QUICKER BETTER SAFER

Laserfiche Forms

Joanna Slusarz

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INTRODUCTION

Every department and business unit has its own unique content management needs. Some are looking for simple search-and-retrieval, some need to streamline information capture, and some want to enable repeatable processes such as hiring, purchase order processing or customer onboarding.

Finding a system that's flexible enough to accommodate these divergent goals and objectives can be a challenge, particularly when so many enterprise content management (ECM) systems require the services of expert—and expensive—programmers, analysts and consultants to customize and configure them.

This type of flexible ECM system—which provides centralized control over an organization's information infrastructure while still offering departmental business analysts and line-of-business managers the flexibility to configure electronic forms, design workflows and create folder structures—ensures two things:

- User acceptance, because the people configuring the system are enmeshed in the day-to-day reality of the group's working requirements, and they know how to ensure that the right work gets done the right way at the right time.

- Flexibility to evolve with changing market conditions, because the group does not have to wait for a vendor, consultant or IT department to maximize the performance of its localized solutions.

At Laserfiche, our goal is to help your organization take advantage of the deep knowledge you have about the ways your processes should run more efficiently—and we believe that the best way to do that is to empower all our users with the knowledge and expertise they need to deliver value quickly, easily and without the need to engage expensive experts.

This is especially true when it comes to automating the capture, routing and approval of information trapped on paper and PDF forms. According to Gartner, 85% of business processes are initiated by a form. Yet research shows up to 40% of submitted forms contain missing information that must be corrected manually.

Laserfiche Forms enables you to quickly and affordably extend your business processes to the point of capture by implementing the process rules and management oversight necessary to ensure accurate data collection and processing. And because we believe you're the expert on how your organization should run, it's designed to enable departments and business units to design and include Web forms in their business processes, providing flexibility in form design and creation—while still allowing IT and Operations to maintain security and management controls.

This collection of real-world solutions provides an overview of ways customers around the world are gaining value from Laserfiche Forms, from streamlining hiring and claim processing to employee review and more. We invite you to tap into their knowledge to help employees within your organization become more informed and more efficient than ever before.

This book contains a collection of solutions that focus on Laserfiche Forms. For more than 120 additional solutions, please visit:

Laserfiche.com/SolutionExchange

New Customer Onboarding

For insurance companies, onboarding new customers can be a paper-heavy process. A great deal of paperwork must be filled out and reviewed by multiple parties. Sometimes, underwriting is necessary for the customer to be approved. Learn how one insurance company streamlined this process with Laserfiche Forms.

Learn how to create a fully automated customer onboarding business process with Laserfiche Forms.

THE PROCESS

The process starts when a prospective customer fills out the main application form on the company's Website. Certain fields are marked as required so that the form cannot be submitted if they are left blank.

Health Insurance Application Form

Are you existing member?
NO YES

Company / Association

Date Employed / Join Date

Section 1. Details of main member
(*For existing member, please confirm or update your details*)

Title*

Last Name*

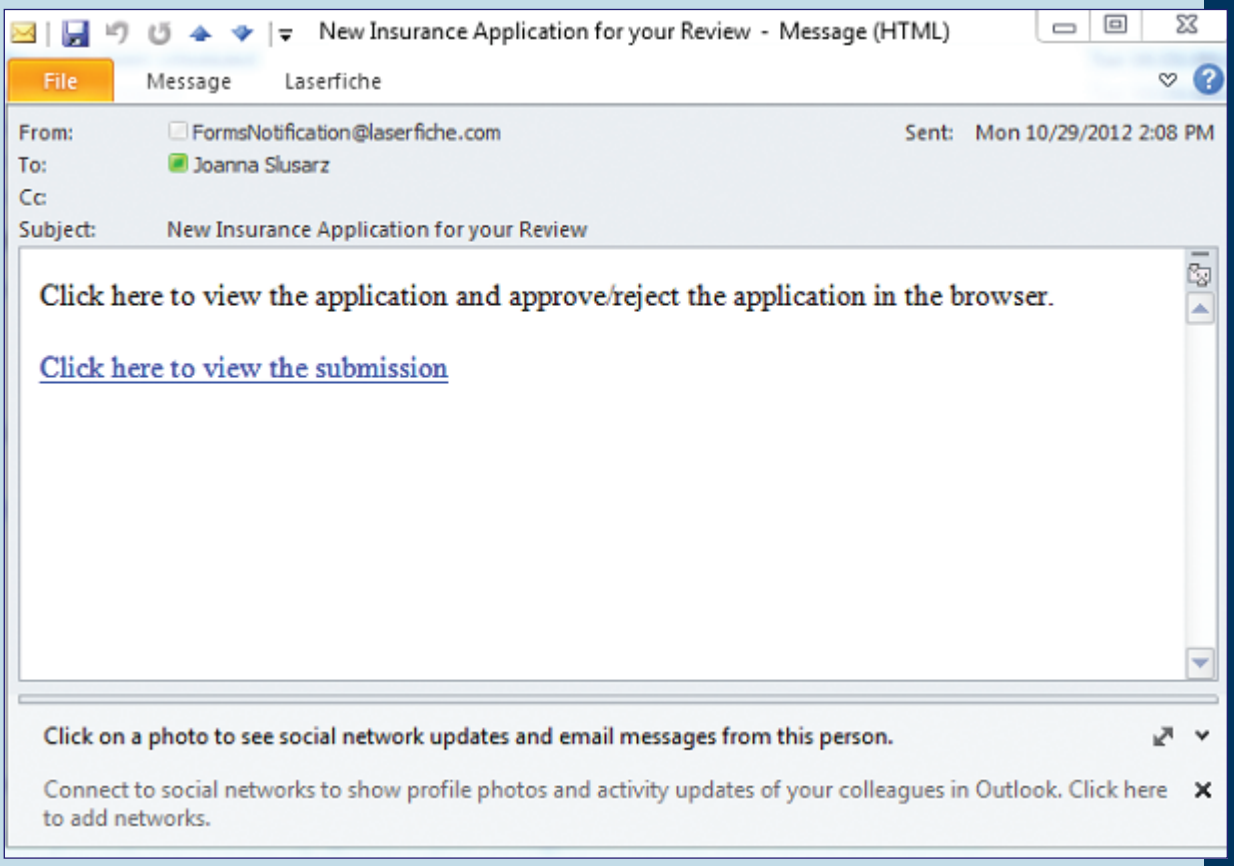
First Name(s)*

Known Name

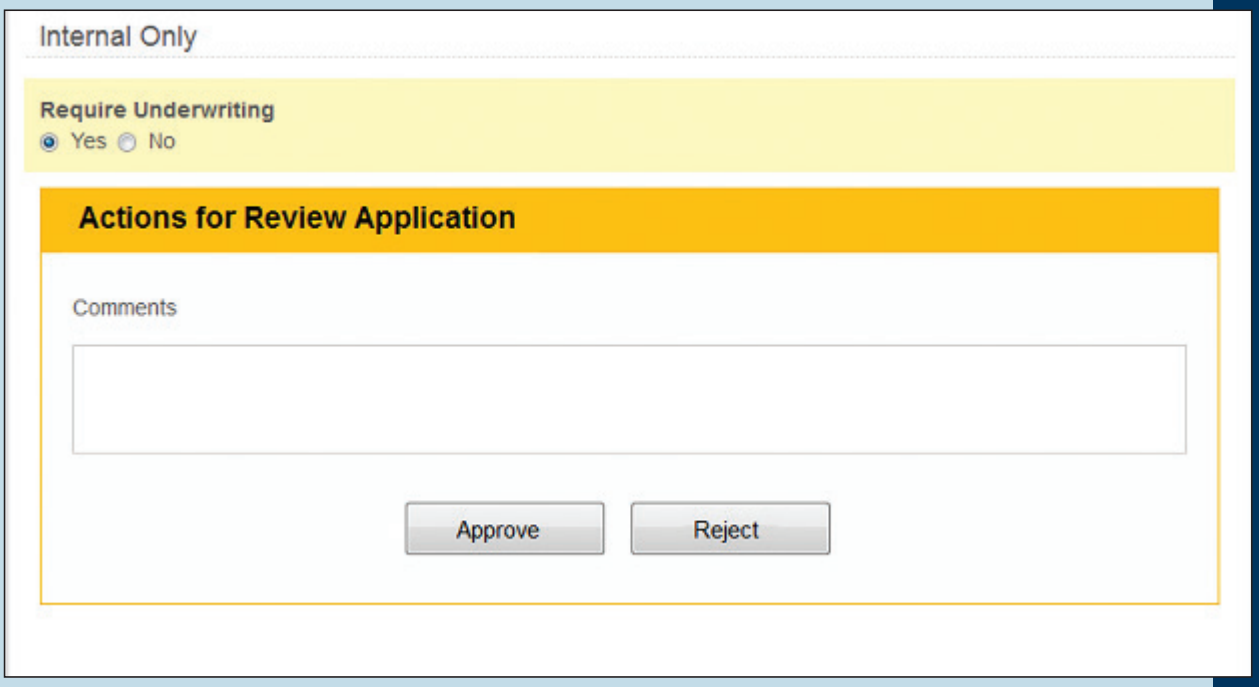
Date of Birth*

Gender*
Male Female

Once the prospect fills out the form and clicks "Submit," the form is routed to the insurance adjuster. The adjuster is notified by e-mail that he has a new form to review. He can click on the link to access the submission directly within Laserfiche Forms.



The insurance adjuster looks over the form to make sure that it is a valid application, and he either approves or rejects it. He also checks to see if the form needs underwriting and checks the appropriate radio button.



If the form does not require underwriting, the health insurance policy is automatically issued. Otherwise, it is routed to the underwriter who must fill out an underwriting form. Some of the fields on the form are pre-populated from the insurance application.

Underwriting Form

Membership ID	
Employer	Laserfiche
Phone Number	5628004567
Email Address	janesmith@yahoo.com
Residential Address	3200 Aquarium Way Street Address
	Address Line 2
	Anycity — City CA — State / Province / Region
	90500 — Postal / Zip Code USA — Country

Lives on Policy

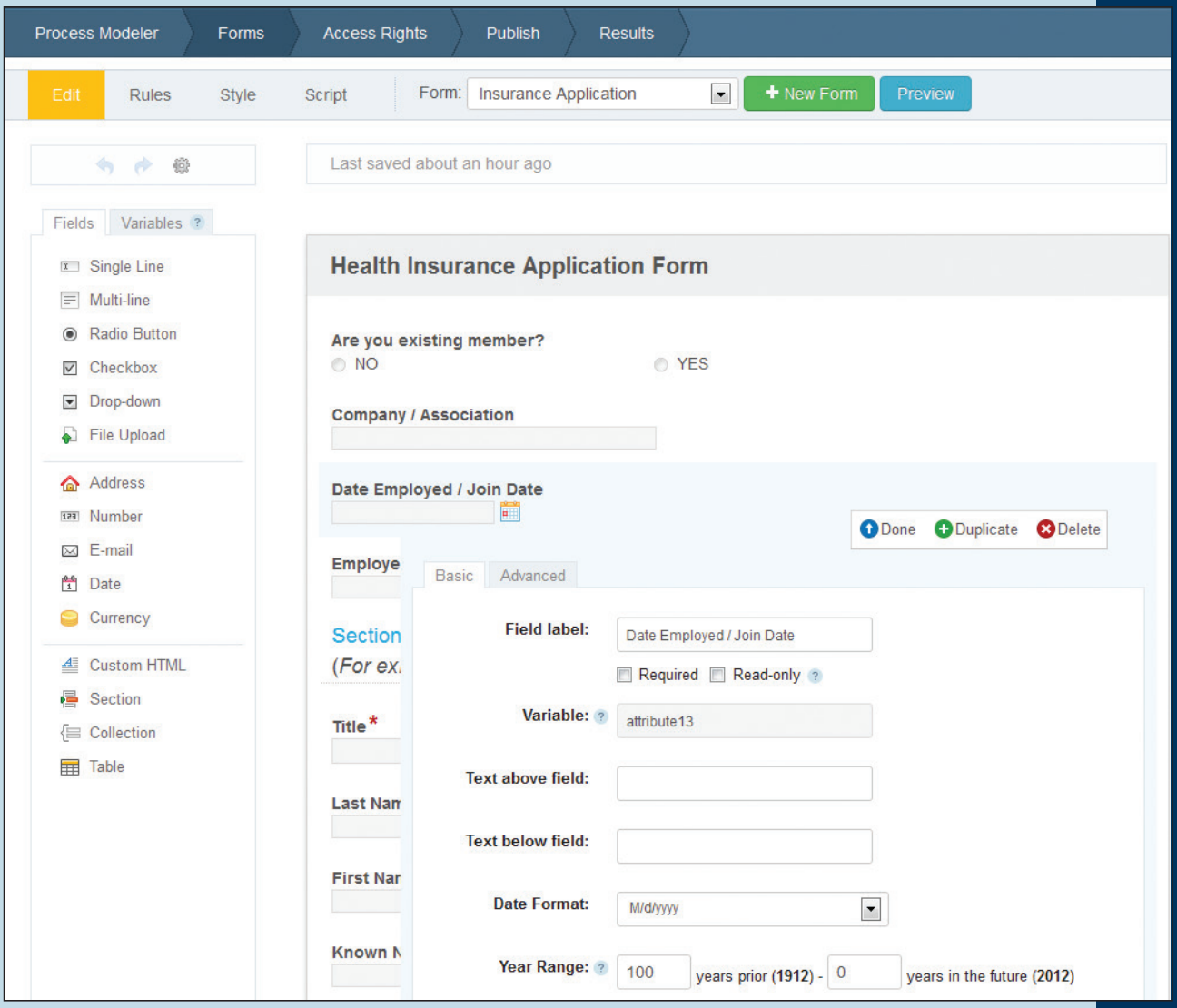
First Name	Smith
Last Name	Jane
Status	
Relationship	
DOB	10/17/1988

Once the underwriting form has been submitted, it is routed to the manager for final review. If the manager approves the form, he is prompted to review the original application. Once that is approved, the policy is issued. The application is then routed to a folder in the Laserfiche repository for storage.

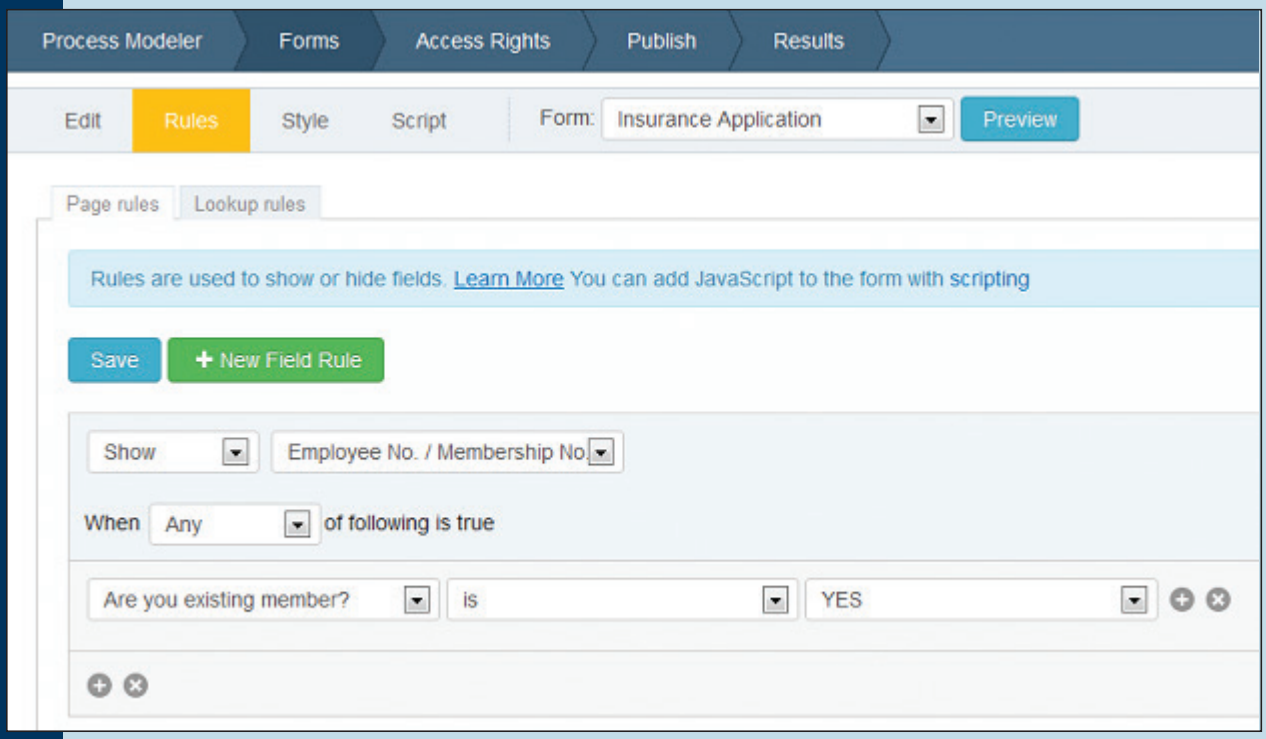
If the underwriting form or application is rejected, then the application is routed to a special "Rejected Applications" folder in the Laserfiche repository.

WHAT IS GOING ON BEHIND THE SCENES

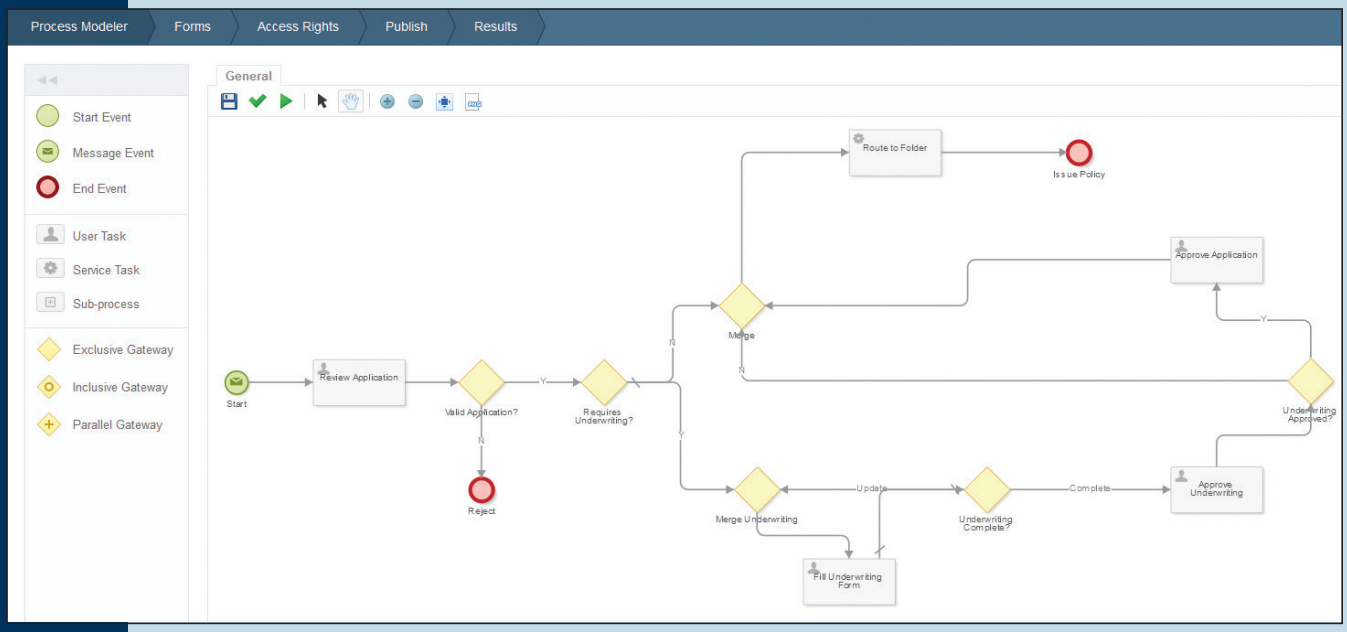
The two forms are created in the Form Designer.



Some of the fields in the form are dynamic. For example, if someone checks "Yes" in response to "Are you an existing member?" then the "Employee No. / Membership No." field appears. If someone selects "No," this field does not appear. These fields are configured in the "Rules" page.



The entire business process is designed in the Laserfiche Forms Process Modeler.



This process starts when an applicant fills out the form on the company's Website. The form is embedded on the site using the code found on the "Publish" page.

Process Modeler | Forms | Access Rights | Publish | Results

Status

Status shows whether a business process is published or hidden. Published processes are available for other users to see and interact with. Hidden processes can only be accessed by Admin users.

Published on Aug 30, 2012 12:22:10 PM

Hide Process

Save to Laserfiche

☑ Save a copy of each submitted form to the repository

◉ Save as PDF

○ Save as TIFF

☐ Save business process data as XML

Documents will be saved in folder: forms\insurance_applications

Share

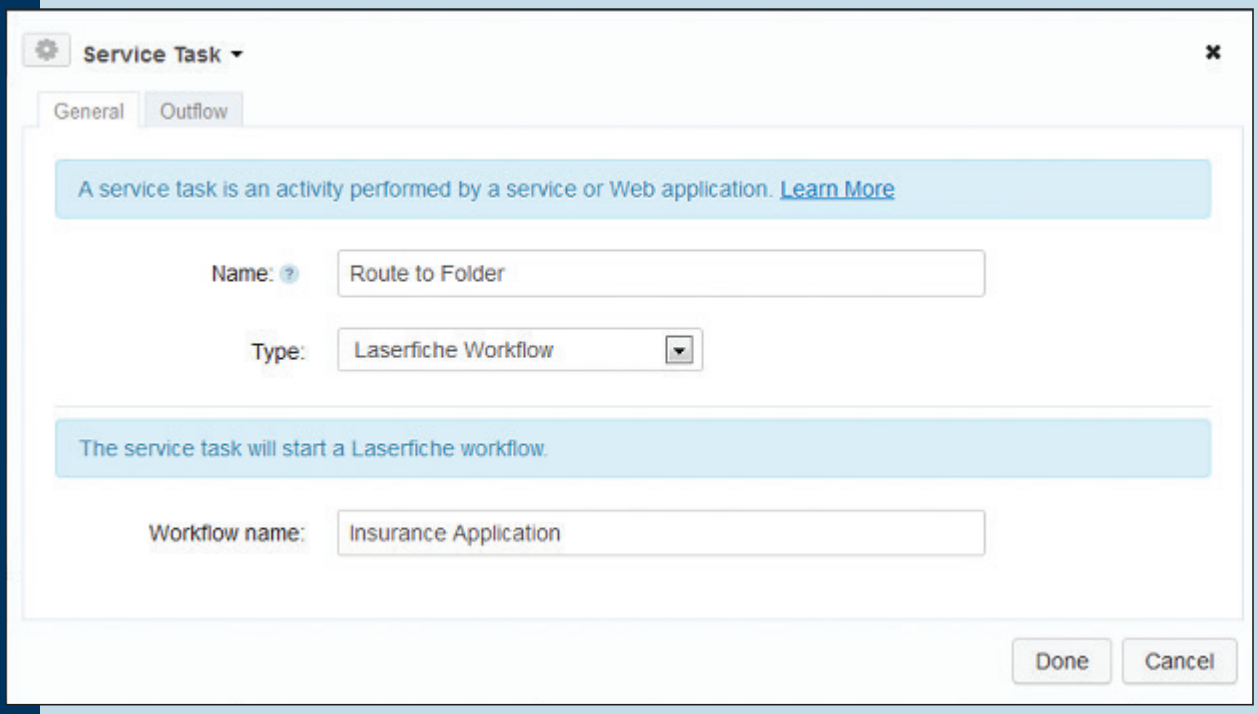
Use the URL shown below to share this process with others.

https://secure1.laserfiche.com/Forms-Beta/82 Edit E-mail

Use the code below to embed the form into an existing Web page.

```
<script type="text/javascript" src='https://secure1.laserfiche.com
/Forms-Beta/js/forms-embed.js'></script><script
type="text/javascript">lfembed = new LaserficheForms.Form(null /*element
to place form in*/,{bpid: '82', host:'https://secure1.laserfiche.com
/Forms-Beta'}).getFrm();</script>
```

Once submitted, the form moves through the various user tasks, each one representing an action performed by the adjuster, underwriter or manager. Finally, a service task kicks off the "Insurance Application" workflow.



This workflow:

- Extracts the values from the application and underwriting forms and converts them into tokens with the "Retrieve Laserfiche Forms Content" activity.

- Locates the actual form using the "Find Entry" activity. When configuring the "Find Entry" activity use the following path, with the objects in <> replaced with the name of these same objects in Laserfiche Forms: \<FORMSROOT>\<PROCESSNAME>\%(formsbpinstanceid)_%(RetrieveLaserficheFormsContent__Submission Date#"MM//dd//yyyy"#)\<FORMNAME>

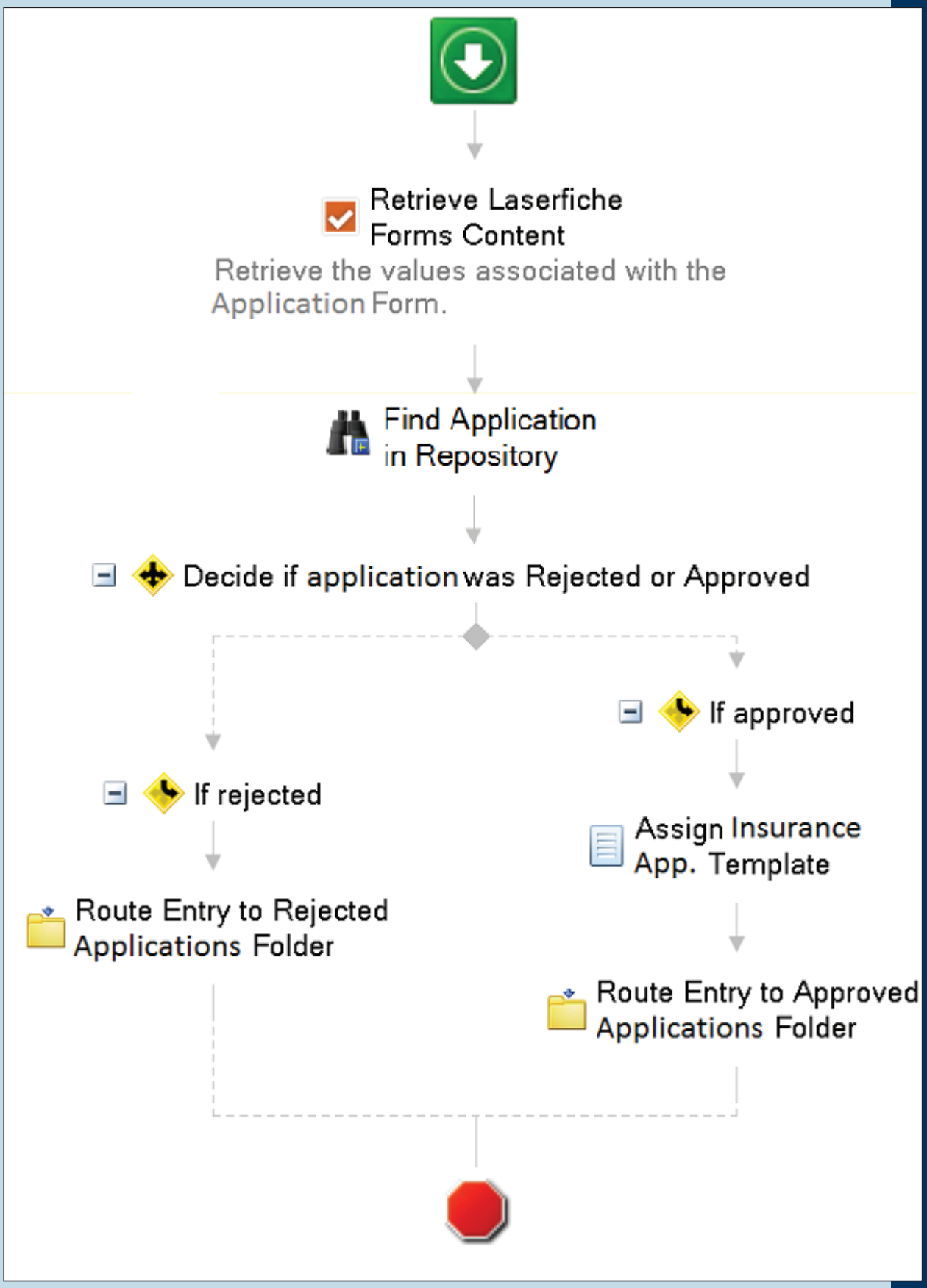
  - This method works only if the form has not been renamed and the form's original path has not been changed.

  - Since the %(formsbpinstanceid) token is created at run time, the Workflow Designer may bring up a warning that the token doesn't exist.

- Once the "Application Status" field value has been changed to either "Hired" or "Rejected" this workflow routes the job application to either a brand new employee folder or to a "Rejected Applications" folder for archival.

- Decides whether the application was approved or rejected by the manager.
  - If rejected, the application and associated underwriting form is routed to the "Rejected Applications" folder.
  - If approved, the application and associated underwriting form is assigned the new "Insurance Application" template and then routed to the "Customers – State – Membership ID" folder. Both State and Membership ID are tokens that are retrieved from the form.

Here is what the workflow looks like:



BENEFITS OF LASERFICHE FORMS

Some of the benefits provided by Laserfiche Forms include:

- The entire application process is paperless from start to finish, which means no lost or illegible applications.
- Dynamic fields in the form prevent applicants from getting overwhelmed with fields that may not pertain to them.
- The integration with Laserfiche Workflow allows a seamless transition between the submission and review of the application and underwriting forms, and their storage in the Laserfiche repository. This makes the entire business process completely transparent to the users – they simply do their regular work and have Laserfiche Forms and Laserfiche Workflow do all the legwork on the back-end.
- Administrators can see and track where each application is in the process allowing them to make sure that everything is being reviewed and accomplished in a timely matter. They can then quickly locate where there are delays and address them directly with the people involved.

Employee Onboarding

Reviewing paper job applications can become a time-consuming task for HR recruiters. Paper applications may be difficult to read, or contain incomplete information. The success of the employee onboarding process depends on effective communication among multiple people throughout the organization. Laserfiche Forms and Laserfiche Workflow make the hiring process efficient from start to finish.

Paperless employment applications ease the hiring process.

THE PROCESS

The hiring process begins when a job opening is posted on the company's Website. The link to the electronic application form created with Laserfiche Forms is embedded in the job description. When a prospective applicant clicks on the link, she is presented with the employment application:

LaserWorks **Application for Employment**

LaserWorks is an equal opportunity employer. It considers applicants for all positions without regard to race, creed, color, gender, pregnancy or related condition, age, national origin, disability, medical condition (including genetic characteristics), marital, domestic partner or veteran status, religion, sexual orientation, or any other characteristic protected by state, federal or local laws.

Personal Information

Last Name *

First Name *

Main Phone Number *

E-mail Address

Residence Address *

Street Address

Address Line 2

City | State / Province / Region

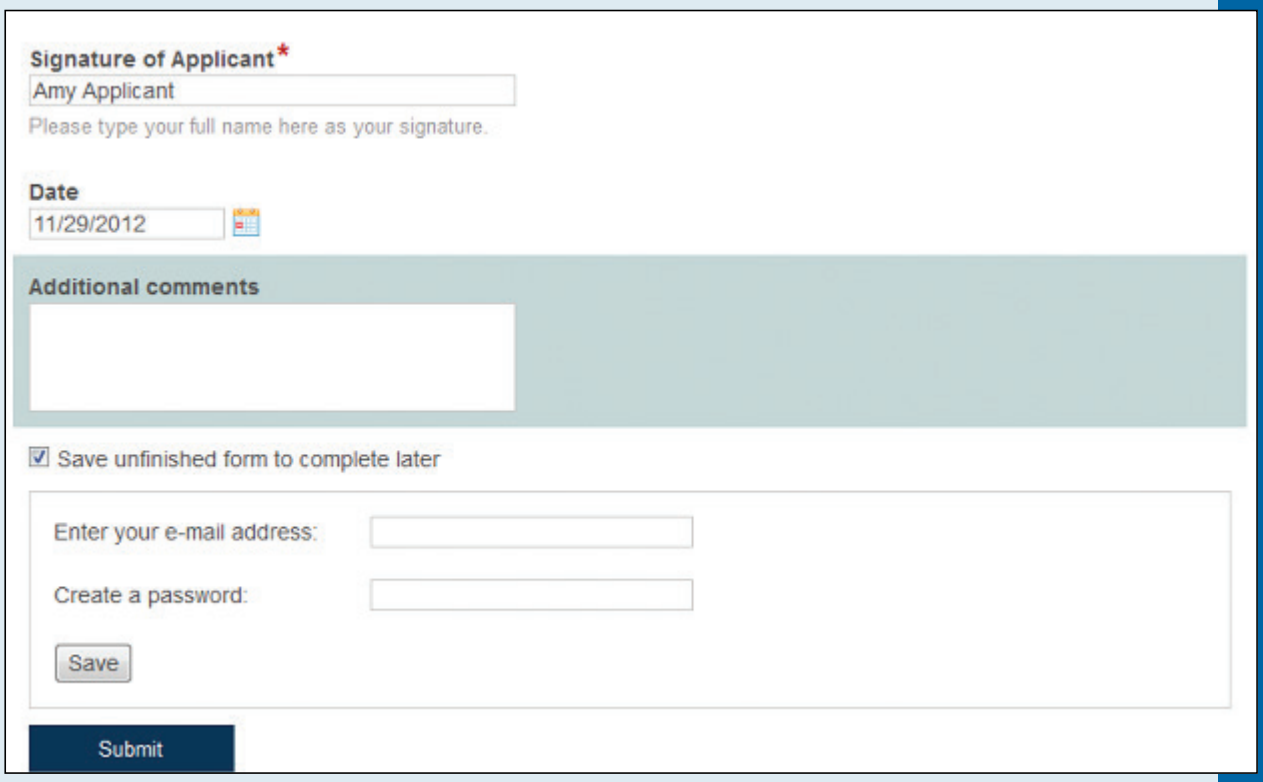
Postal / Zip Code | Country

If employment is offered, can you submit documents required by federal laws veritying your identity and legal right to work in the U.S.? *

Yes No

Position Information

The applicant fills out the application. The fields marked with asterisks are required. At the end of the application, the applicant can upload a cover letter and resume. If the job she is applying for requires additional documents (e.g., writing samples), she can upload those as well. The applicant does not need to complete and submit the form at one time. She can save an unfinished form to complete later. Once everything is filled out, the applicant simply clicks "Submit."



This form and supplemental documents are then routed to the recruiter, who will look over the application to see if the candidate might be a good fit for the job. If this is the case, the recruiter can assign the application to a departmental manager. The recruiter can also leave comments for the manager, such as the notes from a phone screening.

For HR Use Only

Route to Manager*

Stephen Sales

Additional comments

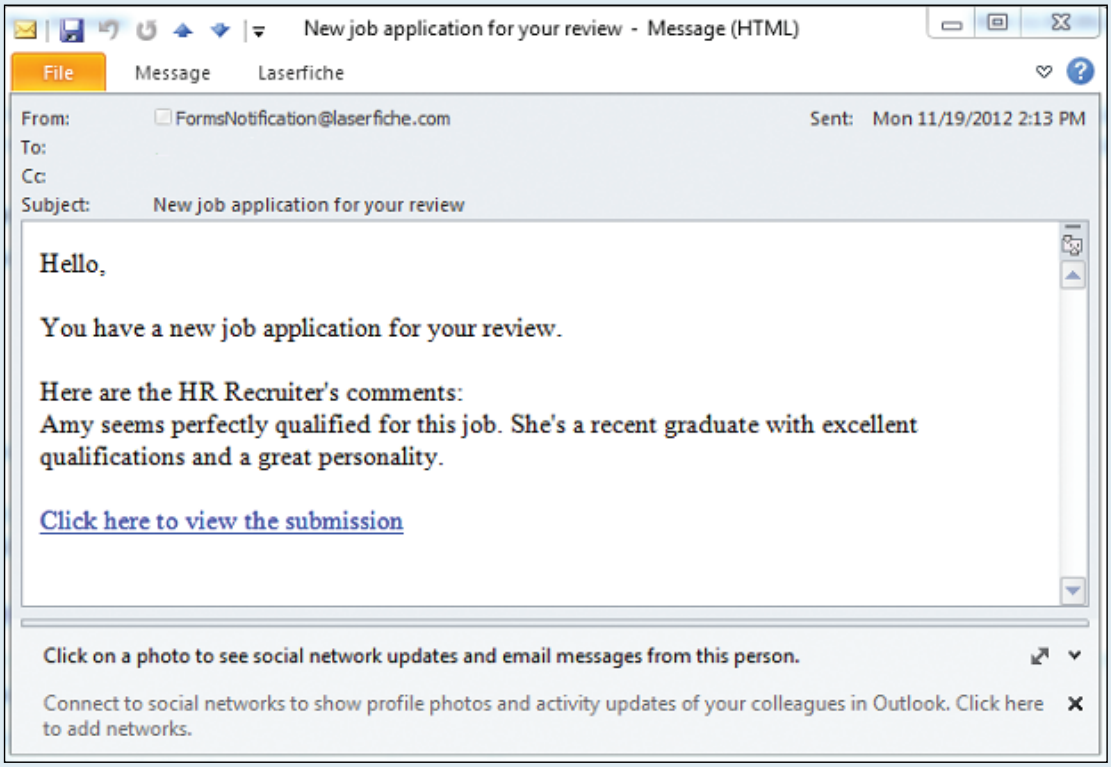
Amy seems perfectly qualified for this job. She's a recent graduate with excellent qualifications and a great personality.

Actions for HR Initial Application Review

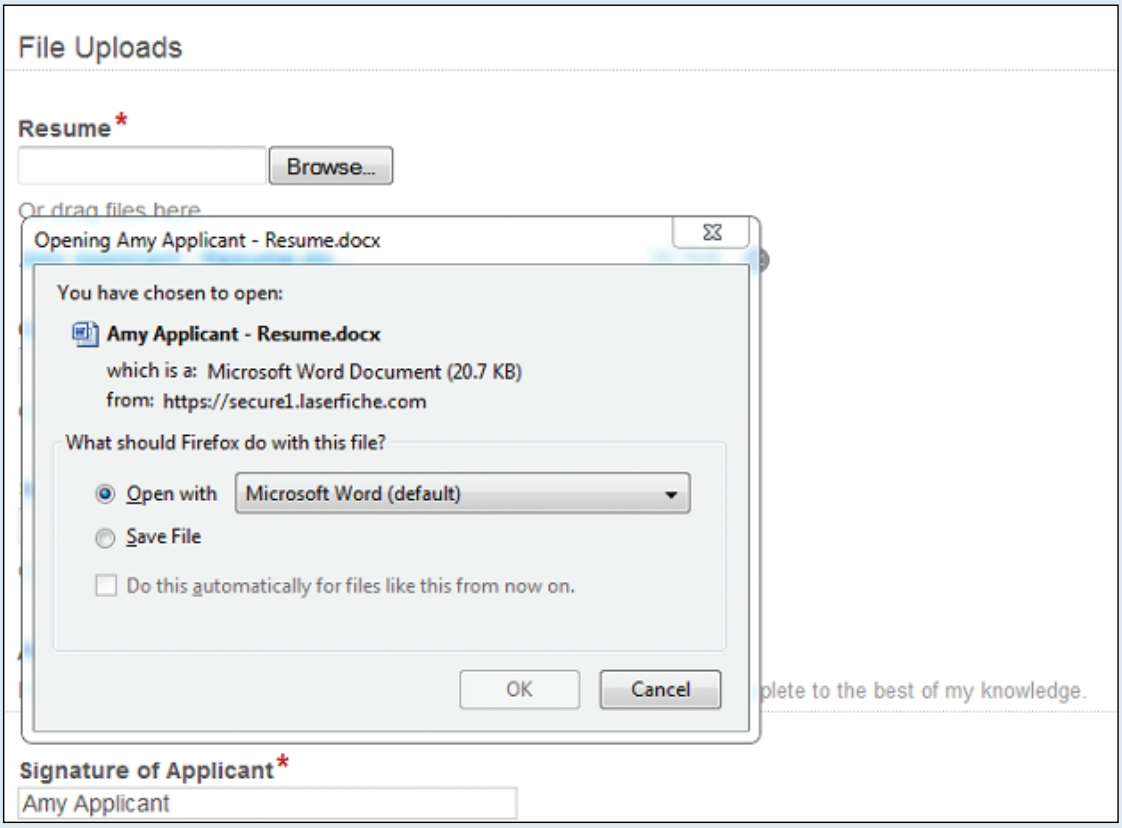
Comments

Approve Reject

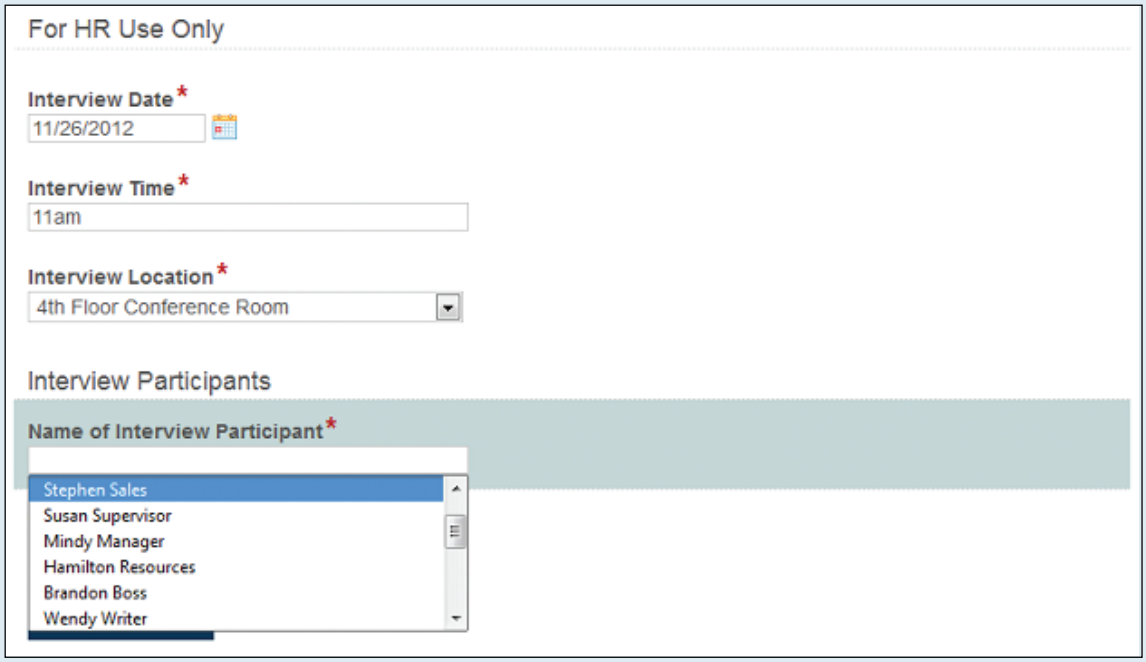
If the application is approved by the recruiter, an e-mail is automatically generated and sent to the department manager notifying him of a new application for his review.



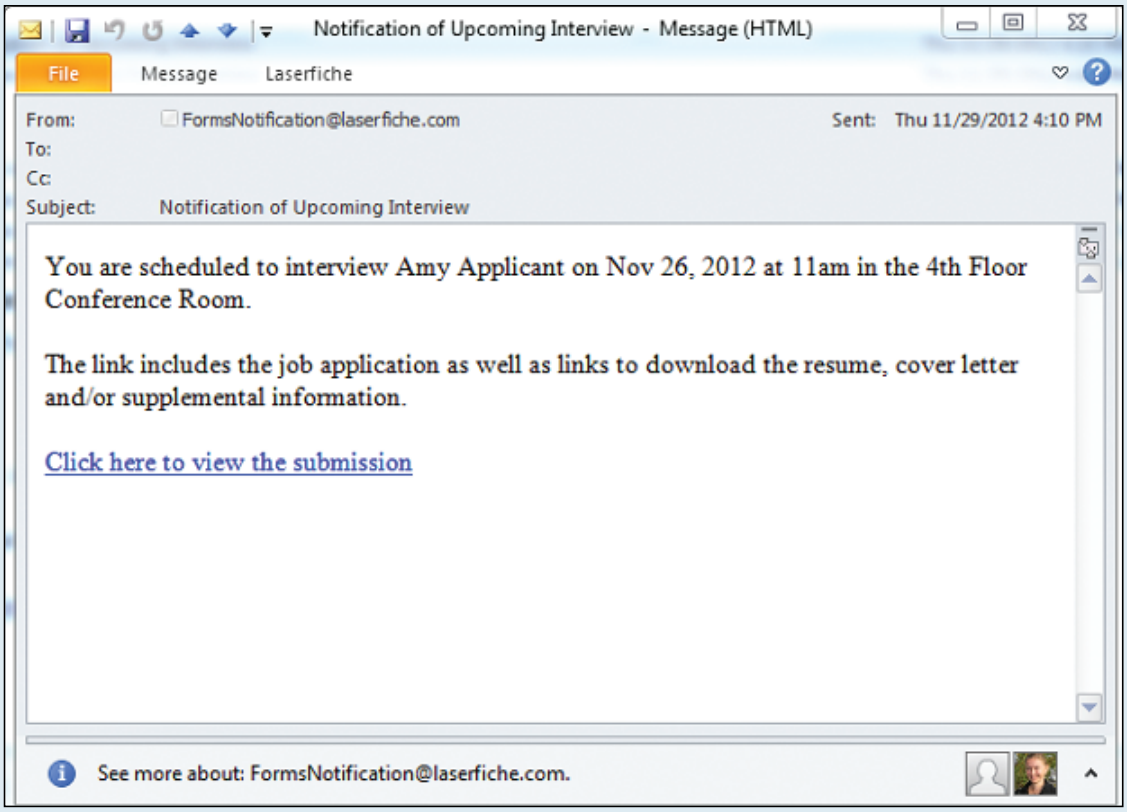
The department manager can look through the application and download the candidate's resume by clicking the resume link.



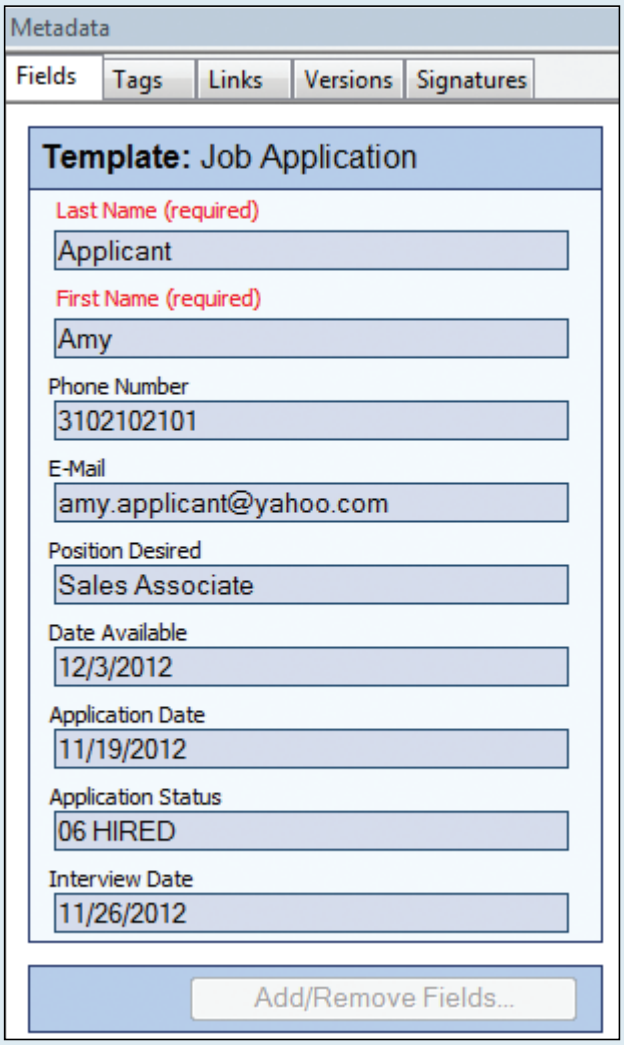
If the department manager decides that he would like to interview the candidate, he simply clicks "Schedule Interview." This alerts the recruiter to contact the candidate to schedule an interview. Once the interview is scheduled, the recruiter notes the date, time and location of the interview on the form, along with the interviewer's name. In order to simplify this task, the field prompts the user with available names of company employees.



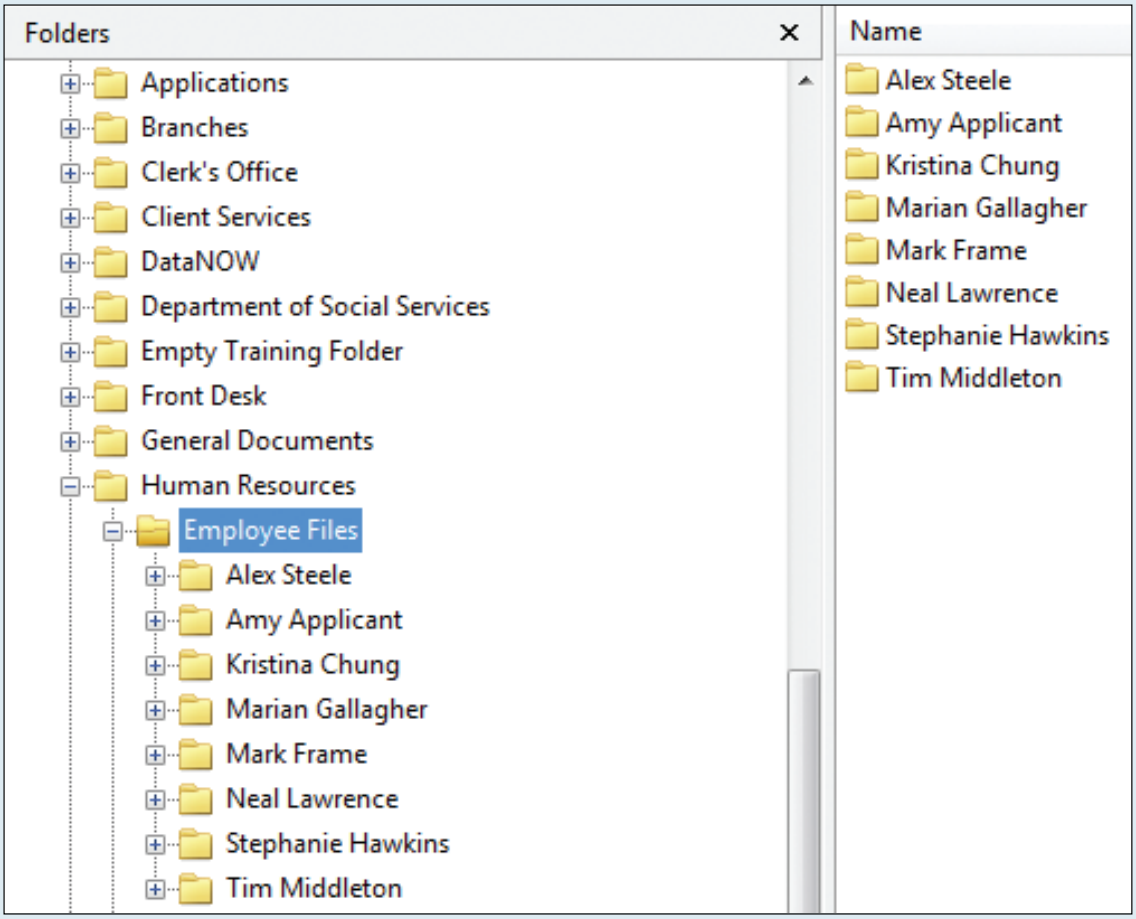
Once the interview is scheduled, the recruiter clicks "Interview Scheduled." This action generates an e-mail to the interviewer that includes interview information as well as a link to the original job application.



The interviewer can view the information, download associated files and print any he'd like to have on hand during the interview. When finished, he clicks on "Application Viewed." The application and supplemental information are then routed to a "Pending Interview" folder in the Laserfiche repository. A template is automatically assigned and the metadata filled out. After the interview, the recruiter opens the application and changes the value of the "Application Status" field to either "Hired" or "Rejected."

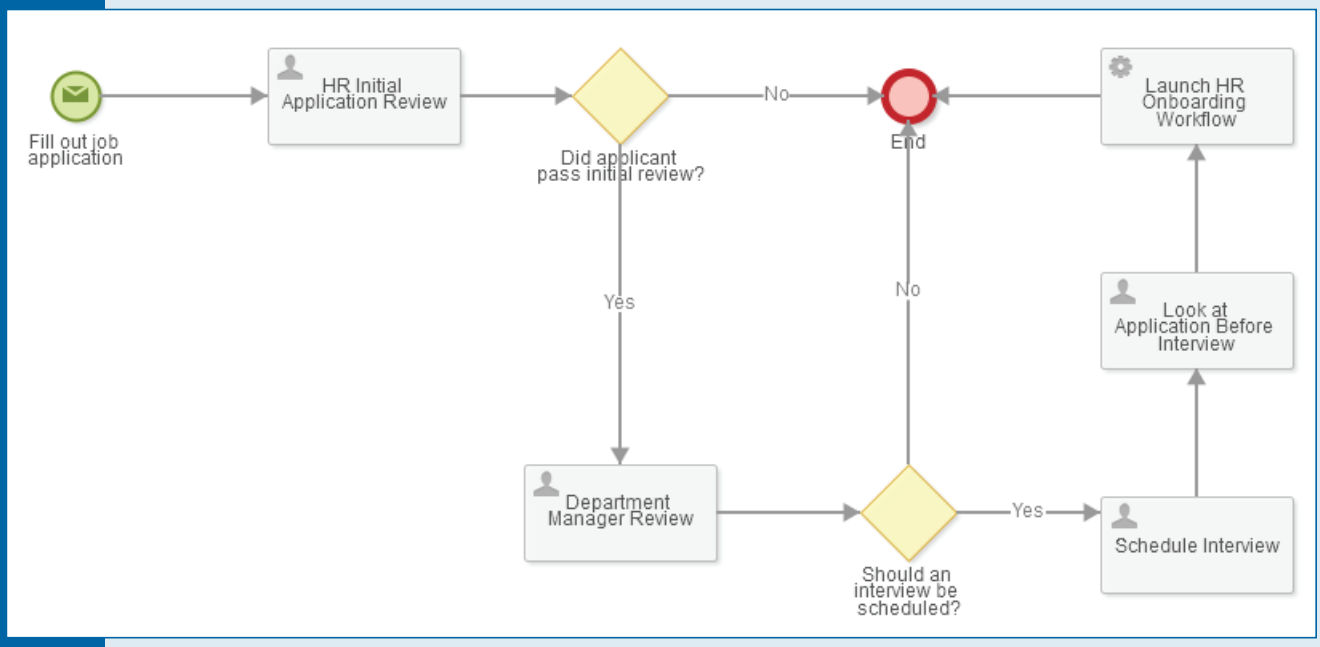


If the applicant is hired, the application and supplemental information are routed to a newly created employee folder. Otherwise, the application is routed to a "Rejected Candidates" folder for archival purposes.

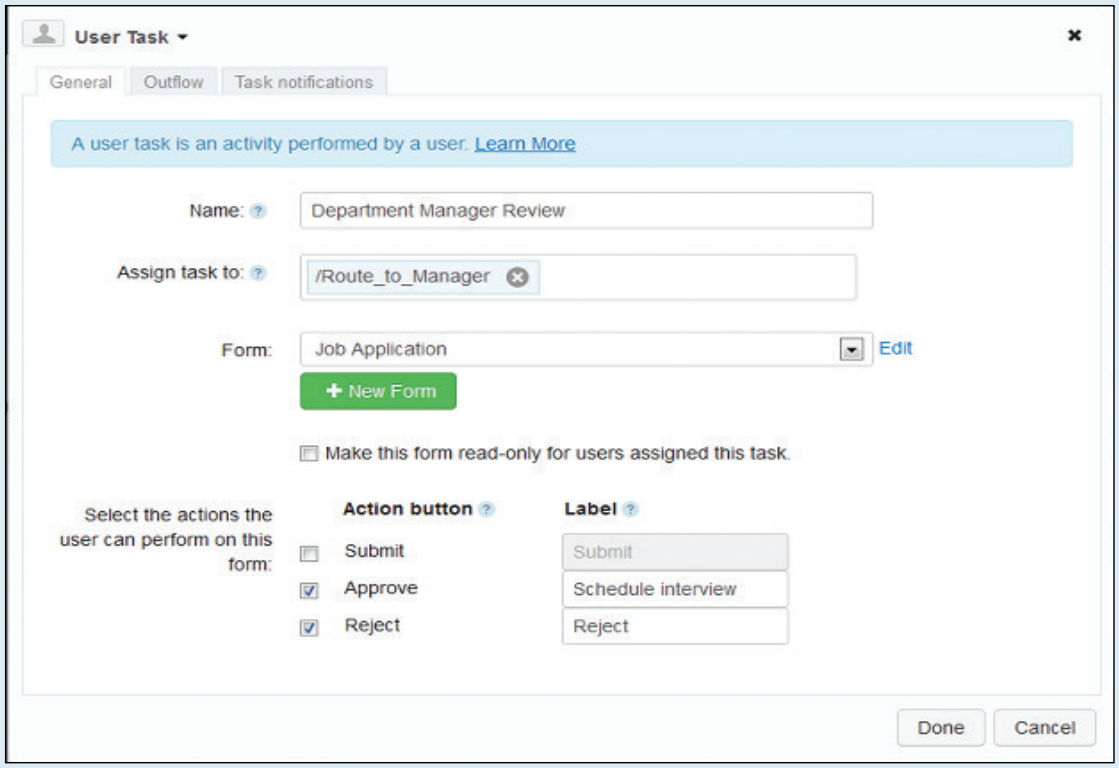


WHAT IS GOING ON BEHIND THE SCENES

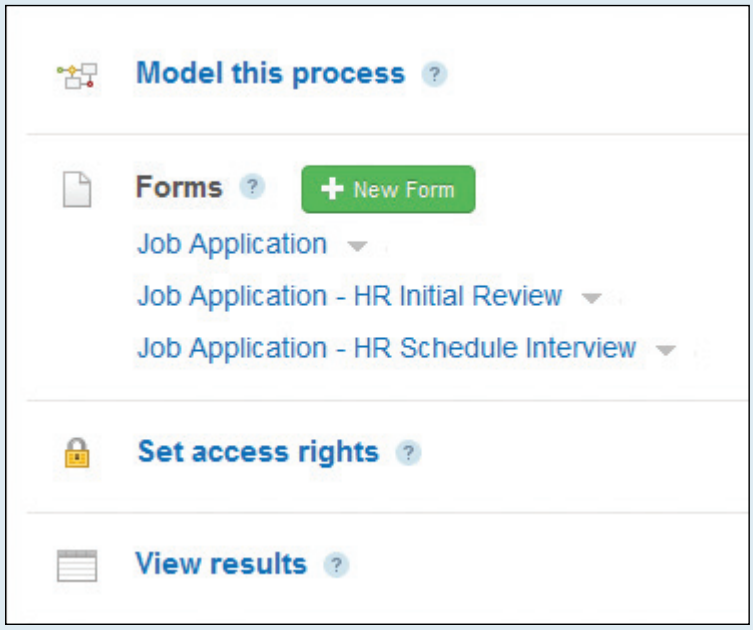
The entire business process is mapped in the Laserfiche Forms Process Modeler.



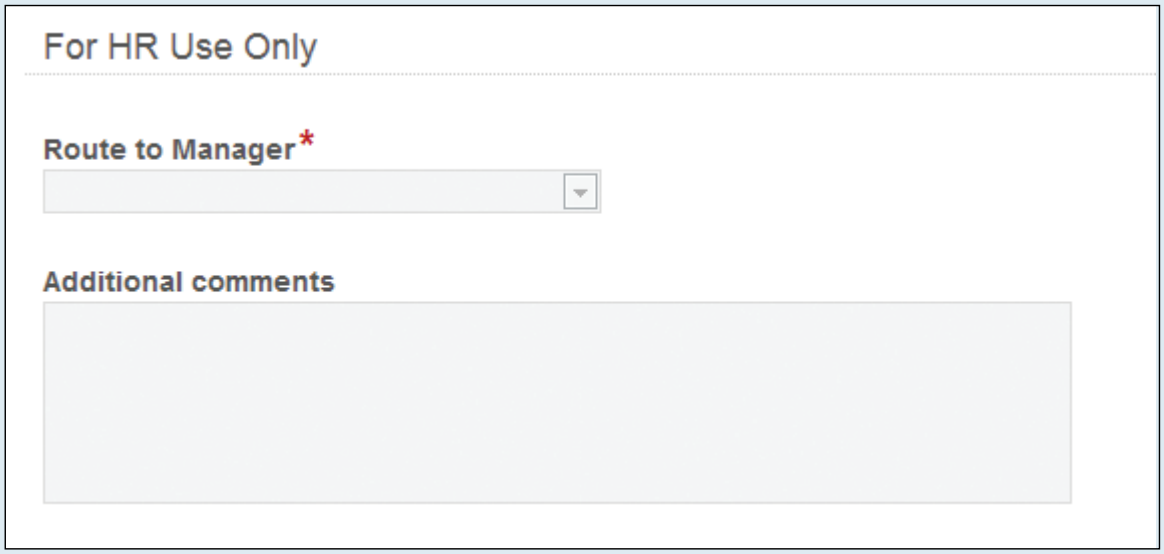
The process starts when a user fills out the job application on the Website. After that, each action taken by an employee is denoted by a user task. Here is what the "Department Manager Review" user task looks like.



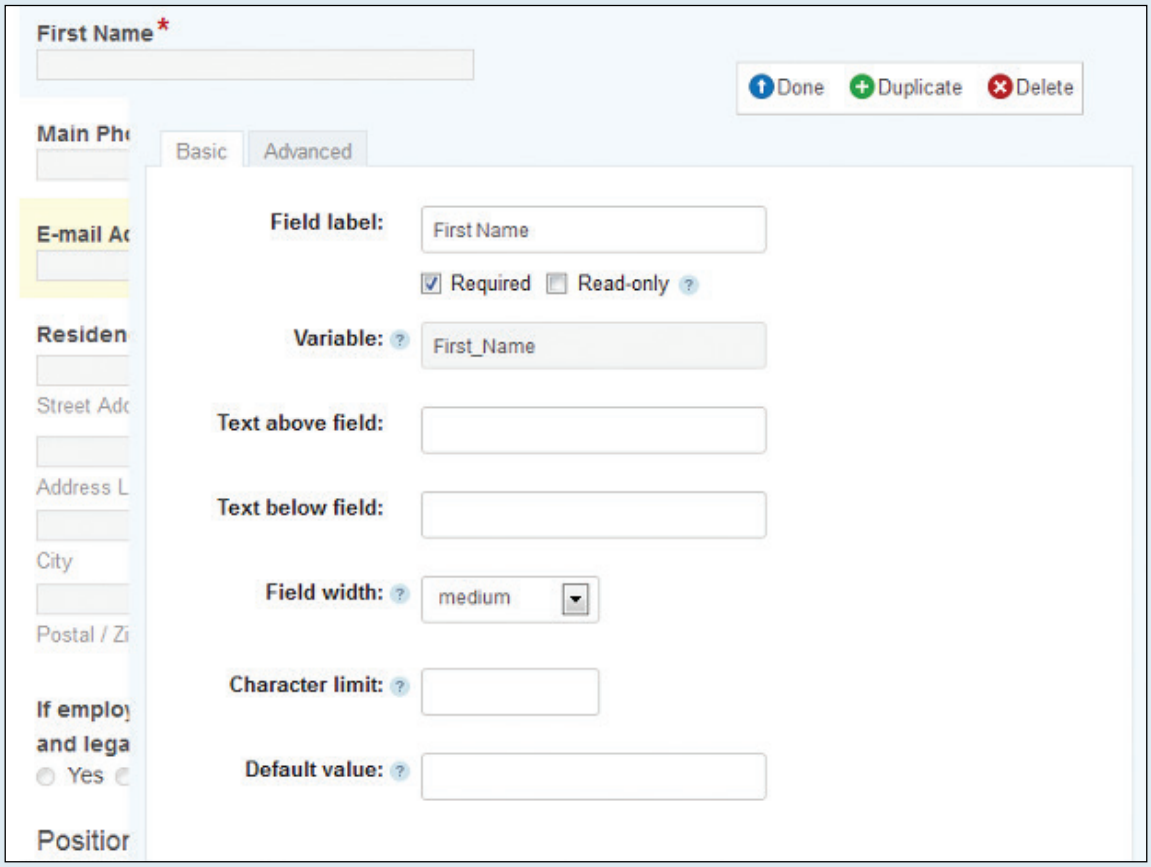
Every user task deals with a particular form. In this process, three different forms are used.



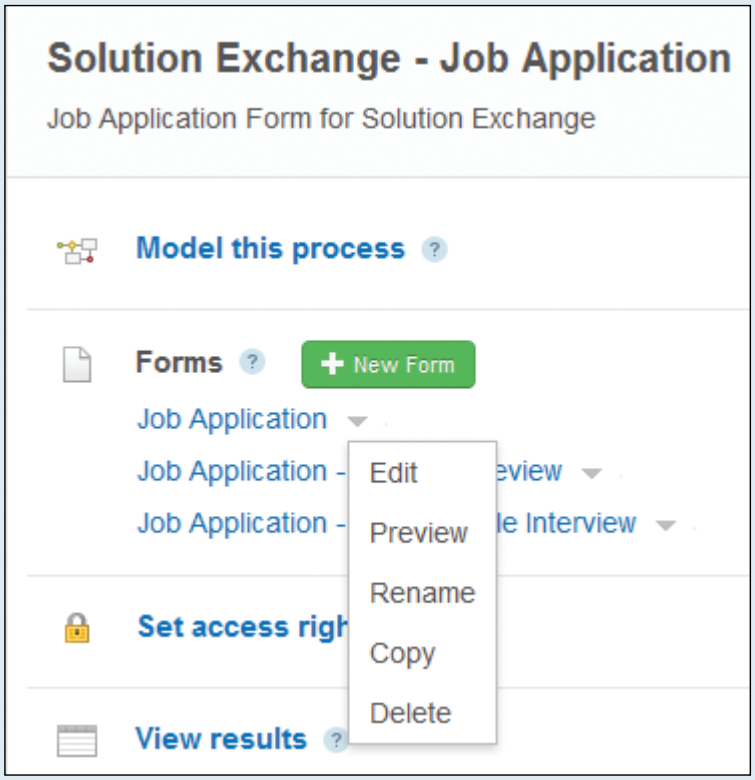
Information from the original job application is copied to the forms that the recruiter and department manager will review, along with other fields specific to those users. For example, the form that the recruiter sees when reviewing the application is not the original job application form but the job application form with the special "For HR Use Only" section appended to the bottom.



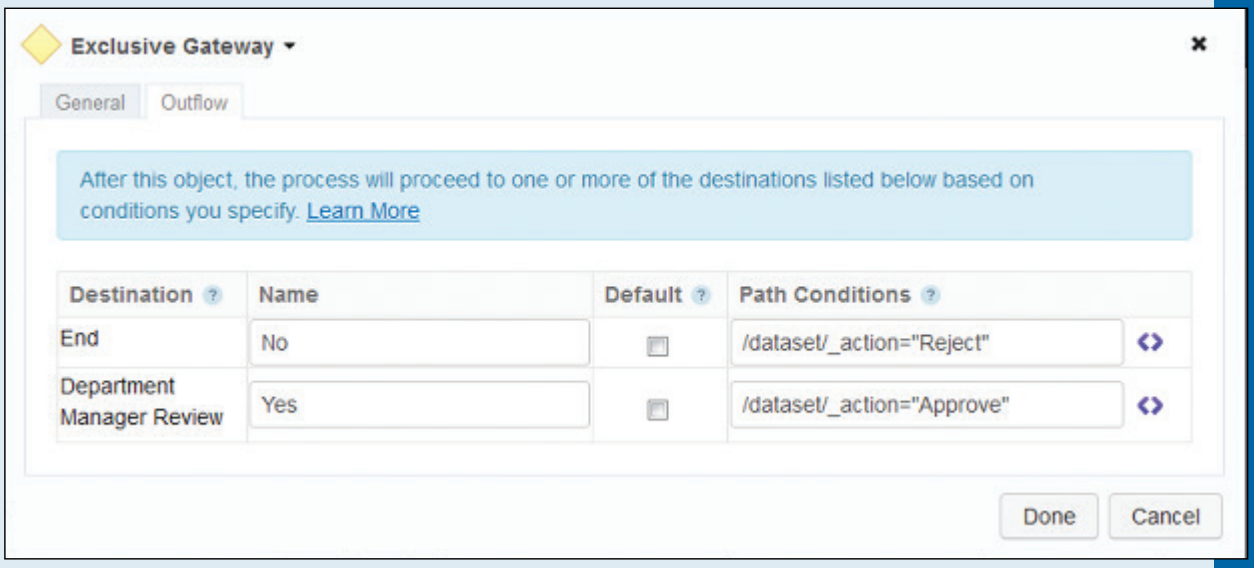
Each form field has a specific variable associated with it. This variable contains the information that is entered into the field. For example, the "First Name" field has a corresponding variable called "First_Name." When creating the form that the recruiter sees when reviewing the application, for example, instead of inserting a regular field and calling it "First Name," a user can simply insert the "First_Name" variable. This ensures that that the field will be populated with the same information entered in the original job application when the recruiter views it.



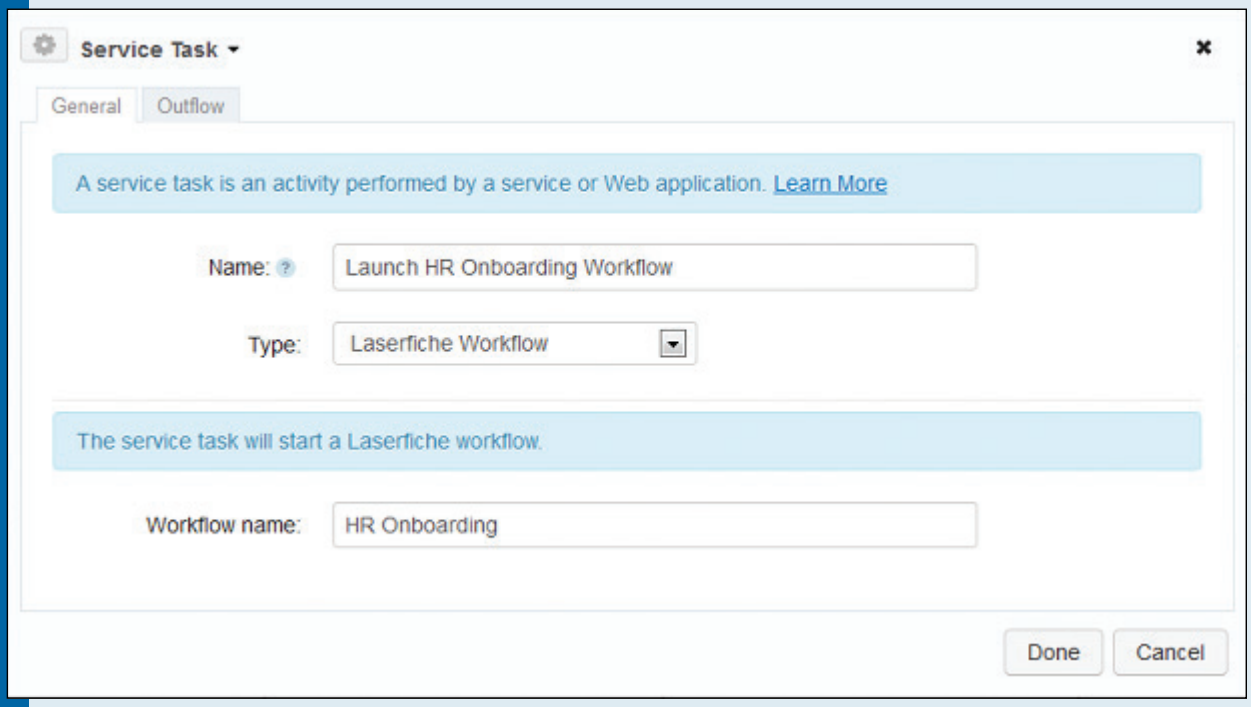
In order to simplify the new form creation process, the user can also copy the form, rename it and then just add the "For HR User Only" section on the bottom. Forms can be copied directly from the Manage page.



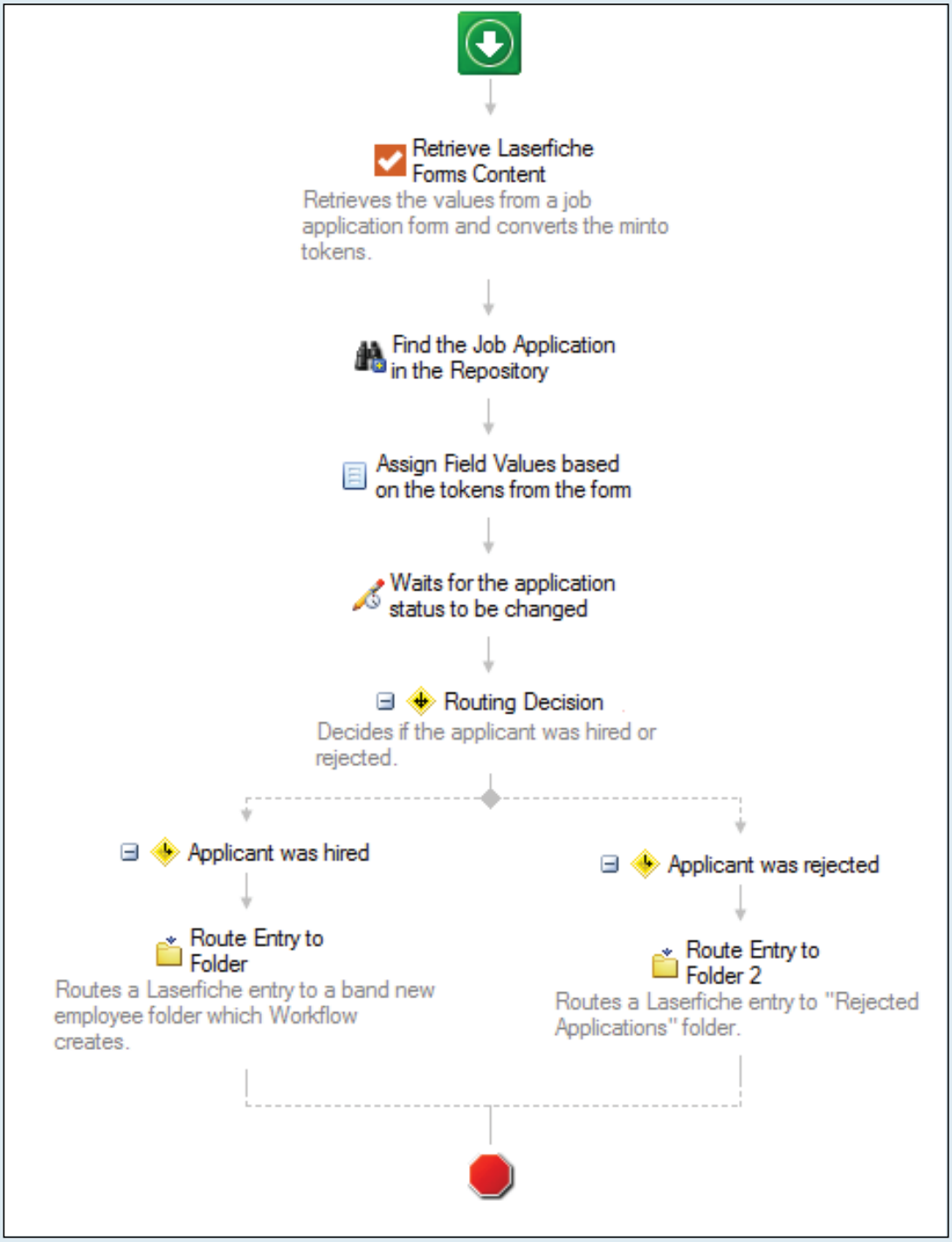
In the Laserfiche Forms Process Modeler, decisions are denoted by gateways, such as this "Did applicant pass initial review?" gateway.



Once the applicant is scheduled for an interview and the interviewers have viewed the application and supplemental information, a service task launches Laserfiche Workflow, which automates the rest of the hiring process.



Here is what the "HR Onboarding" workflow design looks like:



The first activity in this workflow, "Retrieve Laserfiche Forms Content," allows the values in the job application form to be converted into tokens, which can then be mapped to specific template fields.

Before the tokens can be mapped to specific fields though, the selected form must first be found using the "Find Entries" activity. When configuring the "Find Entries" activity use the following path, with the objects in <> replaced with the name of these same objects in Laserfiche Forms:

\<FORMSROOT>\<PROCESSNAME>\%(formsbpinstanceid)_%(RetrieveLaserficheFormsContent__ Submission Date#"MM//dd//yyyy"#)\<FORMNAME>

Note:

- This method works only if the form has not been renamed and the form's original path has not been changed.
- Since the %(formsbpinstanceid) token is created at run time, the Workflow Designer may bring up a warning that the token doesn't exist.

Once the "Application Status" field value has been changed to either "Hired" or "Rejected" the job application is sent to either a brand new employee folder or to a "Rejected Applications" folder for archival purposes.

ADVANTAGES OF LASERFICHE FORMS

- Job applications are always legible and complete, since required fields prevent important information from being omitted.
- Applications can be quickly and seamlessly passed to various employees for review. Because forms can be viewed easily on desktops, laptops and mobile devices, managers can review and act on them from any location.
- Administrators can easily see the status of each application, allowing them to quickly eliminate bottlenecks.

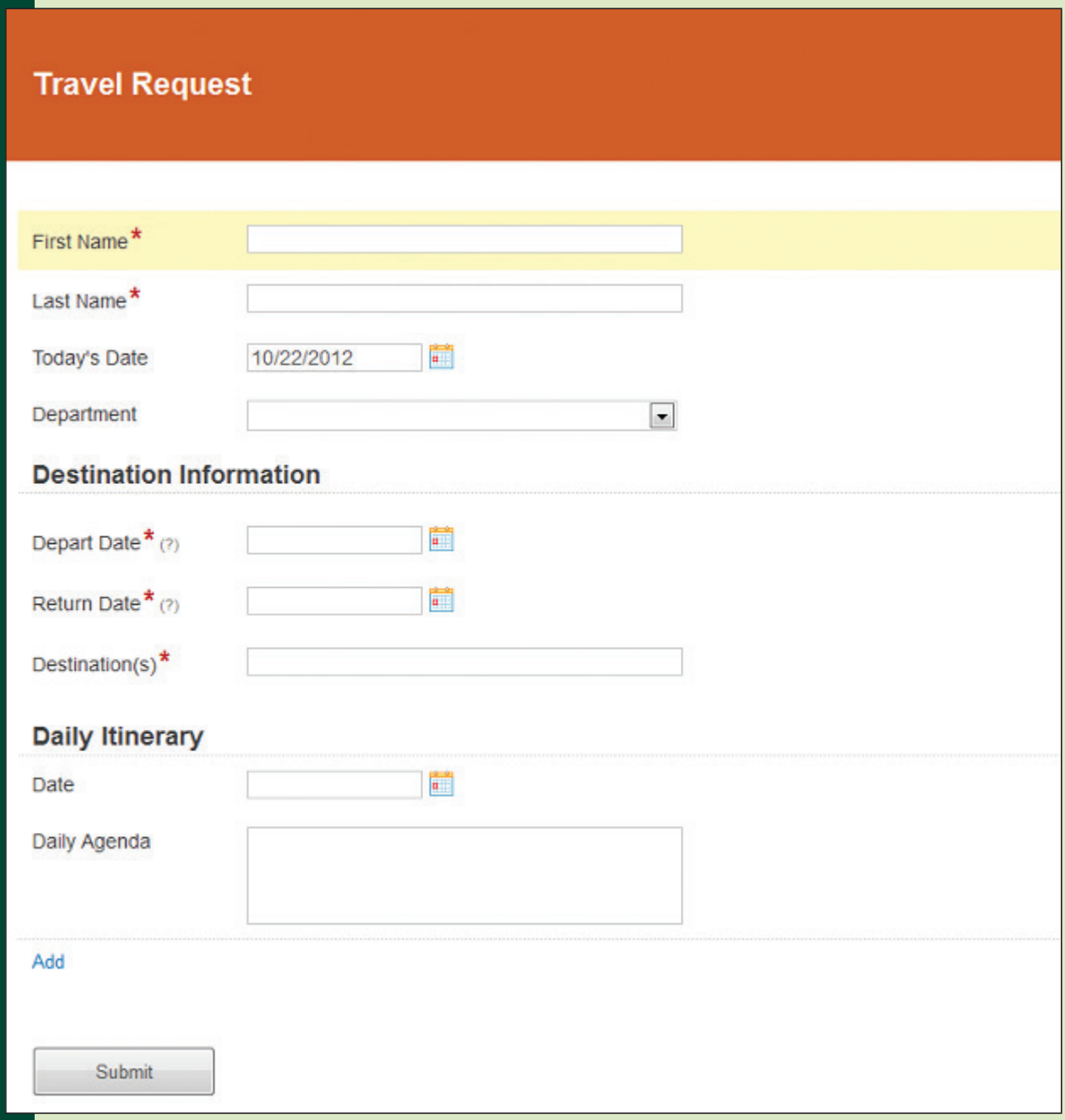
Travel Requests

Most organizations require certain employees to travel on business. Depending on the organization's size, travel requests may be processed frequently and involve multiple people across the organization. Because travel requests are often time sensitive, it is important that they are processed quickly. Laserfiche Forms and Laserfiche Workflow can streamline and expedite the travel request process within any organization.

Learn how to implement paperless travel requests with Laserfiche Forms.

THE PROCESS

The employee initiates the travel request by logging into the electronic "Travel Request Form" in her browser.



She fills out the required information, including "Name" and "Department." Certain departments have conditional rules applied to them. If the employee selects "Sales," for example, a "Reason for traveling" field appears. After filling in the requested information, the employee clicks "Submit" to submit the form.

Travel Request

First Name* Lacey

Last Name* Fish

Today's Date 10/23/2012

Department Sales

Reason for travelling
- (●) Workshop
- ( ) Regional Training
- ( ) User Group
- ( ) Tradeshow
- ( ) Client Site Visit
- ( ) Other

Destination Information

Depart Date* (?) 11/5/2012

Return Date* (?) 11/7/2012

Destination(s)* Pacific Beach, FL

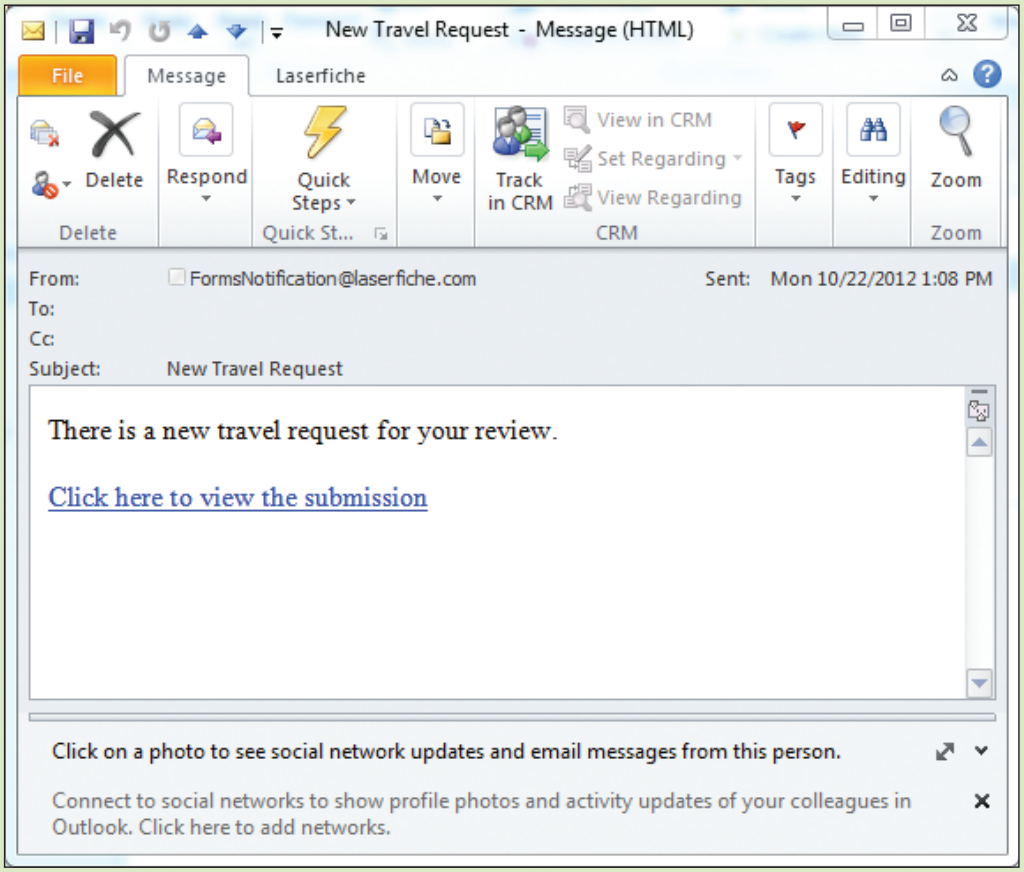
Daily Itinerary

Date 11/5/2012

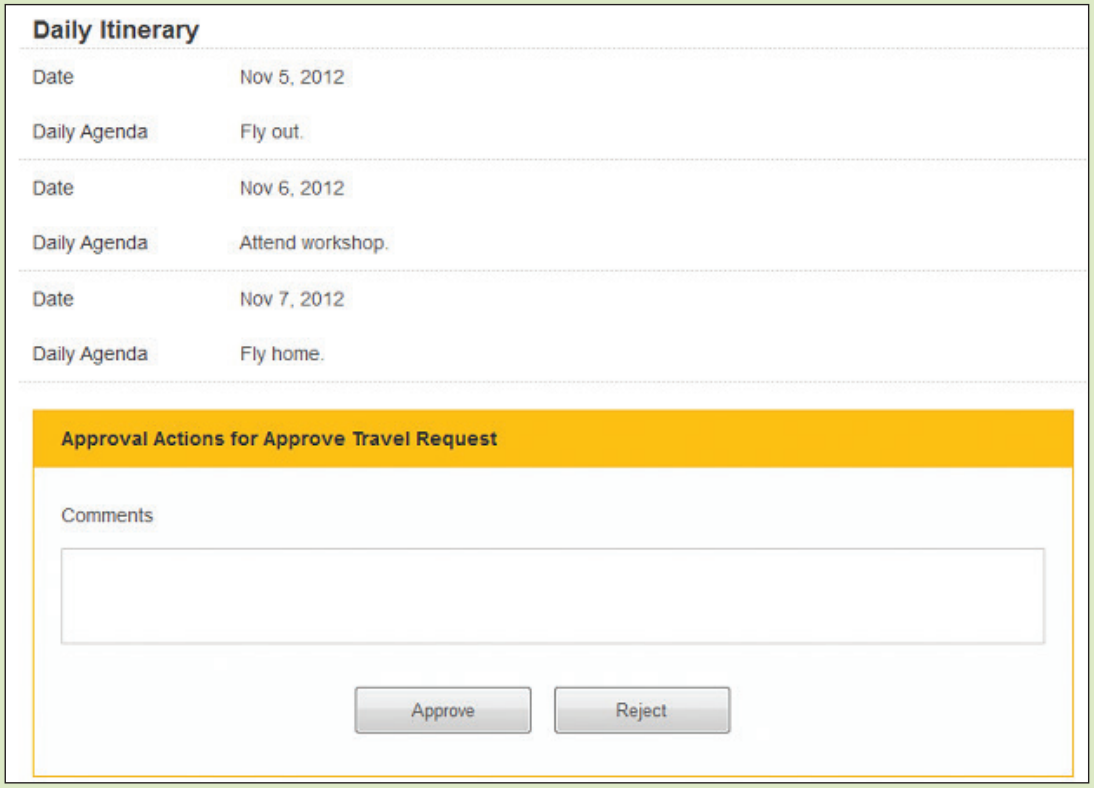
Daily Agenda Fly out.

Date 11/6/2012

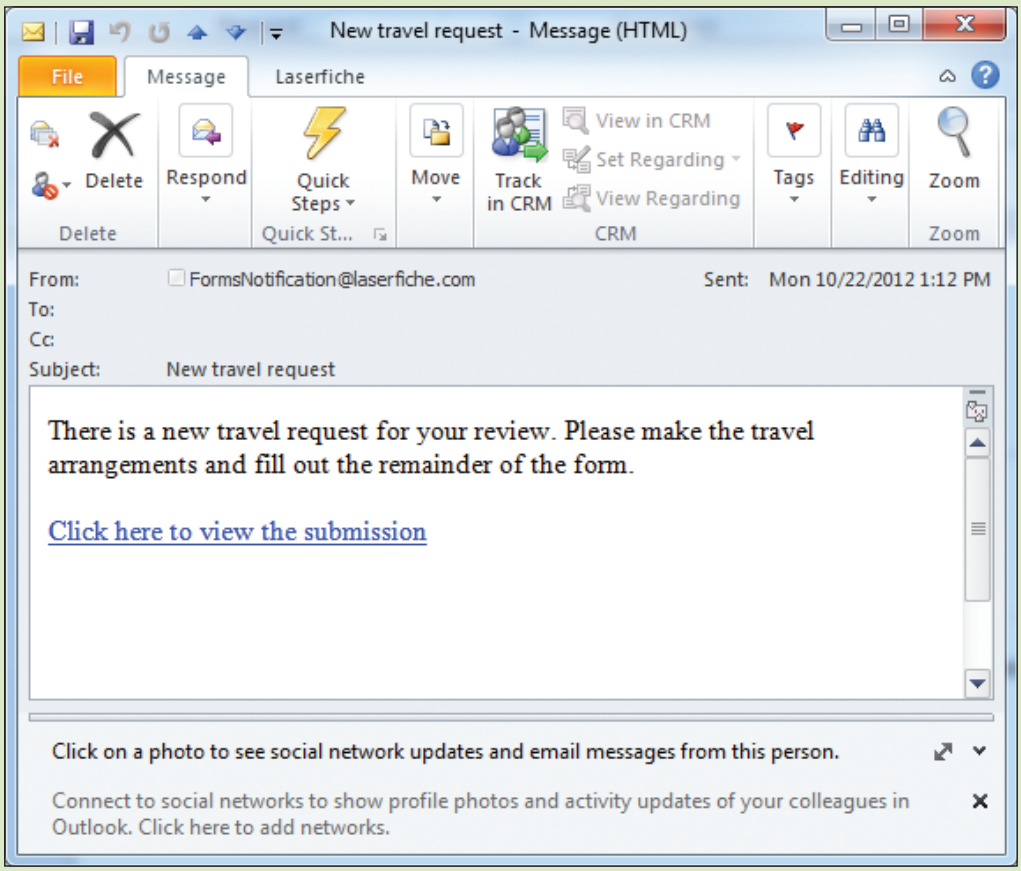
After the employee's submission, the content of the form is converted into a PDF form and saved in the Laserfiche repository. An e-mail is sent to the manager with a link to the form in Laserfiche Forms.



The manager clicks on the link included in the e-mail and a read-only version of the form is opened in Laserfiche Forms. The manager reviews the request and either approves or denies it by clicking on either "Approve" or "Reject."



If the request is approved, an e-mail is sent to the travel coordinator. This e-mail contains a link to the Laserfiche form.



Clicking on the link takes the travel coordinator directly to the approved form. Everything will be read-only except the "Flight/Hotel Information" section at the bottom. After making the travel arrangements, the travel coordinator types them into the form and presses "Submit."

Flight/Hotel Details

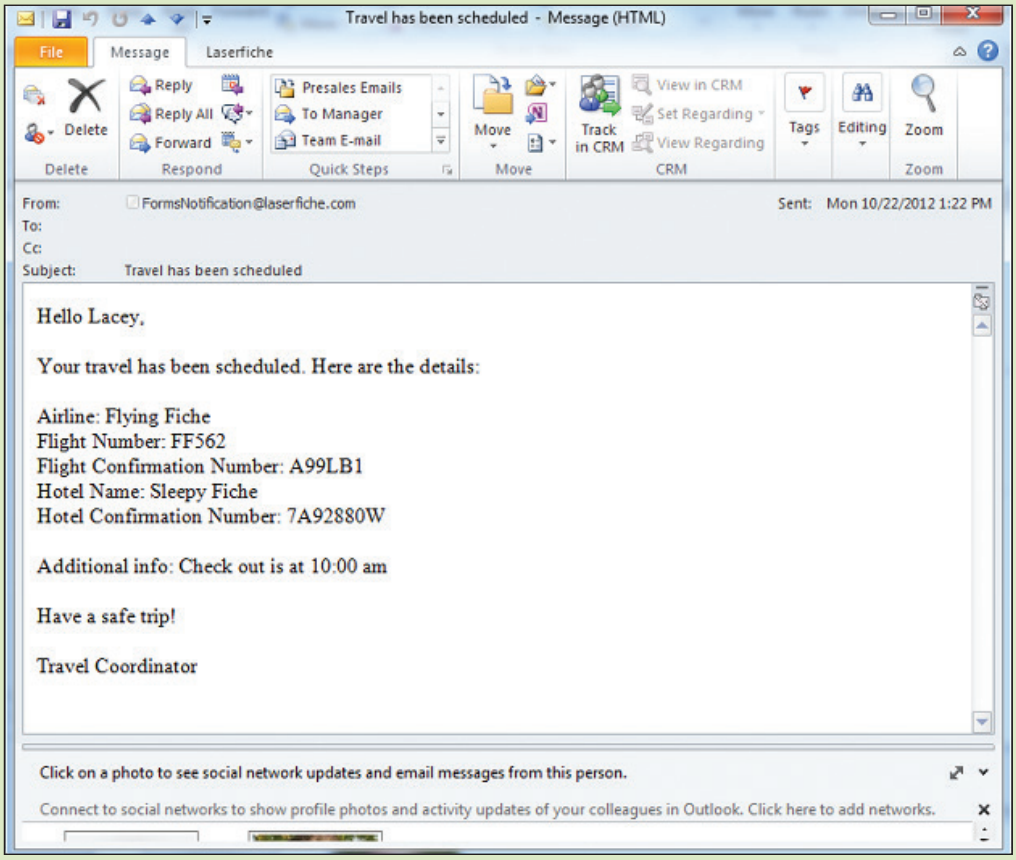
Airline	Flying Fiche
Fight Number	FF562
Fight Confirmation Number	A99LB1
Hotel Name	Sleepy Fiche
Hotel Confirmation Number	7A92880W
Additional Information	Check out is at 10:00 am

Approval Actions for Schedule Travel

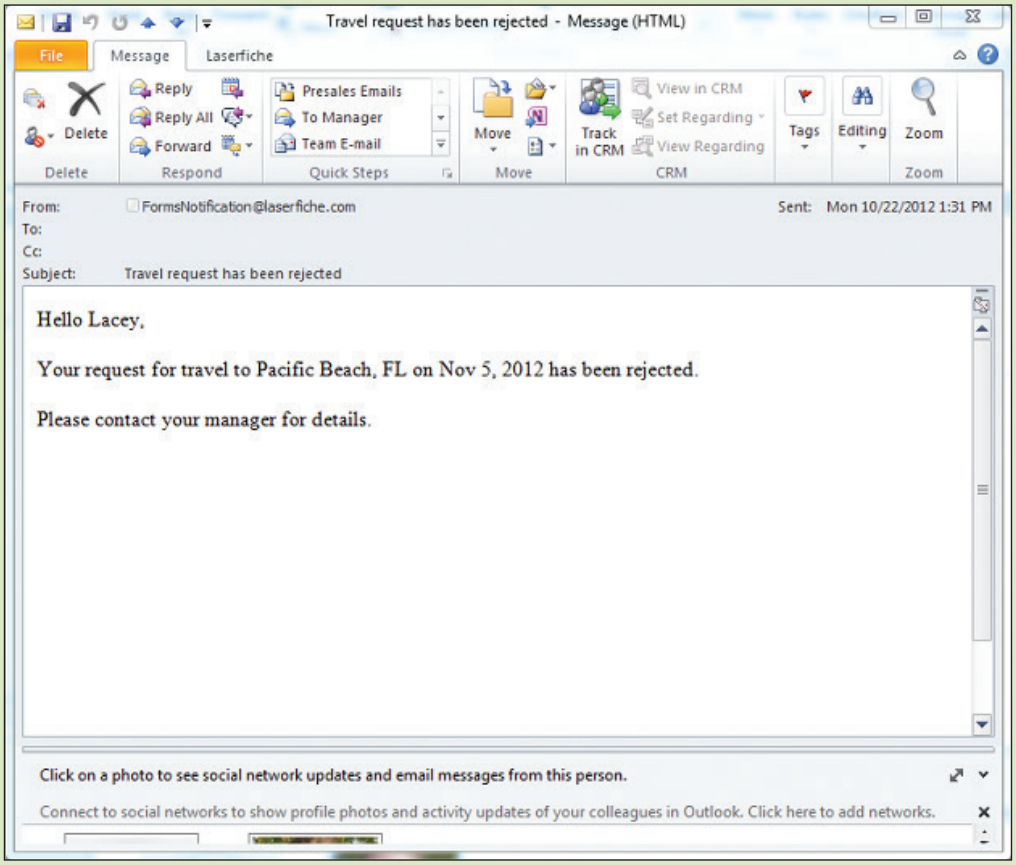
Comments

Submit

This generates an e-mail to the employee with the flight and hotel information.



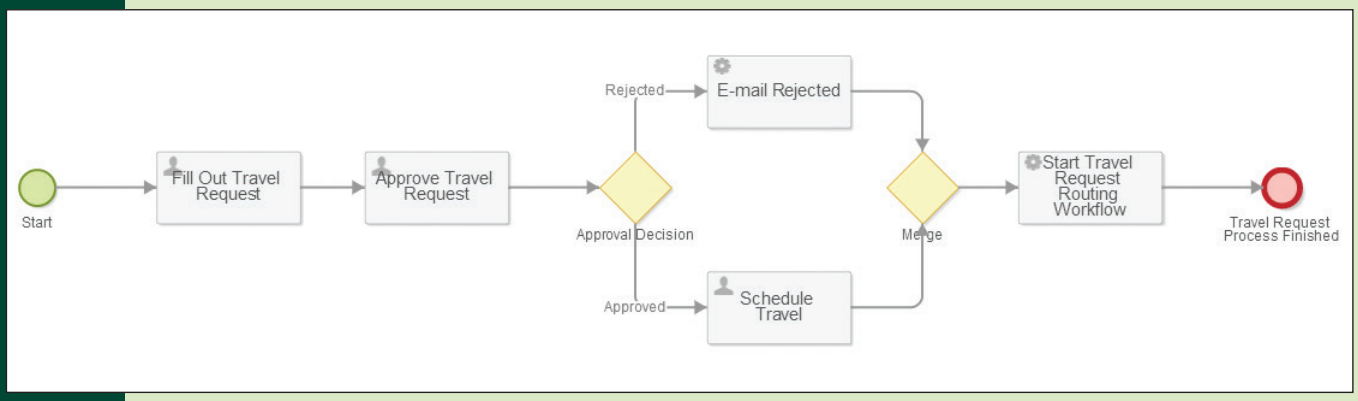
If the request has been rejected, an e-mail is sent to the employee notifying her of the rejection and asking her to contact her manager for more details.



WHAT IS HAPPENING BEHIND THE SCENES

Laserfiche Forms integrates with Laserfiche Workflow to make this process smooth and transparent to everyone involved.

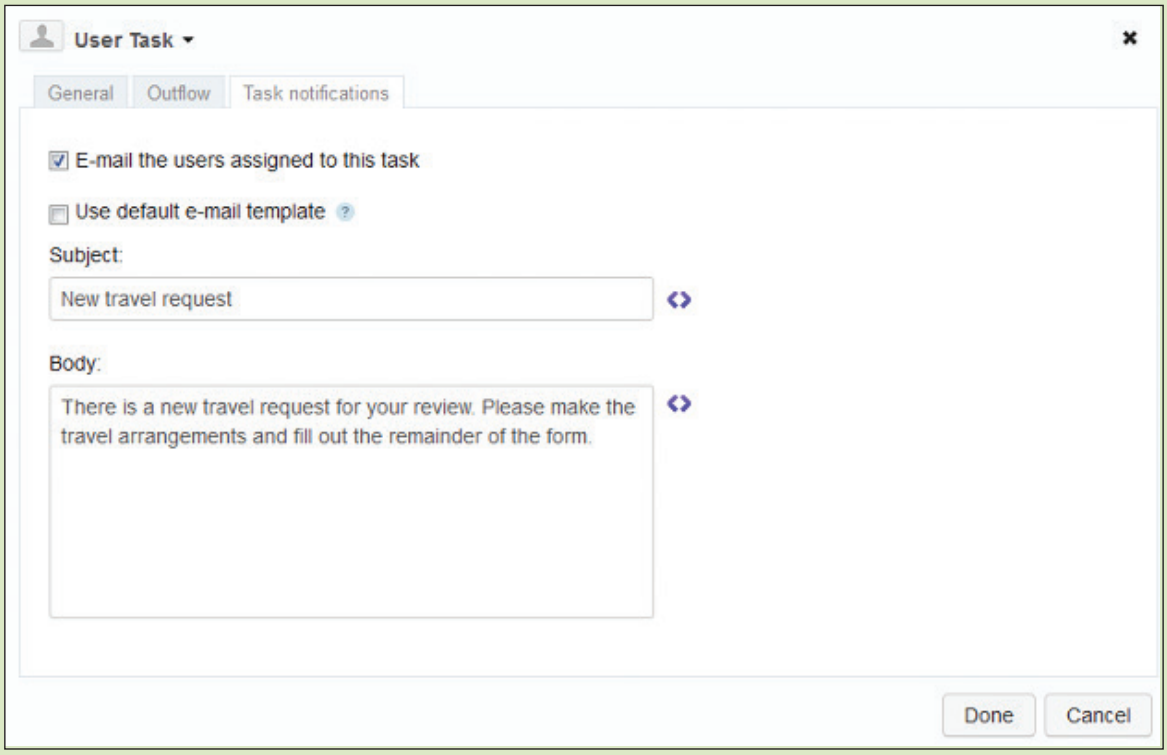
The whole business process is mapped out in the Laserfiche Forms Process Modeler.



There are two different types of tasks used in this process: user tasks and service tasks. User tasks, such as "Fill Out Travel Request" and "Schedule Travel" are tasks that people perform. Service tasks, such as "E-mail Travel Info" and "Start Travel Request Routing Workflow" are tasks performed by services or Web applications such as the e-mail server or Laserfiche Workflow.

TASK NOTIFICATIONS

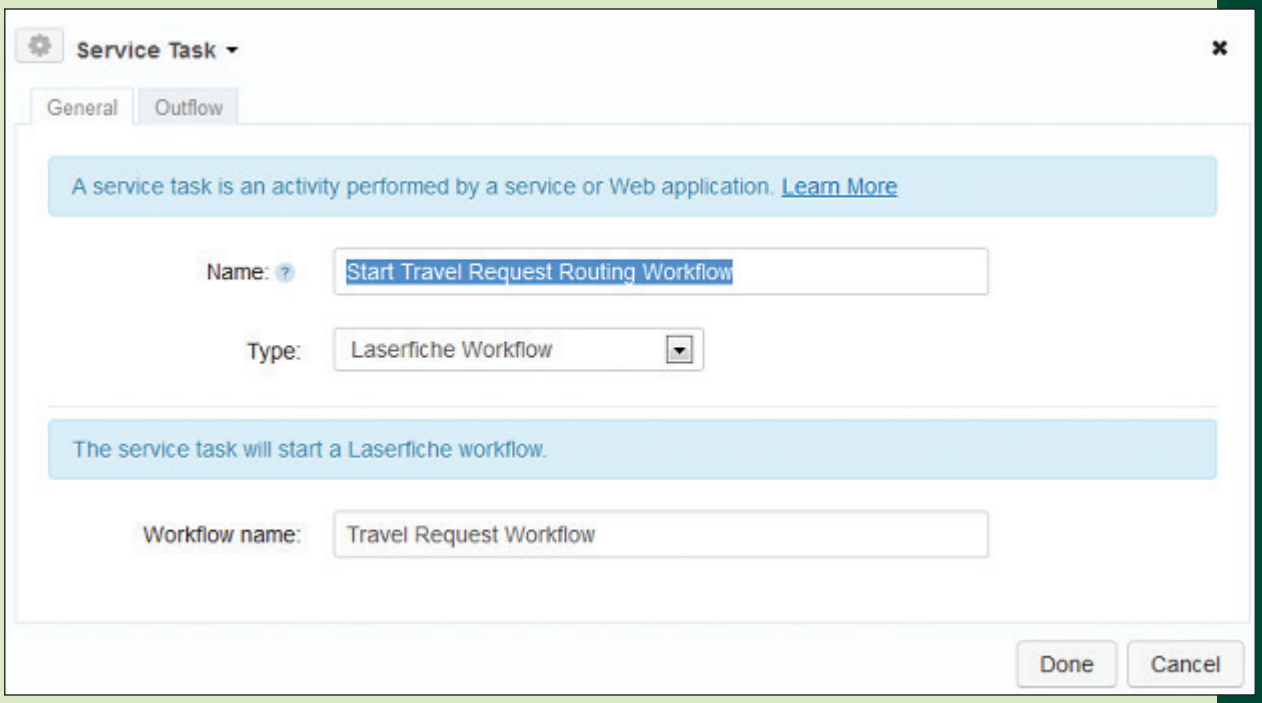
One of the aspects of configuring user tasks is creating the e-mail notifications that will be sent to the manager and travel coordinator to notify them of their upcoming task.



A link to the form is automatically appended to the end of the above message.

LASERFICHE WORKFLOW

Once the travel is scheduled, a service task launches the "Travel Request Workflow."

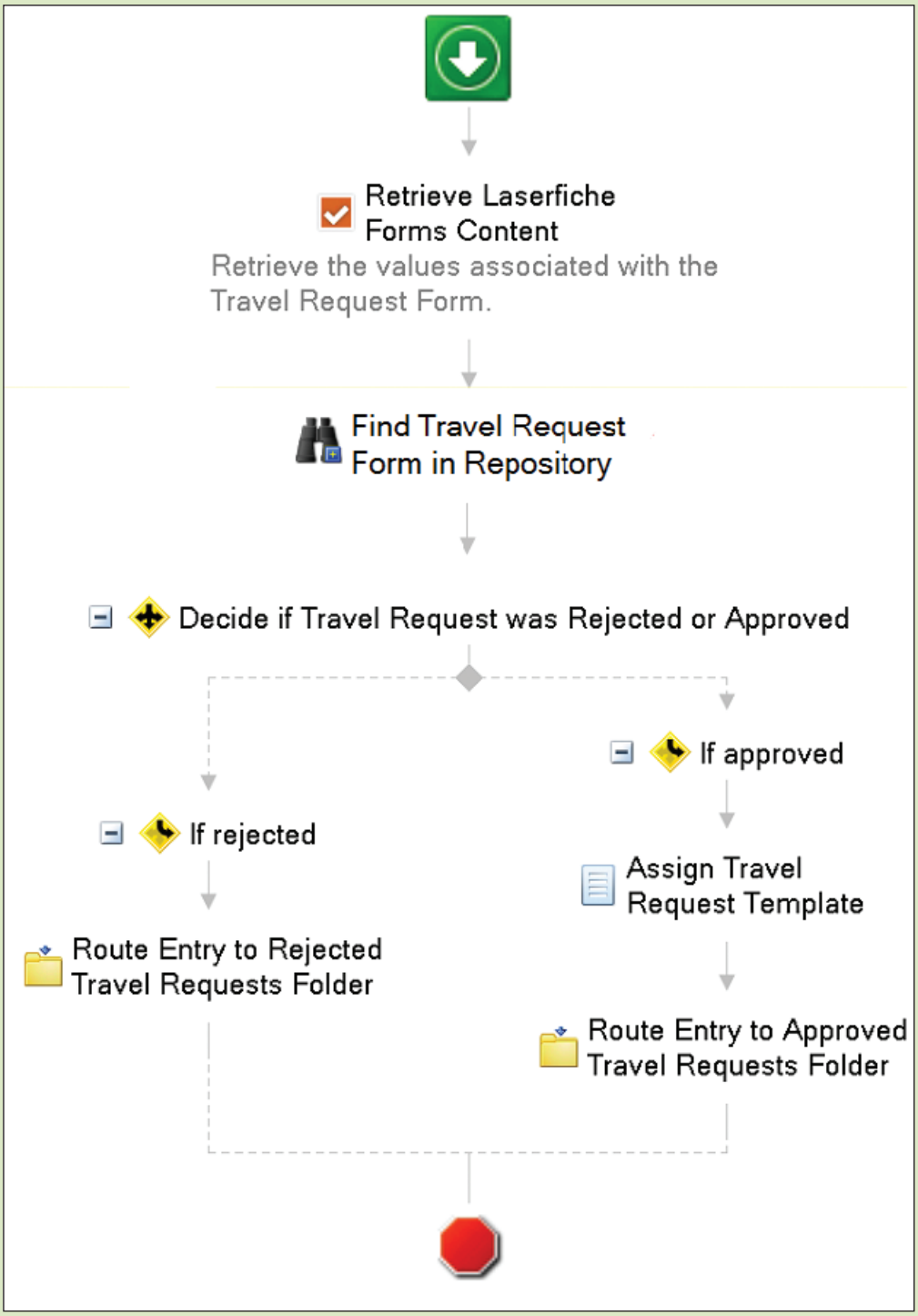


Here is a screenshot of the actual workflow that retrieves data from the form, converts it into tokens, and routes the application form for storage in Laserfiche depending on whether it was approved or rejected by the manager.

If the application form was approved and travel scheduled:

- A new Travel Request template is assigned to the document.
- The fields are automatically populated based on information entered in the form.
- The form is routed to an "Approved Travel Requests" folder for storage.

If the application is rejected, it is simply moved to the "Rejected Travel Requests" folder.



When configuring the "Find Entry" activity use the following path, with the objects in <> replaced with the name of these same objects in Laserfiche Forms:
\<FORMSROOT>\<PROCESSNAME>\%(formsbpinstanceid)_%(RetrieveLaserficheFormsContent__SubmissionDate#"MM//dd//yyyy"#)\<FORMNAME>

Note:

- This method works only if the form has not been renamed and the form's original path has not been changed.
- Since the %(formsbpinstanceid) token is created at run time, the Workflow Designer may bring up a warning that the token doesn't exist.

ADVANTAGES OF LASERFICHE FORMS

With Laserfiche Forms, your organization will be able to:

- Implement completely paperless business processes, from start to finish.
- Efficiently capture input from multiple people in the same form, resulting in a much faster approval process.
- Make capture an integrated component of the business process, allowing the form to be auditable from its very inception.
- Provide administrators with an easy overview of all submitted forms by category, department or any other criteria – allowing them to quickly pinpoint inefficiencies and delays in the approval process.

Employee Evaluations

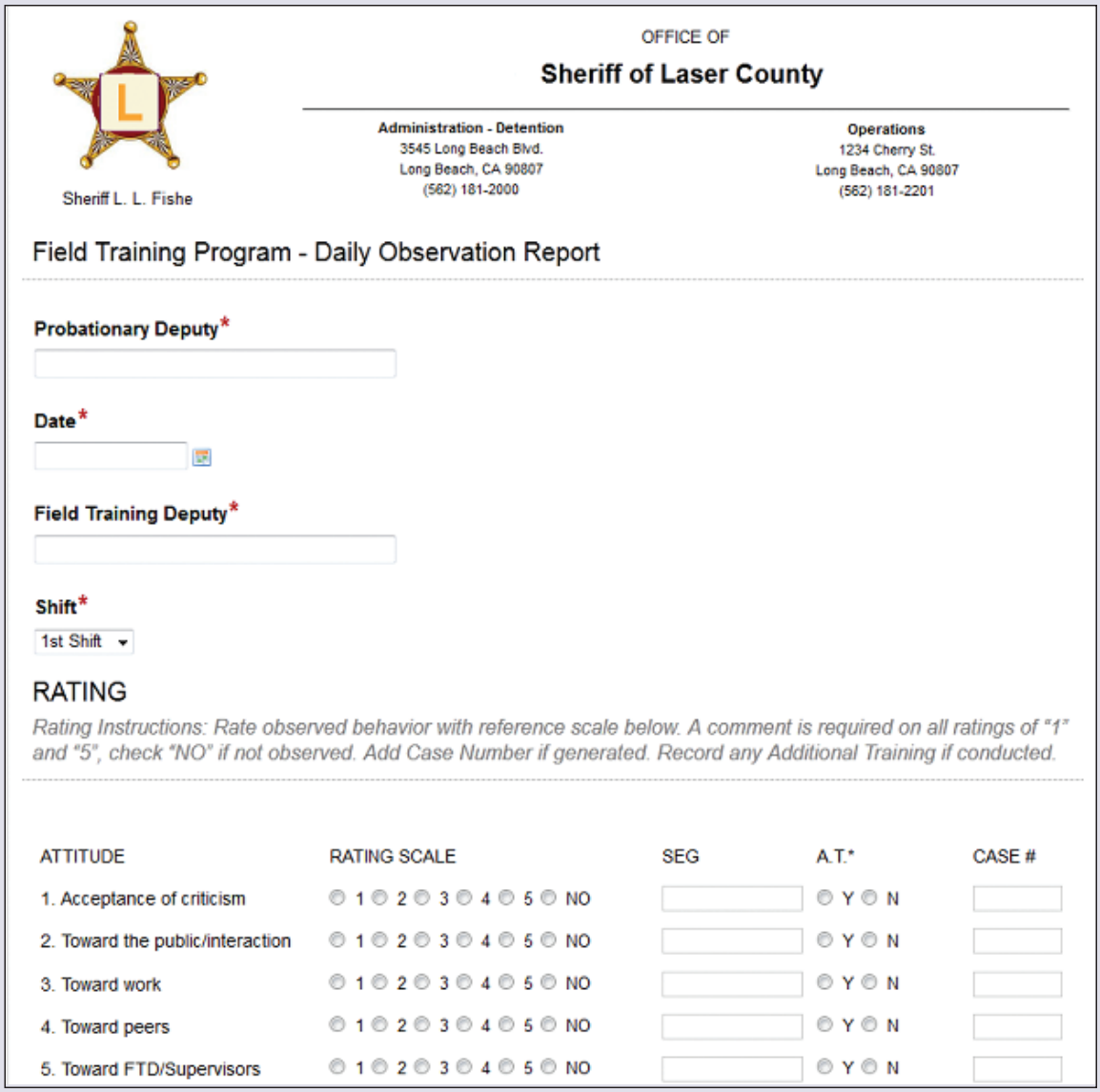
One of a manager's regular tasks is to evaluate the performance of his employees. Regular performance evaluations involve paperwork and approvals by various parties, including employees, managers and higher-level personnel. Learn how one Sheriff's Office made daily performance observations of probationary deputies fully paperless with Laserfiche Forms and Workflow.

Learn how to streamline employee performance observations with Laserfiche Forms.

DAILY OBSERVATION REPORT

In order to make sure that new sheriff's deputies are proficient in their jobs, observing their performance is crucial. While the probationary deputy is undergoing field training, a field training deputy (FTD) evaluates him daily.

Instead of manually filling out a paper form at the end of each workday, the FTD now logs into the sheriff's intranet from the office or his patrol car to access a Daily Observation Report created in Laserfiche Forms.



OFFICE OF

Sheriff of Laser County

Sheriff L. L. Fishe

Administration - Detention
3545 Long Beach Blvd.
Long Beach, CA 90807
(562) 181-2000

Operations
1234 Cherry St.
Long Beach, CA 90807
(562) 181-2201

Field Training Program - Daily Observation Report

Probationary Deputy*

Date*

Field Training Deputy*

Shift*

1st Shift

RATING

Rating Instructions: Rate observed behavior with reference scale below. A comment is required on all ratings of "1" and "5", check "NO" if not observed. Add Case Number if generated. Record any Additional Training if conducted.

ATTITUDE	RATING SCALE	SEG	A.T.*	CASE #
1. Acceptance of criticism	1 2 3 4 5 NO		Y N	
2. Toward the public/interaction	1 2 3 4 5 NO		Y N	
3. Toward work	1 2 3 4 5 NO		Y N	
4. Toward peers	1 2 3 4 5 NO		Y N	
5. Toward FTD/Supervisors	1 2 3 4 5 NO		Y N	

The FTD fills out the form, rates the probationary deputy in a number of categories and indicates whether the deputy needs additional training (A.T.) in any particular category. If additional training is required, a new field appears on the form asking for more details about this training.

The performance required additional training, please explain and describe the plan and list the amount of A.T.:

If additional training isn't required, no such fields appear.

When the form is fully filled out, the FTD presses "Submit" and an e-mail with a link to this form is sent to the probationary deputy. The deputy can make any changes to the form and add his comments before submitting.

Probationary Deputy Comments:

I agree with everything and will attend the A.T.

Field Training Deputy Comments:

Besides the interview and interrogation skills, deputy Smith is doing very well.

List training briefs covered today:

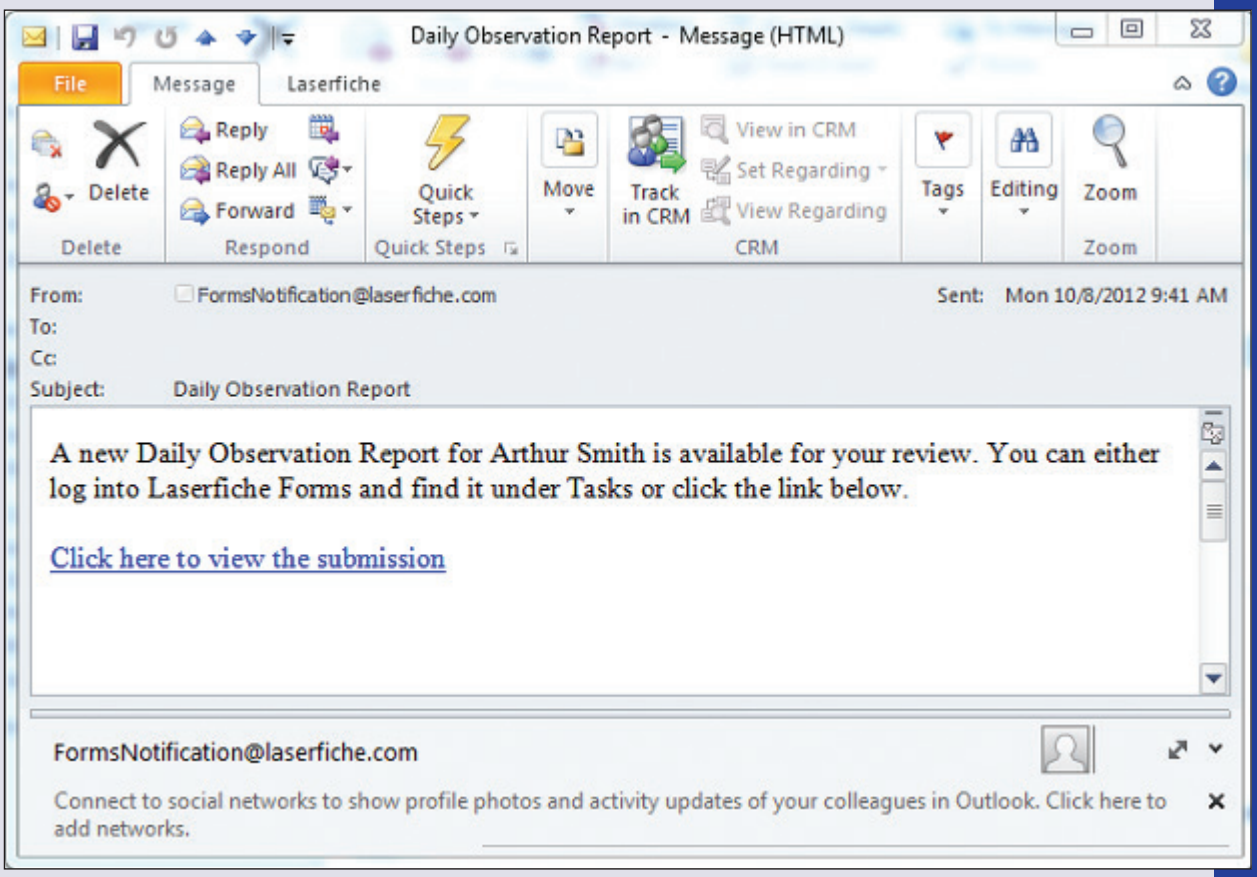
Interrogation and interview.

Approval Actions for Probationary Deputy

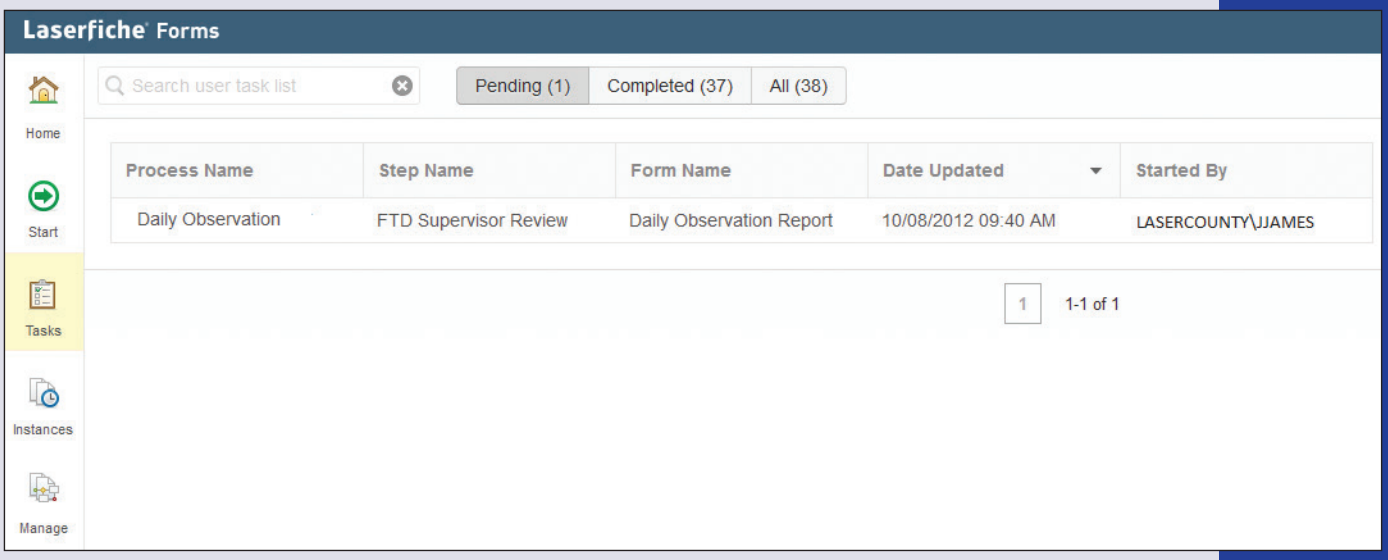
Comments

Submit

Once the probationary deputy submits the form, the FTD supervisor is notified by e-mail that he has a new Daily Observation Form to approve.



The FTD supervisor can either click on the link or log into Laserfiche Forms and go to "Tasks" to view the form.



He cannot make any changes to the form, but can add his own comments and either approve or reject the form. If approved, this form gets sent to the FTD coordinator for review and approval. Similar to the FTD supervisor, the FTD coordinator cannot make changes to the form, except to add comments at the end.

Probationary Deputy Comments:

I agree with everything and will attend the A.T.

Field Training Deputy Comments:

Besides the interview and interrogation skills,
deputy Smith is doing very well.

List training briefs covered today:

Interrogation and interview.

Approval Actions for FTD Coordinator Review

Comments

Approved.

Approve | Reject

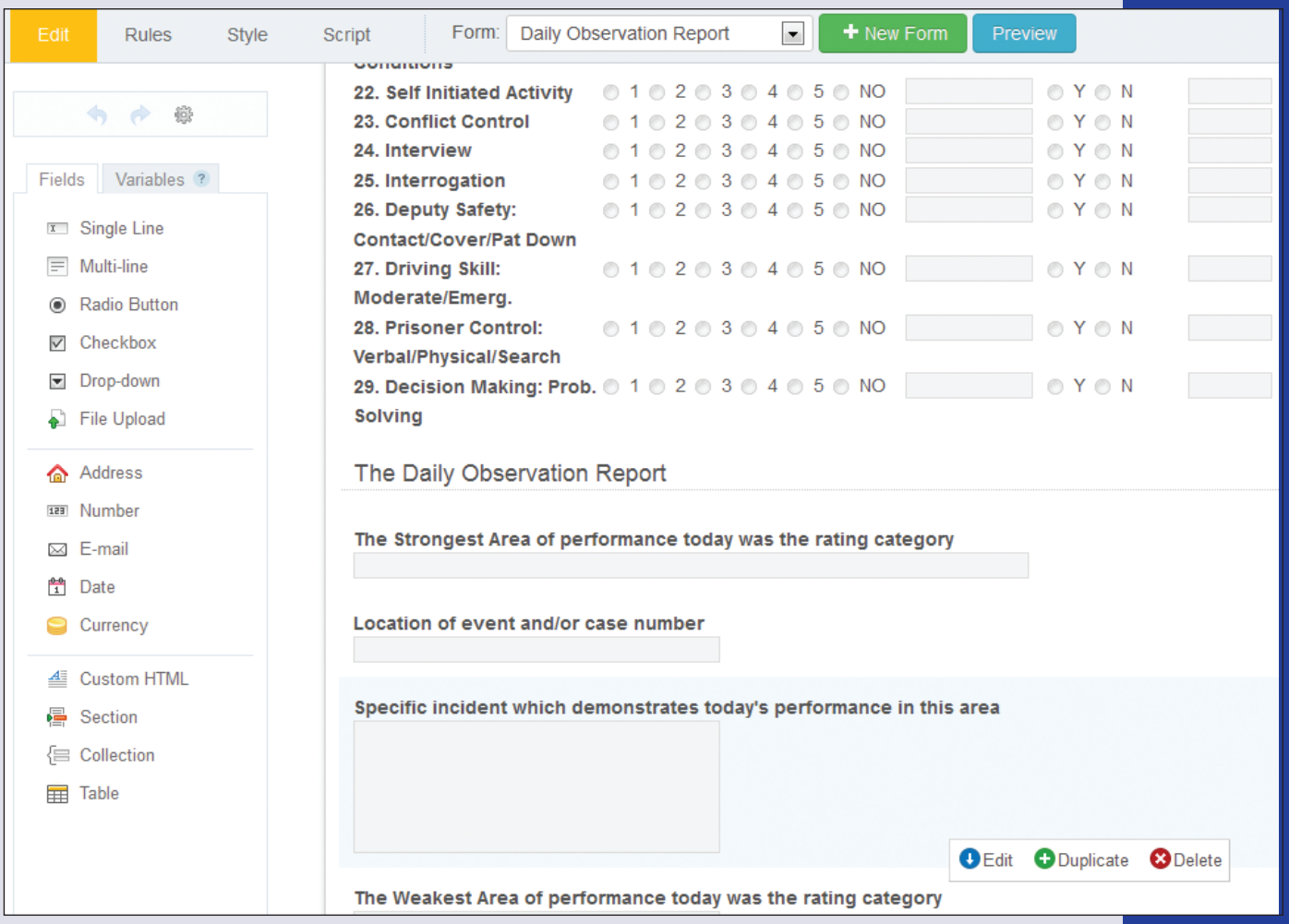
The completed form is then routed to a specific folder in the Laserfiche repository for storage.

Name	Pages	Indexed	Creation Date	Last Modified
Daily Observation Report	3	Yes	10/8/2012 9:36:52 AM	10/8/2012 10:07:57 AM

BEHIND THE SCENES

This entire business process is possible with Laserfiche Forms working in conjunction with Laserfiche Workflow. Here is how it happens.

The form is designed in the Form Designer:

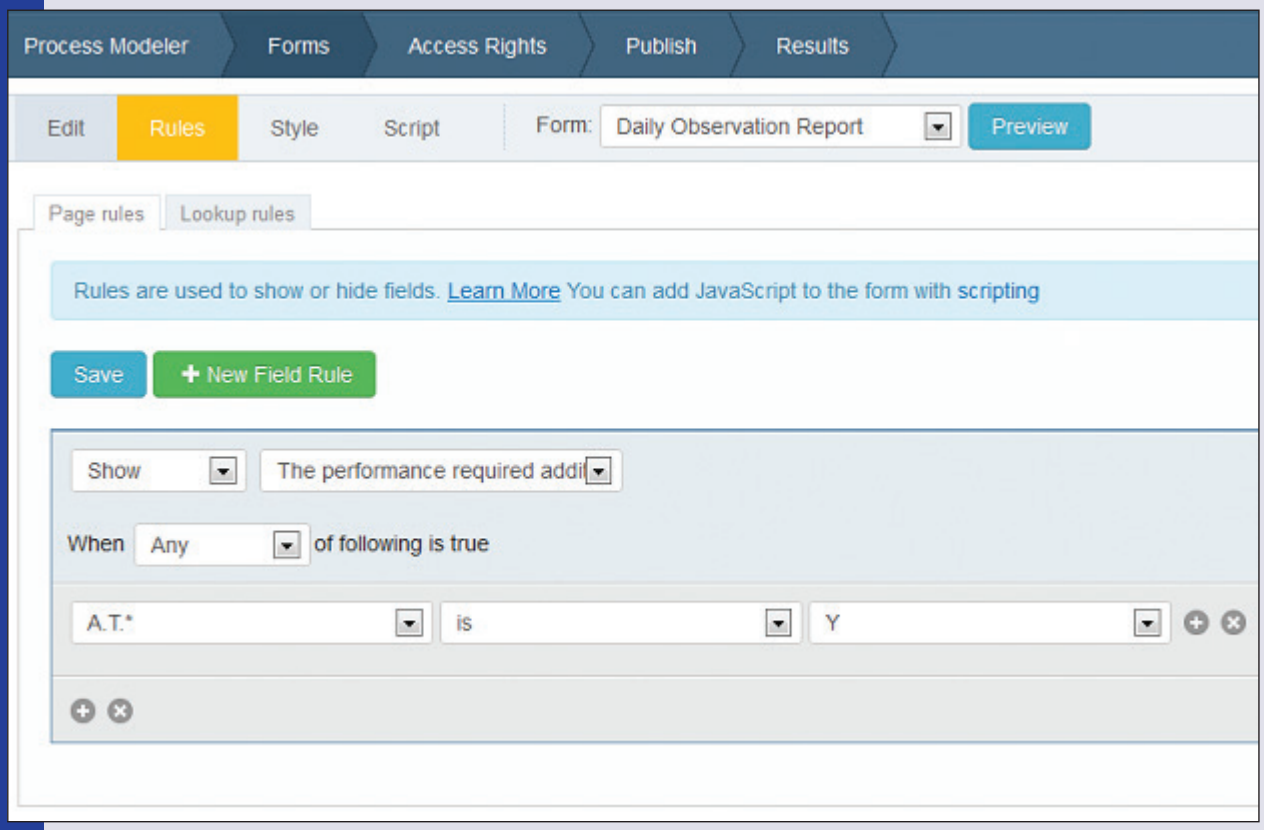


In order to create the dynamic fields—so that a field appears if additional training is selected— custom JavaScript code can be added in the "Script" page when creating a form:

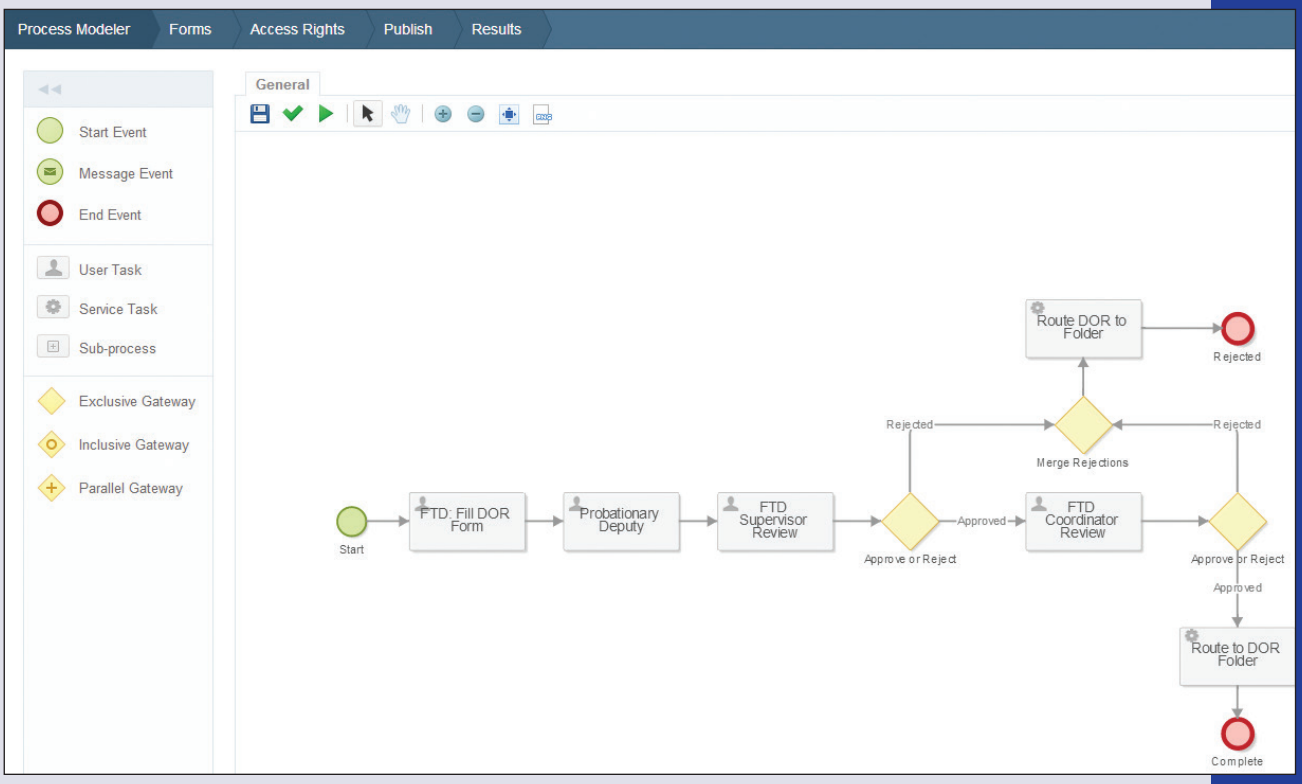
JavaScript

```
$(document).ready(function(){
  $('input[type=radio]').change(function(){
        ToggleBox();
  });
});

function ToggleBox(){

  if($('input[type=radio][value=Y]:checked').length > 0 ){
     $("#q84").removeClass('hidden').show();
  }
  else{
    $("#q84").addClass('hidden').hide();
  }
}
```

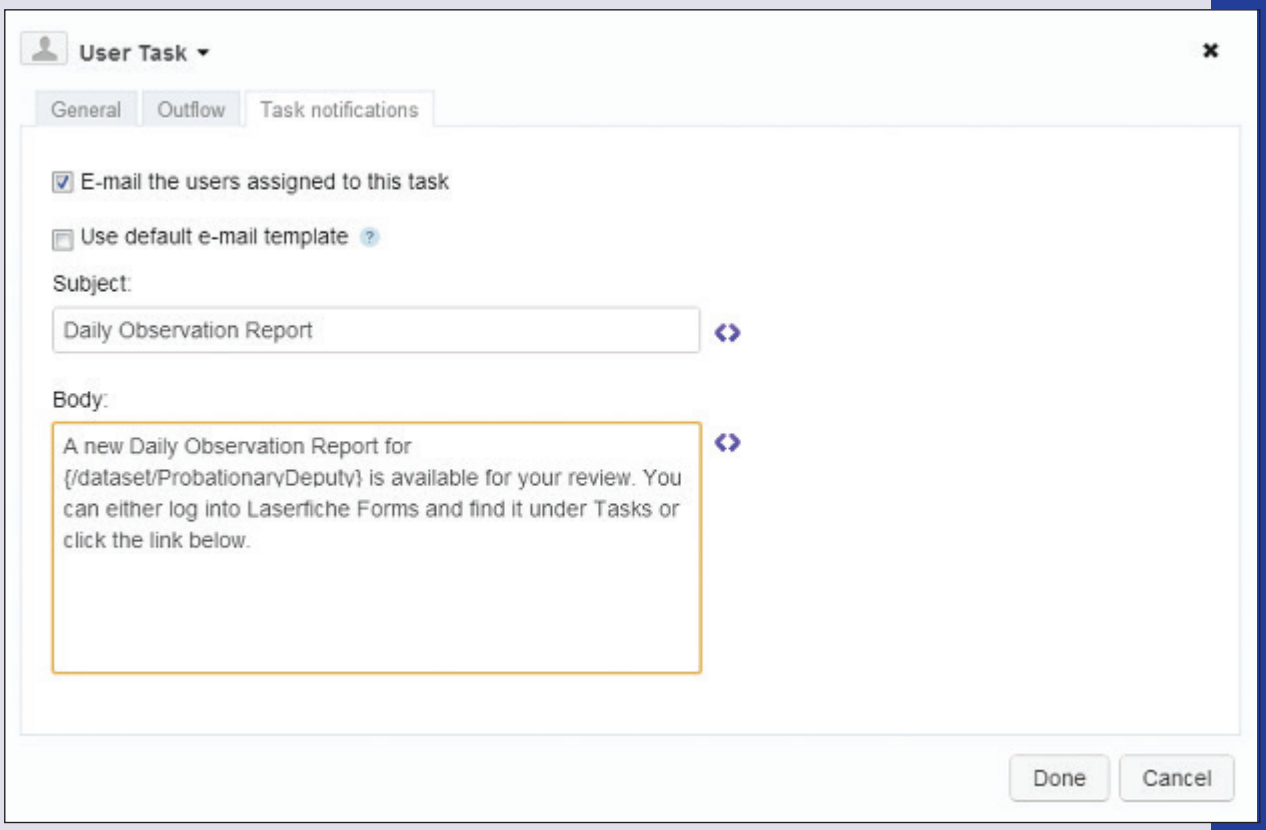
Dynamic fields can be created without code on the "Rules" page, but since that would require one rule per radio button, in this case JavaScript is more efficient.



The whole process is constructed in the Laserfiche Forms Process Modeler.



The process is initiated when the FTD fills out the form. With each step the next reviewer/approver is notified via e-mail. This e-mail can be configured in the "Task Notifications" tab of the User Task settings dialog box. In order to customize this e-mail, the name of the probationary deputy has been added as a variable.



Each time a form is submitted it is exported to the Laserfiche repository as a PDF or TIFF image, depending on the settings selected when creating the process.

Process Modeler | Forms | Access Rights | Publish | Results

Status

Status shows whether a business process is published or hidden. Published processes are available for other users to see and interact with. Hidden processes can only be accessed by Admin users.

Published on Aug 16, 2012 02:23:09 PM by LaserCounty\Admin

Hide Process

Save to Laserfiche

☑ Save a copy of each submitted form to the repository

○ Save as PDF

◉ Save as TIFF

☐ Save business process data as XML

Documents will be saved in folder: LaserCountySheriff\Daily Observation

Share

Use the URL shown below to share this process with others.

https://secure1.laserfiche.com/Forms-Beta/58 Edit E-mail

A default template is assigned to it with the fields automatically populated.

Template: Form Submission

Form Id
112

Form Name
Daily Observation Report

Submission Id
2104

Submitter
LASERCOUNTY\JAMES.JONES

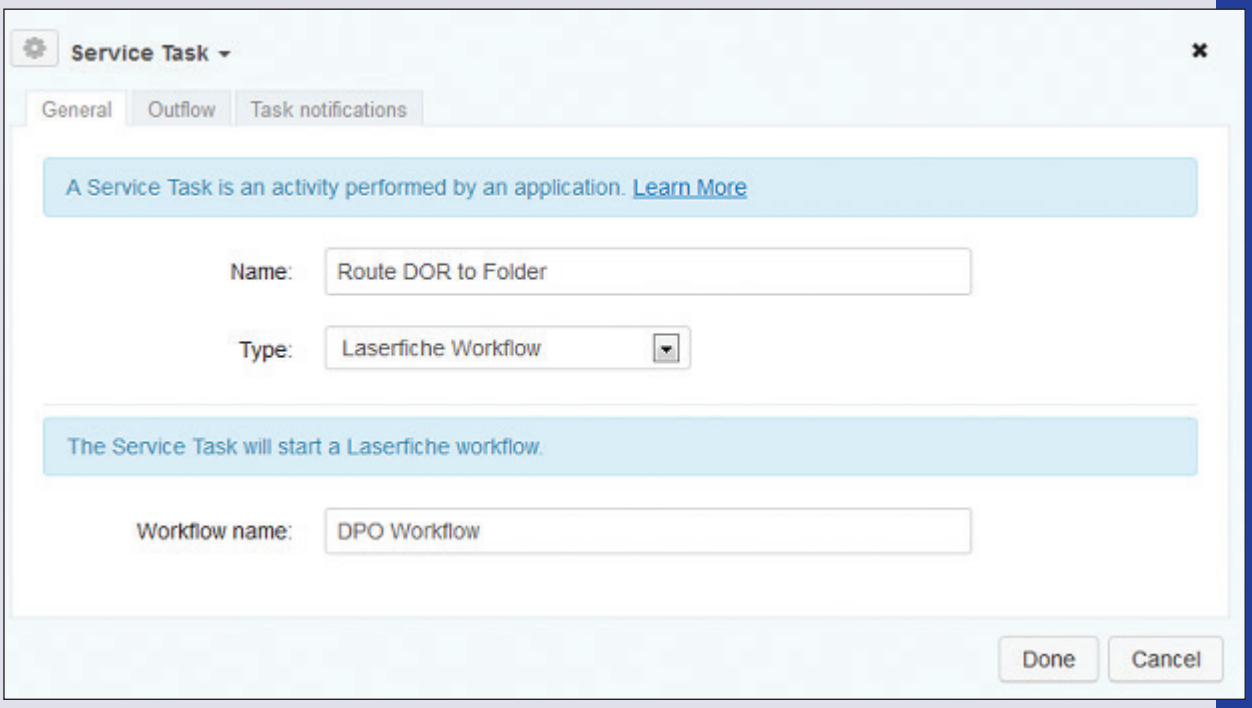
Submission Date
10/8/2012 5:07:49 PM

Action
Approve

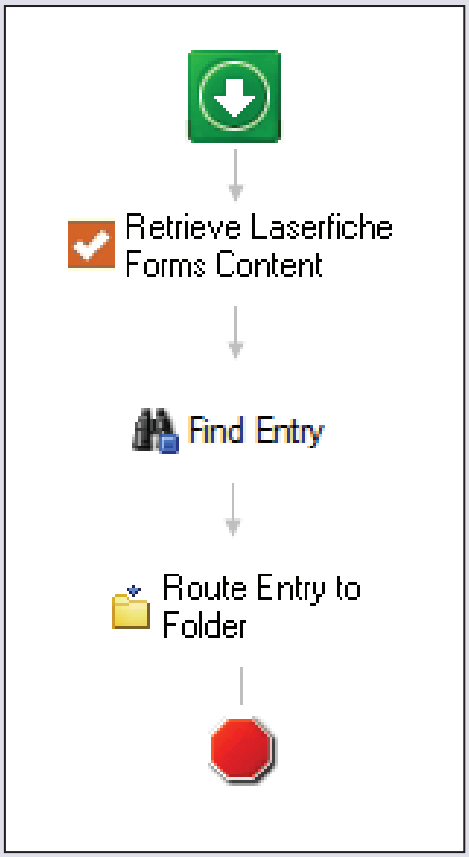
Comment
Approved.

Add/Remove Fields...

When the form is either rejected or approved, Laserfiche Workflow routes it to its final storage place in the Laserfiche repository. A Service Task is used to invoke the "DPO Workflow" that routes the completed forms to the appropriate folder in the Laserfiche repository.

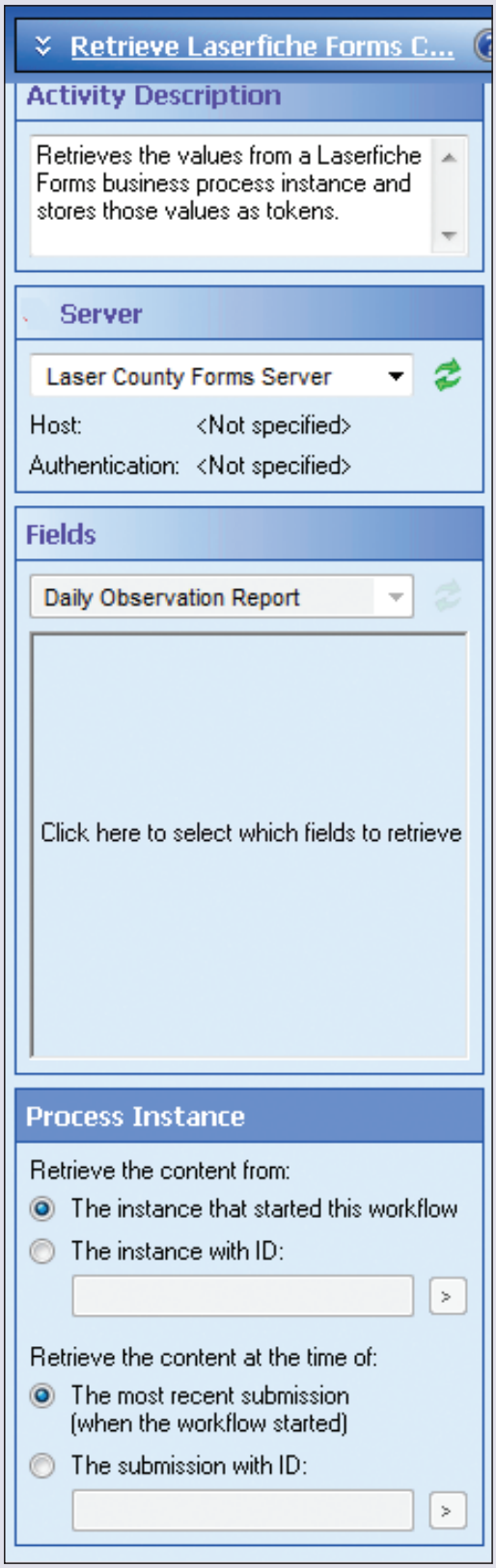


Here is the simple workflow that routes the form and stores it in the "Human Resources\Employee Files\Employee Name\Employee Evaluations\ Current Date" folder.

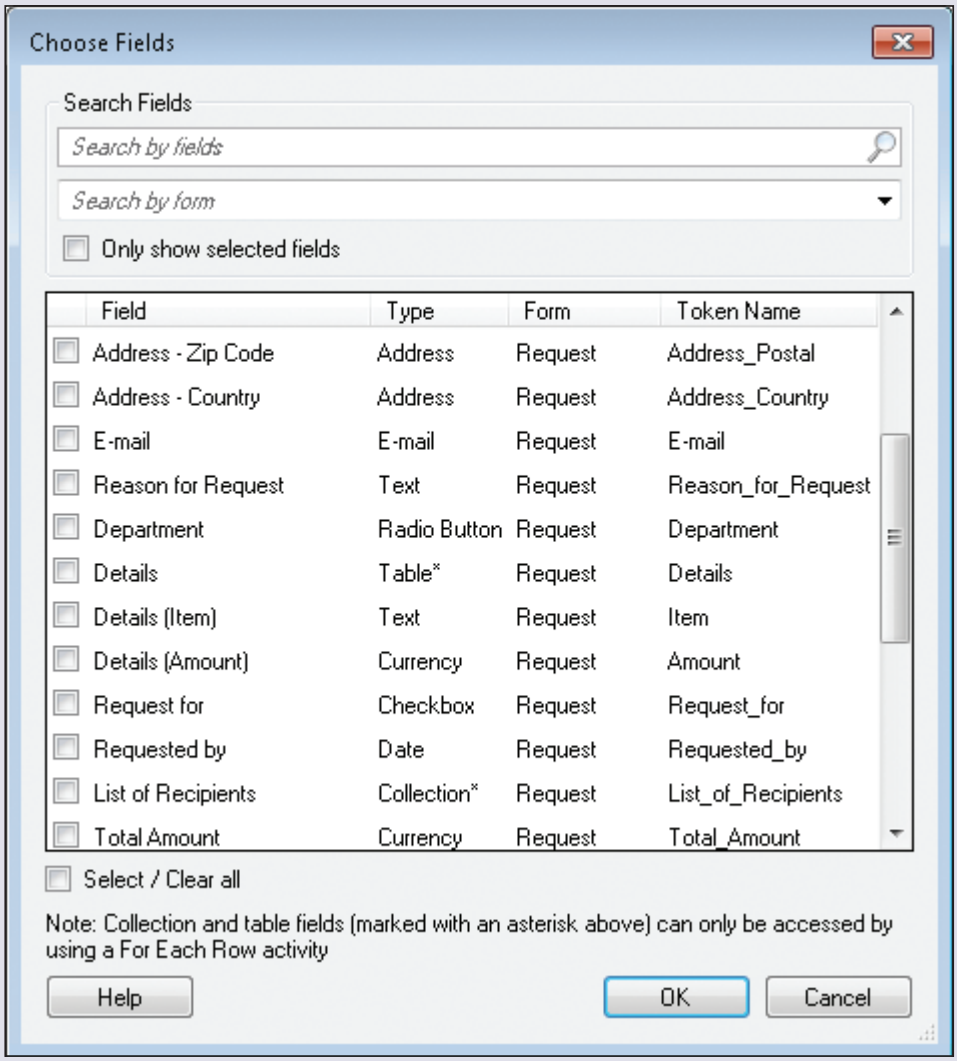


"Employee Name" and "Current Date" are both tokens. The "Employee Name" token is derived from the content of the form—it is the value that has been entered for "Probationary Deputy." This token is extracted using the "Retrieve Laserfiche Forms Content" Workflow activity, which extracts the values entered into a form and converts them into tokens.

Here is how to configure this activity:



After clicking the box under "Fields," the following dialog box pops up:



The user simply selects the form and the fields he'd like to retrieve and convert into tokens.

When configuring the "Find Entry" activity use the following path, with the objects in <> replaced with the name of these same objects in Laserfiche Forms:
\<FORMSROOT>\<PROCESSNAME>\%(formsbpinstanceid)_%(RetrieveLaserficheFormsContent__Submission Date#"MM//dd//yyyy"#)\<FORMNAME>

Note:

- This method works only if the form has not been renamed and the form's original path has not been changed.
- Since the %(formsbpinstanceid) token is created at run time, the Workflow Designer may bring up a warning that the token doesn't exist.

CONCLUSION

Any employee performance evaluation process can be easily streamlined with Laserfiche Forms and Laserfiche Workflow. This daily observation process can be easily adapted to fit the needs of any organization – not only a Sheriff's Office.

Purchase Orders

Every organization must deal with purchase orders (POs) in some capacity. Purchase orders are encountered by most managers across all industries. It is important that the information included in a PO is both accurate and complete or the incorrect merchandise may be ordered. Laserfiche Forms can make paper POs a relic of the past.

Learn how to use Laserfiche Forms to make your organization's purchase orders completely paperless.

THE SCENARIO

The marketing department at LaserWorks outsources printing of product brochures to an outside vendor. A tradeshow is coming up and the company wants to give out three brochures about its most popular products at the show.

The previous process involved an event assistant filling out a purchase order form by hand, and then delivering it to the marketing events manager who reviewed it and signed it. This paper PO would then wind its way through the marketing and accounting departments before finally being completed, approved and filed.

LaserWorks streamlined this time-consuming and inefficient process with Laserfiche Forms.

THE NEW PROCESS

The events assistant accesses the PO form from the LaserWorks intranet. Here is what the full form looks like:

LaserWorks

PURCHASE ORDER

Bill To
LaserWorks
1000 Laser Way
Long Beach CA 90807

Ship To
Same as Bill To address

Requestor Information

Requestor*

Date 11/8/2012

Select Manager to Approve*

Chooose your Department*

Vendor Information

Vendor*

Address

Telephone

Contact

Payment Terms*

Payment Terms*

Item Description

Fill out the item(s) you want to purchase. Click on "Add item" if you have more than one item.

	Product Description*	Quantity	Unit Price	Total Price*	Department	Category
1			$	$		

Add item

Notes — Specify reason or add relevant information about the item(s).

Special Instructions

Tax $

Shipping and Handling $

Total — The total includes the total price, tax, and shipping. $

Attach Supporting Documentation

Attach relevant information for reference. Examples: Screenshots of computer hardware, catering price lists, etc. You can upload multiple files.

Upload — Browse...
Or drag files here

☐ Save unfinished form to complete later

Submit

The events assistant fills out the PO with the required information. As she inserts quantities and unit prices of the brochures, the "Total Price" field is automatically filled out with the correct subtotal. When she adds in the sales tax and shipping/handling charges, the "Total" is automatically calculated.

Item Description

Fill out the item(s) you want to purchase. Click on "Add Item" if you have more than one item.

	Product Description*	Quantity	Unit Price	Total Price*	Department	Category
1	LaserWorks Super Laser Brochure	100	$ 1.25	$ 125	Marketing	Tradeshow
2	LaserWorks Laser City Software Brochure	100	$ 0.89	$ 89	Marketing	Tradeshow
3	LaserWorks Laserphonics Brochure	100	$ 2.03	$ 203	Marketing	Tradeshow

Add item

Notes

Specify reason or add relevant information about the item(s).

Special Instructions

Tax $ 35

Shipping and Handling $ 25.99

Total

The total includes the total price, tax, and shipping.

$ 477.99

Once the form is completely filled out, the events assistant clicks "Submit" and the form is routed to the events manager for approval. The events manager must look over the form and sign it. She can also designate another manager to approve and sign the form. In this case, Mindy Manager has designated Michael Marks, marketing manager.

Manager Section

Type in your name and date. Select yes if the process needs another approver to review.

Signature*

Please type your full name here as your signature

Mindy Manager

Date* 11/8/2012

Does the purchase order need another manager to approve?*

- (•) Yes
- ( ) No

Select Manager to Approve* Michael Marks

Submit

The form will be routed to Michael for his review. Once Michael reviews it, and as long as he doesn't designate another manager to approve it as well, the PO is sent to the accounting manager.

Manager Section

Final Approver

Final Approval Date

Submit

Once the accounting manager approves the PO, it is automatically sent to the accounting clerk who generates a PO number and populates the appropriate field on the form.

LaserWorks

PURCHASE ORDER

Bill To
LaserWorks
1000 Laser Way
Long Beach CA 90807

Ship To
Same as Bill To address

Please assign the PO number

PO#*

If the invoice has already been uploaded, the events assistant receives an e-mail with the PO number. If she has not yet uploaded the invoice, she automatically receives the form below.

Attach Invoice

Attach the invoice here. If the total amount on the invoice is different from the approved amount on the PO, please explain why.

Sample explanations: Online vendor changed prices, shipping costs changed, additional people signed up for a workshop.

Upload Invoice

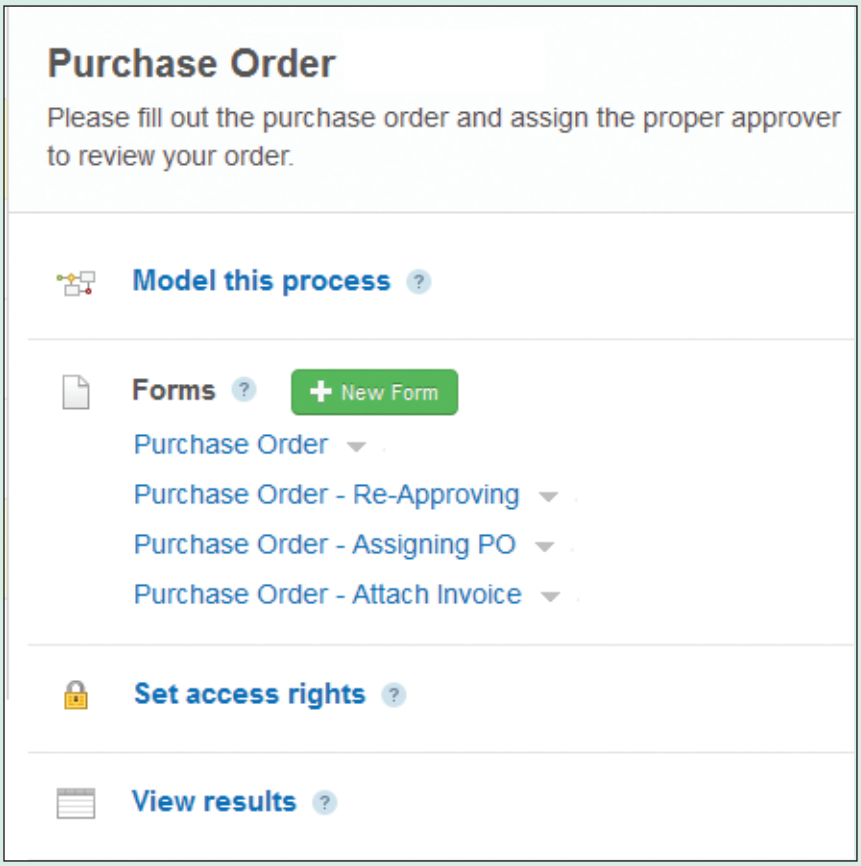
Browse...

Or drag files here

Specify reason(s) if price is different from the origin price

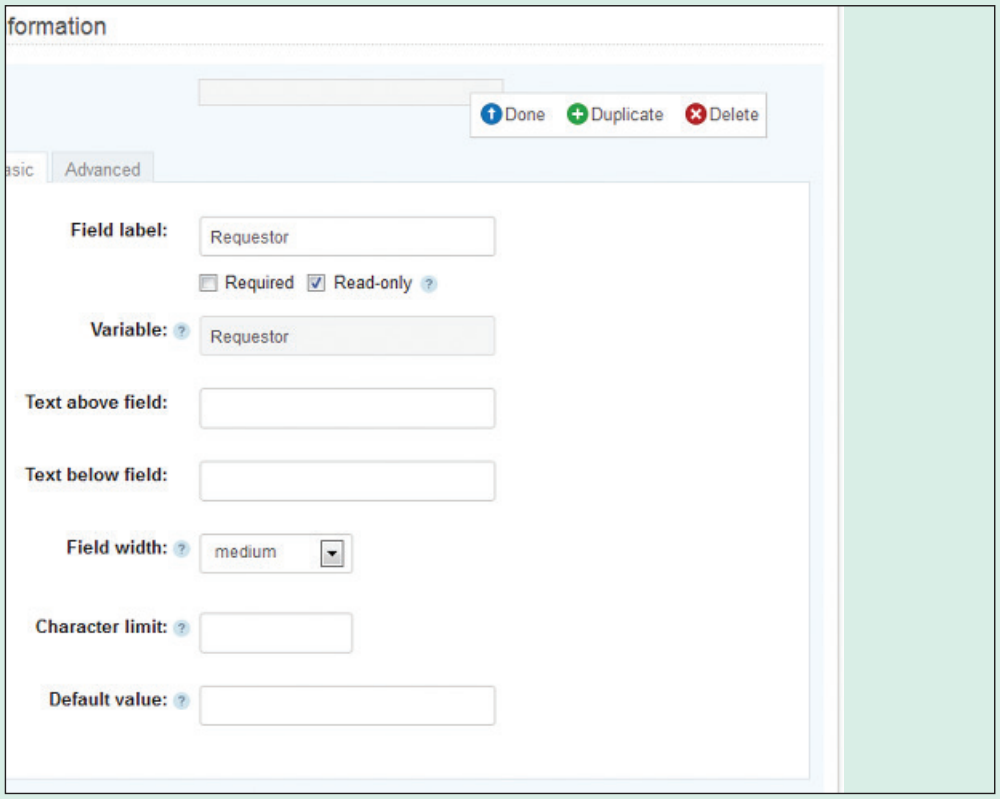
BEHIND THE SCENES

Although the final document is a single PO, this entire process actually consists of four different forms.

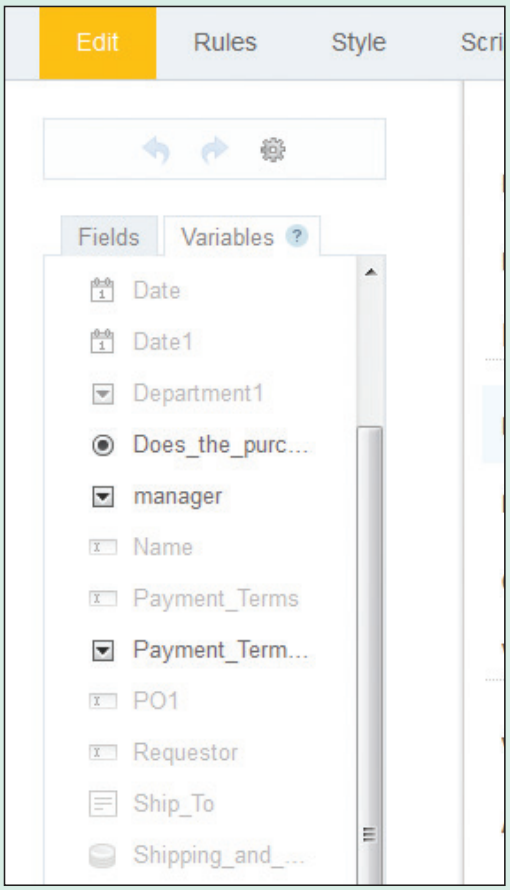


Information from the first form (the original PO form that the events assistant filled out) is copied to each of the other forms, with the specific part pertaining to a particular user added. For example, the form that the accounting manager sees is not the original PO form but the PO form with the special "Manager Section" appended to the bottom.

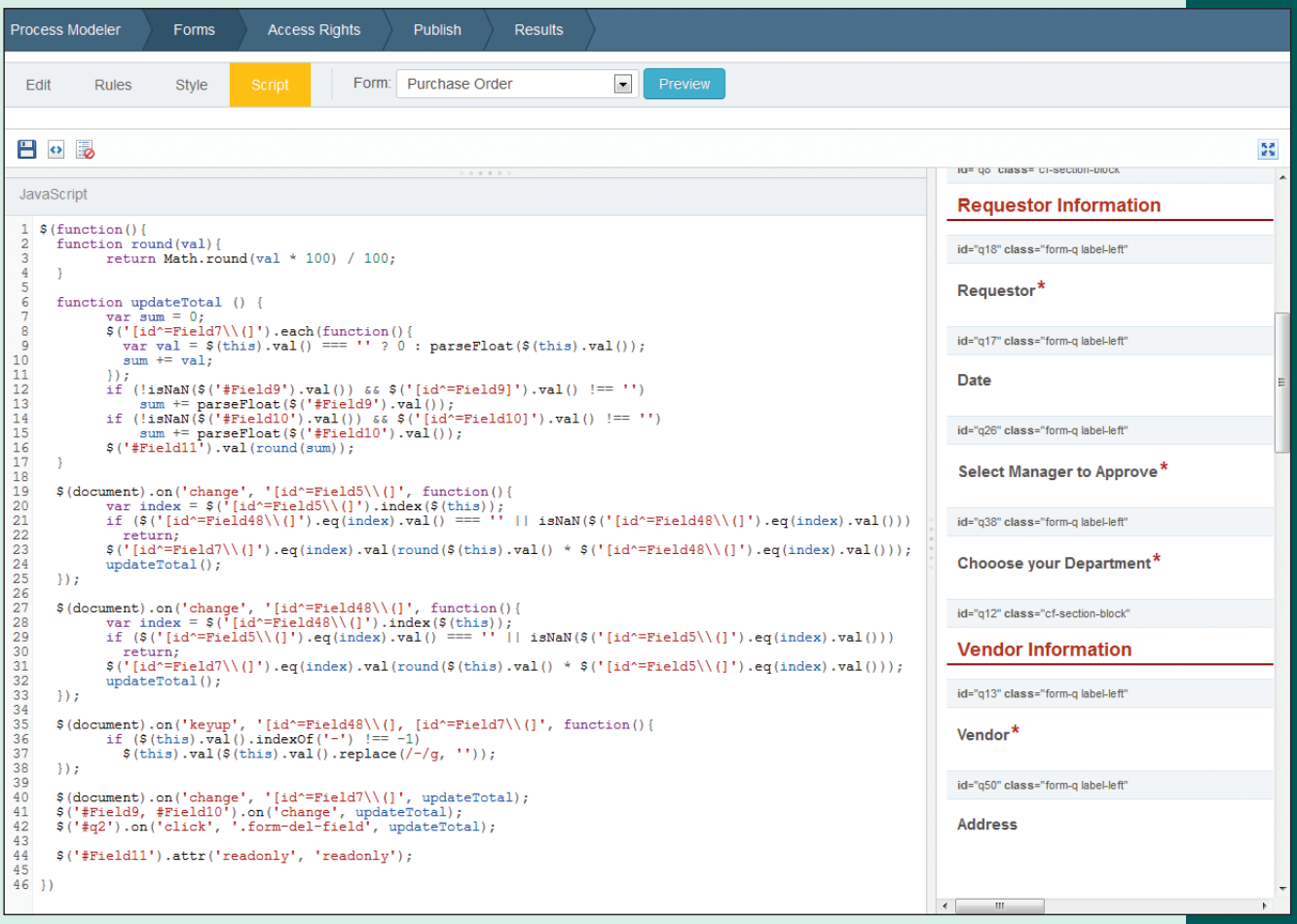
Each form field has a specific variable associated with it. This variable contains the information that is entered into the field. For example, the "Requestor" field has a corresponding variable called "Requestor."



When creating the form that the accounting manager sees, for example, instead of inserting a regular field and calling it "Requestor," a "Requestor" variable can be inserted. This ensures that that the field will be populated with the same information entered in the original PO when the accounting manager views it.



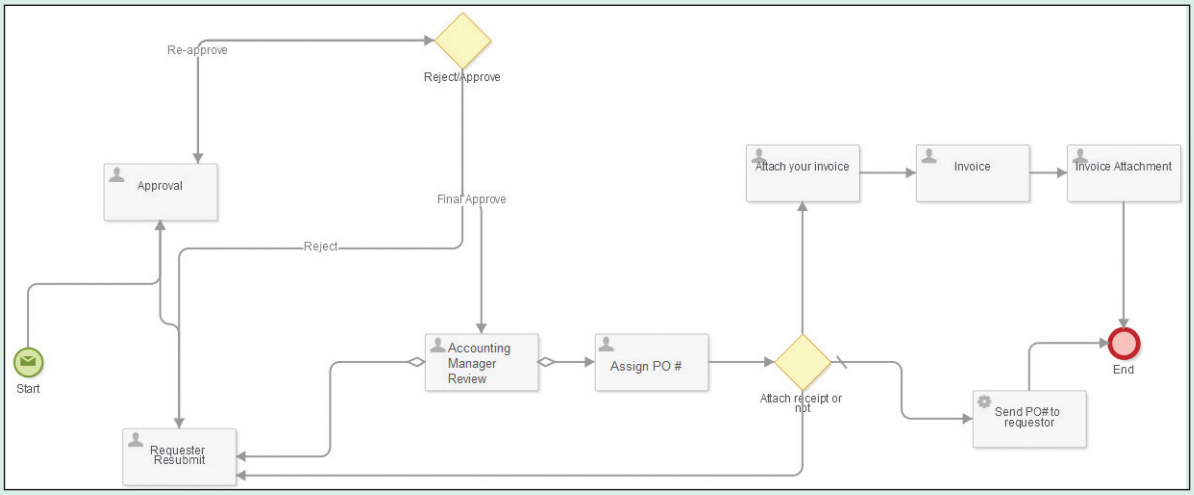
In order to customize the form to have the "Total Price" field automatically reflect the "Quantity" multiplied by "Unit Price" and then automatically add up all the subtotals including "Tax" and "Shipping Cost" to get the actual "Total," the following JavaScript can be included in the "Script" page:




```javascript
$(function(){
  function round(val){
        return Math.round(val * 100) / 100;
  }

  function updateTotal () {
        var sum = 0;
        $('[id^=Field7\\(]').each(function(){
          var val = $(this).val() === '' ? 0 : parseFloat($(this).val());
          sum += val;
        });
        if (!isNaN($('#Field9').val()) && $('[id^=Field9]').val() !== '')
            sum += parseFloat($('#Field9').val());
        if (!isNaN($('#Field10').val()) && $('[id^=Field10]').val() !== '')
            sum += parseFloat($('#Field10').val());
        $('#Field11').val(round(sum));
  }

  $(document).on('change', '[id^=Field5\\(]', function(){
        var index = $('[id^=Field5\\(]').index($(this));
        if ($('[id^=Field48\\(]').eq(index).val() === '' || isNaN($('[id^=Field48\\(]').eq(index).val()))
          return;
        $('[id^=Field7\\(]').eq(index).val(round($(this).val() * $('[id^=Field48\\(]').eq(index).val()));
        updateTotal();
  });

  $(document).on('change', '[id^=Field48\\(]', function(){
        var index = $('[id^=Field48\\(]').index($(this));
        if ($('[id^=Field5\\(]').eq(index).val() === '' || isNaN($('[id^=Field5\\(]').eq(index).val()))
          return;
        $('[id^=Field7\\(]').eq(index).val(round($(this).val() * $('[id^=Field5\\(]').eq(index).val()));
        updateTotal();
  });

  $(document).on('keyup', '[id^=Field48\\(], [id^=Field7\\(]', function(){
        if ($(this).val().indexOf('-') !== -1)
          $(this).val($(this).val().replace(/-/g, ''));
  });

  $(document).on('change', '[id^=Field7\\(]', updateTotal);
  $('#Field9, #Field10').on('change', updateTotal);
  $('#q2').on('click', '.form-del-field', updateTotal);

  $('#Field11').attr('readonly', 'readonly');

})
```

The values in red correspond to the various fields in the form. Exact code and instructions can be found in the Laserfiche Forms Help Files.

The whole business process is modeled in the Laserfiche Forms Process Modeler. Here is what the process model looks like:



Actions performed by people, such as "Assign PO #" are represented by user tasks, actions performed by automated tools such as "Sent PO # to Requestor" are represented by service tasks and routing decisions are represented by gateways.

BENEFITS OF LASERFICHE FORMS

Streamlining the purchase order process with Laserfiche Forms results in the following benefits:

- Purchase orders can be signed electronically and easily routed from party to party without having to be manually carried around the office.
- Everything can be done in an efficient and timely matter as everyone involved is notified immediately of their upcoming tasks.
- Administrators can easily view where each PO is in the process, and can quickly address any hold-ups or bottlenecks.

QUICKER BETTER SAFER
Laserfiche Forms

When solving business process problems, gaining fresh perspective from your peers can be invaluable. That's why Laserfiche encourages its customers to share concrete details (including screenshots) of their solutions to common problems with each other on the Laserfiche Solution Exchange.

This book is a collection of examples on how organizations can incorporate Laserfiche Forms into their business processes. With Laserfiche Forms, organizations can accelerate their business processes by simplifying data collection and processing - making entire business processes paperless from start to finish.

"Laserfiche Forms gave us an easy way to collect information from potential clinical faculty and allow them to submit required documents. The ability to attach documents to the web forms and to have the Laserfiche Workflow initiate a process with the documents is of great value to us."

– Katherine McConnell, Business Systems Analyst, University of Toronto

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