



Automate Document
Creation Using Smart
Templates

Efficient Document Creation in Four Steps

With SmartDocuments for template management and document creation, you manage all your document templates centrally and zero-coding. Our solution divides document templates into four different focus areas:

1. Visual Identity

This section defines the visual identity of your templates, ensuring consistent branding across all documents. It covers aspects like fonts, font sizes, colors, line spacing, and more.

2. Body Templates

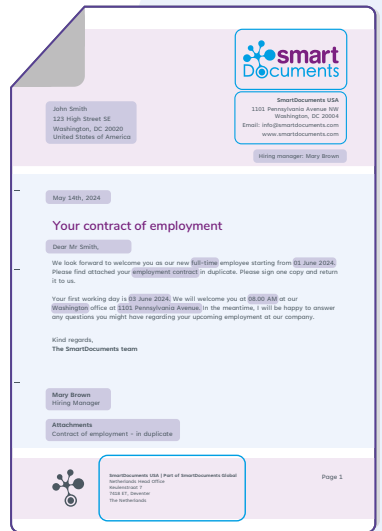
This is the bulk of fixed text and structure in your final document.

3. Building Blocks

These are recurring and reusable elements that can be incorporated into any number of document templates.

4. Data and Variables

This section manages the dynamic data that populates your document templates. Information can be entered through Q&A prompts, or generated automatically using data queries, XML or API, creating perfect personalized documents.



Visual Identity

The communications department specifies the design of your documents, such as logo, color usage and fonts, and maintains these elements in one central location. If colleagues copy texts or even change fonts while creating a document, SmartDocuments ensures these entries are auto corrected. The final document always appears in the default and correct design.

Body Templates

Documents can often differ only in the area of a sentence, piece of text, etc. In the case of employment contracts, there is a standard version and then a number of additional versions for each different function or department. With SmartDocuments, you only have one version per template, as you can use rules to show and hide specific text elements. This means that you maintain one document template per process.

Building Blocks

Thanks to building blocks, changes across templates, such as changing your office address, is done quickly. You only need to change the content of the building block and all linked templates will automatically be updated.

Data and Variables

This is the last step to a personalized document. Dynamic data can be obtained using our “Q&A principle”. The end-user walks through queries with which the document is to be populated, and will be guided with the use of explanatory texts or specifications related to the input format (e.g., for a zip code, date, numbers). You can also automatically populate documents with dynamic data that is retrieved from other applications in your organization.

The SmartDocuments template management system consists of three software components: SmartControl, SmartEditor and SmartWizard. All three applications are included in the scope of the standard delivery.

smartControl

Central Administration

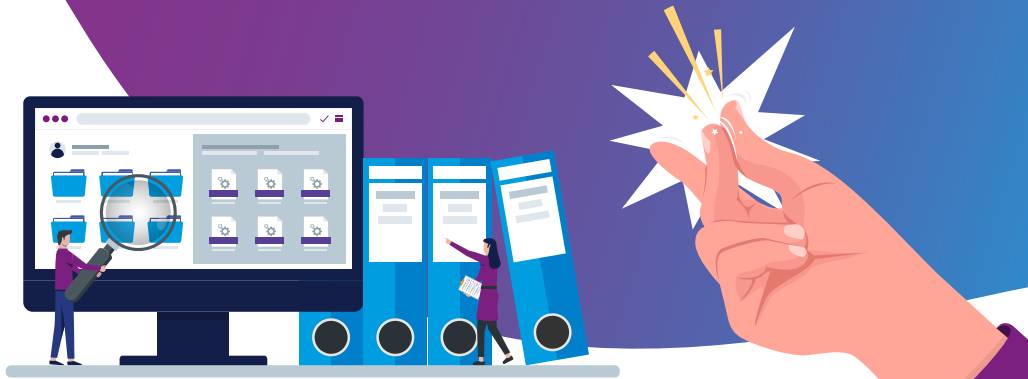
This is where you manage your document templates, define your visual identity, manage user rights, individual modules, building blocks, headers and footers, and configure the system settings.



smartEditor

Your Template Builder Tool

Create templates quickly and easily. Design the document templates in Microsoft Word. You then use the integrated SmartEditor to define the question structure for the Smart-Wizard: What data and information should be determined in the question dialogue? Just drag & drop the defined questions, text modules and building blocks to the right place in the document and the template is done.



smartWizard

Our Web-based Interface for End-users

End-users populate the document with variable content using our SmartWizard. The final document is created by answering the questions set up in the SmartEditor. The wizard always opens the most recently released version of the document template. This allows end-users to work with SmartDocuments even if the template builder is making adjustments to the document template at the same time. A document can also be created by starting it with an XML or JSON-file, automatically populating data fields in the document.

Thanks to flexible automations, the use of help texts and predefined input rules, creating documents with SmartDocuments is done quickly and easily, without end-users needing any extensive training beforehand.

Connecting Cleverly Our Integrations

Do you manage document templates in several applications, but would you like to create and manage these centrally? No problem. We offer an extensive portfolio of integrations with third-party applications, such as:

- ✔ Document Management Systems
- ✔ Workflow systems
- ✔ Enterprise Resource Planning systems
- ✔ Business Process Management systems
- ✔ Case Management systems
- ✔ Specialized procedures
- ✔ ... and many more.

Visit our website for an
up-to-date list of our current
partners and integrations



Additional Modules

Tailor-made Extensions

Expand SmartDocuments as you wish. The following additional modules are currently available:

- Active Directory synchronization
- Concept Storage
- Data Query
- Email Plugin
- High Volume
- Multi Document Output
- PDF/HTML
- Redaction of sensitive information
- Search
- Single Sign On
- XML/JSON

Efficient Document Creation

- Standardized appearance of all documents
- Reduction of document templates. No more proliferation of files, but quick template updates and easy maintenance
- Minimization of user input errors
- Easy-to-create documents
- Time and therefore cost savings.

Discover how SmartDocuments
can benefit your organization.
Contact us for a demo!





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