

Forms Integration and Reporting

There are few things more irritating to a business owner than having employees spend time filling out forms and not being able to capture the data entered and put it to use elsewhere. A form is still a good way to capture data as it's a process understood by a large percentage of the population (i.e. - who hasn't filled in a form at a doctor's office). The goal of an integrated electronic forms system is to reduce the amount of data input by preprocessing the form and capturing the entered data in a database. By performing these two functions, data entry time is saved; the gathered data is more accurate, and stored in a format that provides easy reporting. When integrated with an electronic document management system (EDMS), an electronic forms package becomes even more valuable. One of the more valuable things forms integration can provide is a permanent document that cannot be altered.

An example of using an electronic form

Almost every company has an order form that must be filled out and processed to take a customer's order. If the EDMS and the forms package are integrated, this could be as simple as the following steps:

- Find the customer's folder in the EDMS
- Start a new order form which is prefilled with the customer's information drawn from the EDMS database
- Fill out the remaining parts of the form such as items/quantity
- If necessary, sign the form electronically
- Save the new order form in the customer's folder

In the background a number of steps are taking place which are not readily apparent:

- Data is pulled from the EDMS system allowing all the standard customer information to be prefilled on the form
- As the form is saved, the new order data plus the customer data is updated in a new order table in a database
- After being saved it can be automatically routed for approvals through the EDMS system
- After the approval process, the accounting system can automatically import the new order data into its database
- The actual order document is saved and can be sent to the client as a verification step

One of the key items is an actual document is created that can be sent through the EDMS workflow for approvals, faxed to the client for approval, or basically any function the paper-based form provided. If saved with the correct retention/security policy, it becomes a permanent document that can be referred to should any questions arise in the future.

Integration

An integrated EDMS and forms package can provide a company with a vast array of options for making data more accessible and more usable by other packages. For instance with CNG-Forms, the forms are built as a document template. This document template can then be connected to a table in the CNG database. Fields in the document template can be prefilled by data from the CNG-SAFE database. This minimizes the amount of data which has to be filled in by the user. This makes your data entry more efficient and minimizes data entry errors by using the same data over and over. As each form is saved, a new record is written to the database table saving the data from each field on the form to a field in the table.

Once the form has been saved, it may be routed to other users via a processing rule or by manually routing the document. If the user has the ability to edit the form, then fields may be updated or changed based on the user's privileges. At each step along the way, as fields are changed/updated, the record in the database table is also updated to reflect the most current information. This ensures the form data matches the database table. Once the form has completed its journey through the workflow system, the fields on the form can be locked so that no further changes can be made. A retention/security policy can also be applied making the document unalterable. This unalterable form includes a copy of the data written to the database table so you have a permanent record of the initial data submitted. This type of security makes the auditing process much easier.

Reporting

One of the best features about an integrated forms/EDMS system is the ability to collect data from the form fields and store it in a database table. After the data is stored in the data table attached to the form, it can now be accessed through any number of other software applications. Some different types might be:

- Order entry forms could provide data that can be imported to an accounting system
- Travel expense forms could provide data to an expense program
- Customer service forms could be used to provide service reports

Having access to the data can provide many benefits to a company. For instance; a spreadsheet could be attached to the table and different filters used to generate the necessary report. All of this could be done with a familiar spreadsheet tool such as Excel. Because many users know how to use Excel to manipulate data, this becomes an easier process than using some sort of database reporting tool. Using and manipulating the data provided by an electronic forms program is a major benefit.

Conclusion

An integrated EDMS/electronic forms solution can provide a number of benefits to a company. These benefits allow a company to run more effectively using an interface most of the employees are already familiar with (the form). Electronic forms can be made to look exactly like their paper cousins, so

no employee training has to be performed on how to use the technology. The key benefits to this type of solution are:

- A permanent record of a transaction (form)
- The data in the form fields can be added to a database table
- Electronic workflow allows the form to follow either a rules driven process or ad-hoc routing
- The data in the database table can be extracted, manipulated or reported on
- Simple to use