OPX Document Production

Transform your digital operations with OPX

OPX

Overview

OPX Document Production (OPX DocProd) is designed to let superusers create the requisite documentation with little to no IT staff involvement.

OPX DocProd is better thought of as a content creation solution. From user-defined templates, OPX Doc Prod can create the following:

- letters or communications as Word documents
- letters or communications as PDFs
- letters or communications or attachments as PDFs with unique password per customer
- HTML for use on web sites or interactive systems
- regulatory or management reports
- SMS reply messages
- email responses
- policy documents
- quotes
- statements

Document Templates

Templates can be created and then moved through a release process (such as development, test and production environments) having been signed off as fit for purpose by business managers with appropriate roles.

Templates are date and time driven, so new document versions can be deployed ahead of time. All document template revisions are held securely in a database.

It works by having templates for the required documents created in Word. Although Word is not used for the document creation in production, it is by far the most user-friendly authoring environment.

We support all of the major features including tables, headings, fonts and styles, making the creation of a template easy.

But Word is just not enough, so we enhance the native Word merge type features with:

- Business Rules allowing for optional paragraphs, sentences or included templates
- Charting, allowing customer specific charts and graphs of their data.

OPX

To define a template, the user would choose an XML data model (provided by the OPX team or your IT team) which would show all of the data that you could drag and drop into your document.

Example data files can also be used to see real sample values as you prototype the documents you desire.

Our Word add-on allows you to see the XML data models and choose one, create and interactively check the document in multiple output formats (such as Word, pdf or html) and then deploy to your test and production environments.

The production environment gets its data from either:
- your existing systems
- OPX, by making an SQL query
- the data being passed in by the OPX script as XML

OPX DocProd then creates the output documents which can be used for:
- SMS replies in our SMS Gateway module
- emails, outbound in our Email Gateway module
- letter printing, where we store or forward the Word or pdf files to your printers
- web site content where the web site interactively requests the document

Outbound communication can be stored in your chosen document content management system.