



FORMS-DRIVEN WORKFLOW SOLUTIONS

WHITE PAPER

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INTRODUCTION

The business form of today is constantly evolving. Initially conceived as a paper document, the form is now electronic and can surface on any number of form factors – desktops, laptops, and mobile devices. In addition, there has been a parallel evolution of forms from simple structured documents to the primary interface used to collect data by a variety of enterprise processes and applications.

When using business forms, organizations not only need to implement the right process but also an effective strategy. Modern forms should enable rich interaction with business processes. They should aggregate data and content from multiple sources, and encourage informed and collaborative human interaction.

Organizations should also strive for business forms to be effective, efficient, easy for the designers to build, and so simple that anyone in the company can use them. With an integrated approach to forms, we believe a solid forms strategy can be built that will help organizations gain a critical edge in their industries. After reading this eBook, you'll understand how to approach forms in the context of a larger workflow automation solution.



KEY CONCEPTS OF MODERN FORMS SOLUTIONS

No form is an island

The next time you create or use a form, consider whether it is part of a bigger picture. Does the form drive other processes? Are there other forms that work in tandem with this form? What is the motivation behind collecting the data in the first place? And how will that data be used once collected?

What most organizations find in answering these questions is that no matter how simple the form may be or how little data is being collected, there most certainly needs to be a process or workflow running behind it. What is workflow? Workflow is the quick and easy way to streamline your processes, integrate your content and empower your people, wherever they are.

When a form is connected to a workflow, it not only provides the fields related to the task at hand, but also a variety of workflow variables and data points. On the process side, the workflow can condense or expand on line items, send and receive data from apps both on-premises and in the cloud, and assign task-specific forms to users containing the fields they need for the task.

Whether for an expense form or onboarding a new employee, collecting data will always be a means to an end, and a business process is the only way to reap the benefits from this end. Real value comes from automating business processes and informing people and stakeholders at key decision points.

Forms should deliver value

Capturing data in an electronic form and not connecting it to any workflow automation is a limited-value scenario. People often approach a solution in this way when they wish to maximize simplicity when moving away from a difficult, paper-based solution.

However, once the data is collected you still need to do something with the data you collect; you need the data to surface somewhere else and have processes that ensure that the data in the document syncs with the data in an addressable form.

As a result, forms tied to workflow automation solutions provide incredible value. A process or involved strategy workflow is needed to deliver that value. Key to that is identifying where the value needs to go and what end result should be extracted from use of the forms.



BUILDING FORMS-DRIVEN WORKFLOW SOLUTIONS

People, Process, Content

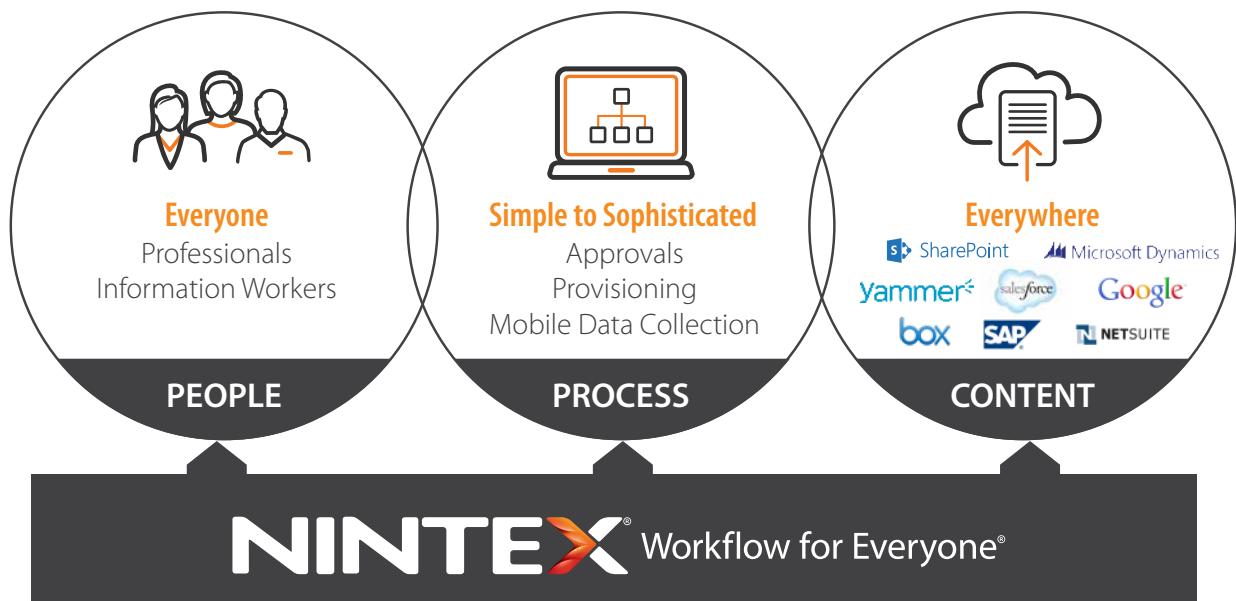
As organizations move to a data-centric and process-centric approach, forms and workflows naturally become joined at the hip. To realize the full benefits of forms in any organization, workflow solutions are essential. The goal of a workflow solution is to automate processes between people and content.

Three important factors should be considered when building a workflow solution:

People: Increased collaboration is imperative. Your workforce is distributed and mobile. They expect to be able to work from any device and expect that forms will be user friendly and engaging.

Process: Time-consuming everyday processes should be automated, resulting in streamlined workflows.

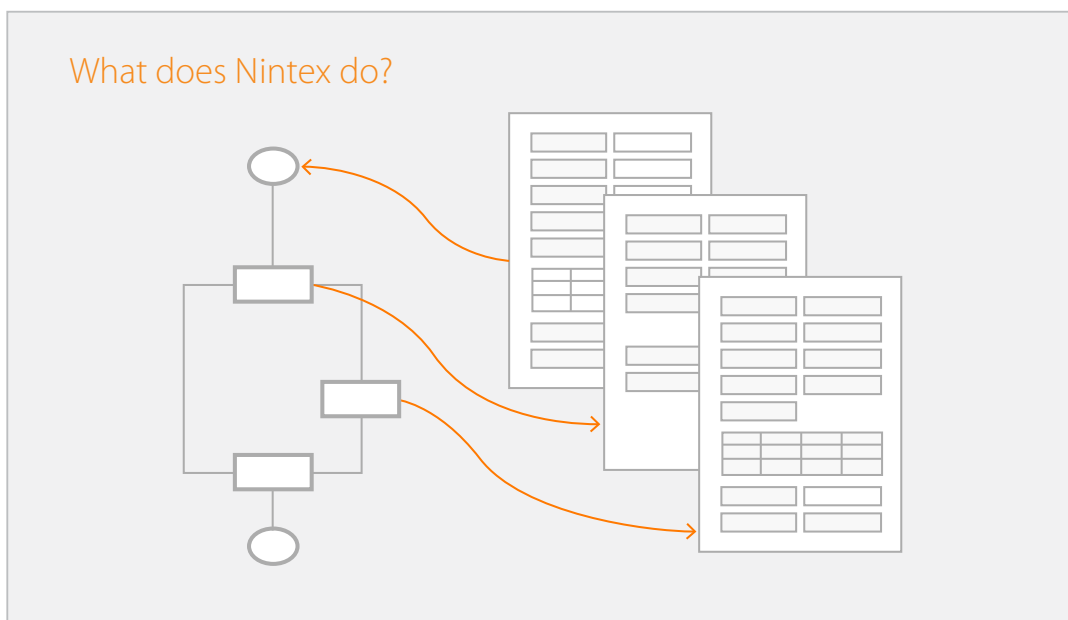
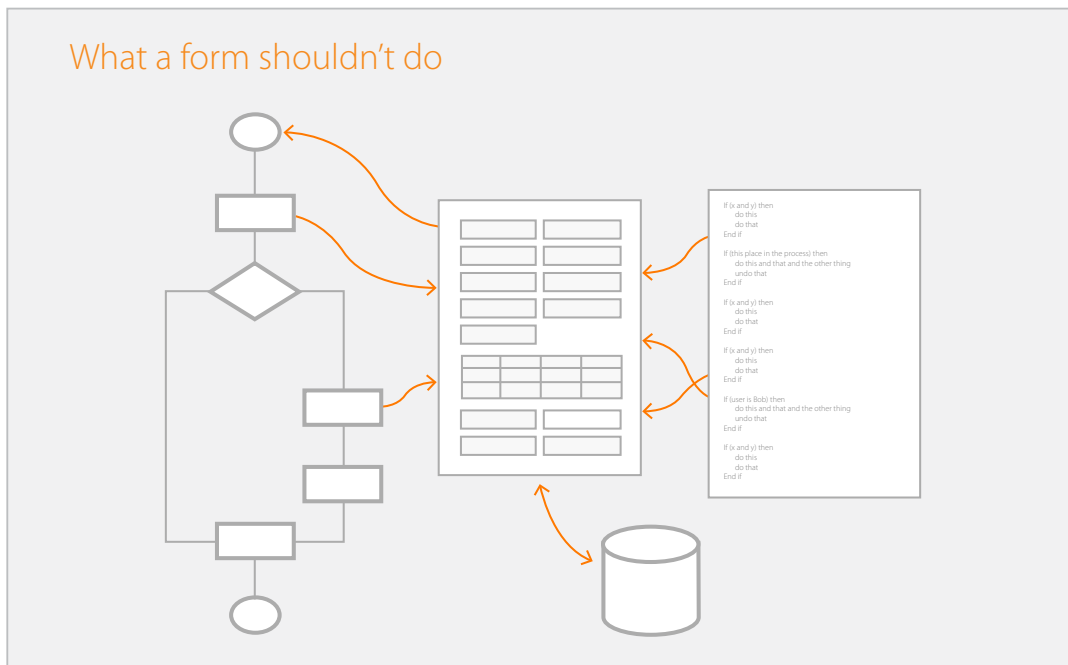
Content: Processes need to be connected to all your content – whether in the cloud or on-premises.



Forms should be simple

Many forms are more complex than they need to be. Frankly, it's because people expect too much from forms alone.

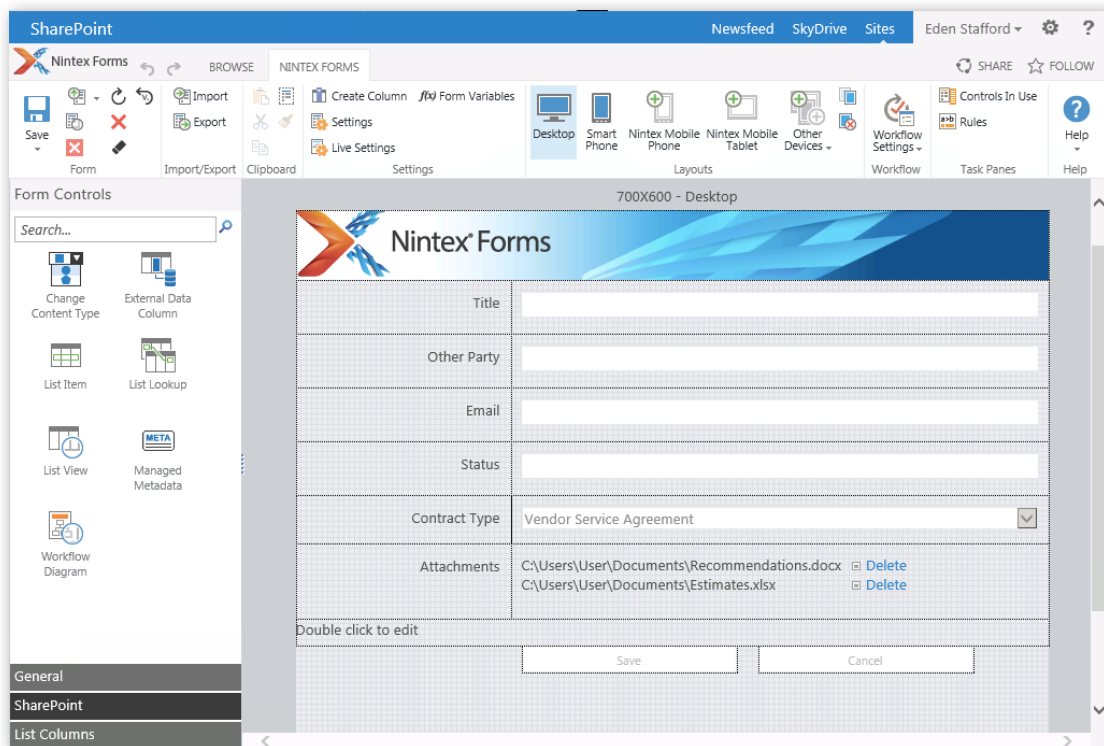
A complex form with built-in process logic is a recipe for disaster and can quickly escalate to a situation where a form is so complex that it defies alteration or maintenance or even worse, renders it unusable.



A great example is the structured document with the famous “Office Use Only” section. This scenario involves the form being passed from person to person. However, someone else is going to execute a different part of the business process using the same form, making it difficult to maintain that office-only edict.

As a form designer, consider all the ways in which a person will interact with a form and choose the best user interface for each part of the process.

A great place to start is to not show extraneous fields and details that people don’t need to fill in, when they only need to see the aggregate. In addition, one shouldn’t use a single form to serve all these needs with complex validation and layout logic. Instead, consider the various points where people need to engage with the process and build forms specifically for them.



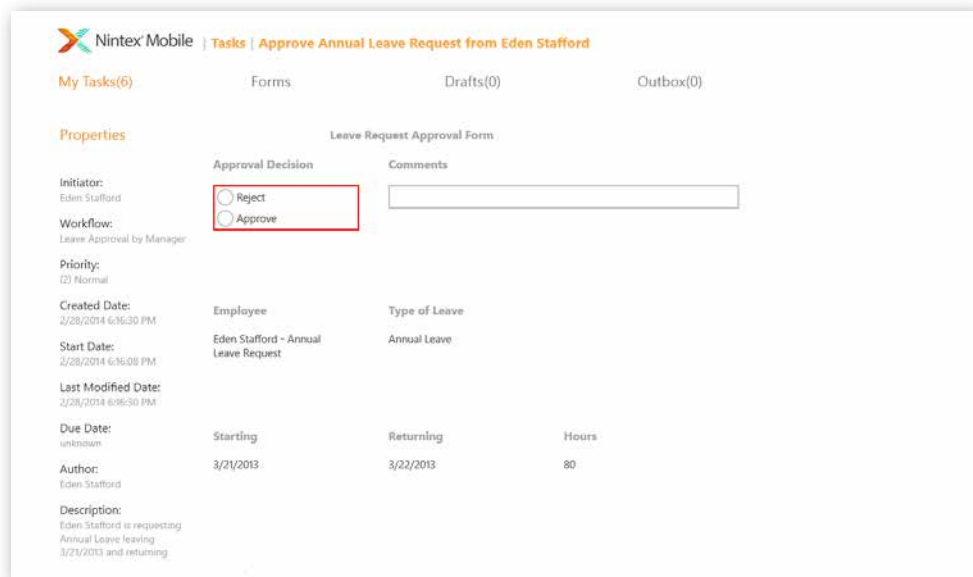
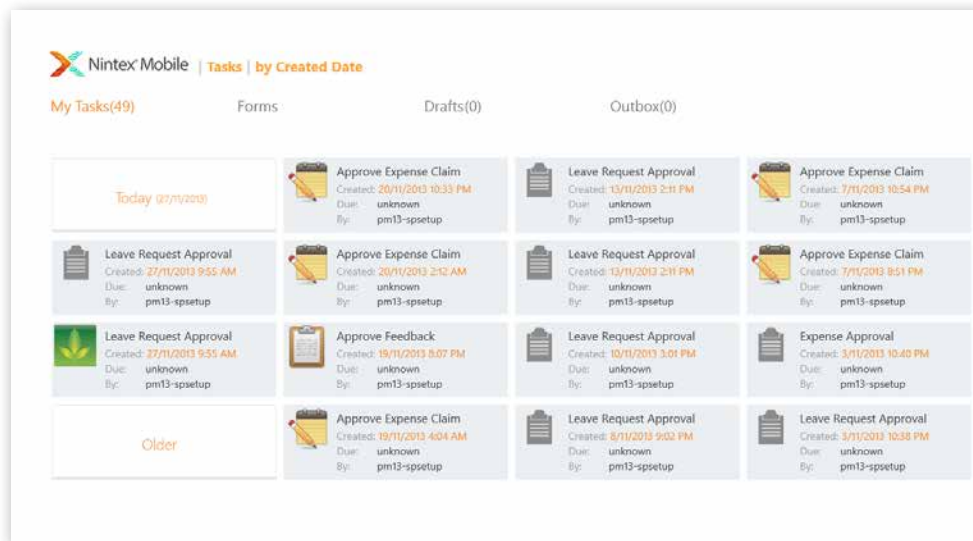
Forms should be mobile

Mobile is here, mobile is now. Today, employees are using mobile devices, working off-site, and in some cases bringing their own devices to the corporate environment. Employees are mobile, and so must be the forms that they need to do their job.

To best work with all these scenarios, workflow automation solution must be designed that supports mobile across all key platforms but doesn’t require special effort. Every forms-driven workflow solution should be mobile ready. If your employees aren’t mobile yet, that day is coming soon.



When you build processes and forms, you can quickly and easily put them in your users' pockets. It's important that you make forms accessible via native mobile clients for iPhone, iPad, Windows 8, Windows Phone and Android.



Whether it's in a mobile browser or via one of our native mobile apps, Nintex Forms works as smoothly on a phone or tablet as on a desktop or laptop. What's more, making a form mobile-friendly doesn't require extra effort.



Forms should be built with users in mind

Many forms and workflow projects fail because they ask too much of users. Users must check new websites throughout their day or deploy and use extra software. Or develop new skills. In other words, many forms and workflow projects expect the user to come to the app.

Clearly, there's a better way. Whenever possible, bring the work to where the user already is, and when that's not possible, at least make the users' lives easier and save them time. In other words, reward them for their help.

The screenshot displays the Nintex Forms Designer interface for a form titled "Assign Flexi task". The interface includes a top ribbon with various toolbars such as "Form", "Clipboard", "Settings", "Layouts", "Workflow", and "Task Panes". On the left, a "Form Controls" pane offers search and selection options for elements like Title, Leave Type, Start Date, End Date, Description, and On Behalf Of. The main workspace shows a form layout with the following sections:

- Outcome:** A section with radio buttons for "Approve" and "Reject", and a text box with the instruction "Or you can Delegate this task to another person."
- Comment:** A large text area with the instruction "Use this field to enter any comments regarding the task."
- Workflow Status:** A section with a "View" button.
- Buttons:** "OK" and "Cancel" buttons.
- List Item Properties:** A section with a "Title" field.

At the bottom left, a navigation pane lists "General", "SharePoint", "List Columns", and "Task Columns".

Consider the above form. It was generated with one click, and it does something you don't often see in other products. The first section contains the task fields (e.g., approve/reject, comments), but the second section includes all of the details about the item being approved. Users don't have to click to see what they're being asked to review. And this helpful feature required no extra effort from the form designer.





In this case, the form not only contains the decision, and the source material, but also a picture of the running workflow status. In a single glance, managers can see what to review, what their choices are, what others have already decided, and what happens next based on their decisions.

If the user is doing you the courtesy of responding to a task you assign, the least you can do is make it worth their while. A complete forms-driven workflow solution guarantees this.

This is where customization, branding, and presentation logic ensure that interfaces are engaging, and help the end user economically and correctly enter data. Forms that make it easy to add business processes later using a workflow automation system give you a better ROI when compared to forms-only solutions.

Structured documents do have their place. Many organizations have business requirements for a document of record to be signed and archived. Even in such scenarios, a workflow where these documents are approved, stored and archived is useful. Remember, those documents have to come from somewhere and go somewhere. You'll need a workflow for that.



IN REVIEW

Before you start building forms-driven workflow solutions, let's review the key takeaways:

Today's workforce is mobile and they expect to engage with their work on mobile devices, regardless of where they are. Define a mobile strategy now to be ready for an inevitable future.

There are a lot of forms in the wild that are more complex than they need to be. Are you trying to get too much out of your forms? Simplify your forms and support them with effective workflow to get the best results. What are your internal customers really using forms for? Build forms with users in mind. If you're collecting data, there's almost always a process behind it. Integrating forms and workflow leads to greater benefits overall.

Workflow is a type of solution, not just a type of technology.

NEXT STEPS

We welcome the opportunity to discuss your business needs and would be happy to provide:

1. A business requirements discussion with one of our workflow automation experts
2. Demos tailored to your requirements
3. A comprehensive response to your RFI/RFP
4. Customer references

Request more information at: www.nintex.com or contact sales@nintex.com

ABOUT NINTEX

Nintex is the world's leading workflow company, providing workflow for everyone. Our platform automates processes on and between today's most use enterprise content management systems and collaboration platforms, connecting on-premises, cloud workflows and mobile users. On platform helps organizations automate their business processes quickly and easily.

