

Capturx Form Lifecycle Feature

Capturx is an easy and flexible mobile form solution that enables field teams to instantly capture and share data collected on paper, tablets, and PCs using common applications such as Microsoft Excel, SharePoint, and PDF readers. As part of the Capturx for SharePoint solution, your team has instant access to the Capturx Form Lifecycle feature.

Feature Overview

With Capturx, teams can manage data to support their workflows by applying a lifecycle approach to each form. With this added structure, teams are building efficiency, speed, and data security into their business processes. They can choose between using standard Capturx form lifecycles or creating their own.

Any Scenario:

- Work Orders
- Time Sheets
- Overtime
- Invoicing
- Field Services
- Inspections
- And more...

Lots of Options:

- Defined Stages
- User Roles
- Secure Groups
- Transitions
- If...then Notifications
- Reminders/Alerts
- And more...

With Capturx, it's simple to implement a form lifecycle:

1. Define the form lifecycle you have today.
2. Design a new form lifecycle that is streamlined and prevents data loss.
3. Implement the new form lifecycle with Capturx

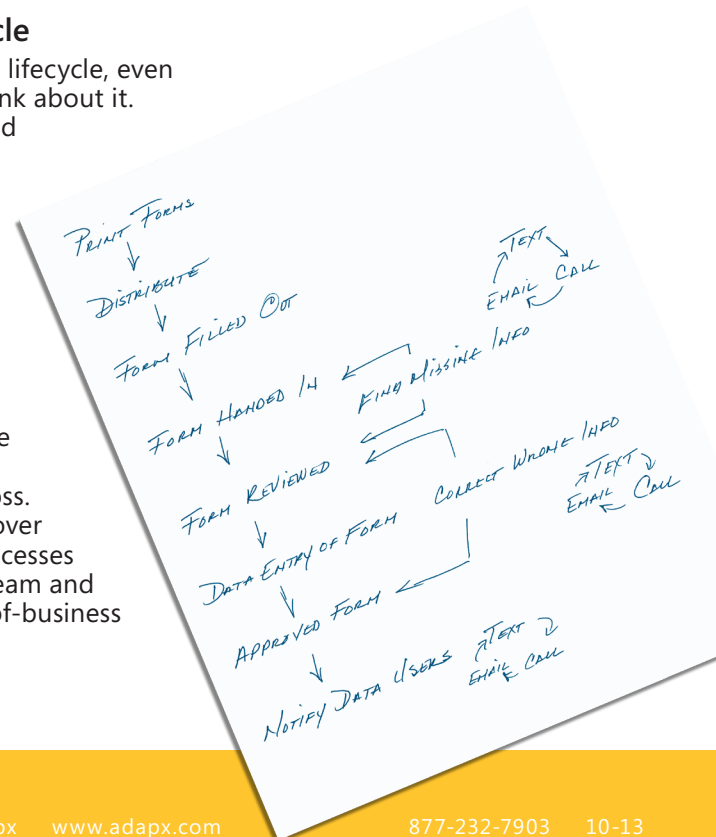
Define Current Form Lifecycle

Each of your business forms has a lifecycle, even if you haven't had a chance to think about it.

A form is printed, filled out, copied through data entry, reviewed, approved, and digitally archived or filed as paper.

That's the form's life – from beginning to end. Seems pretty simple until you delve deeper.

Once you define your form's lifecycle, you will end up with a picture like the one to the right. You'll quickly spot where there are bottlenecks, needs for organized work queues, and risks for data loss. And most importantly, you'll uncover the workarounds and sideline processes that create extra effort for your team and keep data out of your main line-of-business applications.



“Capturx continues to help us streamline the paperwork and process so we can focus on employees, their wellbeing, and help drive positive outcomes,”

JOHN WHALL
LiveHealthier

Design a New Form Lifecycle

To find business value opportunities – improved efficiencies and data loss prevention – design a new form lifecycle by answering these questions:

- What are the stages?
- What roles participate in each stage?
- Should some roles be done by anyone or a secure group of users?
- Who should be added to each secure group?

Use these answers to design and document a form lifecycle that eliminates the need for wasted effort and workarounds. With the document in hand, you are ready to automate the form lifecycle with Capturx.

Implement Form Lifecycle with Capturx

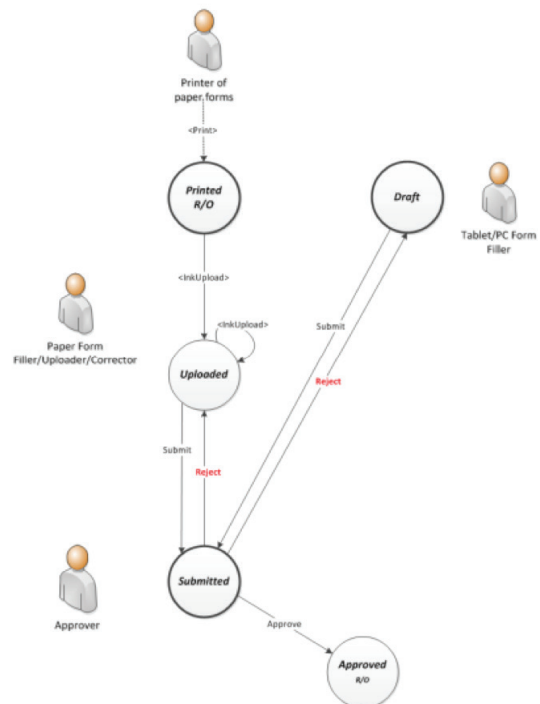
The greater the volume of forms, the more structure is required to ensure consistency, data quality, and compliance with business processes. Capturx form lifecycles provide this structure and enforcement. The Capturx administrator has a choice of using a standard Capturx form lifecycle or to create a new one. Implementing a standard form lifecycle is handled simply through list settings on a Capturx site.

As an example, the picture to the right shows a form lifecycle configured for use with a timesheet and Capturx for SharePoint. Since the timesheet has a form lifecycle that includes defined roles, stages, and transitions between the stages, the following can happen quickly and with low effort:

- If the Approver, Bob, finds an error, he can reject the timesheet and it will automatically be assigned back to Sue who originally submitted it for approval.
- In real time, Sue will get a notification and can correct her timesheet and submit it again to Bob. No need for phone tag or a long email thread.
- Once Bob approves Sue's timesheet, an automated step occurs that exports the timesheet data into the accounting system.
- With accounting's immediate data access, clients are quickly invoiced for the time that Sue worked onsite.

Summary

Eliminating inefficiencies, gaps, and workarounds from your form's lifecycle will result in your teams and business applications getting quicker access to accurate data that they need for invoicing, inspection trend reports, payroll, and other business-critical activities. The Capturx Form Lifecycle feature provides a structured and automated method for streamlining your form-related business processes.



To learn more about Capturx Form Lifecycles and how they can help your organization, contact your Adapx Solution Engineer info@adapx.com