

ActiveModeler Avantage

Content Module  
plugin

## When a Process Diagram is not Enough...

The Content Module. An innovative automation assistant to produce standardized project and process documentation.

**ActiveModeler Avantage**  
Managing Enterprise Documentation



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For additional information visit [www.activemodeler.com](http://www.activemodeler.com)

## Executive Summary

When a process diagram is necessary to clearly define a process, the use of the BPMN standard is a “**must do**” in today’s BPM world. Any other type of flowchart or diagram is an island with limited ability to add more detailed information (e.g., metrics, SOX etc), almost no ability to interchange the diagram with other tools (XPDL and future BPMN 2.0 serialization) and has a poor future for integrated process execution.

So after making a standard BPMN diagram what next? If there is a need to make project or process documentation, a diagram alone is often not enough to fully describe a process. A rules engine could be used to provide more detail but it’s not easy to convey such information to process stakeholders. In reality, a CEO or business owner does not really want to delve into a modeler or rules engine.

In most projects, there is a requirement to make clear and easy-to- understand documentation such as:

- Project proposal and initiation documents
- Business Requirements
- Specifications
- Sign off documentation
- Development documentation
- Final User Documentation and manuals

There is a requirement for a tool to make this kind of documentation easily with the ability to include the process related information as well as other related diagrams, documents etc. and to present in a common format.

This is where the KAISHA-Tec’s new Content Module comes in. It can reduce the time, cost, and effort needed to create such project documentation and to encourage the use of standards. Standard business documents can be developed in the ActiveModeler Avantage process modeler based on reusable sections, as a tree structure, so there is no copying and pasting of sections between documents. Any part of the process model can also be included (e.g. a full diagram, task, metrics, owner information) and the whole thing exported as a standard Microsoft Word document for easy reading and sign-off.

If a scope statement or image changes – it is automatically changed in all documents and a new export can be produced. All documentation is produced to ISO 9000 standards too.

### Conventional Approaches have problems

To convey information about a process to the business community, there are surprisingly still many shortcomings which have not been successfully addressed with conventional approaches. Let’s highlight some of these:

- A diagram is not usually enough. More detailed information is required to enable the stakeholders to understand the complexities of the process.

“

*Our Bank is currently using Active Modeler to draw processes and the Content Module to fulfill the reporting requirements needed by regulations and management governance. Process diagrams and necessary reports can be easily created and modified. This has provided simplicity and flexibility to our bank.*

”

*Baki ARSLAN, Director  
Internal Control Department  
Nurol Investment Bank*



- Stakeholders often do not understand how to read process diagrams, especially if they are made using a non-standard methodology.
- Conventional ways of making project documentation are difficult to maintain and time consuming to produce. They involve copy/paste of sections, diagrams and other information. It is essentially a manual process to produce this documentation.
- It is difficult to enforce standards and to ensure people use the right documents as templates.
- It is difficult to keep project documentation up to date – for instance if a process diagram changes, all documents which use this diagram have to be checked and manually updated.
- Document approval has to be made for the whole document.

## The Need for More Visibility and Flexibility

There is a need to be able to associate a full feature set of information with process details and be able to compose such documentation easily and with automatic updating of all included content.

Individual sections should be able to be sent for approval without waiting for the whole document and the complete document should have full version history and easy retrieval of previous versions.

## Introducing the Avantage Content Module

Unlike other products on the market the Content Module is the first of its kind to truly address the **actual process of business process improvement itself**. It works by optimizing the production of documentation and content used during the lifecycle of a business process improvement initiative. It helps to standardize the documentation process and therefore improves the quality of any output.

Unlike most enterprise content (CMS) and document management systems (DMS), KAISHA-Tec takes a different and more flexible approach to the production and management of document content. Typically, a CMS or DMS manages documents as a single entity (i.e. a single file), but we recognized that multi-user collaboration of single documents such as functional requirements, manuals, or QA documents is not a very convenient way to work in a multi-user environment.

Essentially we have split the stored document into separate managed sections. Then when a collection of sections needs to be made into a complete document, the Content Module provides an extremely flexible export function to allow the export of content to any chosen document format. The benefits of this approach are:

- Document standardization is easy and transparent to the user
- Improved document quality
- The improved quality of the exported documentation can certainly lead to an improved project success rate.

“

*We were looking for an easy-to-use BPM tool to give to our consultants, offering a versatile way to produce process documentation at different levels of detail. ActiveModeler's Content Module offers just this and allows us to tailor our process documentation according to our customers wishes.*

”

*Ulrich Moser, BPM Competence Manager, AWK Group*

**AWK Group**

Consulting and Engineering

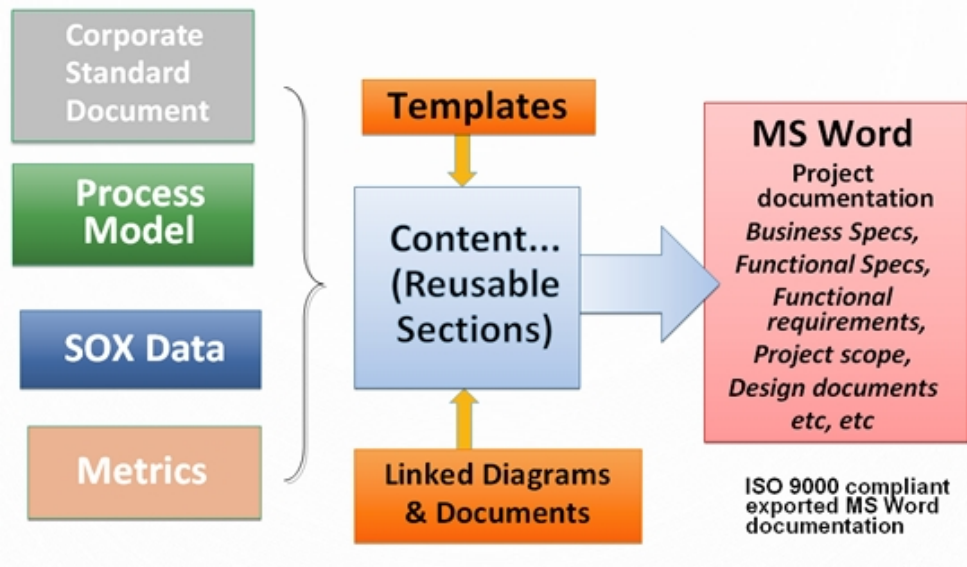
- Easier management of documentation and contents
- Increase in the rate at which documentation can be produced

## Some Key Features

Some of the key features of the Content module are:

- Content can be reused through imbedding links, which removes duplication and allows for content to be updated at its source and this content to be automatically reflected in any documents to be generated containing the links Documents can be constructed in minutes using individual document parts stored in a separate parts library.
- Word documents can be generated from any selected content.
- All Word documents that are generated can use a custom corporate template.
- Sections can be quickly added to documents without the need to reformat the whole document. You can see the status of each section of your document through the use of coloured categories e.g. (approved, under review etc).
- Any part of the process model can be included in the Content e.g. diagrams, tasks, metrics, SOX information, responsibilities etc.
- Process models no longer need to be exported to an image format to include them in process documentation. Simply add them to the content hierarchy and they will automatically appear in the exported document.
- Content normally kept outside of the project repository can be managed under the same folder as your process models, organization and data including remote data.
- Existing corporate project documents can be imported to create templates in the Content Module and automatically split into sections for reuse.
- Any language can be used for creating documents. The templates used can also be customized for any language.

The following diagram shows how a wide range of information can be brought together as managed content, and subsequently exported to produce project and process documentation.



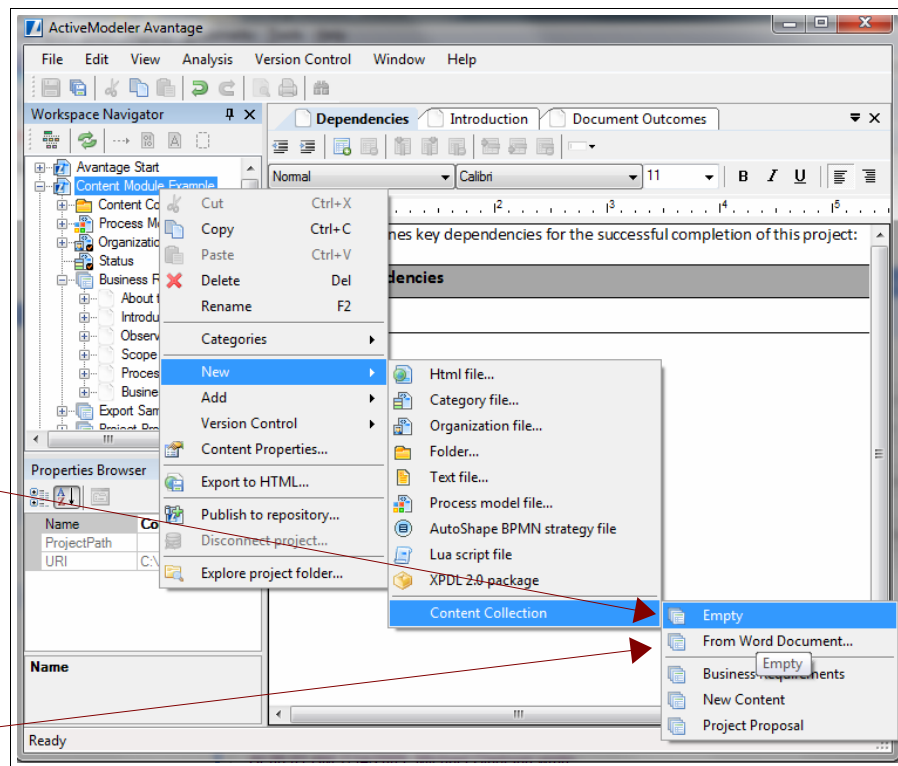
### How it Works in Practice

The key steps are:

1. Make a New Content Collection or import an existing document from Word

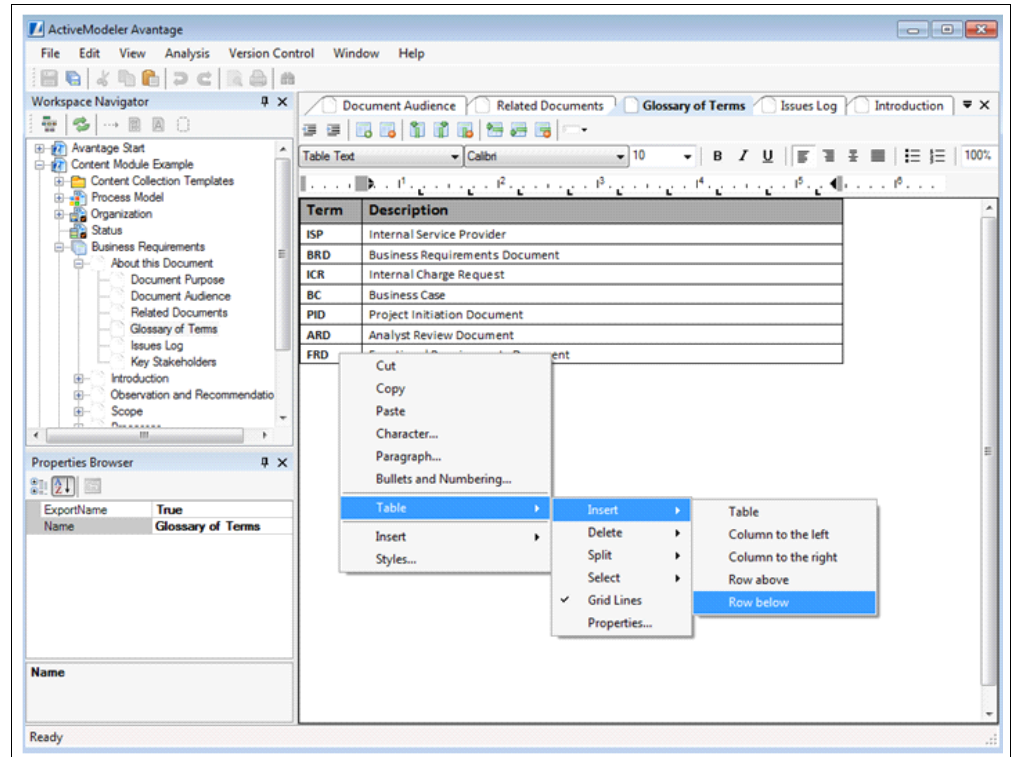
Click on ...Content Collection > Empty to create an empty collection where you can start adding new sections.

Click on ...Content Collection > From Word Document to begin importing a Word document.



## 2. Use the internal editor to edit your sections

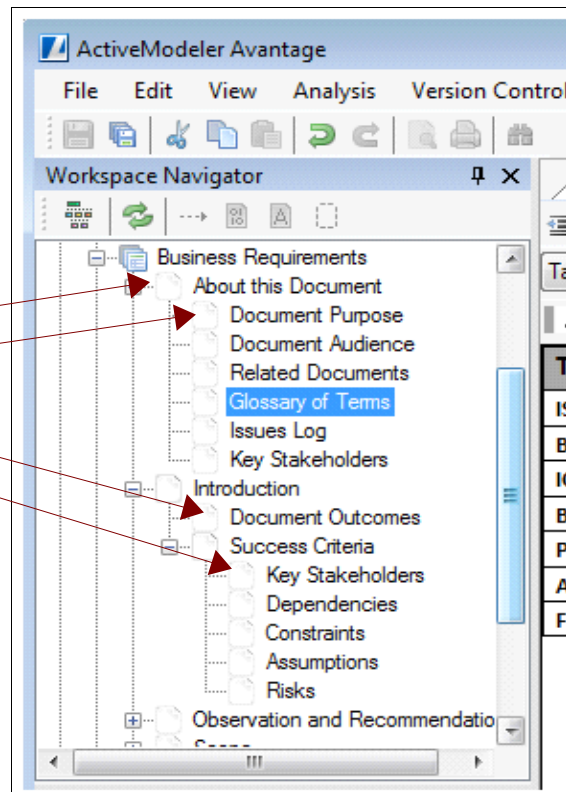
All Word processor capability is provided i.e. Spell checker, Style selection, Table Format, Font format etc.



## 3. Sections are organized in a user friendly tree structure

Each Level in the hierarchy of the collection becomes a heading level in the hierarchy of any exported document i.e.

- Heading level 1
- Heading level 2
- Heading level 3



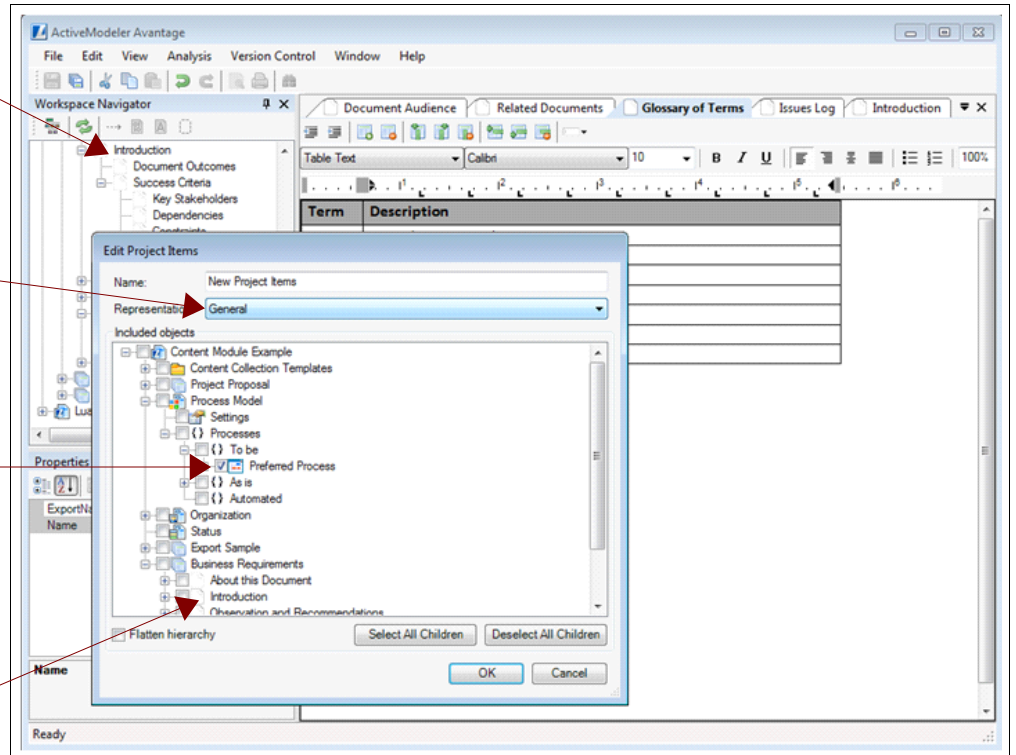
#### 4. Link to content elsewhere in your project

Right click anywhere in your collection to insert a link to any another project item.

Select how you want linked a process model or other piece of written content to look like in your exported Word document.

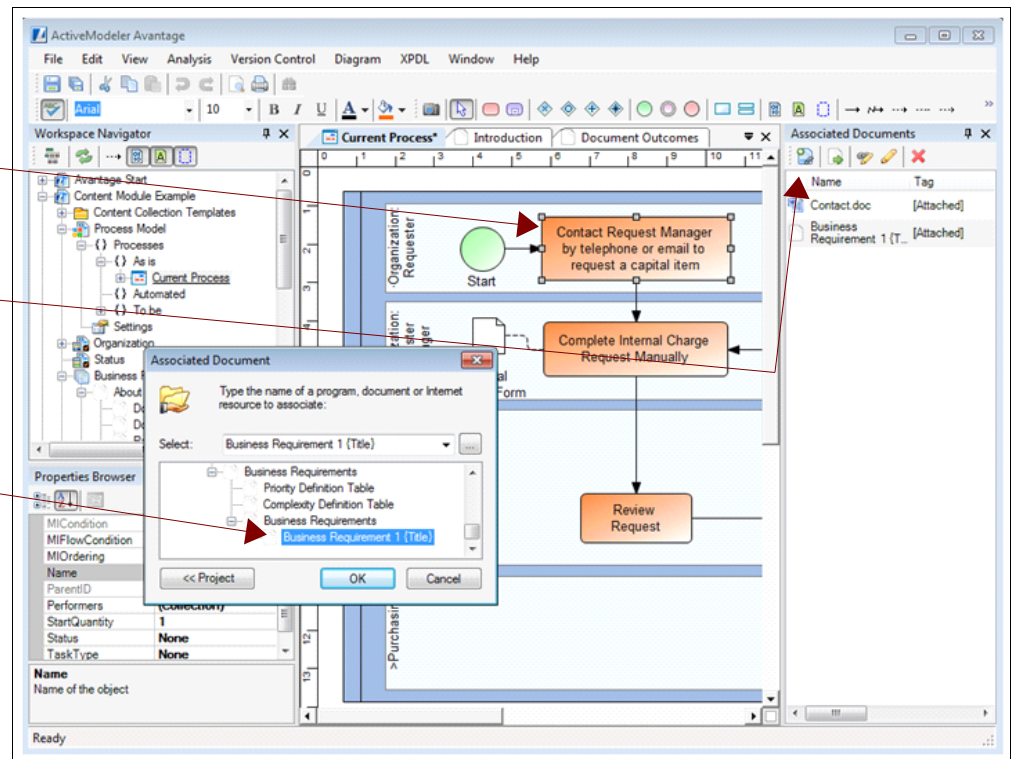
Select a Process model or any of the items within the process model to link to.

Select a scope statement, introduction or any other content from another collection such as a Project Mandate. If changes are made to the Project Mandate these will be reflected in your linked collection.



5. Link your diagram objects to the content or documents to give readers relevant information about the objects.

Select a process object then in the Associated Documents window click on the Document icon and from the Associated Document dialog box select any content or external file to link to. The example shows a task being linked to a business requirement.

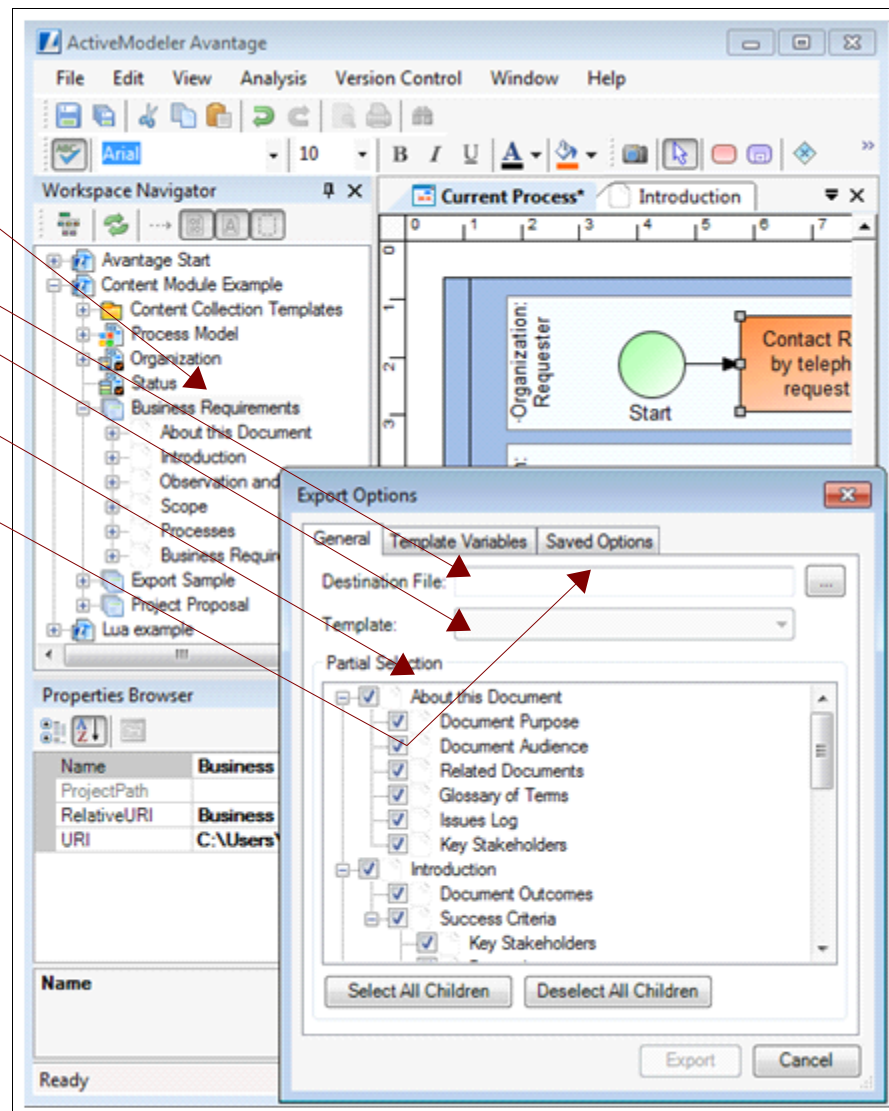
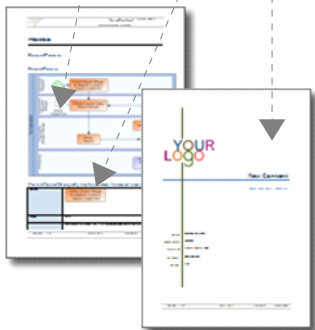


## 6. Export the Content collection or parts of it to MS Word

Right click on a collection to export it to a Word document

Select where to save it  
Select a custom corporate template  
Choose the items you wish to export  
Save the configuration of the items chosen

Produce High quality Word documents to a corporate standard.  
Process models and Object Metadata is embedded automatically.



We have more functionality of course to satisfy demanding requirements but the above are the main steps to producing quality documentation

## Where can it be used?

The Content Module can be used to produce any project or process related documentation including:

- Business case documents
- Project plans and Project scopes
- Business requirements
- Functional requirements, Functional specifications, Functional design documents
- Test plans, Implementation plans
- Training manuals
- Minutes , Agendas etc

## Getting Started

KAISHA-Tec offer a 28 day free trial of the software and this can download this from our website at [www.activemodeler.com](http://www.activemodeler.com)

We can also offer training to get the most out of our software as quickly and efficiently as possible. We will be pleased to offer you a free demonstration of the Content Module over the web at any time convenient. Just request a demonstration at

<http://www.activemodeler.com/inquiryForm>

## Customer and Partner Value Creation

Beside normal project documentation, we are currently building a set of templates for

- ITIL
- Prince2
- TOGAF

We would be pleased to work with customers and Value Added resellers to help companies and organizations create standard documentation templates. Please contact [sales@kaisha-tec.com](mailto:sales@kaisha-tec.com) for more information.

## About KAISHA-Tec

**KAISHA-Tec** is a leading edge BPM solution provider based in Tokyo, Japan.

KAISHA-Tec provides serious yet easy-to-use software to allow companies and consultants to model, rationalize and automate processes. The end result is **Cost Reduction**.

Some of the world's largest companies use our scalable process automation software to orchestrate the mission critical workflows of thousands of their employees.

One of our goals is to transpose the well-known efficiencies of Japanese manufacturing into management processes. Our methodology is a blend of the most advanced technology and the timeless requirements of efficiency and cost-effectiveness. This is symbolized by our roots in Japan where old and new blend in surprising ways.

See our website at [www.activemodeler.com](http://www.activemodeler.com)

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