DocuWare

DocuWare Forms

DocuWare Forms in action

19 examples of customers using web forms and workflow in their everyday processes

DocuWare

Introducing DocuWare Forms

SET THE NEW PACE FOR BUSINESS

Learn more and request a demo
docuware.com/forms

DocuWare customers use modern web forms to collect information for the processes at the heart of their business. DocuWare Forms enhance the efficiency of these processes and have even more impact when combined with automated workflows and integration with line-of-business applications.

Our customers now use convenient, standardized, online forms in place of outdated paper documents, hard to navigate PDFs, and error-prone manual data entry.

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DocuWare Forms for financial transactions

Underwriting, contracts, loans and billing

Recognized as one of the most paper-intensive areas of any organization, finance departments are the gatekeepers to information that is crucial to the bottom line. DocuWare Forms capture data into one centrally located system, enabling finance and accounting teams to share, secure and properly manage sensitive information.

Top management expects finance departments to run a tight ship. Using paper processes limits the ability to efficiently handle, route and track large volumes of information. DocuWare Forms eases the everyday pressures that finance departments face and makes it simple to accurately determine cash flow statements and Days Payable Outstanding (DPO), quickly payout invoices, better handle vendor inquiries, improve customer service and meet regulatory compliance.

Insurance: underwriting and quoting

Completing an insurance app is a snap

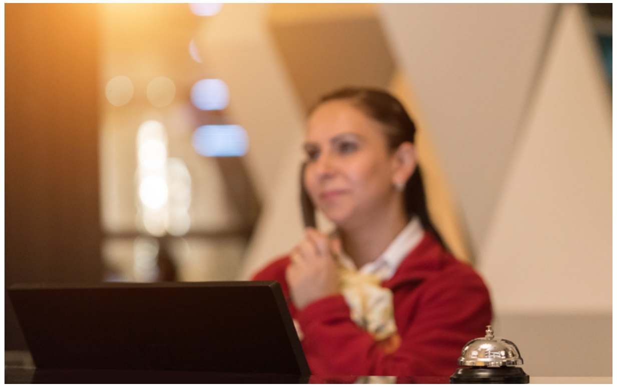
Previously, one paper form included coverage for employment practices liability, fiduciary liability, miscellaneous professional liability, and network security.

Now using DocuWare Forms and its built-in conditional logic, only the questions that are pertinent to the coverage that the broker is quoting are shown. Depending on their answers, applicants respond to as many as 20 questions or as few as 5. Information is stored electronically and company-side data entry is eliminated.

Hotel and casino: contract approval

Effective treatment for contract approval headaches

Contract approval is complex at this multi-site hotel and casino group, owned and operated by a Native American community.



Some contracts need a sign off from an outside governing body and some do not. Before DocuWare Forms, contracts were processed at a central office resulting in lost time figuring out which approvals were needed. Now a staff member from the initiating department uses an online form to index the contract and define its approval route.

Finance company: loan agreement

Catching missing information

The company, which finances boat purchases, wanted a web form to collect supporting information and automatically verify that it has been received.

Customers apply for a loan via a DocuWare web form. Once the form is submitted, the system notifies the main office if any information is missing. DocuWare creates a Task List that reports on which applications are submitted, in process, accepted or rejected. DocuWare is integrated with their accounting system and there is visibility into the volume of loans approved and pending.

Healthcare: medical billing

Resolution revolution: quickly fix or write it off

At a medical billing practice that manages revenue for 100 physicians, their account follow-up team investigates when an insurer denies a charge.

It may be a simple fix because of an address change or incorrect date-of-service. If the bill can be resubmitted, the team uses DocuWare Forms to document the change.

DocuWare also builds a list of adjustments, so that the bill can be corrected and resent for payment. If a charge should be written off, the accounts receivable group completes an additional form designed for that purpose.

2

DocuWare Forms for human resources

Pre-interview screening, hiring, onboarding, and vacation requests

Human resources departments want to focus on creating a positive work environment and improving employee performance.

Their goal is to spend more time on employee development and retention and less time on administration. Our customers use DocuWare Forms to automate pre-interview screening, hiring, onboarding, vacation requests, and other functions.

Automated HR processes enable them to attract qualified employees faster and ensure a smooth start. DocuWare Forms are a modern tool for collecting, appropriately sharing and managing confidential data.

Manufacturing: onboarding

Pace yourself: employee engagement for newbies

A new employee fills out one online form and the data populates a W2, benefits enrollment, IT request and other employment forms.

The onboarding process includes industry-related training to be completed in the first four weeks of employment. Each week, new employees receive a form with links to online courses and other new employee information specific to that week. They complete the courses and take a test. Their score is recorded on a web form. HR receives notification on whether each weekly assignment is complete, so they can follow up as necessary.

Nonprofit: vacation request

Time off to recharge

Employees access an ultra-simple vacation request form via the web. They enter their name and employee number and pick their supervisor's name from a drop-down list. Using a three-step workflow, the form goes to their supervisor who approves or denies it. A reminder is sent to the supervisor letting them know if a request has not been approved after a week, and again after two weeks. Employees can check the status of their request and receive an email when it's been approved or rejected.

Airline: pre-interview screening

Come fly with us

When a pilot applies for a job, he or she fills out an online form that tracks their FAA required training and certifications.

They attach supporting documentation and provide their work history. With this information relayed via a web form, the airline's HR department can determine whether the pilot is eligible for employment before scheduling an interview.

Transportation: employment application

Drivers wanted:

A multi-state transportation company hires drivers for car services, taxis and limos. It's a business with frequent employee turnover, so filling positions quickly is important.

Applicants apply online at home or on a tablet at one of the company's offices. A DocuWare workflow routes the application to the HR department in the state where the candidate would like to work.

Once the application passes internal review, and a new employee is hired, the form is sent to a third-party HR team that collects a W2, medical forms, and Department of Transportation information.

Car dealership: hiring

Automation makes it easy

A candidate completes an online form on the dealer's website and it is submitted into a DocuWare workflow with the status of a new employee. The application goes to a high-level manager who determines whether it's a viable candidate.

After screening, selected applications are routed to the appropriate department – sales manager, service or parts. If the candidate is rejected they automatically get a "no thank you" email.

State law requires the business to retain rejected applications for three years. The reason for rejection is recorded in a single form field, stored in DocuWare and automatically deleted at the end of the retention period.

3

DocuWare Forms for public-facing communication

Pension plan information, parent portal, visitor sign in, and delivery tickets

By using DocuWare Forms, information is gathered and shared appropriately within your organization and with job seekers, retirees, vendors, customers and others. Via any web browser or mobile device, these constituents can submit employment applications or benefits enrollment documents, check pension information, inquire about services or place orders.

DocuWare Forms presents the request for information in a structured format, outsourcing data entry to each person who fills out the form. DocuWare Forms eliminates trying to decipher unreadable handwriting and following up to get missing data. The online form's built-in logic highlights errors and flags missing data. This lightens the burden on administrative staff and enables them to spend less time on routine tasks and concentrate on value-added work.

Insurance: pension plan information

Ready access to information reassures employees and retirees

This pension plan's participant website uses DocuWare Forms to give employees and retirees more control and reduce administrative costs.

Users go online to enroll, change their profile information or the bank where their pensions are paid. Employees can get information about what their pension would be if they retired today or in five years on demand. When form data changes, it is also updated in the pension plan's backend system.

K-12 education: parent portal

Grade A communication

An online portal implemented in this school system enables students in grades 6-12, and their parents, to access grade books, attendance records, schedules and other information.

Teachers also send parents progress updates via the portal. Parents use a web form to register for the portal online and receive an email with their user name and password.

They also use web forms to request information or schedule teacher conferences.

Wholesale food distributor: visitor sign in

High tech for a warmer welcome

A sign-in form is displayed on a tablet at the company's reception desk.

Visitors enter their name, company name and who they are meeting with. When they submit the form, an email is sent to the person they are visiting who is alerted to come to the front desk. A customization enables the receptionist to print out a visitor's badge using this information.

Manufacturing: delivery tickets

Keeping drivers on the move

This chemical company employs third-party drivers who need to know what they're carrying and where to deliver it, along with any special instructions.

The company was using carbon paper to create paper delivery tickets. Now an online, searchable form is stored in DocuWare. DocuWare sends an email to the dispatch team with a link to the document which is indexed by the driver's name. Drivers record their progress on a tablet. Dispatchers can see which drivers are out and whether their cargo has a status of delivery complete, partial or refused.

DocuWare Forms for operational processes

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Purchasing, order processing, receiving and sales

Flexible DocuWare Forms take the guesswork out of paper-based processes.

DocuWare Forms present the request for information in a structured format, outsourcing data entry to each person who fills out the form and routing the form to the next step in the business process through automated workflow. Email notifications and reminders can be scheduled to ensure that processes are completed within a specific timeframe.

Online forms improve communication between central offices, the field and within internal departments.

Construction: purchasing

Teamwork builds good fences

This fencing company wanted to improve communication between the home office, drivers and supervisors in the field.

When the paperwork was actually paper, it would often get wet or ruined in transit. Now when a sale is made, a workflow is kicked off by a web form. The warehouse is notified about how much fencing the job requires. If there's not enough in stock, an email is sent to purchasing so they can order more. Drivers and on-site supervisors view the order online. Once the job starts, the on-site supervisor fills out a form that details how much fencing is installed each day.

Leasing company: new customer on-ramp

Faster order turnaround

All sales personnel bring tablets when visiting a customer site. They enter customer contact information, the lease term, and products ordered. The customer signs the online form.

This authorization kicks off a workflow that notifies the warehouse that equipment should be shipped. The sales team is no longer traveling back and forth to the office with paperwork.

This automation reduced turnaround time from order to delivery from 2-3 weeks to 4 days.

Manufacturing: purchase requisition

Special handling

Since the same parts can be ordered for many different jobs, DocuWare automatically assigns a unique transaction number to each purchase requisition to eliminate potential mix ups.

The request form contains a high-level description including the name of the requestor, the dollar amount and the product code. A quote, proposal, or blue print from the vendor may be attached. The requestor chooses the purchasing manager who buys the item type from a drop-down menu. The form goes into a DocuWare workflow where requestors can track the progress of their request and receive reminders if it hasn't been ordered in a specified amount of time. The request also goes to a financial approver, who approves it, before it reaches the purchasing manager.

Packaging distributor: quote requests

Boxes are us

DocuWare Forms connects customers and regional sales representative with the customer service department.

Customers use an online form to request a quote, indicating what they would like to order and where it should be shipped. If a salesperson is on-site with the customer, they can fill out the form instead. The form is submitted into a workflow and sent to a customer service representative who generates a quote. Orders are placed with another online form that is integrated with the company's order processing software.

Manufacturing: receiving and inspection

The acid test

The company receives gas and liquids in 50-gallon drums. Samples are sent to their lab to be tested based on the reliability of the supplier, the material type and other criteria. The lab checks on whether an acid is at the right strength or if an adhesive is what they ordered, before it goes to the production floor. Before, the receiving department copied the documentation and hand-delivered it to the lab -- which is several floors away from the loading dock. Now the receiving department scans a barcode on the drum which populates a DocuWare form. A DocuWare workflow sends a notification to the lab where they decide whether to test the materials. It only takes one day to test, approve, or reject materials and deliver to production.

Car dealership: prospecting

Tracking potential customers

Potential customers who visit the dealership enter their contact information and what kind of car interests them into a web form on a tablet.

The prospective customer can specify when they would like to be contacted and what make and model they are interested in.

If they don't buy that day, the system emails the salesperson periodically with a reminder to reach out.

DocuWare

Set the new pace for business

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About DocuWare

DocuWare office automation solutions deliver smart digital workflow and document control that set a new pace for worker productivity and business performance. By removing the tedious, manual tasks that drain your team's energy, your knowledge workers are free to focus on the projects that drive productivity and profit. Set a new pace for business with DocuWare office automation solutions.

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