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Marji McClure

## The Bottom Line: Investing in Digital Forms Processing



In today's challenging economic times, organizations are trying to do more with less. This objective is proving a strong selling point for the implementation of digital forms processing solutions. Through the design, creation, and management of digital forms, companies can improve efficiencies across all aspects of their organizations—both internally and externally. From forms that are used to register customers for new services to forms that employees fill out to receive company-sponsored health benefits, the ability to offer these documents in a digital environment ensures that tasks are done completely, accurately, and efficiently.

While the forms represent a way in which companies can collect information from all of their stakeholders, from customers to employees, they (as a more robust data entry tool) can actually serve as the beginning processes that help store that data and make it usable in various applications across an organization's operations.

"Digital forms allow organizations not only to capture information but to automate the processes associated with that information, manage those processes, report on them, optimize, and leverage that information in ways you just can't

do with manual forms," says David A. Kelly, president of Upside Research, Inc.

Kelly adds that referring to these processes as forms "may be a little misleading because it's really about the automation of business processes and information," he explains. "So 'forms' is sort of shorthand for a collection of information. In this case, [the information is] represented in a form."

### WHAT THE FORM CAN DO

The form in its digital state actually serves as the framework in improving business processes. Through the design, creation, and management of these forms, organizations have the potential to significantly change how they conduct business.

Brian Lincoln, senior product line manager for Xerox DocuShare (web-based content management software) says that Xerox customers are transitioning to digital forms because of the ability to save money on paper and storage costs in addition to the efficiencies a reduction in paper naturally yields. "By moving a digital forms process online, you're able to find that information much faster; sometimes in terms of seconds as opposed to hours or days," says Lincoln. "With a form, you're usually seeing some sort

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of approval process or downstream workflow that needs to be triggered by that incoming form. Rather than have something that has to be physically routed around or physically looked at, you have all that happening online.”

Another benefit, notes Lincoln, is the reduction of data entry errors. Validation of the data can be done at the point of input, he says. This can also lead to time and cost savings.

In addition to cost-saving measures and improving efficiencies, other potential benefits are motivating organizations to transform their forms-processing strategies. Collaboration and compliance are two main drivers, according to Tim Nissen, director of marketing for DocuLex, which provides document and content management software solutions.

“Collaboration is really where the forms come in, especially with being able to share information in real time with colleagues throughout an organization or vendors or anybody else who is involved in a company’s project,” says Nissen. He also notes that compliance is becoming more crucial in this space. “Whether it’s because they’re going to have to report [data] or if they’re going to have to justify it for funding, litigation, or prediscovery, they need to have knowledge of what information is being circulated within an organization.”

While organizations bring different reasons to the table to explain why and how they want to utilize a digital forms processing initiative, how they actually integrate such solutions varies as well. Some choose initiatives that encompass all of their forms at once, while others prefer a gradual entry. “In many cases, organizations do this at a project-based level, focusing on one form or forms associated with a certain process,” says Kelly. “They want to define the process, define the forms, and get the automation in place. They tend to expand out from there, adding forms or processes as they go.”

Joby O’Brien, VP of development for **BP Logix**, agrees that this is typically one of the best places to start. “Where we’ve been successful is going in at that branch level, department level, or business unit where they’ve got a particular problem that has gotten to a point where they realize that some type of forms-processing automation is going to be a good thing for them,” says O’Brien. “It lets them have a high degree of control of what that is. So it’s not a corporate edict that says, ‘This is how documents are going to be stored or forms are going to be collected.’ It lets them tailor it to their requirements. The key is it allows them to do business a little bit closer to the way they do currently.” BP Logix enables

customers to transition to an automated digital form system through its Workflow Director web-based offering.

### BETTER FORMS BY DESIGN

Beginning with digital form design, companies can make their transition to digital forms processing a smooth one, and they definitely have a lot of flexibility when it comes to the actual design of their digital forms. Sometimes, companies choose to replicate the traditional hard-copy form because they want users to see a familiar document. But oftentimes, they choose to utilize the technology to be more creative and more streamlined with their forms design.

O’Brien says that many clients want their digital forms to be browser-friendly, “which means it’s easy for people to scroll up and down,” he explains. “You add to it in a way that truly does embrace the browser and in a way that people are used to.” Kelly says that it’s more likely for companies to replicate a paper-based form for external processes (such as those involving customers), whereas “internally, you have a bit more variation and control over that, or an opportunity for change.”

However, adoption (both internally and externally) can be aided in the design stage by making the forms almost tutorial in nature. Lincoln notes how companies can create forms that have applications of sorts that will guide users as they enter data into a form, ensuring that all of the required data is entered and that it is accurate.

Organizations must have the users and their specific needs in mind when designing and creating their digital forms. “It’s one thing to sell this to managers and IT directors when you’re selling the advantages and benefits and how you’re going to get compliance and control of your processes,” says O’Brien. “When you’re actually dealing with the folks who are going to be using it day in and day out, it’s a completely different sales process. The most important thing to them is what the interface looks like.”

While some companies create online-specific versions of their forms, some opt to just convert their print forms into online digital files. Yet both processes enable the same result: making form content accessible in a digital format.

### IMPROVING INFORMATION MANAGEMENT

The main goal of creating digital forms is to make data more usable and to help streamline business processes related to that data. However, some companies don’t initially realize how deeply many segments of their business can benefit from these initiatives. In essence, creating the digital forms and collecting the data is just the beginning and provides a framework for a variety of data management capabilities.

O’Brien says that once organizations take a deeper look at the capabilities related to digital forms processing, they typically do recognize even more value. “They realize it’s more than just a data collection method,” he says. “It becomes a way to manage that data. The user starts entering the information and then interfacing with your back-end systems so you can take action on that form. You can interface with your ERP (enterprise resource planning) system.”

The available features and functionality work to make digital forms processing systems a complete solution. Kelly notes how companies can have different systems (such as ERP) through which they need to flow information between. “That’s an opportunity for forms

Item	Description	Price	Quantity	Amount
1100	Widget	\$21.15	1	\$21.15
1101	Widget	\$10.00	1	\$10.00

*Digital forms, such as this one powered by BP Logix's Workflow Director, enable users to input and view data, and they provide additional capabilities such as the ability to attach approvals to a form.*

processing to manage those interactions, such as managing something that comes in from a fax machine that needs to get entered into an ERP system and needs to be verified externally through some other service,” says Kelly. “That would be forms automation as well.”

In terms of data entry, Lincoln says he has seen electronic forms being used as the presentation layer for a business process management application. “The presentation of the data for that work will be controlled through the use of e-forms,” he says. “Different people in that process can be given a different view of the data.”

Regardless of the view, all users must be able to access the data that is most crucial to their particular tasks when and where they need it most. DocuLex’s Archive Studio product contains its WebSearch functionality that works like a typical internet search engine, says Nissen. It enables users to search the forms they need (via password access). The technology works for forms that are created digitally and paper documents that are scanned and converted into PDF or XML.

“The real key is that we’re able to capture and have access and usability and reusability of any form in its native format,” explains Nissen. “We’re able to organize it and provide access to users who need it. It provides a level of security. The people who an organization needs to have access to the documents can have it quickly and easily literally from any location.”

Having such processes in place is also serving companies as a security measure of sorts. Having digital forms and related processes at work can help ensure that important data and the workflow surrounding it remains accessible and intact.

“Having important documents on paper is a recipe for disaster if a disaster were to occur,” says Lincoln, noting that DocuShare has customers who use the solution as part of their disaster recovery or disaster prevention efforts—including a judicial court located in a hurricane zone in Florida. “Whenever a hurricane would hit and they couldn’t get to their

paper documents, or paper documents were lost, it would interrupt their court proceedings.”

#### **PLANNING FOR NOW AND FOR THE FUTURE**

Still, the truth is that despite all of the possible benefits companies can receive through innovative forms-processing initiatives, many organizations won’t ever (or not at least for many years) eliminate the paper form entirely. O’Brien notes that while many companies do roll out automated solutions slowly, even those with highly automated and sophisticated processes will still use paper. Because of this, organizations need to be able to keep both the print and online processes working together to ensure data is captured accurately (regardless of its native format) and effectively utilized.

“In this enterprise content management industry, we collectively need to recognize that there is a growing online contingent of forms being filled out and there is a remaining high percentage of paper,” says Brian Ball, VP of forms processing for Parascript, LLC, an image analysis and pattern recognition technology provider. “If you have an online capture method, it needs to be tightly coupled with your paper mode so that you’re consistently branding yourself and consistently supporting your customers as they’re filling out forms to order your product or register your services. You [need to] use the same kind of infrastructure to integrate with the data to maximize the efficiency of capturing that data both online and offline.”

Kelly adds that organizations need to implement practical and nimble solutions to handling forms-processing tasks, “solutions that are going to address specific needs but have the flexibility and infrastructure for future growth and aren’t going to be too expensive,” he says. “They need to be practical from a cost standpoint and from an implementation standpoint. I think we’re seeing some of that focus come out in the market now.” **EC**

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