

What is Document Automation?

Module 1 – Document Planning

Version 1.0

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1. What is Document Automation?

Document automation is revolutionising the way customised documents are delivered with efficiency and accuracy. This technology uses a questionnaire to extract the required information, to then produce a tailored version of the document for your specific circumstances.

2. Why use Document Automation?

Anyone who needs to regularly produce the same documents should consider using document automation. There's no limit on the industries that can benefit from the speed and accuracy automation provides.

2.1 How it Works

There is no need to reinvent the wheel every time a document is created

Document automation means creating reliable documents with minimal input. Once a questionnaire and template have been developed, they can be used to generate unlimited versions of the document.

Options and flexibility

The questionnaire can cater for variations within a document by using the answers provided to steer the questionnaire in different directions. This ensures that the minimum and only the relevant questions are asked to capture the required data.

Low maintenance

A single version of the questionnaire and template are maintained. When updates are required, the changes are made in a single version of the questionnaire and template and once set live, will immediately become the version that is generated.

2.2 The Benefits

Efficiency

Automation creates documents with accuracy and speed. A single document can cater for multiple scenarios and be generated over and over again.

Re-keying of data is minimised as responses entered are stored and available to reuse in future documents.

Workflows are improved by the integration of PMS/DMS systems and e-Signature tools.

Accuracy

A questionnaire can be as flexible or as controlled as you require. By setting rules and limitations, you can restrict (or remove) the potential of errors or data being missed.

Consistency

No matter who generates the document – the result will be the same. With everyone using a single template, the wording and formatting will always remain consistent and comply with the organisation's style and branding.

3. What is involved?

Determine what documents can be automated

Any document that is used regularly is a great candidate for automation. The more variations and complexity to the document, the greater the benefit that automation can provide.

Build a form

A form comprises the **questionnaire** and **document template**. The questionnaire is designed to capture the required data, and the document template is the precedent document.

Once the questionnaire has been created, the automation is applied to the Word template and together the customised output is determined.

The form builder will work with the document author to identify the variables and alternatives to be catered for. The questionnaire is then designed and conditioned to meet the requirements, after which the Word template is coded accordingly.

Test and release

Before a form is released, the author and builder work together to test and finalise the document. This is the time to consider the variations of the document and whether all of the goals and outcomes have been achieved. Once the document is set for release, access settings should be considered to ensure the appropriate team members specifically do or don't have permission to generate the document.