some documents will require editing in a word processor after they have been generated.
- Is the software a mature solution proven under a variety of conditions?
- How scalable is the software? Can it grow with the number of users and documents? Does it have processing power to handle volumes of thousands or even millions of documents that could potentially be managed through SharePoint?
- Is it business managed? That is, can business users handle most of the processes themselves without IT support?
- Is the user experience embedded within the SharePoint interface, or is there a need to exit SharePoint for some tasks? Ideally, a document composition tool should run in the background, so users don't have to leave the SharePoint environment to create variable data correspondence, personalized communications and other business documents. This saves time, increases efficiency and delivers a smoother user experience.



SharePoint and Document Composition: Better Together

When you select the right document composition tool, you close the functionality gap with a versatile, complete document composition solution for all types of applications. You can build a complete document environment that includes document creation, along with collaboration, capture, archiving and security.

“According to leading analysts, ITP Software is the only major correspondence solution that fully integrates with SharePoint 2010 and extends its value as a complete electronic document management system,” says Leon Pillich. “ITP for SharePoint supports the entire process, from collaborative document creation to approval and distribution. Information workers can create personalized, interactive customer-facing correspondence in a controlled environment.”

Post-processing actions like printing, PDF conversion and e-mail become automated, server-based activities. Generated documents are automatically stored in a SharePoint Document Library, where they can be centrally accessed and managed.

With the addition of a personalized correspondence solution, SharePoint-based organizations gain a broader set of document generation capabilities that go beyond the limited scope of routine word processors. Pillich explains, “You’ll benefit from the ability to focus more on customer engagement and personalized communications using dynamic variable content and customer data. In other words, your organization will become a stronger customer communicator, and that translates into a stronger customer base.”

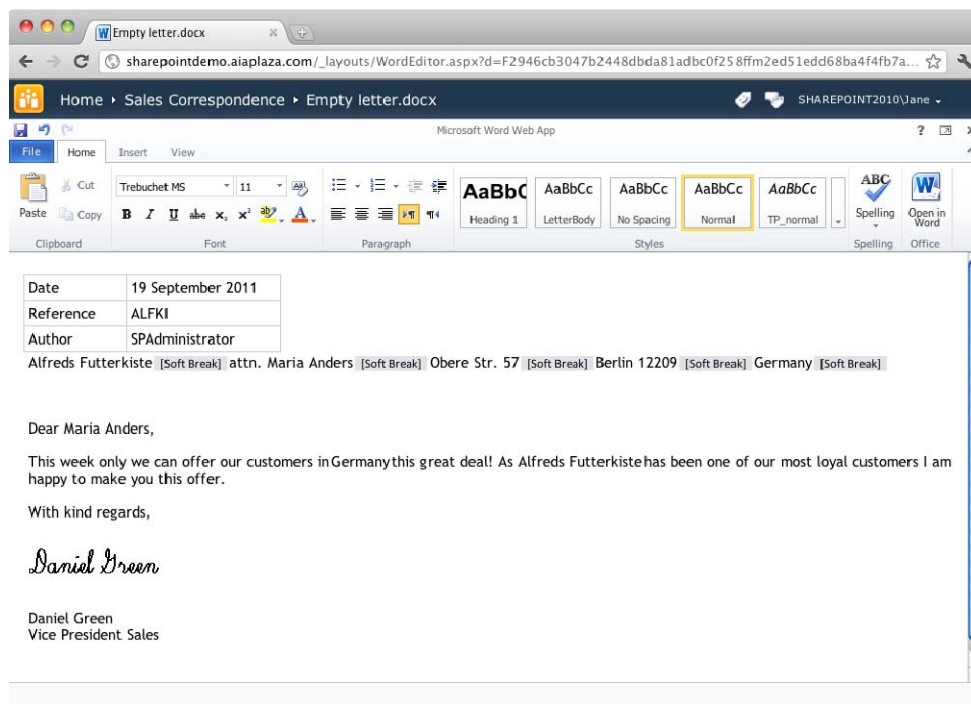


Figure 3 - Leveraging Office Web apps with integrated document composition



ITP for SharePoint

The ITP Document Platform from Aia Software is a high capability document composition solution that is in use in over 1000 customer installations worldwide.

Through Aia Software's considerable success to-date, we believe that ITP is the premier product family for business output solutions. Deployment of ITP solutions has provided many of its clients with competitive advantage through genuine reduction in overall operating costs and time to market for business mission-critical output.

The advanced capability that ITP (Intelligent Text Processing) has for creating 'interactive' bespoke, tailored correspondence is particularly well suited to a SharePoint environment. ITP for SharePoint brings the full breath of functionality already available in the ITP Document Platform as a seamless integration for SharePoint 2010.

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