

## WHITE PAPER

How to create professional business documents simply and cost-effectively

## Overview

Documents form the heart of many business processes, and in some cases (e.g., contracts, proposals, manuals, others), the materials themselves are the deliverable from the process. Currently, documents such as technical publications, contracts, leases, annual reports, prospectuses, operating procedures, manufacturing record books (MRB), and more are assembled by hand, sometimes taking days or even weeks, depending on the business process.

However, there is a more straightforward, more efficient, digital solution available, created using tools such as GCI PowerTools for Documents. With this solution for SharePoint and OpenText Extended ECM platforms, organizations can save millions of dollars in labor and administrative costs, as well as significantly reduce the time it takes to complete the documents.

This white paper explains what document automation is, why it is needed, and how companies can effectively and efficiently create and manage documents, automatically. Specifically, outlining how Global Cents offers a complete solution that is easy to use and collects all the documents you need, automatically.

## A Very Manual Problem

Organizations in highly regulated industries have to document and compile a vast amount of data as part of their everyday business processes. Whether it's producing manufacturing record books (MRBs) that contain hundreds of documents, creating reports that include a multitude of financial documents and records, or generating case reports encompassing site plans, photos, and surveyor reports. Companies have to prepare and publish these documents regularly.

Often, these processes rely on dozens of staff to physically collect and collate the original paper versions of these documents, then scanning and uploading copies to folders stored within document repositories. Alternatively, they may perform searches across their local drives, shared drives, or email servers to find the documents. This manual process is highly error-prone, time-consuming, and very expensive. Pages go missing, duplicated in error, or are not in the correct order. The scanned images can be of poor quality and unreadable. There is no unified branding to the completed document, no table of contents (TOC), and there is no easy way to reorder the materials.

### A practical example from the public sector

Publishing documentation for public hearings is an excellent example of a manual document generation process. Currently, local, regional, and federal bodies periodically collect and publish agendas and other materials for public hearings.

These types of organizations often create twenty to thirty very complex documents on a weekly basis, each of which includes every file relevant to an individual hearing. These dossiers may consist of financial spreadsheets, site plans, photos, surveyor reports, blueprints, as well as the overall agenda for the hearing, all to be included in one document.

To create this important and mandatory set of documents, staff have to find all the relevant materials in their records and assemble them correctly. Without a digital solution, they have to locate a physical copy of the required documents and scan them. They possibly also have to contact external parties that are involved and obtain the relevant documents from them.

After this process, the team needs to check each document for quality, making sure that any illegible or unacceptable materials are corrected. They would also have to account for human error and check to see if the documents are assembled correctly and complete.

Once the collection and collation process is complete, the staff sends the dossier to the chairman or secretary of the hearing board. If the dossier is complete, correct, and accurate, the process would be a success. Should a single page be out of place, incorrect, or otherwise unacceptable, the chairman or secretary rejects the dossier, and the team then needs to revise, recreate or obtain the missing information until the dossier is accepted.

Ultimately, spending vast amounts of time and effort—potentially costing the organization thousands or even millions of dollars annually.



## The First Step

As you can tell from the above example, it can be an arduous and time-consuming task to collect all the correct documentation, format, and publish it correctly. However, this doesn't have to be the case.

Many companies use Enterprise Content Management (ECM) to store, organize and manage their documentation. While this certainly is an excellent first step from the manual method, ECM only goes so far in the pursuit of a digital solution to document automation.

## Document Automation within Content Suite

Essentially, ECM provides the core set of features needed to store and manage unstructured content across your organization, including document management, workflow, search, and information retrieval services. Allowing users to collaborate on documents enterprise-wide, managing permissions for documents, increasing productivity, and efficiency. All tightly integrated into a platform that is easily customized and extended.

While it's true that ECM helps keep track of documents and assists users in finding and managing those documents, in terms of a complete document automation solution, additional functionality is needed.

### What else is needed?

ECM is a great start for companies seeking to automate document assembly and publishing. There are several additional features and functionality required to complete the document automation solution.

#### Ability to convert files

When creating an assembled document, one can expect to deal with a large variety of file types. These may include CAD files, PDFs, Word documents, Excel spreadsheets, Visio diagrams, and more. When dealing with the large variety of materials that most assembled documents contain, it helps to be able to convert those documents into a format that is easily accessible for users or intended readers.

The ability to convert these files into a standard format like PDF, HTML, or XML is an essential feature of any document automation solution.

#### Merging of documents

Having the individual documents rendered into a standard format like PDF is a first step before merging into a single, assembled document. Most companies want a complete table of contents (TOCs), bookmarks, hyperlinks and they want to leverage any existing TOCs from the original materials as well as preserving the original documents' bookmarks and hyperlinks in the assembled document.

Creating a single assembled document that retains original TOCs, bookmarks, and hyperlinks is a critical feature of a document automation solution.

#### Dynamic content

Having the ability to insert dynamic content into the assembled document adds higher levels of

efficiently. Most people are familiar with updating dates in a document, but document automation solutions take it to the next level. There are no limits to the amount of metadata available to be added as dynamic content like the document owner, last revision date, latest version number, and more. This kind of dynamic-content insertion can transform the assembled document, allowing for auto-generation of contracts, leases, and other legal or regulatory documents.

Dynamic content insertion is an indispensable feature of a document automation solution..

### **Customizable templates**

Different assembled documents require different formatting and structures. Each assembled document has a unique purpose, like documentation for a specific client or regulatory agency, requiring different formats (e.g., font, colors, style, and layout) and structures (e.g., tables of content, headers and footers, chapters, and watermarks).

Without customizable templates, changing the format and structure of assembled documents would remain a manual process.

### **Review, approval, and signing capabilities**

A review and approval process with online signing capabilities is often needed to complete a document automation solution. The assembled documents may be contracts, agreements, policies, or procedures that require signatures before the documents can be accepted by clients, or regulatory agencies. Many companies are finding electronic, graphical, or digital signatures to be an effective method of signing these documents.

The intended audience of the finalized document will drive the level and complexity of the review and approval process as well as which type of signature.

Having a review and approval process with signing capabilities adds additional sophistication and efficiency to a document automation solution.



## Summary

ECM provides the core set of features needed to store and manage unstructured content across your organization. However, additional features are needed to have a complete document automation solution. Here is a summary of those features:

- The ability to convert these files into a standard format like PDF, HTML, or XML is an essential feature of any document automation solution.
- Creating a single assembled document that retains original TOCs, bookmarks, and hyperlinks is a critical feature of a document automation solution.
- Dynamic content insertion is an indispensable feature of a document automation solution.
- Without customizable templates, changing the format and structure of assembled documents would remain a manual process.
- Having a review and approval process with signing capabilities adds additional sophistication and efficiency to a document automation solution.

Global Cents provides an easy-to-use SharePoint and OpenText Extended ECM apps that automates document production. Let's take a look at how Global Cents helps, and how they can improve your experience within these ECM platforms.

## How Global Cents Radically Enhances and Improves the Document Automation Process

With the standard set of features offered by ECM in mind, you may think that consistently creating an error-free assembled document cost-effectively is almost impossible.

However, with Global Cents, the process becomes much simpler and significantly more efficient.

Global Cents offers a range of products and solutions that extend and enhance ECM. From workflow and deployment tools to archiving and document publishing tools, Global Cents can effectively address the challenges of a modern SharePoint and OpenText user.



**GCI POWERTOOLS  
WORKFLOW**

**GCI PowerTools for Workflow** can automate the collection of all relevant content based on the requirements for the specific assembled document and route the assembled document for review, approval, and optionally signature.



**GCI POWERTOOLS  
REPORTS  
& VIEWS**

**GCI PowerTools for Reports and Views** offers enhanced reporting capabilities plus provides the functionality to tailor the user experience.



**GCI POWERTOOLS  
DOCUMENTS**

**GCI PowerTools for Documents** converts, formats, assembles and publishes materials from over 200 file types into standard document formats like PDF, Word, or HTML. This tool also offers the ability to insert dynamic content into the assembled document and to digitally sign it.



**GCI POWERTOOLS  
VIEWER**

**GCI PowerTools Viewer** is a fast HTML5 document viewer for ECM that views more than 300 file types, including 2D CAD, provides secure annotations including redactions, performs on-the-fly PDF rendering, and enables enterprise-wide document acknowledgments.

## How to generate technical publications, contracts, leases, annual reports, prospectuses, operating procedures, and MRBs using the Global Cents Document Automation Solution

Now that we know how Global Cents PowerTools works on collecting and compiling the document, it's helpful to understand how these tools operate and in what order. Below is an explanation of this process.

1. The Global Cents solution can be configured to automatically find and collect relevant documents that are required to make the assembled documents based on a set of criteria. These criteria could come from SAP, another ERP system, or elsewhere.
2. Arranging the collected documents in a pre-defined order saves significant time and effort. From there, they can then be converted to a standard format.
3. Inserting of dynamic content and formatting can be applied including headers, footers, and watermarks.
4. The solution can be configured to identify any missing information based on pre-defined criteria specific to each assembled document's requirements.
5. Once complete, the assembled document is sent around for any final approvals and signatures.
6. Routing the assembled document for review, approval, and signature is the final step.

The Global Cents complete document automation solution performs all of these essential and necessary tasks within an intuitive and straightforward user interface for enterprise-wide adoption.

The screenshot shows the 'opentext Content Server' interface for publishing a sales proposal. The main area is a table with the following columns: Order, Name, Size, Split TOC, Levels, Docs, and Front page. The table contains the following items:

Order	Name	Size	Split TOC	Levels	Docs	Front page
	Sales Proposal	9.9 MB	<input type="checkbox"/>	<input checked="" type="checkbox"/> 1	<input type="checkbox"/>	GCI_Front Pages.docx
1	Solution Summary	400 KB	<input type="checkbox"/>	<input checked="" type="checkbox"/> 2	<input checked="" type="checkbox"/>	GCI_Section_Letter.docx
1.1	Executive Summary	333.8 KB				
1.2	License Budgetary Pricing	32.5 KB				
1.3	Services Summary	33.8 KB				
2	Global Cents Collateral	8.8 MB	<input type="checkbox"/>	<input checked="" type="checkbox"/> -1	<input checked="" type="checkbox"/>	GCI_Section_Letter.docx
2.1	Datasheets	7.2 MB	<input type="checkbox"/>	<input type="checkbox"/> -1	<input type="checkbox"/>	<None>
2.1.1	Competencies	1.1 MB				
2.1.2	PowerTools for Deployments	2.5 MB				
2.1.3	PowerTools for Documents	798.7 KB				
2.1.4	PowerTools for Reports and Views	578.6 KB				
2.1.5	PowerTools for Workflow	800.1 KB				
2.1.6	PowerTools for Content Export	735.5 KB				
2.1.7	PowerTools for Digital Signatures	749.6 KB				
2.2	Whitepapers	1.6 MB	<input type="checkbox"/>	<input type="checkbox"/> -1	<input type="checkbox"/>	<None>
2.2.1	Case Study - Managing Regulated Documents	873.5 KB				
2.2.2	Whitepaper - Signatures	796.5 KB				
3	OpenText Collateral	697.7 KB	<input type="checkbox"/>	<input checked="" type="checkbox"/> -1	<input checked="" type="checkbox"/>	GCI_Section_Letter.docx
3.1	OpenText Content Suite	494.9 KB				
3.2	OpenText Content Server	202.8 KB				

At the bottom of the interface, there are buttons for 'Apply Changes', 'Revert', and 'Build', along with a 'Document Builders' dropdown menu.

## How GCI PowerTools benefit document automation

With traditional document production processes demanding a highly manual effort, the key benefits of the GCI Document Automation Solution are the massive reduction in the level of effort, allowing for the reallocation of staff, the significant reduction of human errors, and the improvement of quality of the final documents.

The GCI PowerTools Suite also delivers significant time reductions, enabling organizations to generate and publish assembled documents faster than previously thought possible—in a

matter of minutes rather than days, weeks, or months. Where every second is a dollar lost, this is extremely useful for companies who wish to create their assembled documents and not outsource the process.

For review, Global Cents collects all the documents, drawings, files, and other materials you need automatically—so you don't have to do anything manually. It then catalogs each document, comparing it with the specific requirements for each assembled document criteria that you are using, and notifies you of anything you still need to collect or create to ensure a comprehensive and complete final document. After obtaining the documents, they'll automatically be converted, organized, formatted, processed to insert dynamic content, headers, footers, watermarks, and the auto-generation of the table of contents, and published in an easy to read PDF format—ready to be automatically sent around for review, approval, and signature.

This automation eliminates human error and frees up human resources for less tedious tasks around the organization.

### In Short, the GCI Document Automation Solution allows you to:

- **Convert over 200 different file types into PDF and other formats (such as DOCX and XML)**  
Since PDF is an internationally recognized format, you'll be able to keep your documents consistent and easily accessible for all viewers.
- **Assemble documents as part of a controlled and structured process**  
Through configurable processes, you'll never leave out a required document again as the Document Automation Solution keeps track of what you need for a successful and complete assembled document.
- **Dynamically insert paragraphs, metadata or workflow data into documents**  
Quickly add additional dynamic content to your documents that need updating before or after assembly, saving you the time it would take to revise, re-review, and re-approve.
- **Digitally, graphically or electronically sign documents**  
Add signatures to confirm approval or acceptance of the assembled document
- **Collate and publish disparate files into an assembled document**  
With the GCI Document Automation solution, you'll be able to include a variety of data in one assembled document, no matter their file-type or formatting.

### Which organisations could benefit from using the GCI Document Automation solution?

The GCI Document Automation solution is a powerful addition for any company that manages complex documents. Many industries with rigorous documentation requirements will find this solution essential to document generation, review, and approval. Organizations expand the use of this solution to areas not initially considered because of its ease of use, ability to save time, and improve quality during the document generation and publishing process.

A few of these industries include:

- Life Sciences
- Energy and Utilities
- Financial
- Engineering
- Manufacturing
- Defense
- Public Sector

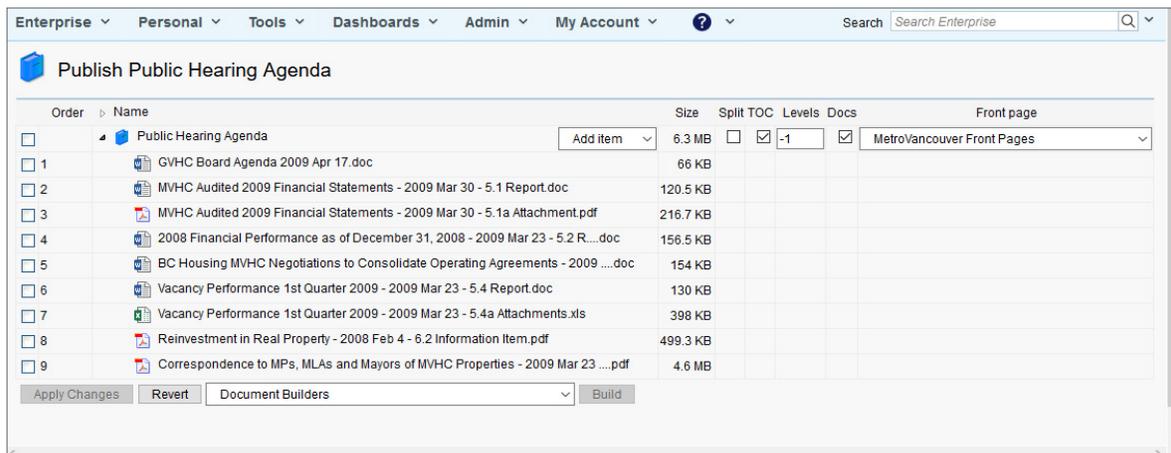
### A return to the practical example

Remember the organizations from the Public Sector that we introduced earlier in the white paper? Let’s re-imagine that situation with the GCI Document Automation solution at their disposal.

The staff would access ECM, initiating a workflow process to collect all relevant information for the dossier based on pre-defined criteria like Hearing Date or Type of Hearing.

Collating the information and running a report to ensure the completeness of the files. The team inspects the dossier virtually via an intuitive browser-based interface. Ensuring the information is in the correct chapters enabling the auto-creation of the table of contents. After this review, the process converts the documents into a standard format and applies specific formatting based on pre-configured templates. Additional processing occurs inserting dynamic content like dates, version numbers, regulatory jurisdiction, and other metadata. Next, the process electronically sends the dossier for review and approval. Within minutes, the document generation and review process has created the dossier and sent it for review and approval. Once approved, publishing the document to their public site is also automated.

Completing the whole process is quick, accurate, and efficient. This process is highly repeatable, ensuring quality and document integrity.



## Conclusion

Generating documents can be a long and challenging process if you lack the right tools. The collection of every file, spreadsheet, certificate, or drawing can mean hours, days, or weeks, of work for organizations. By using the GCI Document Automation solution, organizations with complex or onerous documentation requirements can gain an edge by automating the document generation, review, and publishing process.

If you'd like to find out more about how you can get the most out of your SharePoint and OpenText Extended ECM investment, contact us. Global Cents has the solutions you need to optimize your document automation processes, no matter how large or complex they may be.

We understand that traditionally, automating processes on ECM platforms is complex. Since 2005, our team of experts has been simplifying automation efforts for organizations large and small.



Contact Global Cents today and unlock your organization's potential.

To learn more visit our website [globalcents.com](https://globalcents.com) or contact us at [info@globalcents.com](mailto:info@globalcents.com) 

