BPM (Business Process Management) is a hot topic these days because it offers adopters a structured technology path to improved efficiency, productivity, and profitability. But for many enterprises for which document generation is critical (such as banks, insurance companies, law firms, government agencies, or businesses in any number of vertical markets), a BPM suite will solve only part of the automated workflow problem. For the automated-document-generation piece, such enterprises will likely need to turn to a dedicated document automation (document assembly) platform, such as HotDocs.

What Is BPM?
BPM is a management strategy based on two ideas: first, that an enterprise can be viewed as a collection of related processes, each of which consists of a series of steps or stages, and second, by better managing each of these processes, an enterprise can become more efficient and, thus, more profitable. BPM suites are software solutions that facilitate the modeling of each of the processes within an enterprise as a software application—commonly referred to as a workflow—that guides users through the steps in the process. Beyond workflow modeling, BPM suites enable an enterprise to deploy, analyze, and refine its workflows and, in doing so, evolve as a continuously profitable organization.

At the core of BPM suites is a RAD (rapid application development) platform that allows for each process to be modeled in decision-tree logic, in effect, transforming it into a workflow. As users interact with the workflow, inputting data in one form or another, they are routed down one of the limbs of the decision tree toward a conclusion.

The BPM/HotDocs Touch Point
In large enterprises of nearly every kind, many workflows involve the generation of custom documents based on unique data sets. For example, in a bank, a workflow might be triggered when a customer applies for a loan, and the end stage of the workflow would be the execution of closing documents. Any of the large BPM suites could easily model the data-routing aspects of this sort of workflow, including interim stage approvals, outsourced credit checking, etc. But depending on the complexity of the document set and the relative need of the system to generate transaction-ready instruments, none of the BPM suites may be capable of the data-gathering and document generation part of the process. That’s the main touch point between BPM and document automation (document assembly) platforms like HotDocs, which is a technology stack for automating the generation of custom documents of virtually any complexity and facilitating their deployment within the context of workflows modeled by any of the BPM-suite vendors.

The HotDocs Stack
HotDocs is a stack of integrated technologies that enables the transformation of word processing documents and PDF forms into powerful productivity tools called templates. A template generates custom, transaction-ready documents from a question-and-answer interview in a fraction of the time it once took, all the while providing machine precision. The HotDocs value proposition is...
both simple and compelling: higher-quality documents in much less time and with much less spend.

HotDocs is the most powerful and flexible document automation tool available, allowing an enterprise to automate the generation of even the most complex transactional documents and forms. Consequently, HotDocs has become standard equipment in many of the world’s largest corporations, law firms, and government agencies.

The HotDocs stack includes deployment platforms for virtually any environment, including the desktop, client/server, and cloud.

At the base of the HotDocs stack is a logic core that enables HotDocs to automate virtually any document set, no matter how complex. On this core sits a tools layer, an interface that enables a template developer to build sophisticated business logic (everything from advanced Boolean expressions controlling the inclusion/exclusion of language blocks to complex financial calculations) into a document or form. This tools layer, likewise, allows a template developer to design powerful interviews that gather all the information necessary to generate documents.

HotDocs’ interviewing capability is a key part of its value proposition: risk mitigation via better quality documents. In other words, given correct business logic, the critical component to perfect documents is correct data input. By giving a template developer the ability to build safeguards into the interview (everything from numeric and date range validations to interactive help screens for individual questions), HotDocs can help ensure that system users enter the answers correctly.

Key to the HotDocs architecture is its ability to operate within a word processor (Microsoft Word or Corel WordPerfect), the native environment for most of an enterprise’s documents and forms. This approach affords HotDocs all the functionality of the word processor and enables an enterprise, for which the look and feel of each document may be critical, to generate documents using whatever font faces, design, and pagination elements it chooses. (Contrast this functionality with XML-centric document automation systems that are capable of mirroring just a mere fraction of a word processor’s formatting/pagination functionality).

HotDocs, likewise, includes a sophisticated development engine that allows for the automation of PDF-based graphical forms (fields, check boxes, etc.). Given that many document sets consist of both word processor documents and graphical forms, HotDocs allows for shared components among any number of instruments. In other words, all the Word documents, WordPerfect documents, and PDF forms in a set can be generated from a single set of answers.
Deploying HotDocs in a BPM-Defined Workflow

Once an enterprise has transformed its documents into HotDocs templates, it can then deploy those templates within the context of its BPM-defined workflows. For example, at the beginning of a bank’s loan generation workflow, the first step may be to email the customer a link, complete with login credentials, to a cloud-based HotDocs interview. After the customer submits the completed interview, the workflow, based on the user’s input, may route the interview to a particular department to edit or add more information. The workflow could then access an external credit rating system and, based on the applicant’s score, route the interview to a different department for approval, and so on. Eventually, when the customer’s application is approved, multiple documents could be generated quickly and efficiently, all based on the data entered into the HotDocs interview at various stages throughout the workflow.

Once HotDocs templates have been developed, they can be deployed on the desktop, in the client/server environment, or in the cloud. In regard to integrating with BPM workflows, client/server and cloud integrations are the most likely scenarios. HotDocs Corporation’s platform for client/server deployments is HotDocs Server. Integrations between HotDocs Server and BPM workflows can be achieved via HotDocs Server’s .NET API, COM API, or through SOAP or REST-based web services. HotDocs Corporation’s platform for cloud deployments is HotDocs Core Services, a Microsoft Azure-based web service that can be consumed by virtually any BPM-defined workflow via either SOAP or REST protocols.

HotDocs’ Roots

What is now HotDocs Corporation began as a research project in the mid-1970s at the Brigham Young University Law School. Funded at the time by West Publishing, the project began as a code base developed for the VAX mainframe computer running the VMS operating system. In the late 1980s, the project became commercial with the founding of Capsoft Development, which licensed the technology from BYU and ported the code-base into DOS. A few years later, the technology was re-birthed as HotDocs, a Windows version that reflected many of the original feature sets from the old VAX version.

As pioneers in the document automation space, the founders of HotDocs Corporation invented many of the core concepts that today enable HotDocs to automate virtually any legal instrument, no matter how complex. It’s this ability—the total automation of documents and document sets and the resulting generation of transaction-ready instruments—that has established HotDocs as the clear leader for mid-to-large enterprises around the globe, which tend to view the high-quality document output they get with HotDocs as the technology’s key value proposition. Consider, for example, a global bank, which has thousands of loan officers generating millions of contracts worth billions of dollars. While saving time and money on document generation would certainly be valuable, decreasing legal exposure by reducing the number of errors in a contract could be much more compelling.