

An industry white paper

From the desk of

Jacques Mirodatos

Interactive documents – word processing or transactional tools?

The interactive document requirement is presently met through adapting the way existing tools function, generally by writing bespoke interface applications tailored to corporate or individual application's needs. The primary contenders for these applications are Word Processing tools and complex Document Composition solutions. This document compares the benefits and pitfalls of each solution set.

Interactive documents – word processing or transactional tools?

For years, a debate has raged on and it is still unclear who the winner will be, or indeed, if a winner may ever be declared. The contenders are well known to the modern enterprise who has often paid tributes to them both. First, let's introduce the contestants:

On one hand there is the almighty, almost universal and ubiquitous MS Word, though in deference to other tools in the space we'll refer to this as Word Processing. It allows the most non-technical individual to create, edit, change, review and produce an extensive array of documents, from simple letters to quite complex and lengthy reports, passing through contracts and even marketing materials. Indeed, it is possible to add variable data and insert spreadsheets into current tools which extends their reach considerably. Today, many companies have hundreds if not thousands of readily available templates to support every aspect of the front and back office life.

On the other hand, there is the Document Composition tool, usually entirely managed by the IT department, Document Composition tools replace the traditional 'print program' and effectively churn out the daily mass of batch documents of varying complexity that need to be produced in the most cost effective manner. Document Composition tools initially targeted data driven documents such as invoices and statements. However, they quickly began extending their reach into the more textual space occupied by the Word Processing tools.

As the Word Processing and Document Composition tools encroach on each others' territories, one can reasonably ask which solutions are likely to prevail?

The shortcomings of Word Processing tools are well identified if, however, mostly ignored. Difficulties include:

- enforcing presentation rules (corporate fonts, layouts, numbering systems etc),
- validating content (for compliance, language, tone, legal admissibility)
- ensuring proper storage for retrieval (for compliance, customer services etc)
- managing templates.

In short, corporate control over the widespread use of Word Processing tools is almost impossible. Strong advocates argue that this is where its beauty lies, and indeed, the flexibility provided is quite astounding (imagine drafting even a simple document such as this white paper without a Word Processing tool!).

But the Document Composition tool, which overcomes the Word Processing tools' shortcomings, and more, is not an improvement for the average office worker. Creating documents and or templates is slow, inflexible, complicated, not intuitive, and certainly unavailable to non technical or specialist document development staff, making it an almost impossible tool for quick turn around requirements, such as interactive documents.

The interactive document is in general a template where most of the content, the presentation and even data components are prepared in advance of its use. A minimal amount of flexibility is available to the user who selects a template and applies the permitted customisation prior to

final production. Document types range from letters to contracts or forms, to marketing brochures, product offers or customised promotional flyers. In short, a document that is very closely related to the business and that contains text, images and often both.

The authoring of such documents is typically a two-step process. The first step involves a particular user or group of users, we'll call them authors herein, who draft and approve the vast majority of the final document content, text, images and layout, and define a set of personalisation rules. The personalisation rules prescribe the changes that can be applied to the template, for instance selecting paragraphs, editing or changing existing content, selecting a different image or message or even importing entirely new content into the final document.

As a second step, a different user, or group of users, select an appropriate template, apply the relevant changes within the boundaries set by the authors, then create mail pieces to a unique recipient or a group of recipients.

Unfortunately, neither Word Processing nor Document Composition tools offer a suitable platform for such scenarios. Word Processing tools are too permissive and the Document Composition tool is too restrictive. Although Document Composition tools have made a lot of progress in this direction, there are still too many limitations for them to be effective Interactive Document platforms. They are too technical and lack the simplicity and intuitive nature of Word Processing tools. In the absolute, defining a template is simple enough – for the trained document developer. However, change to a template, an inevitable feature of business life, is not simple in this highly controlled world and a simple rewording of a paragraph often generates unacceptable elapsed times.

The solution lies with tools that are capable of simplicity, yet that are powerful enough to enforce standards and constrain users within acceptable limits. And the most appealing feature is that such tools must be available in complete autonomy to the end users themselves, allowing quick turn around times and maximised usage. Of course, if so desired, such tools can be placed under the supervision of technical people, especially when the output produced needs to be directed to the production facility.

And the winner is.....!!

The Interactive Document battle will be won by neither Word Processing nor Document Composition tools quite simply because because none of these tools were created with this objective in mind. Powerful new tools have been developed with the interactive need in mind, and with no intention to replace either Word Processing nor Document Composition tools. One really should see this as a case of horses for courses such that each tool can do what it is best at:

- Word Processing tools can still be used for simple documents that require little control and need to be heavily customised.
- The traditional Document Composition tool can still be used for complex, high volume transactional documents.
- Interactive Document software is emerging to offer specific capabilities to a new world of requirements that none of the existing tools will ever be able to support.

Yes, a third breed of document tools is well on its way and which will provide powerful solutions for the Interactive Document needs, notably:

- Certain letters – particularly call centre letters.
- Customer communication output such as promotional campaigns, reacting to unexpected events (economic, competitive, environmental).
- Product or service announcements, flyers, and promotional materials.

If you are interested in debating this subject further please feel free to contact the author – Jacques Mirodatos.

Jacques is presently the Technical Director of Nirva Systems UK Ltd. Jacques has more than 20 years experience in the document space as a technical director and industry evangelist. He has held senior technical positions at numerous specialist companies in the document space including Astron (prior to its acquisition by RRD), edotech and Lasercom. He has also sat on advisory panels with various composition vendors, most notably Metavante and Exstream. Jacques' numerous roles have included consultancy, analysis, architectural design and project management. Jacques possesses a rare capacity to bridge the communications gap between technology and business requirements making him a sought after analyst as well as a speaker at international seminars and conferences.

In addition to his role as Technical Director of Nirva Systems UK Ltd, Jacques is the Chief Architect for the Nirva set of products.

Please feel free to contact Jacques on:

Jacques.mirodatos@nirva-systems.com or +44 7902 923 774