

DOCUMENT MODELLING AND PROJECT MODELLING – CONCEPT AND IMPLEMENTATION

Financial modelling or spread sheet programs have been around for a long time on personal computers.

In fact, it was probably the application which founded the personal computer revolution and distinguished personal computers most vividly from their less intelligent, dedicated word processor predecessors.

In computing terms, the real significance of electronic spread sheets is that they are really programming tools whereby those with no formal computer programming training can apply their experience and their own discipline to effectively write a computer program to assist in their own work or in its delegation to others.

Document modelling is similar to financial modelling. With the exception of those, such as novelists, journalists and copy-writers engaged in the creative generation of text, a very high percentage of text generation in offices is based on applying fixed text to situations which vary with the facts in any particular case.

Document modeler was implemented first on the Apple Macintosh and is supported best in that environment, although a version running under Microsoft windows is available.

To explain the example above, the first window is the reference window which contains constantly relevant on-line "help" data explaining to users the significance of the current

stage of the work they are doing. This information can be embedded in an off-the-shelf template written by a person experienced in that work or can be developed inhouse to comply with the particular requirements or policies of the firm. The shape of the window can be changed and the contents scrolled at any time.

The second window, labelled "free form" in the example displays the "questions" and accepts the answers being inserted in a particular case. The program is designed particularly for data entry by the person who has knowledge of the facts and is therefore a significant improvement over nearly every other program which professes to adopt a similar approach.

Questions can be specified as requiring a numeric, "yes"/"no", select one or several from multiple choice list or free text. Where appropriate, data can be

checked for accuracy and a message box containing calculated fields can be programmed to appear if incorrect data is provided.

A given answer to a question can be programmed to call another question and "example" data in the reference window can be copied into the answer window and further edited before being accepted. As suggested, the most common response can be included and the data accepted merely by hitting the enter key.

The final window is a changing view of the document as it is being created by merging the skeleton document with the variable information. Upon completion, this document can be further edited by the user in the word processing program of his choice.

In many cases, a document prepared today is merely part of a chain of documents which may contain information or be affected by a document prepared or facts learned in the past or will affect other

documents in the future.

Rather than re-prompt for the same variable information each time a document is prepared in a "project", the companion program project modeler, stores these values as global variables and makes them available to document modeler as needed, without the users needing to be aware of where the information is stored or when it is required.

a project. Selecting any of the buttons on the left hand side takes you to the relevant section, where the user is presented with a more detailed list of individual tasks to be performed.

These tasks might include moving to a spread sheet and automatically opening a previously prepared template, quitting to a terminal emulation program and automatically rolling on to an external data base or transferring to a document modeler template to

program is complete, control automatically reverts to the project modeler file for a further step in the project or for transfer to the last step taken in another project.

There is a desk accessory or memory resident program accessible at all times, called the Calendar Program. This program can be written to automatically when data is being supplied to a project modeler file. A model can be written in such a way that a reminder is inserted in the calendar on a day appropriate to the type of data being inserted.

For example, if an event or a particular type of document is to be followed up in 14 days, the appropriate calculations are undertaken and the entry made on the correct day. These entries are also automatically brought forward for the number of days specified at the time, with a default of 90 days.

Document modeler and project modeler were developed principally for the legal profession, although their application in other professions and businesses where the need to produce documents with a degree of standardization, is emerging.

The values in the "global facts" window are scrollable and can be changed at any time so that all letters thereafter might be sent to a client's new address. The "global check list" contains any number of "main sections" in

prepare a document, relying partly on values inserted during the project modeler session and partly on values obtained in the document modeler session. And when the use of the called

