# Business Requirements Document for Word Fillable Forms Data Collection

Author: Andrew Charest

Document Version: 1

Date: 9/20/2019

## Overview:

This document serves as the technical reference of the requirements needed to solve the following problem as stated in the Estimate for “Word fillable forms data collection” using recommendation 2’s solution.

### The problem as stated on Estimate:

“The business needs to provide a softcopy or an online form for customers or contacts to go to and update or provide initial personal contact information. The information provided should only be entered once by the client and programmatically flow into any databases such as customer or contact lists, HR application and database, Payroll application and database of the business. Additionally a printed blank form is needed for customers to fill out and return for data entry into business systems. The softcopy should have similar look and feel as printed form but be easily edited by customers and returned either through e-mail attachment or dropped into a secure cloud location.”

### Recommendation 2 as stated on Estimate:

1. Utilizing word fillable forms take existing hand printed form and make it fillable so it is easy to add information to by end users.
2. Provide a macro enabled master document that allows processing of all returned filled out softcopy forms.
3. Base pricing collects all data from all forms returned and creates a txt file that can be opened or imported into Excel where all data will be in columns.
   1. Additional cost if data is to create a .xlsx file that can be opened in Excel. (option is not part of the current requirements)
4. This option doesn’t address any online presence or a secure location for customers to log into and update their information.
5. $100 per form created per page.
   1. [only one form is being created for this solution]
6. Creation of processing document $250
7. 1 hour of Training of office personal in process is included (This is service and does not impact the requirements as listed in this document.)
   1. Additional training as requested is billed at $65 per hour.
   2. Support Contract can be purchased that would cover ongoing support and training.

## Business Case:

## Many small businesses use a paper form to gather information from customers. This form has evolved from a handwritten form, to a typewriter written form, to the printed form from a file created and edited by any one of today’s word processor application. The bottleneck is the digitizing of the data gathered. The same person who edits the file is also the one that gets elected to do the data entry of the information gathered. That Program the user enters the data into can then be utilized by that program or shared with other applications. Today’s customers are increasing their request to have an editable softcopy sent to them that they can fill out and return to the business. The current business user with the skills to create and edit a word processor file that has been printed out and copied 50x times for the stack at the front desk to give each customer to fill out is also doing the data entry into an application and will more than likely send the exact same softcopy of the file. The most common word processor application in use in businesses these days in Microsoft Word included with Office. The main problem with this approach is best exemplified in a YouTube video by Scott Hanselman: <https://www.youtube.com/watch?v=pv60ZIAJa54> . In the video he uses the term, “paper casual form” to refer to these documents good enough to print out and be hand filled in but not professional enough to be sent as a “softcopy” and easily edited by the customer and sent back. Common examples of pain points in these forms include. Using underscores next to a typed field label such as NAME. The customer then has to delete the underscores enough for their name and then decide to underline their name or not since it looks weird not underlined. He goes on to show how to remove all the underscores using a find and replace wildcard. He shows the basic of a “sloppy” form using content controls that some advanced users may have created to address some of the common problems with ease of entering the data being requested. However these sloppy forms still are limited in the business users ability to gather the data programmatically so it can be loaded into business systems. Some users will have discovered that using a table is the recommended way to manage field labels and data entry points using content controls.

## Requirements:

1. A fillable form will be created utilizing word tables for formatting and content controls for data entry.
   1. The look and feel will mirror as close as possible the current form being printed and used by customers and business.
   2. All content controls will have a tag
   3. All content controls tags will be unique.
   4. The fillable form will be locked for editing so as to prevent end users from editing the form over what information is being asked to be provided.
2. An additional copy of the fillable form will be provided that is solely to be used for printing and hand entry.
   1. Field data entry prompts will not be visible on this form.
      1. On screen or on print out.
   2. Form will be locked for editing
3. Create a macro enabled master document that will be used to process the filled out forms and combined data into a txt file with each record on one row with a header row at top.
   1. File will be txt format but doesn’t require a .txt file extension.
   2. File will be able to be imported or opened by excels file open choice.
   3. The master document should give the business user instructions on how to process the forms returned and information on the forms to send or print.
      1. The location and use of the printed copy of fillable form
      2. The location and use of the fillable softcopy of form used to send to customers.
      3. Instruct user to place all files returned for processing into a specific folder
      4. A means to select the folder where the documents to process are located
      5. information on if a document is determined to be invalid what will happen
      6. A means to select the location of processed files
      7. A means to select the location of files deemed invalid to process
      8. A means to select the location where the consolidated data file will be created.
      9. An option to start processing the files
      10. A screen prompt that processing is complete.
      11. Information prompts if user has left out any specified location or names needed.

## Scope:

Common user mistakes should be addressed programmatically through message boxes to user. No error should be encountered by user. It is enough to not process invalid documents and place them in a separate folder. User will either decide to troubleshoot invalid file on their own or decide to hand process those files. Support fees would apply for any assistance on troubleshooting invalid files, determining root cause and any additional solutions or training required to solve the creation of invalid files. This solution doesn’t address any online presence or a secure location for customers to log into and update their information.

3 word documents are to be created

1 for printing

1 for sending as softcopy

1 for processing the files

## Implementation Team:

Andrew Charest

## Glossary:

Any technical terms used in this document that could mean different things or scope for different people and skill levels are to be clarified here.