# Automated Document Creation & Control

Discover how Riftsoft delivers the best-in-class cloud document creation and control software

## Who is this for?

If you are responsible for creating and maintaining Standard Operational Procedures, Work Instructions, Safe Work Method Statements or similar procedural documents within your company or control the distribution and usage of these documents, then Riftsoft is the right solution for you. We will examine why today, more than ever, it is important to automate procedural document creation and control and ensure compliance to QMS standards.

## What does this mean?

When using procedural documents, it is very important to ensure their content is accurate and up to date. That is a huge task and if there is no solution in place to aid in content creation, update and delivery, problems quickly become apparent and work processes break down.

Depending on the size of your company's operation, the number of documents produced to achieve operational efficiencies can be vast. Being able to control the usage and approval of change is also a challenge.

Without adequate processes and controls in place the effectiveness of your work force can be dramatically reduced and that impacts directly on your bottom line.

## Why Automation?

The traditional way of creating documents is to use a word processor, each document must be created individually or copied from another and modified. The documents are then stored somewhere on a computer system and if required manually linked to an ERP/CMMS system to be incorporated into a work process. Often the source documents are lost as people move to other positions and need to be recreated when edits are required.

This is all very time-consuming and has many limitations and prone to error. To solve this, automating and controlling the creation, and subsequent distribution of documents is a key factor in delivering operational effectiveness and compliance.

## The solution

Riftsoft has solved all these problems by means of cloud-based web apps which will save companies vast amounts of time and money when creating, maintaining, and controlling procedural documents.

Let us now examine each of these solutions in detail.

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# The Riftsoft Cloud Platform

The creation and use of electronic documentation is especially important today more than ever.

Electronic documents are key to every company's success. Whether they are sent to customers, suppliers or used internally for process governance or operational compliance, all companies depend on their accuracy.

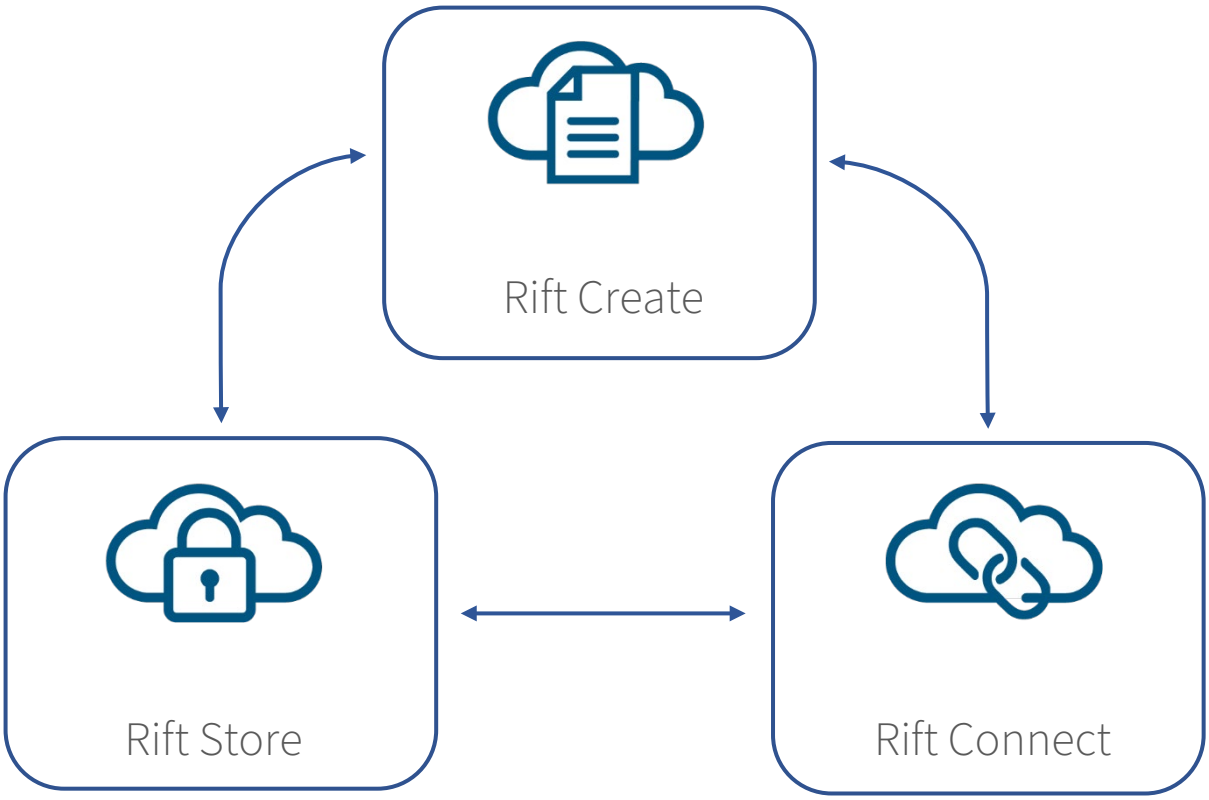
Riftsoft has a long history delivering software in the document space. Everything we do is document focused.

We have developed a scalable automation platform that allows you to quickly implement a cost-effective document creation and control solution with minimal programming or IT involvement.

The Riftsoft platform is accessible via three web apps

- Rift Create
- Rift Store
- Rift Connect

Each web app is accessed from the cloud via a web browser and on any device and is interconnected. However, each can also be used independently of one another. The Riftsoft platform allows you to easily pick and choose the required level of functionality as you progress through the document automation process.

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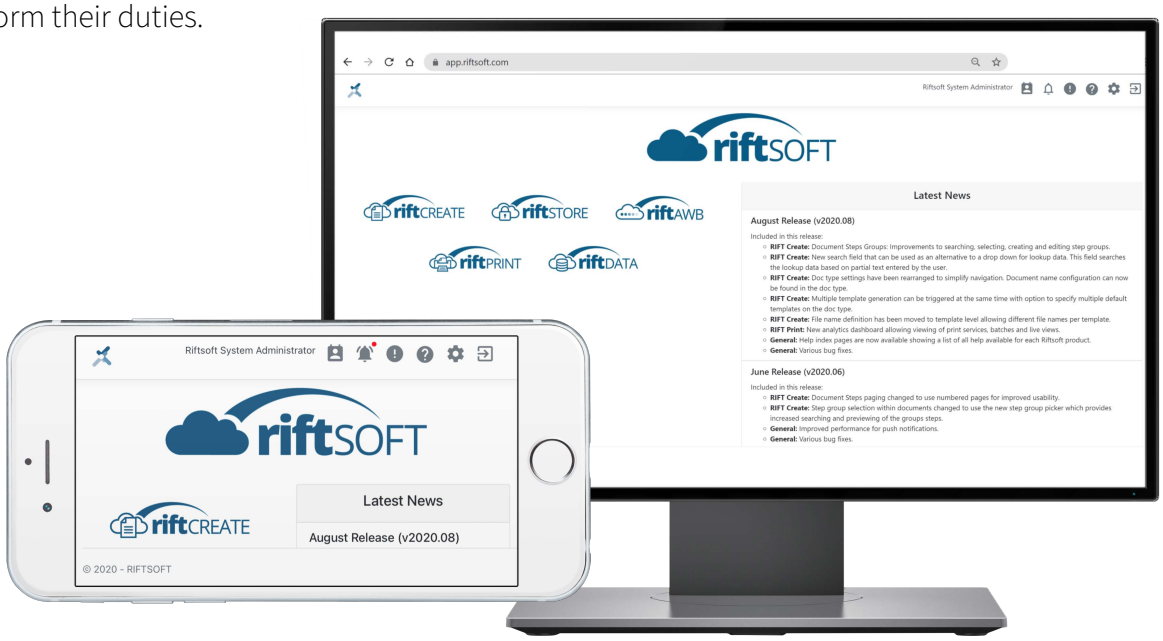
# Rift Create

## Solving the biggest challenges in document creation

Rift Create is a powerful cloud-based web application that streamlines the creation of templates and the authoring of documents which contain procedural steps such as Standard Operating Procedures (SOP) and Work Instructions. Because it is accessed from the cloud there is no software to be installed and entry is from any web browser on any device. All our web apps are licensed under Software as a Service agreement (SaaS) ensuring it is a very cost-effective way of automating your document creation and control processes.

Where you previously had documents and templates stored in different folder locations and in different formats and versions, Rift Create centralises and streamlines the whole document process, end-to-end. From a set of web-based screens you can see what templates are active and available for use, who created or changed them and what version of the authored document is currently in use. Furthermore, with the addition of our powerful workflow approval process, you will always be working from the latest approved version and be confident that your employees are receiving the right information to perform their duties.




Access to all the Riftsoft web applications is controlled by a company administrator. A central administration function is available for user creation and granting access to the different web apps on the Riftsoft platform. The Rift Create web app is licensed for company usage, never individual users, so you can make it available to all members of your organisation without worrying about spikes in subscription costs.

Creating and maintaining document templates that keep up with corporate change is a challenging and expensive process. Combine this with the fact that document content is forever changing, it soon becomes clear that what is correct today becomes obsolete tomorrow and the whole process needs to be repeated time and time again for hundreds if not thousands of documents.

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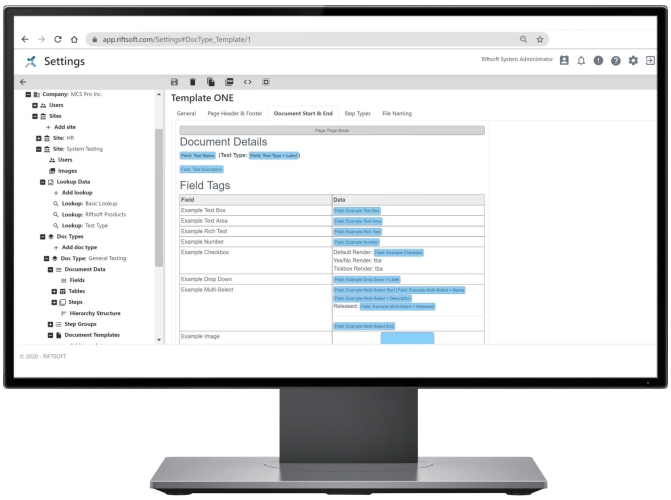
## Rift Create Designer

The document cycle begins with a Rift Create Designer, creating a template which is an important step in controling how a final document is assembled and the informtion contained within it is displayed.

An in-line WYSIWYG editor is available for the template creation process so no technical knowledge is required to achieve expert results.




Rift Create has a number of in-built template examples that can be adopted immedialty or copied and modified to suit specific process requirments.

Within templates you can include corporate specifications such as colours and fonts and also logos and text to ensure your final documents meet all necessary standards.

The template contains configurable header and footer sections and document start and end sections. Within each of these sections, images, fields and texts are added that include the document process and operational information.

Dynamic fields and tables are centrally created and maintained which are tagged into the template sections. They can also contain lookup data that can be imported which aids authors to populate the final document content with the required data.

The procedural section of the template is defined by adding step fields and step types. The step types dictate the structure and layout required in the final document and individual step fields dictate the content required for each procedure.

Using our software to build expert templates will help you exceed compliance with any QMS document standards such as ISO 9001, ISO 14001 and OHSAS 18001.

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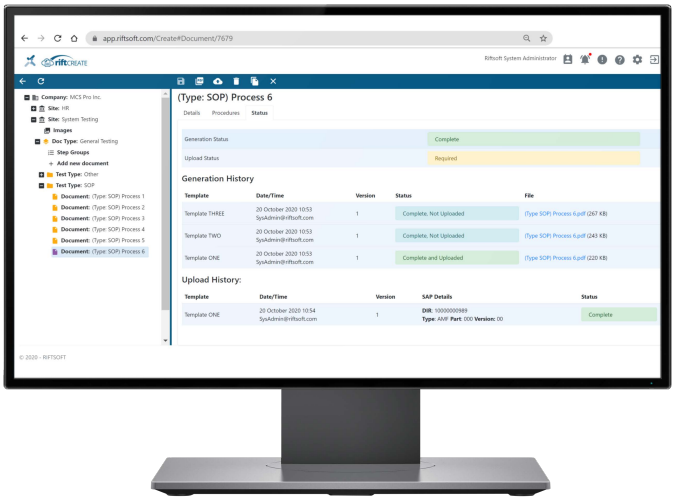
## Rift Create Author

A Rift Create author selects templates created by a designer to generate a procedure based document. The document subsequently produced will always be consistent in both look and feel and also data quaility.

Being controlled by the fields, tables and step types defined in the template, an author concentrates on adding data to build the document rather than being concerned about the format of the final document. This has an immediate positive effect on the quality of the final document produced and also increases the productivity of the author.




Futhermore, step groups can be centrally created and added into a library containing a set of pre-defined procedures. These groups can then be added into procedural documents which contains similar sets of repeatable data. This has the benefit of further reducing the time taken to create and update documents.

Whole sets of documents can be changed in bulk where repeatable step data is used or logo and image changes are required. This is especially useful when a central governance change is required against large sets of approved documents and saves many hours of work.

Images can be added directly to documents or selected from a pre-loaded image library. Each image in the library is tagged with meta-data providing for quick search and retrevial. Once an image is added to a document, markups can be annotated for specifc process adjustments.

Every document created in Rift Create is version controlled and all versions are kept either in Rift Store or archived, essential for achieving QMS compliance.

Once a document is generated by an author either as a completly new document or a change to an existing approved document, workflow approval is triggered and the document flow is then monitored by the author under the status tab.

Rift Create is plug and play ready to produce…

- ✓ Standard Operating Procedures
- ✓ Safe Work Method Statements
- ✓ Safety Critical Operations Manuals
- ✓ Work Instructions
- ✓ Catalogues
- ✓ User Guides
- ✓ Training Manuals
- ✓ Material and Parts Lists
- ✓ Support Documentation

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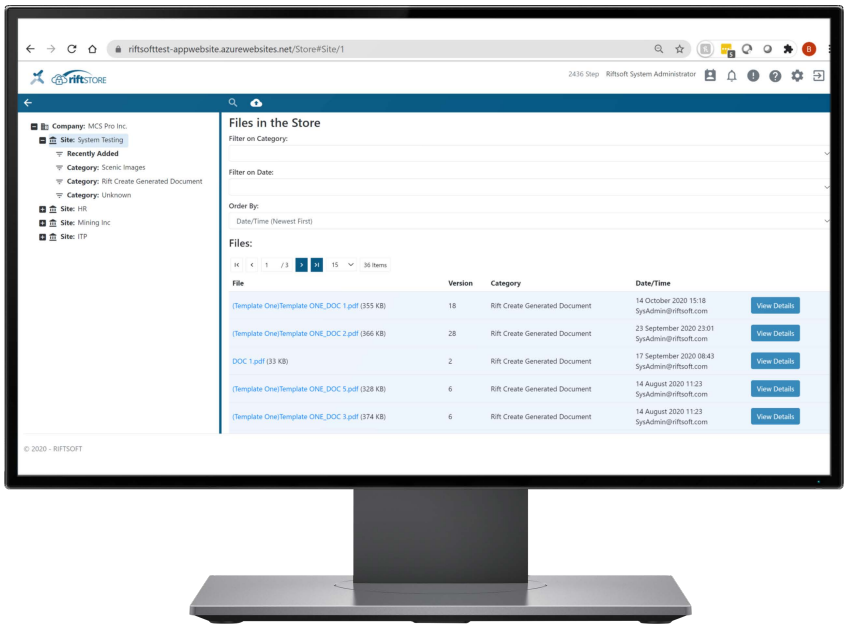
# Rift Store

## A modern cloud-based content server

Creating templates and authoring documents is the first stage in automating document creation and control. The second stage is how you actively control and store these documents once they have been generated. Rift Store performs the control in two parts, document storage and document workflow approval.

Rift Store is a centralised content server for documents produced by Rift Create and from elsewhere in your company. It requires minimal setup and is very easy to use. Rift Store enables you to effortlessly manage workflow approval of any stored documents in a controlled and logical way.




- Rift Store offers unlimited storage, so you never have to worry about disc space usage when creating folders and adding files.
- All files are 100% encrypted and securely backed up.
- Rift Create authored documents are automatically added into Rift Store in a dedicated folder and workflow approval applied. These files are locked into Rift Store and can only be edited in Rift Create.
- Additional folder structures can be created in Rift Store simulate what you have in your current storage locations. Users will be immediately familiar with the layout and locations of all their documents, saving time on training and reducing errors when activating workflow approval.
- Adding your own documents is a simple drag and drop process

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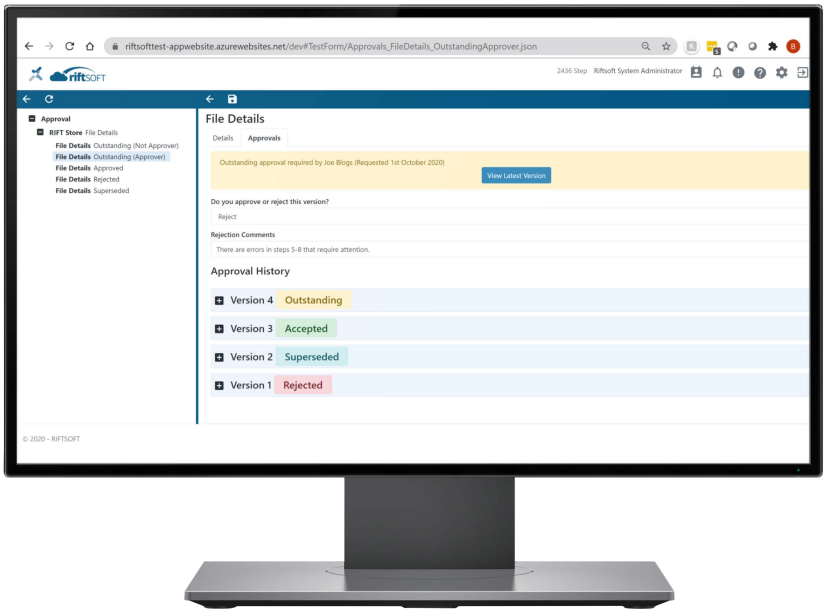
## Integrated workflow approval for deeper QMS compliance

Rift Store's workflow approval process has been developed for ease of use while at the same time offering unlimited approval cycles and version control optimisation.

Rift Store is included as a standard part of the Rift Create process, however, it also can be used for any file that you add to a folder in Rift Store which is linked to a workflow approval group. Rift Store can, therefore, be used as part of the Riftsoft platform or independently for companies wishing to achieve QMS compliance on their existing set of documents.




- Rift Store manages all your approval requirements and helps you achieve conformity to standards such as ISO 9001.
- Approval groups are simple to setup and are then added to folders. All files within a folder are then sent through the approval process.
- Approvers are notified by email and on-screen notifications of any pending document approvals. They will see all documents requiring their attention in a simple to navigate approval screen.
- All documents that are rejected require a reason, and the requestor is then informed via notifications.
- All versions of a document and its approval history are auditable, and reports can be produced showing the complete document life cycle.
- Only once a document has been approved can it be used, either downloaded or queued for Rift Connect to upload to an external system.

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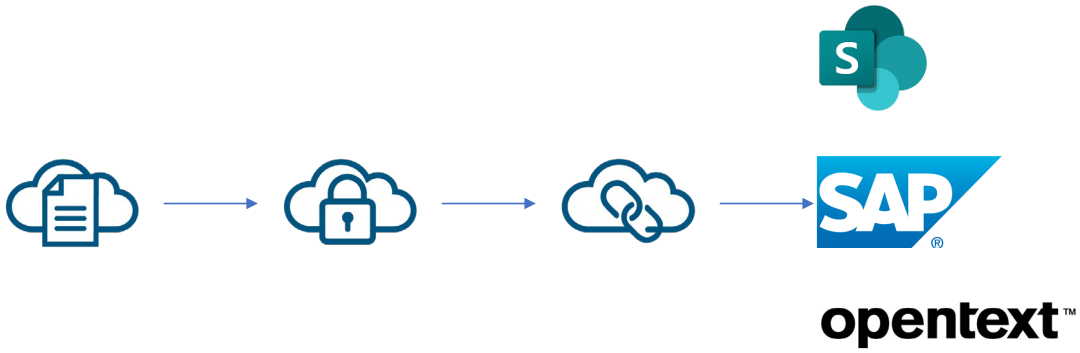
# Rift Connect

## Automating the distribution of electronic documents

Once a document has been through the creation and control processes it is then typically assigned to a business process or asset in an external system where it can be performed by a user to complete their tasks. This could be a maintenance planner completing their rounds via a work order and work instruction or a factory technician performing maintenance activities to comply with safety guidelines.

The procedure of linking the document to the right process or asset is typically manual and requires a lot of resource effort. Combine this with the fact that documents continually evolve, change in content due to process improvements, governance or the introduction of new procedures, the document linked to the process or asset also needs to be continually updated. Often this link is not recorded or easy to locate so it becomes very hard to identify where and which documents need to be changed.

Rift connect solves these problems by electronically creating and maintaining the link between documents created in the Riftsoft platform to external systems where these documents are used. Rift Connect links to systems such as SAP, Oracle, IBM Maximo, OpenText and SharePoint via standard and vendor API's and connectors.




Rift Connect is simple to configure by an administrator and can be securely called directly from the Riftsoft platform via your Gateway. Alternatively, you may also choose to host the Rift Connect web service inside your Gateway for added security and control. Once configured, SAP connections can then be rapidly implemented as no ABAP code is required to be imported into your SAP system.

Rift Connect offers several options to create new Document Information Records (DIR's) and the addition and update of URL attachments from Rift Store, SharePoint and OpenText. It can also be used to pass over the Rift Store file as binary data where it is checked into your existing content server for secure storage.
Rift Connect eliminates all manual processes in relation to electronic document distribution and replaces it with a flexible solution for creating, maintain and tracking documents.

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## About Riftsoft

Riftsoft is a global company and leaders in producing software that automates asset management and document control. We help companies to operate more efficiently and stay compliant in an increasingly challenging environment.

We develop software using ISO 9001:2015 compliance standards for industries sectors such as oil and gas, mining, energy production, manufacturing, and logistics to help them deliver process efficiencies and to become industry leaders.

We understand first-hand the challenges faced by these sectors and have built software that tackles these specific problems. Using our software will help you achieve greater efficiencies, cost savings and compliance to QMS standards.

## Additional Resources

Riftsoft capability statement

The Riftsoft Cloud Platform

Rift Print – The definitive guide to printing in SAP

Rift Print – Implementation Process explained

Riftsoft has sales and support offices located in the United States, Australia, and the United Kingdom. For more information on Riftsoft solutions or to contact a representative near you, please visit www.riftsoft.com

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