Purely Digital: How E-forms can Transform your Business

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Introduction

Paper is being pushed out of the enterprise wherever possible, and in short order the enterprise has shifted to a digital centric way of working. However, this transition has not been easy. Every day, inbound paper documents, specifically paper forms, pile up and clog processes in our organizations, anchor us to paper laden systems, and entangle valuable business information in a form we can't readily or effectively make use of.

Forms are a ubiquitous presence across industries from banking and healthcare, to manufacturing and human resources, and collect, organize, and prime critical data required for effective operation of our businesses and office processes. At times, forms simply acquire information, act as a data receptacle, or transmit information to where it needs to go; other times, forms trigger processes, are acted on by processes, or act as the driving force. As we will see in this report, how we leverage forms is critical to efficient operation of our businesses, and there is a clear advantage in processing forms digitally. Therefore, to best accommodate our now digital ways-of-working, we must turn paper forms into something more easily accessed and automated, an electronic form, in order to deliver it into our content management systems, workflows, and the digital lifecycle.
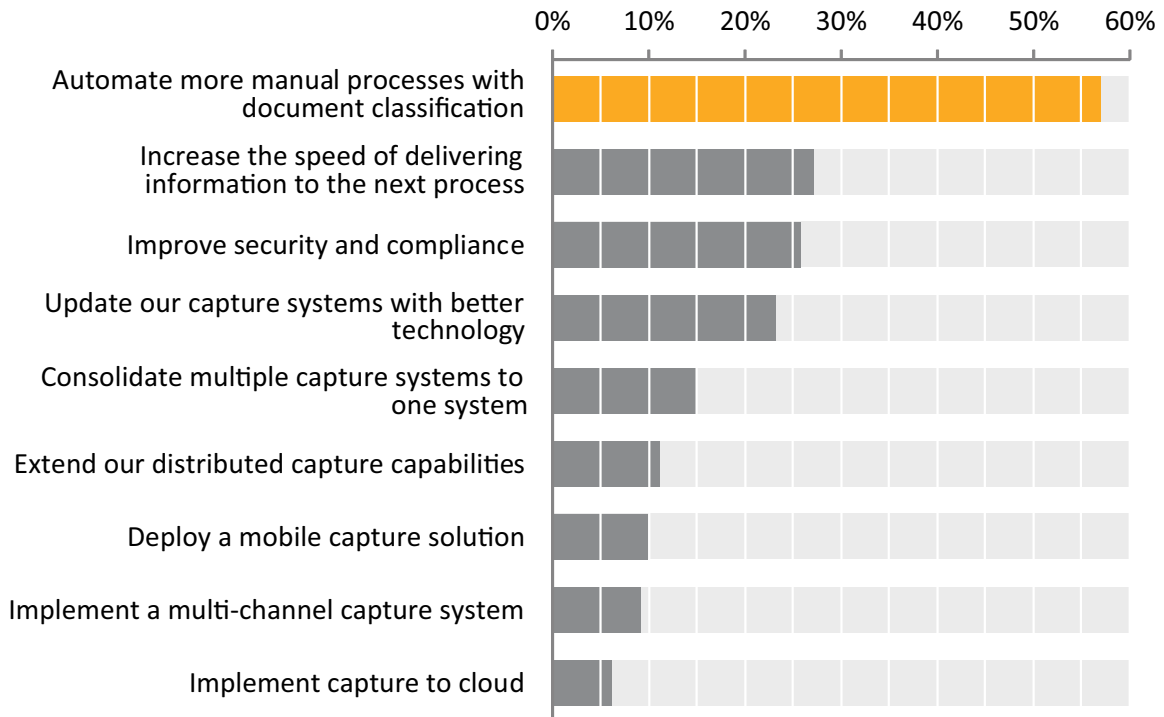
Eliminate Paper at First Touch

As long as we cling to and inject any amount of paper into our process—including paper forms—business processes will be forced to slow to the speed of paper. While many organizations have become very proficient at capturing paper forms at the earliest possible point, the first touch point, the question must be asked, "What is the purpose of the paper medium, and is there a way to eliminate the need for paper from the beginning?" To answer this, you can begin by looking at the paper-based information used in your organization, especially forms that need to be completed by employees, customers, and potential customers. What benefits are gained by using paper forms—if any at all—opposed to digitally born E-forms? Could E-forms be an overall better solution to obtain and manage form acquired information?

The Problem with Paper Forms

The truth is paper forms whether filled out by hand, or indexed via content management software, necessitates a process that is incredibly unwieldy. Re-keying of data for forms is time-consuming and error-prone, and physical handling of paper within the process saps productivity. In addition, we know that searching for paper documents is tedious and requires physical proximity to the file cabinet. In fact, in a recent AIIM survey, the automation of manual processes command a striking lead as the biggest driver for scanning and data capture, as reported by a selection of the 196,000 strong AIIM community. This indicates possible backlash against the disadvantages of paper and paper forms, and the desire for a medium to correct these perceived problems such as E-forms.

What are your immediate priorities to improve your current capture system(s)?1

Priority	0% – 60%
Automate more manual processes with document classification	~57%
Increase the speed of delivering information to the next process	~27%
Improve security and compliance	~25%
Update our capture systems with better technology	~23%
Consolidate multiple capture systems to one system	~15%
Extend our distributed capture capabilities	~10%
Deploy a mobile capture solution	~9%
Implement a multi-channel capture system	~9%
Implement capture to cloud	~5%

Moreover, we also know that the elapsed time of response in a paper process far exceeds the actual process time itself. By ushering out paper forms, in favor of the E-form, we can eliminate these physical transport blocks and in-tray queues dramatically to improve speed of response to the customer – whether actual customers or internal customers; this translates into cost savings.

Electronic Forms (E-forms)

E-forms are born digital, and therefore are always in context within the digital environment. When implementing electronic forms, the information is immediately brought into the system, validated, and made available for re-use. Submission of the form itself triggers related workflows, and directs the information to all vested parties for actions needed. This approach of automating manual processes with document classification - a focus for nearly 60% of AIIM respondents - increases operational efficiencies, reduces operating costs, and maximizes the value of the captured data.

Maintaining and updating version history for files is more reliable and easier than paper alternatives by providing a clear, digital audit trail. The digital audit trail easily tracks user activity, modifications, routing, approval, and version history. Also, with an E-form you simply update and modify the E-form as changes are needed in real time. There is no need to print, inventory or discard unused forms. In fact the new form is immediately brought into use with minimal transitional impact to the user, process, and operations overall. These features enhance security, speed up workflow, mitigate the need and costs of paper storage, and prevent duplicate work if employees erroneously use unsynchronized documents.

E-forms can be prepopulated with data sourced from ERP and line-of-business applications, reducing the need to re-key data that already exists in the system. They can also contain user-friendly features that can assist with the form completion process—features like date pickers, pre-configured data sets, e-signatures, and form validation that can help guide the user—reducing errors and facilitating completion of the form. Usability enhancements for flexible creation of E-forms also exists, such as low code design, conditional logic, filters, support for embedded media, and universal acceptance of multiple file types (e.g xml, html). Client-side, once the form is completed and submitted, it is immediately available for electronic routing, and the resultant data is available for review, all the while sensitive data is kept locked and secure until accessed by the appropriate people. In many ways, the E-form is best seen as a living system, one component of a much larger content management process and strategy, capable of improving security and compliance requirements, and providing increased speed of delivering information to the next process as indicated by nearly 25% of AIIM respondents.

Mobile Access

E-forms extend the ability to capture vital business information beyond enterprise walls to outside users, allowing and supporting mobile device use via specific mobile apps or device agnostic web interfaces. For instance, students can apply for enrolment and tuition loans. Patients can complete history forms and complete forms required for information to be released. Also, E-forms can be accessed anywhere at any time – important for collaboration, and a crucial factor when travelers and home workers are involved. Consider the advantages of a field agent or even a customer completing a claims form, application or conducting a review and approval cycle while in the field. What would that mean to your organization in terms of time saved, and responsiveness to your clients? The variations are only limited by not understanding where information can be captured and how E-forms can be used as the capture vehicle.
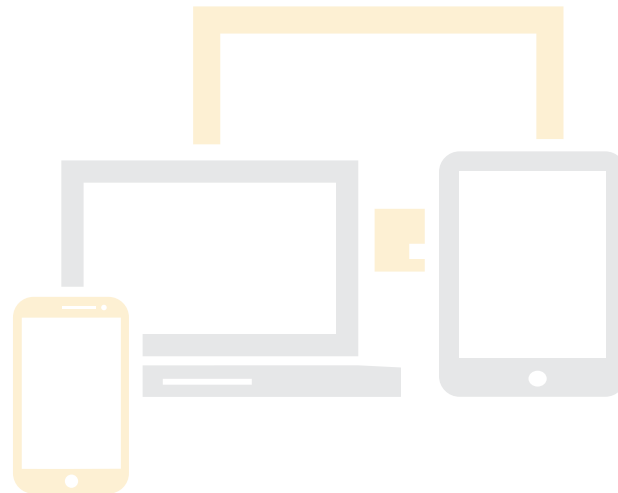
Conclusion

How much do your business processes rely on forms? Now think about how E-forms could transform your business. Paper-based information slows processes, increases risk of loss, and is unrecoverable in times of disaster. Organizations must seek to digitally transform their operations. Use of E-forms is one way to move the organization forward.

Here are a few key considerations to take into account when appraising the potential value of E-forms in your organization:

- Look critically at places where E-forms can help streamline existing processes or entirely eliminate others. Ask where the form should be placed in the process, who will complete it, and on what type of device.

- Evaluate your reusable data and how best to harness this data to support other processes or create additional value. Ask how the captured data will be used as it is intended, and also where other departments and applications could potentially reuse it.

- Make every effort to drive out paper from the workplace where possible. When assessing the use of E-forms, consider associated review and approval processes, as well as other points where a signature is required. This is an opportunity to implement use of e-signatures and keep the information securely in digital form throughout its lifecycle.

References

[1] AIIM Industry Watch Paper free Progress – measuring outcomes www.aiim.org/research

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Thomas LaMonte is an AIIM Market Intelligence Researcher well versed and credentialed in the fields of ECM, ERM, and BPM with a heightened focus on solving the operational problems of today's businesses.

About OnBase

OnBase
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OnBase is a single enterprise information platform for managing content, processes and cases. Providing enterprise content management (ECM), case management, business process management (BPM), enterprise file sync and share (EFSS) and capture all on a single platform, OnBase transforms organizations around the world by empowering them to become more agile, efficient and effective.

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