

Functional Specification

Generate™ V1

Generate software enables a user to simultaneously create a collection of Word documents and manage the input and updating of related references and information stored in a database. Clients control the set-up process and customise Generate with their own corporate identity and styles. All data collected is stored and updated centrally.

A series of functionality is available depending on the role of the individuals – Author, Administrator or User.

GENERATE AUTHOR

The role of the Author is to create all the required libraries of documents and manage the data store of fields using the Task Pane to add items to any document template.

Generate Author Task Pane
Template Master Wizard for creating or editing company document sets
Bookmarking function to easily navigate bookmarked locations in document templates
Editing function to manage existing master document content and fields and manage what appears in the data store
Wizard for Creation of document fields for Data Store management
Review feature to edit existing fields and manage types
Field type set up from available list (single line of text, multiline, multi-select from a pre-populated list, number date, table, stock text)
Double click option to quickly add bookmarks to documents
Navigation buttons to edit, change order or delete existing fields
User data field manager

GENERATE ADMINISTRATOR

The role of the Administrator is to create a User list and manage the profiles and access rights. Administrators can also update and edit “Stock Text” for retrieval within document sets.

Generate Administrator Wizard
User profiles manager to give access rights and levels to selected users
Stock Text generator to easily add/edit stock text (available to all users)

GENERATE USER

The role of the User is the document drafting function to enable multiple users to create and update documents as required. If a record changes in single or multiple documents sets created, functionality means that changes made once can be globally applied to the relevant places.

Generate User Task Pane
User task pane with navigation buttons and fields for the creation of documents from a pre-defined set of templates
User can complete fields globally for a set of documents and generate at the push of a button
Easy search and retrieval of stored data and all documents and records created
Toggle to show/hide bookmarks
Current Document navigator to edit existing documents
User information (office address, telephone, email, fax, mobile, etc.) can be stored locally, for insertion into personalised documents
“Alias” option to generate documents on behalf of another user (e.g. secretary can generate documents on behalf of their manager)
Advanced search text finder
User data fields to set personal information (e.g. Name, Telephone, Fax, Office)
Live update of current document