

# Automated Forms Management:

## Maximize Your Time and Resources

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Smart management of everyday business information helps you to accomplish necessary work quickly so you have more time for other things.

One night this summer, I ordered a few things online for my daughter for horseback riding camp. It went like this: As I sat at my computer, ready to tackle a non-profit newsletter I had wanted to work on for days, my daughter reminded me she needed several things for camp the following week. (Sigh. Why does everything demand immediate attention?) Eager to work on the newsletter, I reluctantly switched gears and jumped online. The process was amazingly quick, easy, error-proof, and painless. It made me think about challenges we all face in business every day, and how we too often accept processes that are cumbersome and inefficient instead of working to make them better.

In case you never considered the process behind convenient online shopping, here's a quick rundown:

1. I clicked on the category for the item I wanted (riding boots). The category I chose (riding gear) produced a page with several options.
2. I clicked on the desired item (paddock boots). The item number appeared magically in the "item number" field – no chance of my hurried fingers mistyping.
3. My choice of paddock boots returned a message suggesting I might need half chaps to accompany the boots. "Good idea," I thought. "I forgot she needs half chaps to go with paddock boots." (Riding is a whole new world for those of us who are unfamiliar with it.) Pause. "Hmmm... since the snaps and zippers on half chaps don't hold up as well as the boots, I'll order two sets." No need to do the math – everything was calculated automatically, including tax and shipping.
4. Confirmation of the sale produced a request for shipping information. As I started typing my name, my home address appeared in the boxes, drawn from their customer database. "I'm on the home stretch!" I thought, relieved.
5. After confirming my address, a thank-you screen appeared with links to several websites offering related products. This time I refused the temptation and exited the screen, ready to get back to my newsletter.

Within minutes I had ordered everything my daughter needed, and returned to my work with a smile.

"Why aren't job applications, course registrations, or expense reporting that easy?" I pondered. It can be that simple – but like riding, dancing, or any other achievement, it's only easy after you've put in the necessary work. The effort is worth it.

### Everyday business: forms rule

Consider the forms you use in your business, such as:

- Job applications
- HR forms
- Expense reports
- Invoices
- Purchase orders/requisitions



Imaging, BPM/workflow, and Document Management Software

- Registration forms
- Surveys/questionnaires
- Forms specific to your business

If yours forms are on paper, then organizing, filing, and finding them quickly steals precious time, not to mention managing them as they pass from person to person awaiting appropriate approval and action. If they are digital then your systems have hopefully improved, but without integrated forms management and process automation, the riding gear website is miles ahead of you.

## Increasing your options

Web-based forms that are part of an integrated electronic document management (EDM) system give you powerful options. They also proffer the flexibility to accomplish your goals the way that is best for your business rather than forcing you to adapt to vendor constraints. As part of an EDM solution, e-forms offer:

**Flexible design** – A good solution puts you in control of form design. Expandable boxes, drag-and-drop windows, adjustable form length, and form controls put the reins in your hands.

**Consistent form completion** – Data validation tools ensure entered information is consistent with prescribed formats (such as MM/DD/YYYY). Guided entry tools such as drop-down boxes simplify form completion.

**Cost-effective (and green) storage** – An EDM forms solution saves forms into a centrally searchable repository. This saves money by eliminating the need for physical storage space and related costs such as heating, cooling, and filing staff.

**Greater security** – Configurable settings ensure only authorized persons can access, view, and manage forms according to the permissions they are given.

**Thorough classification** – Indexing rules you establish prescribe how forms and content are classified so authorized persons can find what they're looking for via varied search methods.

**Instant and secure retrieval** – Powerful search tools ensure forms and content are retrieved securely within seconds, anytime and anywhere, following user rights.

**Greater use of available information** – As forms are indexed, their contents are available and useful to others who need it. Behind-the-scenes submission rules provide users with secondary forms or route them appropriately for processing. BPM/workflow maximizes availability of useful information to other business applications. Rules route information wherever it is instructed to go, advancing decision making, reducing processing costs, and increasing profitability.

**Timely and appropriate archival** – When forms reach the end of their useful life, your retention rules automatically schedule them for archival on appropriate media, sending notifications when documents should be purged.

**Thorough tracking and auditing** – Form history is visible within seconds after forms are completed and indexed, whether they are being reviewed, are awaiting other documents so they can enter a process along with a package of materials, or have already been archived on other media. Secure desktop access to thorough audit trails gives you the evidence you need for audits and eDiscovery, as well as proof of compliance with policies and regulations.

## Getting a leg up

Now imagine your forms as part of a centralized, digital repository subject to your everyday business rules. Submitted forms could perform multiple actions simultaneously and automatically, including:

- Generating a PDF for permanent storage or output as an email.
- Displaying customized feedback to the user, such as:
  - thanking the user for submitting the form;
  - informing the user of additional information s/he might want to review, along with a link; or
  - notifying the user that the form is incomplete or has an error that requires correction.
- Importing a completed form and indexing pre-established data fields (name, ID number, etc.)
- Loading an external URL that is provided to the user after the form has been submitted.
- Loading a subsequent form in response to completion of the first form.
- Adding a completed form to a document package per pre-set business rules.
- Launching an appropriate business process. (Example: A checkbox determines whether a form is routed to department A or B; a completed document package is routed for approval.)
- Loading and storing specific form content in an external storage location such as a third-party database. (Example: a taxpayer form might load the taxpayer's name, ID number, amount due, payment amount and method, and date paid for action, historical records, or auditing purposes.)

## Mimic online retailing

Consider how much easier your processes would be if forms management software would be integrated with your other information systems:

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**Expense reports** – When an employee enters his or her name, EDM could use stored employee data to automatically assign the expense to the appropriate department, assign a general ledger code, etc. The data could be pushed to the payables department after payment is approved. The expense submission could automatically route the request to a manager for signoff, and checking the “approved” box could route the request to accounting for payment.

**Invoices** – Data could be extracted from invoices and compared with pertinent purchase orders, requisition, or receipts using pre-established calculations. Forms and supporting documentation could be packaged and routed for review and signoff. Email links could provide secure access to relevant information, ending cumbersome searches and waiting.

**Registration forms** – Form submission could generate and send customized thank-you notes to your clients, along with secure user access to pertinent materials such as other courses that might interest the registrant, etc. An email alert could automatically instruct accounting to dispatch an invoice, supported by a link to the registration form.

**Surveys and questionnaires** – Submission could generate customized thank-you notes and automatically enter users into a raffle, which in turn could inform submitters that they have been entered and when the drawing will occur, all without any human involvement.

### Money saved equals money earned

As part of an integrated information management system with a robust BPM/workflow rules engine to route information and drive processes forward, e-forms let you maximize the meaningful use of information across your organization. The results:

- quicker turnaround,
- cost-efficient processing,
- better customer service,
- informed decisions, and
- better use of limited human resources.

### Race the clock...and win

As the saying goes, “Life is short and time is swift.” Smart management of everyday business information helps you to accomplish necessary work quickly so you have more time for other things. Implementing e-forms and workflow as part of an integrated and automated document management system gives you a strong work horse and the bridle you need to steer your organization wisely and manage your information effectively. Together, they generate powerful returns quickly. Why simply trot forward when you could be readying yourself to win the race?



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