

ELECTRONIC FORMS

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ITD RECORDS MANAGEMENT
MAY 19, 2009



Presentation Overview

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- Definitions
- Benefits
- Toolset
- Demo

State of ND's Forms Definition

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- Any document designed to record information, and containing blank spaces and which may contain headings, captions, boxes or other printed or written devices to guide the entry and interpretation of the information."
- A form typically does one or more of three things:
 - initiates an action
 - records a transaction, or
 - reports something.



Definitions

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- **Electronic Forms.**
 - An electronic replication or replacement for accessing, filling, submitting, and storing a traditional paper form.
- **Forms Processing.**
 - Software designed to automate data entry activities by using recognition technologies to convert form entries to digital data.



Electronic Forms

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- **Five levels of Automation.**
 - Level 1 – Print and fill.
 - Level 2 – Fill and print.
 - Level 3 – Intelligent local fill and print.
 - Level 4 – Application autofill and electronic submission.
 - Level 5 – Digital signatures, record copies and dynamic linking to other forms.

E-Form Benefits

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- **Elimination of data entry.**
- **Elimination of incomplete submissions.**
- **Elimination of calculation errors.**
- **Validation prior to submission.**
- **Automated export of form data to business application.**
- **Automated storage/return of record copy.**

Forms analysis vs. forms design?

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- **John Schied: "forms analysis resolves what goes on the form, while forms design continues the analysis until it resolves how to best arrange and present the information."**

Forms Analysis vs Forms Design?

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- **Analysis resolves what goes on the form**
- **Design determines the arrangement of the information on the form**
- **Design determines form media and construction**

Forms Analysis and Design Benefits

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- Makes the form look good
- Well designed forms are more pleasing to use and will make fillers happier
- Provide for easier entry of data
- Allow easier use (retrieval) of data
- Reduce chance of error
- Be self instructing
- Reduce your costs

Tools

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- Forms are tools of communication. They are custom designed for a specific systems usage purpose.
- As the forms world gets bigger and more complex, electronic forms are doing more work, better and faster.



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- Analyze forms to create a “good” forms. We don’t want to automate a “bad” form.
- "If you automate a bad form, things will only get worse." - Rob Barnett,

State’s Toolset

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- TeleForm
- FileNet E-forms
- Liquid Office



Teleform

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- Ability to process paper forms and attachments.
- Decreases the amount of manual data entry
- Lowers the cost of data entry by 90%
- Increases operating efficiency and provides an accurate, timely process for getting existing forms and documents into FileNet by utilizing lookup tables and data validations
- Auto merge publisher allows merging of electronic data onto forms for automated processing.

When to Use TeleForm

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- Automation is important
- Completed in paper form and may include attachments



FileNet eForms

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- Allows the user to add existing documents into FileNet by utilizing database lookups to populate desired data.
- Ability to have more than 1 approver without needing additional licenses.
- Ability to discard/keep form and store attachment(s)
- Access to forms without logging on when user is already in FileNet
- Can use the form as a step processor for Business Process Management (BPM)

When to Use FileNet eForms

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- You need to utilize database lookups in the indexing process.
- You need to add electronic documents into FileNet.
- Currently are a FileNet user.

Liquid Office

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- Provides the ability to complete, sign, route, process and store forms electronically.
- Forms designed in Liquid Office can be accessed via a friendly URL or through the Liquid Office repository.
- Routing of forms can be configured based on a single destination or can be specified by the user.
- Forms can be electronically signed and the data on the form locked by the signature process.
- Ability to use off-line
- Ability for public access

When to Use Liquid Office

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- The form utilizes pre-population of data from a database
- The form requires authorization and/or electronic signatures.
- A file copy is needed in FileNet.

Current Applications

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- Department of Agriculture
- DOT
- Human Services
- Insurance
- Job Service
- Tax Department

Benefits of Current Applications

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- **Insurance**
 - Companies submit electronically abstracts
 - Renew yearly (January – March)
 - Saves approximately 25 hours per renewal period
 - Paid for itself after one renewal period
- **DOT**
 - Bridge Inspection Form
 - Saves 115 hours each year



Demonstration

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Questions

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