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OpenText - SmartDocuments Connector for Content Suite

Automatically populate Microsoft Word templates in SmartDocuments while working on cases in OpenText Content Suite or Extended ECM

Increased ease of use

Increased data quality

Reduced processing time

What if it was possible to increase efficiency and reduce errors and time spent during manual transfers by automatically populating Microsoft Word templates in SmartDocuments with metadata from OpenText Content Suite, or vice versa?

OpenText SmartDocuments Connector is a Content Suite module. It allows users to create new documents or new document versions in Content Suite via SmartDocuments' document generation functions and update both the document and metadata when returning to Content Suite.

While working on a document, Content Suite users can begin creating a document such as a letter or a form for a customer within their case with no need to enter all the case related data manually within the document. In comparison to a manual activity, this way of working increases processing speed and reduces spelling or typing mistakes.

Increased ease of use

Thanks to the connector, the manual re-typing of already available metadata is no longer required. The integration simplifies the generation of personalized or pre-populated new documents in combination with SmartDocuments. End users are able to start SmartDocuments directly from the Content Suite interface, in both the Classic View and Smart View interfaces. The data is transferred invisibly in either direction, providing the least amount of effort for end users while getting the most out of both products. Creating templates in SmartDocuments requires zero coding.

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smart Documents

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partnership:**

https://smartdocuments.com/
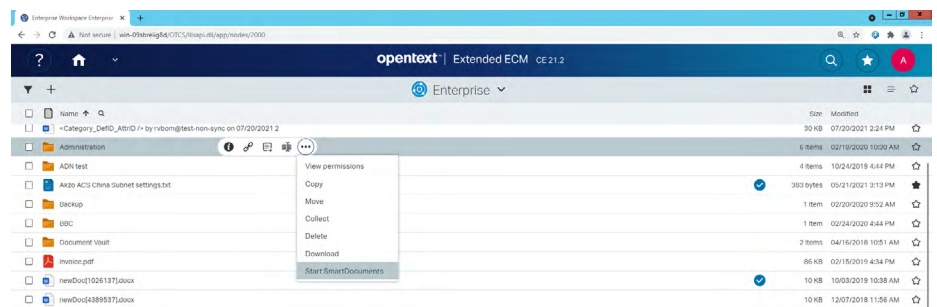partners/opentext/

Increased data quality

Map and then automatically pass any category attributes or specific document attributes from the Content Suite document to SmartDocuments, having the values filled in within the SmartDocuments template. The automation of the metadata integration significantly reduces mistakes due to manual spelling or typing errors. This increases the quality of internal and external processes.

Reduced processing time

Copying metadata to letters only requires a few mouse clicks, the same for future updates. The generated document is automatically handed back from SmartDocuments into Content Suite, updating the document or version as well as any mapped category attributes.

System changes

The connector is a documented software package that is installed during or after the implementation of a Content Suite and SmartDocuments project. Once this is completed, end users can put placeholders for metadata values at the desired place in the SmartDocuments templates and maintain a mapping between the fields on both systems.

Starting SmartDocuments from a document

Key Features

Integrated in OpenText smart UI

The integration in Content Suite is directly accessible from the well-known function menu of the container or document the user is working from. Based on the context, the system knows whether to create a new document in that container or create a new version. Users just need to click the function menu or use the SmartDocuments icon when hovering the mouse over the document.

Bi-directional metadata synchronization

Based on a mapping being set up towards, from, or bi-directionally, the system knows which fields should be taken from the metadata of the starting object, and passes them towards SmartDocuments so the template can be prefilled in SmartDocuments. Upon completion of the document in SmartDocuments the (changed) metadata can be updated in both the Word custom properties and the same or other category attributes.

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Mapping configuration for either document, folder or business workspace

Since containers like folders or business workspaces often only have a part of the document's metadata available, the mapping between the different types of objects can be differentiated, if needed. This provides full flexibility to not only pass particular metadata from a starting folder, but populate other fields coming from the generated SmartDocuments Word document in the new document created in Content Suite.

Preconditions and considerations

Usage of the described connector requires licensing and deployment of the SmartDocuments application. SmartDocuments is a third-party software from SmartDocuments (**www.smartdocuments.com**). Any required SmartDocuments licenses are not part of the OpenText – SmartDocuments Connector.

To talk to an OpenText Professional Services expert about this solution or to request a proposal, please contact **ProfServices@opentext.com** or visit **www.opentext.com/services**

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