How to Shape, Manage, and Control Your Business Information:

Tips for Using Electronic Forms Effectively

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The ancient Greek philosopher Plato viewed everything as a form, and every form as an ideal version of an object. His notions hold true with an increasingly popular business tool: electronic forms (eforms), which allow organizations to stipulate the ideal form for content so it enters their organizations as consistent, desirable, and ready to use. (Had Plato lived to see eforms, I think he would have approved.)

To generate desired efficiencies, electronic forms demand meticulous attention to detail. Each form must shape the content it captures to maximize meaning and usefulness for those who rely on it. When they're well designed, forms gather quality content and use it intelligently. Built-in controls provide tools to capture and make meaningful information useful wherever it has value.
This article will help you understand considerations in designing and using online forms so they will supply the control, compliance, and results you're looking for.

The basics

Web-based forms that are part of an integrated document and process management system ensure:

- Form content is standardized, consistent, and complete
- Content is available and searchable within moments of creation
- Forms can be accessed, amended, routed, and submitted securely from anywhere, anytime
- Authorized persons can view, edit, and delete forms and their content
- Audit trails of content creation, access, and transactional use are always available, allowing quick response to reviews, reporting requirements, litigation, etc.

In essence, eForms make your people more productive, efficient, and compliant.

What eForms provide that paper forms don't

If you think you can just scan your paper forms and forego this article, you're right…and wrong. Scanning paper is a big step forward. However, creating content digitally – rather than scanning the paper later – renders significant added controls:

- increasing the probability of productive search;
- promoting quick completion of collaborative forms;
- making submitted content available instantly;
- enforcing governance policies; and
- promoting significant cost savings (no paper).

Creating eforms isn't difficult, but reaping the rewards requires more than replicating paper forms. If you plan to automate processing using eforms – a huge benefit -- you need to don your thinking cap before you start designing. Here are some standard steps for eforms projects and questions you should ask yourself before you begin.

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Conduct a form inventory

Analyzing your forms leads to effective streamlining, ending the collection of duplicate information for different uses and reducing inevitable errors.

Ask:

- What form types do we have (expense reports, applications)?
- What purpose does each serve? (Documenting form function will help users select correct forms when multiple options exist.)
- Is there data duplication between forms?
- Can form types (or content) be eliminated or combined?

Gather accurate information

Research claims 5-10% of your time should be allocated for quality control. Assuming your workers' error rate is typical 3-5% – or even 1% -- errors and correction are costly. Rules-based eforms enforce your rules, collecting clean data by:

- Regulating data collection protocols
- Confirming procedural compliance
- Creating automated reports by throwing form contents against your business rules

Ask:

- What specific information is needed (First name, document ID number)?
- Can content be extracted from existing data sources (line-of-business software, customer database)?
- Must data sources be re-executed when documents are updated?
- Which metadata (such as an invoice number you plan to import from your accounting system) should not be subject to change?
- Which fields should be mandatory? Which can be optional?
- In which order should questions be answered to enable logical, quick form completion?
- What data restrictions would help to ensure accurate data entry? (Examples: prescribing an acceptable date range or the number of digits for an ID number; forcing users to choose responses from drop-down menus.)
- Can we automate numerical calculations using existing data?
- Is the information users will need for successful search marked mandatory?

Classify content so forms and information can be found quickly

Indexing is critical to a successful eforms implementation, since it catalogs crucial information people expect to retrieve. These questions will help you wrap your mind around classification so diverse users can find the information they require when they need it, without fail.

Ask:

- How would I describe this form type and its function(s) within our organization?
- What metadata will workers need to search for historical, reference, or legal purposes (name, document type, customer ID number, etc.)?
- How are documents currently grouped – by department, function, or another method?
- Does it make sense to adapt current practices as an indexing scheme, or can they be improved?

Enforce adherence to governance policies

Purchasing eforms as part of an integrated document and business process management suite lets you control how they are accessed and used throughout the document lifecycle. Your security settings follow each form throughout its creation, storage, and useful life, leaving a clear, continuous audit trail from generation through destruction.

Ask:

- Which groups of users need to access to this form type or its contents?
- Should users be permitted to re-index documents after they have been classified?
- Which feature rights should each user group have, such as the right to retrieve, view, annotate, email, or delete this form type?
- Should metadata values (such as accounts over a certain sum) be used to restrict form access?
- After this form serves its purpose, will we need it for historical, legal, or reference purposes?
- How long must this form be retained in order to comply with regulations?

Since regulations keep mounting and penalties for non-compliance are increasingly severe, governing who has access to your information and how it is used is critical.

Regulate the flow of work

Artist Donald Graham once quipped, "The world seems to be made up of a never-ending series of overlapping forms. There always seems to be something in back of something else." So it is in business; processes typically use multiple forms that overlap and depend on each other. The greatest efficiency is when eforms automatically launch routine processes, expediting the distribution and completion of work. Even if you implement forms simply as a way to collect and store information, keep your eye on process automation, where the greatest savings and benefits occur.

Ask:

- Which data on each form is needed for processing or decision making?
- Is the entire form needed, or just specific data?
- At what point in each process is the information needed?
- What integrations would allow seamless data transfer from other systems to the form?
- When the completed form is submitted, should it automatically create a PDF?
- Should form submission launch one or more specific processes, email acknowledgements, or other actions?

What you need to know

Version control: Form completion, review, and signoff can involve multiple people, so versioning is critical. Make sure your product tracks when saved documents were created, edited, viewed, and deleted. It's helpful during the forms lifecycle, audits, and eDiscovery.

Ease of use: Like any technology, this is vital to adoption. Assess whether your product has a user-friendly interface with tools to help users, such as flexible windows, moveable work spaces, and interactive user guides. Although training is important, tools that are easy to use will shorten the learning curve.

Browser-based access: As employees become more mobile, web access to work is becoming crucial, offering flexibility, round-the-clock service, and saving trips to the office. Even if you don't think you need it now, you will – so think ahead.

Summary

Successful forms management demands that you:

- Invest ample time in design so you consistently get what you need;
- Create a thorough indexing plan with input from all levels of

staff so diverse users can consistently find what they need to be efficient;
- Understand and leverage the interrelationship of the forms and processes in your business through eforms and process automation so you can offer better service and realize significant savings.

With these goals in mind, along with these guidelines to help you on your way, you're on the path to enable smart, sustainable business practices that will make your business more agile, profitable, and successful.

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- Configurable security and feature rights ensure sensitive information is protected.
- DocFinity is easy to use, administer, and support: one logon gives authorized users and administrators access to documents, content, and prioritized task lists.
- An intuitive interface with configurable options such as moveable and resizable windows and adjustable column widths maximizes each worker's productivity.
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