



document assembly checklist

Selecting the right data capture and document assembly tool is an important decision. The wrong choice can lead to frustrated end users, IT maintenance nightmares, cost blow outs and, ultimately, a failed project.

Below are some key features to look for when investing in an enterprise document production platform.

Does your document assembly system...	 exari	Other
• automatically produce dynamic web forms (wizards) with real-time validation and follow-up questions, for an intuitive and responsive user experience?	<input checked="" type="checkbox"/>	<input type="checkbox"/>
• ask users only the minimum questions necessary for their transaction, ensuring quick and easy data entry?	<input checked="" type="checkbox"/>	<input type="checkbox"/>
• share business rules, questions and answers across templates to simplify maintenance and maximise re-use?	<input checked="" type="checkbox"/>	<input type="checkbox"/>
• share styles across templates for a consistent look and feel?	<input checked="" type="checkbox"/>	<input type="checkbox"/>
• include an interactive web-based document preview that allows users to simply click on content to quickly revisit and modify answers before final document production?	<input checked="" type="checkbox"/>	<input type="checkbox"/>

	 exari	Other
• generate packages of documents from a single web form (wizard), removing the need to re-key data?	<input checked="" type="checkbox"/>	<input type="checkbox"/>
• elegantly gather and use repeating data (e.g. milestone payments)?	<input checked="" type="checkbox"/>	<input type="checkbox"/>
• provide specialized WYSIWYG authoring, with clear visibility of document content and logic in context?	<input checked="" type="checkbox"/>	<input type="checkbox"/>
• include a controlled authoring environment that enables authors to visualise and handle complex conditions and nested logic with ease?	<input checked="" type="checkbox"/>	<input type="checkbox"/>
• insert and re-use variables and conditional logic at the click of a mouse?	<input checked="" type="checkbox"/>	<input type="checkbox"/>
• provide an extensible smart library of pre-built functions and calculations for powerful, yet easy, authoring?	<input checked="" type="checkbox"/>	<input type="checkbox"/>
• control user interaction and access rights based on role, user, folder, or template?	<input checked="" type="checkbox"/>	<input type="checkbox"/>
• include out-of-the box integration with other systems to enable maximum data re-use?	<input checked="" type="checkbox"/>	<input type="checkbox"/>
• incorporate automatic version control for all files to ensure retention and audit trail compliance?	<input checked="" type="checkbox"/>	<input type="checkbox"/>
• handle the most complex workflow requirements at all stages of the document generation process (including within the web form/wizard)?	<input checked="" type="checkbox"/>	<input type="checkbox"/>