Integrate Web-based Forms Data with RPI's PROFORMA

rpi consultants

Overview

Many business processes rely heavily on input and information submitted by end users or people outside the organization. Often, this results in inefficient and time-consuming tasks, such manually transcribing data from written forms or images, or costly custom development to create and maintain online forms.

Working closely with our clients, RPI Consultants recognized this challenge and identified the opportunity to develop an easy to use forms platform that could empower business owners to rapidly create and deploy web-based forms are integrated with their important business systems – such as Infor Lawson, Perceptive Content (ImageNow), or OnBase by Hyland.

The result of that effort is our powerful, yet simple, proprietary web-based forms solution, **PROFORMA**. With PROFORMA, clients can quickly create and customize web-based forms with a simple drag and drop user interface, integrate specific data points into an ERP or ECM solution, and publish updates and changes on the fly. Forms can be deployed internally, externally, or framed into existing web pages for simple and seamless integration into existing processes and resources. Forms are saved as PDF files, which can be imported, edited, and/or routed into workflow processes.

While PROFORMA was built to empower business users with little or no development experience, the platform is also flexible enough to handle more complex requirements and integrations, including custom style sheets, SQL queries and conditional logic, and web service calls.

Deployed and hosted on premise or by RPI, and device agnostic, PROFORMA is a powerful tool that can be utilized by almost every department across every industry, including Accounts Payable & Finance, Human Resources, Higher Education, Financial Services, and Healthcare.

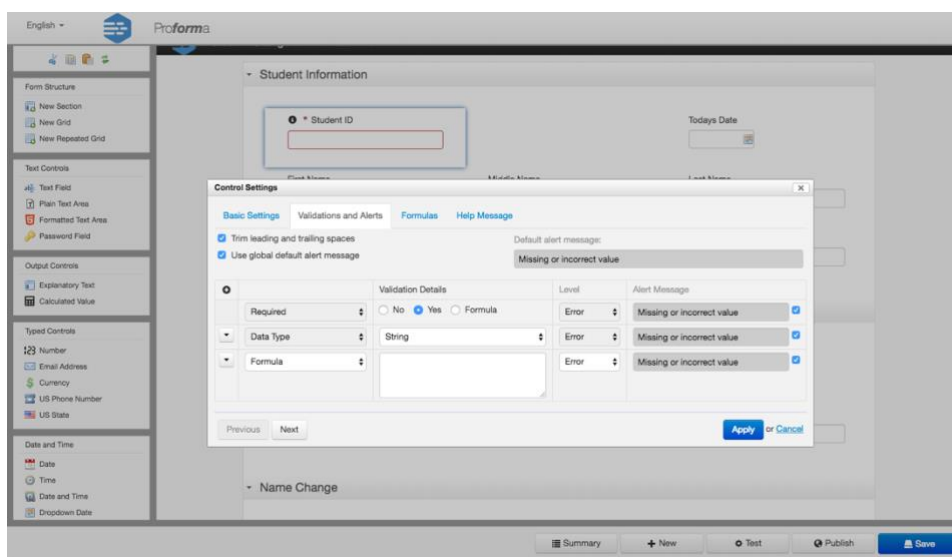**PROFORMA Example: Student Change of Information Form**

Implementation

PROFORMA is a proprietary product and available exclusively through RPI Consultants, although forms may be configured to integrate with any number of ERP or ECM solutions, including Infor Lawson, Perceptive Content (ImageNow), and OnBase by Hyland. Through a standard implementation, RPI consultants will install a dedicated instance of PROFORMA and provide any and all training according to the needs of the client. Additional services may be provided to support more complex integrations requiring custom styling or development, or for managed services.

Form Designer

PROFORMA was built around an easy to use and intuitive forms designer, with simple drag and drop interface. Within the designer, users drag different types of data fields or objects to create and configured multiple forms sections, and add inputs such as text fields, numbers or currency, dates and times, and calculated values. The designer also makes it easy to add custom actions for conditional form fields and database base services for lookups.

The form designer makes designing and editing a form in PROFORMA possible without any development experience, although users are able to expose the native HTML or add a custom style sheet to meet more complex requirements. Additionally, custom SQL queries, web services, and/or Xpath triggers are set within the interface, making it easy for users to setup in-form field lookups and integrate documents and data into an ERP or ECM solution.
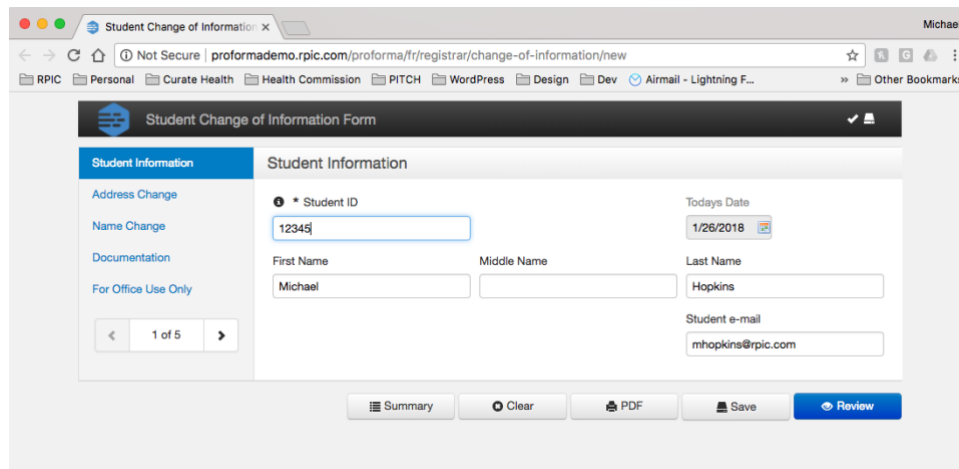
PROFORMA Example: Student ID Data Validations and Settings

Another great feature of the form designer is that web forms can be transcribed into a predefined format, such as employment tax or legal forms like W-9s. PROFORMA also natively integrates with AssureSign for eSignatures, making it easy to capture legal digital signatures for these types of forms. While the form itself can be laid out in whatever order or format, the data fields and signatures are mapped into the actual form layout when it's submitted.

Deploying & Submitting Forms

PROFORMA forms are hosted natively by the web server, which makes them easy to access within a secure network infrastructure. However, forms may also be exposed externally, as needed, using a reverse-proxy.

This ensures the security of the form and web server itself. More often though, forms will be framed into an existing web page or web application which is made possible through HTML5. This means that you can seamlessly integrate forms into existing processes and tools, reducing or eliminating the need for any additional training.

PROFORMA Example: Live Student Change of Information Form

When users submit forms, the PROFORMA server automatically saves all submissions in an editable PDF to preserve data and for auditing and troubleshooting purposes. Submissions are then processed according to the form settings – transcribing into legal forms, sending data to an ERP or ECM solution, or exporting images with text files or custom imports.

Native Integrations

Form fields can easily be matched to data points in other systems, such ERPs or ECM platforms like Infor Lawson, Perceptive Content (ImageNow), Kofax, or OnBase by Hyland. RPI has developed PROFORMA to work especially well with Perceptive Content and OnBase, and utilizes these platforms' integration servers to quickly transmit documents and data into the library and workflow.

For systems that do not have open integration servers or available web services, PROFORMA also enables direct integration through direct SQL or database queries. Custom web service calls and database queries can both be set up through the forms designer, making it quick and easy to deploy and test. For even less complex integration, PROFORMA also has the option to export a simple image file with text file which can be imported by another system.

Technical Considerations

As a web-based platform and solution, PROFORMA may be deployed on premise or it can be hosted by RPI Consultants on a dedicated web server instance. Generally, form submissions are not very resource intensive which means the web server does not need to be very robust and will not require much maintenance or attention.

PROFORMA forms are built and deployed in HTML5, meaning there are no requirements related to Java, Silverlight, or Flash. This enables PRORFORMA to take advantage of HTML5 standards across all modern web browsers and ensures that forms are device agnostic. This means that forms created in PROFORMA should display the same across any platform or device, including desktop or laptop browser, mobile devices, or tablets. Additionally, form fields interact with each other using Xpath, a widely supported and well documented development language.

For forms that need to be exposed externally, RPI recommends securing the server using a reverse-proxy. RPI will work closely with the client in these situations to ensure the server and the form is completely secure.

License & Pricing

The initial price of a PROFORMA implementation is $35,000, which includes the license fee and services related to install, configuration, and training. PROFORMA also has a 20% annual support and maintenance service agreement fee. As compared to other tools, PROFORMA is not based on a cost-per-submission pricing model and provides for an unlimited number of users, forms, and submissions.

For additional design and implementation support, services will be scoped and quoted separately. For AssureSign integration, transaction packs must be purchased at $1 per transaction, with minimum purchase of 5,000 transaction for the year.

Solutions & Applications

PROFORMA was built to be scalable, flexible, and secure enough to be used in almost any solution for almost any industry. Check out some of these examples, but let us know if you have questions about how PROFORMA could help your business process.

Accounts Payable & Finance

+ Invoice Submission

+ PO Request Forms

+ New Vendor Request / Setup

+ Expense Reimbursements

Human Resources

+ Employee Applications

+ Benefits Elections

+ Employee Surveys or Event RSVPs

+ Transfer Requests

Higher Education

+ Admission Applications

+ Financial Aid Inquiries

+ Student Employment Requests

+ Transcript Requests

Healthcare

+ New Patient Registration

+ Patient Survey or Event RSVPs

+ Patient Requests for Information

+ Patient Billing Requests / Inquiries

About RPI Consultants

RPI Consultants is a leading ERP and ECM professional services organization with over 18 years of experience designing, implementing, and supporting Infor Lawson, Perceptive Content (ImageNow), Kofax advanced data capture products, OnBase by Hyland, and Brainware by Hyland. RPI employs approximately 100 full time consultants, developers, and solution and technical architects with tremendous experience across many industries and solutions. RPI is based out of Baltimore, MD, with additional permanent offices in Tampa, FL, and Kansas City, MO.

RPI's Imaging Strategy & Technical Services (ISTS) practice is focused on providing enterprise content management and advanced data capture automation solutions. ISTS is made up of consultants and developers that have direct experience with Perceptive Content, Kofax, OnBase by Hyland, and Brainware by Hyland. The ISTS team represents the only independent consulting organization with over a decade of Perceptive Content (formerly ImageNow) experience.

RPI provides professional services for new installations and upgrades, existing solution health checks, new solution design and implementation, and custom integrations. RPI is also a licensed reseller of Perceptive Content, Kofax, and Hyland products, including OnBase and Brainware. For more information about RPI Consultants, including professional services, license requests, and general inquiries, visit www.RPIC.com.

About the Author
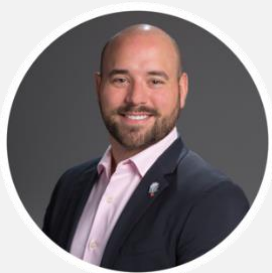
Michael Hopkins, Marketing & Corporate Communications Manager

Alex has six years of experience designing, implementing, and supporting enterprise content management solutions with Perceptive Content (ImageNow), OnBase by Hyland, and Kofax products.

A master of automation, Alex strives to help his customers find ways to increase efficiency, thereby lightening their workload.