Dialogue Live
THE SOLUTION FOR INTELLIGENT, INTERACTIVE DOCUMENTS
imagine the next dimension of document automation
Enterprises conduct hundreds of business processes every day. Most of these processes are in place to optimize the relationship businesses have with their customers. Others are aimed at managing employee relationships.

Research suggests that seventy percent or more of these processes have a common requirement to use or produce some type of document. Documents are used to collect data, communicate internally, and to market, sell, and correspond with customers.

Documents, or communications, vary by format, content, delivery channel, and many other characteristics, and can generally be grouped into three categories:

• **High-volume**—require scheduled production runs that process vast amounts of variable data, provided by various systems and data sources, to generate documents for a large number of customers at one time. Examples include monthly statements, bills, direct marketing, and correspondence.

• **On-demand**—point in time requests for a specific document. These processes often involve people, like agents or customer service representatives, requesting a document through some type of interactive system. The system sends data they have entered to a document service that composes the required communication and sends it back to the requesting system in real time. Examples include proposals, quotations, and correspondence.

• **Interactive**—people interactively participate in the completion of a document by providing data or selecting content within the document itself. Common examples of interactive documents include enrollment forms, proposals, quotations, and correspondence.

Most enterprises deploy many systems and processes to address these different document application requirements, and attempt to integrate them through expensive projects. These attempts are often ineffective in meeting business and customer objectives, and end up requiring even more expense to maintain and support the systems.

To improve the customer experience, while increasing internal productivity and controlling costs, an enterprise document automation platform is required that supports all types of document applications and streamlines the related processes.
The Challenge with Interactive Documents

While the creation of high-volume and on-demand documents is controlled by automated systems and processes, interactive documents are completed and managed by different people within different departments across the enterprise. Further complicating matters, enterprises typically have many point solutions and processes for different types of interactive document applications—some for creating letters or general correspondence, others for proposals, and still others for contracts, quotations, forms, enrollments, and other point-of-need documents.

Customer-facing employees spend an inordinate amount of time completing different types of documents for clients—using everything from word processors to purchased application software and custom-built systems. This siloed and people-intensive environment is very costly for organizations, error prone, and lacks controls to ensure that compliancy and corporate standards are met.

Companies attempt to control this environment with thousands of different IT-developed and supported templates, but most provide little to no flexibility for customer-facing employees to meet their customer’s needs. Integration with back-end systems is either non-existent or implemented through inefficient processes and expensive projects. This results in extraordinarily high development and maintenance costs to the organization, failure to provide customer-facing employees with the tools they need to meet customer demands, and ultimately, a less than optimal experience for the customer.

Interactive documents are often a single step in a larger business process. In some cases, the purpose of the interactive document is to collect information in order to update databases or to generate the final documents to be sent to customers. Manual processes requiring many people to re-key data, make copies of documents for records management and archives, and provide fulfillment are inefficient and result in errors and high costs to the organization.

Without a common platform that seamlessly supports high-volume, on-demand, and interactive document applications, organizations can become trapped in a manual, error-prone, and inefficient environment that results in great expense—both in terms of customer retention and the bottom line.
The Solution is Dialogue Live

Integrated with Exstream’s market-leading Dialogue for high-volume and on-demand enterprise document automation, Dialogue Live is an intelligent, interactive document solution that provides a common infrastructure for managing the editing of all types of interactive documents across the enterprise. Additionally, Live automates integration of edited documents with corporate systems and document production. Companies benefit by eliminating point solutions and manual fulfillment processes, resulting in more productive employees, significantly reduced costs, less strain on IT resources, fewer calls to customer service, and happier customers.

Benefits:
- Reduce costs and improve consistency by eliminating point solutions for field-delivered documents—from proposals, letters, contracts, and forms, to other types of interactive communications.
- Reduce errors and miscommunications by controlling what content customer-facing employees can deliver based on built-in document intelligence.
- Improve customer satisfaction by automating follow-up and fulfillment from interactive processes, such as sending personalized letters, enrollment kits, brochures, and more.
- Reduce employee training costs by replacing paper-based forms and their manual processes with intelligent, interactive documents customized for different users. Documents actually “complete themselves” with just a few pieces of information entered.
- Reduce IT costs and complexity by reducing the number of document templates that need to be developed and supported.
- Reduce mailing and archival costs by centralizing the distribution of field-generated documents.

System Requirements
- Intel® Pentium® III or equivalent processor
- Windows XP Professional / Home Edition or Windows 2003 Server
- 128MB of RAM (256MB recommended for complex or large documents)
- 32MB of available hard-disk space

Supported Browsers
- Microsoft Internet Explorer 6.0 and 7.0
**DEVELOP TEMPLATES**
IT develops and maintains many custom systems for creating and deploying thousands of correspondence templates. This results in high maintenance costs, static content, and inefficient use of expensive IT resources.

**FIND CORRECT TEMPLATE**
Users find appropriate template to use amongst thousands. This can take time and presents opportunity for errors.

**COMPLETE TEMPLATE**
Users complete template, but without guidance or controls for what content, fonts or standards should be used. Presents opportunity for errors, takes time, and may not support corporate branding.

**DESIGN/DEPLOY LIVE DOCUMENT (DLF)**
The Dialogue GUI design environment is used to build a standard DLF correspondence application and deploy it to a common repository for user retrieval. DLF is role-based, corporate compliant, and dynamically retrieves the most accurate content from corporate systems.

**EDIT AND MANAGE LIVE DOCUMENTS**
Users use context-sensitive help and interview pages to guide them through completion of the Live document. Certain sections pre-fill with pre-approved content according to what the user selects, while other sections allow the user to include personalized text and graphics. Automatic revision tracking and the “change review” panel speed the approval process.
**Automate Fulfillment Processing**

Dialogue retrieves completed DLFs from a common repository, makes copies for records management and archive systems, and uses edited data and content to update corporate systems and drive automated fulfillment.

**Send for Review/Approval**

Users send completed letter for approval. Slow back and forth review process compromises response time, lacks consistency, and is error-prone.

**Send to Customer**

User prints final letter, manually addresses and mails. This is non-productive, results in higher postage, and lacks controls to ensure current address and corporate-approved packaging is used.

**Complete Fulfillment**

If additional documents are required to send to the customer, users spend time initiating the fulfillment process. The manual pick and pack process is inefficient and error-prone, and other steps must be taken for records and archive management.
**DESIGN/DEPLOY LIVE DOCUMENTS**

Live documents are designed and developed in the visual, collaborative Dialogue design environment just like any other Dialogue document. Using Dialogue DLF Designer, the document developer has the ability to add editing controls and rules to the document in order to manage user interactions, making some areas of the document editable, while locking others down.

With DLF Designer, the Live developer can include logic to access external data sources for pre-filling areas of the Live document based on what is input, authenticating user rights and content, executing decision-making logic, and triggering other processes.

Live document developers can also add interactive features to existing Dialogue document applications, so any Dialogue-created document can be turned into a Live document.

Once tested in the Dialogue design environment, the Dialogue engine processes the Live document application to produce the Dialogue Live Format (DLF) output.

XML-based, DLF files are self-contained and portable, so they can be routed and managed like any other data file in the enterprise. Their XML-based structure makes it easy for external systems, like Enterprise Content Management (ECM) and Business Process Management (BPM) solutions, to easily retrieve data and content from DLF files.

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**How Dialogue Live Works**
EDIT AND MANAGE LIVE DOCUMENTS

DLF files can be stored in a common repository for user retrieval. Depending on the type of document they need to create, users select the appropriate DLF file from the repository and use the Dialogue Live Editor to personalize and complete the pre-approved document.

The Dialogue Live Editor allows users to edit and interact with Live documents, or DLF files. Live Editor can be used as a browser-based plug-in for web applications, or run stand-alone as a desktop application.

Live Editor provides context-sensitive help and interview pages that guide users through the personalized document completion process. Users enter information into predefined areas of the Live document and depending on what is entered, certain sections, sentences, words, or images will automatically be included or excluded.

Live documents can also be role-based, so what the user sees and can edit depends on who they are.

Based on logic in the Live document application, the Live Editor can also access data or pass data to external systems through web services or other connectors to and from corporate systems. For example, the Live Editor can automatically retrieve current information for a customer after some identification has been entered, and automatically pre-fill areas of the document based on content from that source(s).

With Live Editor, users can deliver personalized, pre-approved documents on demand with the accuracy, flexibility, and speed they require. Additionally, the edited Live document(s) can be sent to a central repository for further processing by the Dialogue production environment.

AUTOMATE PRODUCTION AND FULFILLMENT PROCESSING

With Dialogue DLF Input, edited Live documents (DLF files) may be used as input to the Dialogue engine to drive other processes. Data and content can be extracted from the Live document and used to update corporate systems, generate new documents, trigger events, make copies of the edited document in other formats (such as for archiving and mailing), or be used as content within another document, which could be output in any format (such as AFP, PDF, PostScript, etc.).

With Dialogue DLF Fulfillment, Live documents can be used as templates to drive delivery of personalized documents to many different people. Using an attached or defined distribution list, the Dialogue engine processes the Live document with its rules to generate a document for each person on the list. A corporation that wants to provide its franchises or branches with the ability to localize and personalize direct mail pieces, but needs to ensure branding standards and certain content remain unchanged, is a good candidate for using Dialogue DLF Fulfillment. The local branch simply adds their content, such as custom images, provides the distribution list, and submits the Live document for processing.
provides control, intelligence, and automation
Any business process that involves end users interacting with documents, or any interactive document process that exists to spawn other processes or generate additional documents, is a potential fit for Dialogue Live.

Some of the applications suitable for Dialogue Live include:

- Correspondence
- Proposals
- Contracts
- Collateral fulfillment
- HR Forms
- Claims
- Group Policies
- Enrollment/account opening kits
- Direct mail

Benefits

- Eliminate point solutions
- Provide controlled editing experience
- Make any type of document interactive
- Improve customer experience
- Automate production fulfillment
- Ensure accuracy
- Personalize all communications
- Automate and streamline document processes
- Significantly reduce costs
- Improve time to market
- Improve productivity
- Automate decision-making
- Ensure compliancy
- Ensure consistency across all communications
- Increase delivery speed
Dialogue Live will change the way your company does business.
Dialogue DLF modules for Dialogue Live

• **DLF Designer**—DLF Designer extends the functionality of Exstream Dialogue Designer so document developers can create Live documents by adding interactive functions, such as editing controls and rules, into any existing or new Dialogue document application. Functionality traditionally included in entire interactive document systems can be included in Live document applications. Live documents can be designed as stand-alone applications or for inclusion in web-based or other types of custom-developed interactive systems.

• **DLF Output**—Dialogue Live Format (DLF) files, or Live documents, are generated by the Dialogue engine just like any other type of document output. Based on XML standards, DLF was designed to support any type of interactive document. DLF embodies the interactive application framework for accessing and feeding external systems, interfacing with workflow systems, controlling presentation, formatting, and editing rules, providing user and content authentication, and containing data and content. DLF output can be produced from a work station, concurrently by the Dialogue engine with other output in high volume, or created on demand using Dialogue Real-time. DLF files can also be used as input to Dialogue.

• **DLF Input**—DLF Input allows an edited Live document (DLF file) to be used as input to the Dialogue engine for data extraction, to trigger events, create other documents, or be used as content within another document, which could be output in any format (e.g., AFP, PDF, PostScript, etc.).

• **DLF Fulfillment**—DLF Fulfillment supports template processing, allowing users to store an edited DLF file along with an accompanying distribution list, or defined location for one, in a repository for fulfillment processing by Dialogue. For this type of processing, the edited Live document may have some variables and rules that will be resolved in the Dialogue production run.

• **Web Services Interface (WSI)**—The Web Services Interface allows Dialogue Live applications to participate seamlessly in an organization’s Service-Oriented Architecture (SOA) without custom integration required to leverage existing web services. Utilizing Dialogue’s easy click and map design interface; Dialogue Live applications can be configured for interaction using standards-based methods for data, content, or authorization directly from the Live Editor. The WSI also is an ideal mechanism for sending DLF files to the Dialogue engine as opposed to traditional file-based methods or messaging enable submission events which require the additional deployment of software. This module is highly recommended for Dialogue Live applications that need to integrate with critical enterprise systems such as Dialogue, ECM, CRM, and ERP.
THE SOLUTION
Enterprise Document Automation