K2 + HOTdocs™

A COMPLETE SOLUTION FOR POWERFUL WORKFLOW WITH SOPHISTICATED DOCUMENT AUTOMATION

Organisations all over the world are challenged by the requirement for custom, complex documentation that is critical to successful business operations. The production of high-volume documentation tailored to individual clients or situations is time consuming, costly and can leave companies open to risk through error and non-compliance.

HotDocs is an established and powerful document automation technology, and the company has partnered with K2 to offer industrial-strength automation of business documents within K2 workflows. Wherever there is a need for the production of a document or form – either simple or complex – as part of a K2 workflow process, the HotDocs Service Broker for K2 can be used to generate accurate, styled and transaction-ready documentation.

WHY IS IT BENEFICIAL?

There are multiple business benefits of using HotDocs within K2, including:

Elimination of duplicate data entry	Much faster document production	Greatly reduced risk from human error	Greater assurance of compliance	Document approval as part of workflow

WHERE IS IT USED?

The HotDocs Service Broker for K2 can be used to produce any type of document from a workflow, including:

- *Client on-boarding*
- *Matter inception*
- *Case management*
- *Contract approval*
- *Loan generation*
- *Employment agreements*

The integration between HotDocs and K2 harnesses the unique SmartObject and Service Broker processes within the K2 platform, enabling workflows to include HotDocs' powerful document assembly technology. This allows users to work with familiar design tools within HotDocs technology, without coding.
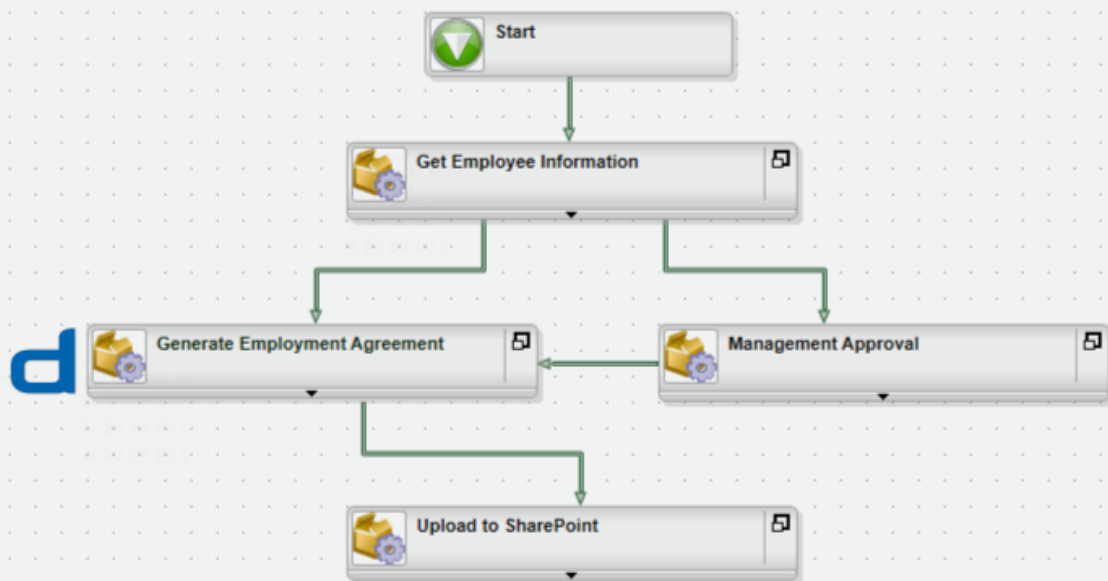
Technically, HotDocs Service Broker for K2 exposes the data points and logical structure within document templates and allows users to map data from any other process or SmartObject, such as a CRM connector, as inputs that push the data into documents to be produced. This abstraction facilitates access to all live process data and its respective connected data via LOB systems – ready to be used for any document production requirements.

Process designers working with the HotDocs Service Broker for K2 simply consume and use the connector like any other SmartObject. HotDocs exposes the ability to assemble a single document or suite of documents, then returns the outputs to the business process to be consumed or passed on within the automated workflow. Downstream processes can then be connected to the workflow, for example, the assembled document can be profiled to SharePoint, HP Worksite or any other document management system.
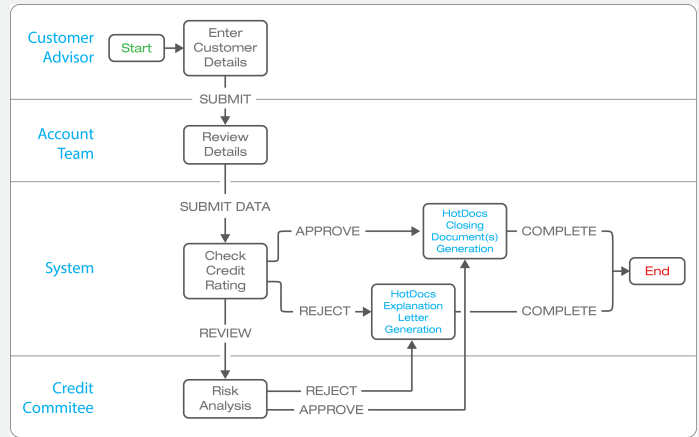
HotDocs and K2 both work across – and have mutual customers in – a wide range of sectors including financial services, legal, insurance, government and corporate.

HOTDOCS DOCUMENT GENERATION WITHIN THE K2 STUDIO PROCESS DESIGNER

STANDARD WORKFLOW OUTLINING A TYPICAL HOTDOCS DOCUMENT GENERATION PROCESS

MAPPING OF PROCESS DATA TO THE HOTDOCS SMARTOBJECT