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Paving the Way for Roads

Implementing a New IM System Speeds Up Road Repair

BY
Laurie Shufeldt

With a population of 23,000, the Hart County, Georgia Government has approximately 160 employees to run the county's municipal system, manage public works, and maintain a safe environment for the beautiful town set in the foothills of north-east Georgia. Hart County, whose seat is Hartwell, has approximately 148,000 acres of land (256 square miles) and is home of the popular and beautiful Lake Hartwell, an attraction that brings more than 14 million visitors every year.

The Hart County Government Administration needed a document management solution that would allow them to cut down on the tremendous amount of paper being generated. They also needed to provide better service to their citizens and elected officials, without the expense of additional staff.

Initial objectives included:

- ⊙ Reducing cost
- ⊙ Reducing the time required for information research
- ⊙ Eliminating response time lag for requests for

information

- ⊙ Minimizing risk inherent with paper document systems

After considerable investigation, Hart County's Information Technology Manager, Mary Hughes, realized it was crucial to implement a solution that allowed the team to accomplish more than just scanning and management of paper documents. The ideal solution would also equip them with the scalability to handle future growth. Mary and her team spent considerable time



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certification by ensuring that the test remains in-depth and relevant to the current state of the industry. All questions and answers are reviewed by the Form Systems Certification Board (FSCB) before inclusion in the test.

The FSCB is calling on all members to submit questions on your favorite industry-related topics by February 1st. The Form Systems Certification Board is currently scheduled to meet on February 17, 18, 19, and 20th to review all old and new exam questions to update the exam database. The Board will

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determining their future needs and came up with the following detailed requirements:

- ⊙ Comprehensive and easily accessible view of all related information for sharing across departments
- ⊙ Ability to manage both paper and electronic documents
- ⊙ Scalability to handle future growth
- ⊙ Ability to perform automated workflow processes
- ⊙ Ability to easily accept the input of notes taken from interactions with citizens and staff
- ⊙ Ability to organize and connect all information in a usable form
- ⊙ Security to ensure confidentiality and regulatory compliance
- ⊙ Easy to learn and use

Selecting a Software Solution

After reviewing several software options, in the spring of 2003, Hart County chose FileVision's Information Relationship Management system for the Administration Department and has implemented it in several areas. "We chose FileVision because it quite simply met all of our current and future needs", stated Mary Hughes. "In addition, we needed a system that could be implemented in phases which is working out very well."

Better Workflow, Better Roadways

For the Hart County Roads Department, specifically, the improved workflow has ramped up. The implementation of FileVision has made their connected processes nearly seamless, and has eliminated time-consuming redundancies. They are now also able to generate valuable reports that were difficult to produce under their old process. Based on the increased productivity and improved workflow, Hart



County Road Department was able to achieve a time savings of 20 hours week or 1,040 hours a year.

Planning Ahead for Success

Hughes knew in order for Hart County to realize the tremendous benefits of using an electronic document management solution, she needed to do a back file conversion of the previous paper files and folders. As part of her Implementation Strategy, she hired two college interns, who worked all summer scanning documents and entering data, a method she recommends to future users. The interns scanned the road repair work orders and county contracts, including lawn maintenance, litter pick-up, leases, and all service contracts her department touches.

Mary also credits FileVision for their participation in the implementation strategy. She said the FileVision team never hesitated to provide help and always returned phone calls promptly. "We sometimes asked them to do things we thought were 'no big deal'," stated Mary. "As it turned out, they actually jumped through some hoops to add the additional features and functionality to accommodate our needs. You can't ask for better service than that."

Implementing the Solution

Hart County is currently using FileVision to store and retrieve contracts and grants, as well as certificates of insurance. However, the greatest return on investment has been realized by the Public Works department for road repair work orders.

Before the implementation of their new document management solution, the creation and tracking of road repair work orders was a manual process. Work orders were created and a copy was given to the Roads department to complete repairs. The open work orders were kept in paper file folders by the Public Works department until the repairs were completed and then filed away afterwards. When someone phoned to inquire about the status of a road repair—which happens frequently—Public Works had to look for the work orders manually. It was like looking for the proverbial 'needle in a haystack'. This was an extremely time-consuming and sometimes unreliable process. ▶



In addition to road repair work orders, Public Works also kept right of way contracts and all other roads information in paper folders. A folder for a single road is often several inches thick. Multiply that by several hundred roads and you begin to see their dilemma, one

shared by many county governments.

Improved Workflow and Response Time

FileVision helped Hughes and her staff to create a Work Order form that is easily saved electronically. They also created a folder within

the software for each county road. Now staff can create and save road repair work orders within the new system and easily retrieve them. FileVision's Information Relationship Management system provides them the ability to search and retrieve all files related to a particular road, helping them quickly look up and respond to requests from the County Commissioners, as well as inquiring citizens, all without having to change their business process. A task that once took two to four hours to complete is now being done in just a matter of minutes.

Switching to electronic workflow has also provided Hart County with benefits they could not realize with a paper system. Hart County staff members can now automatically generate reports based on information requested. For example, they can look up all work orders generated in a particular month or in a particular Commissioner's district. This functionality has helped Public Works reduce the time spent generating monthly cost reports from eight hours to only two hours.

Improved Service for Citizens

In addition, they recently began putting monthly reports on a secure web site for the five Commissioners, who now

have 24 hour a day access to information for the roads in their districts.

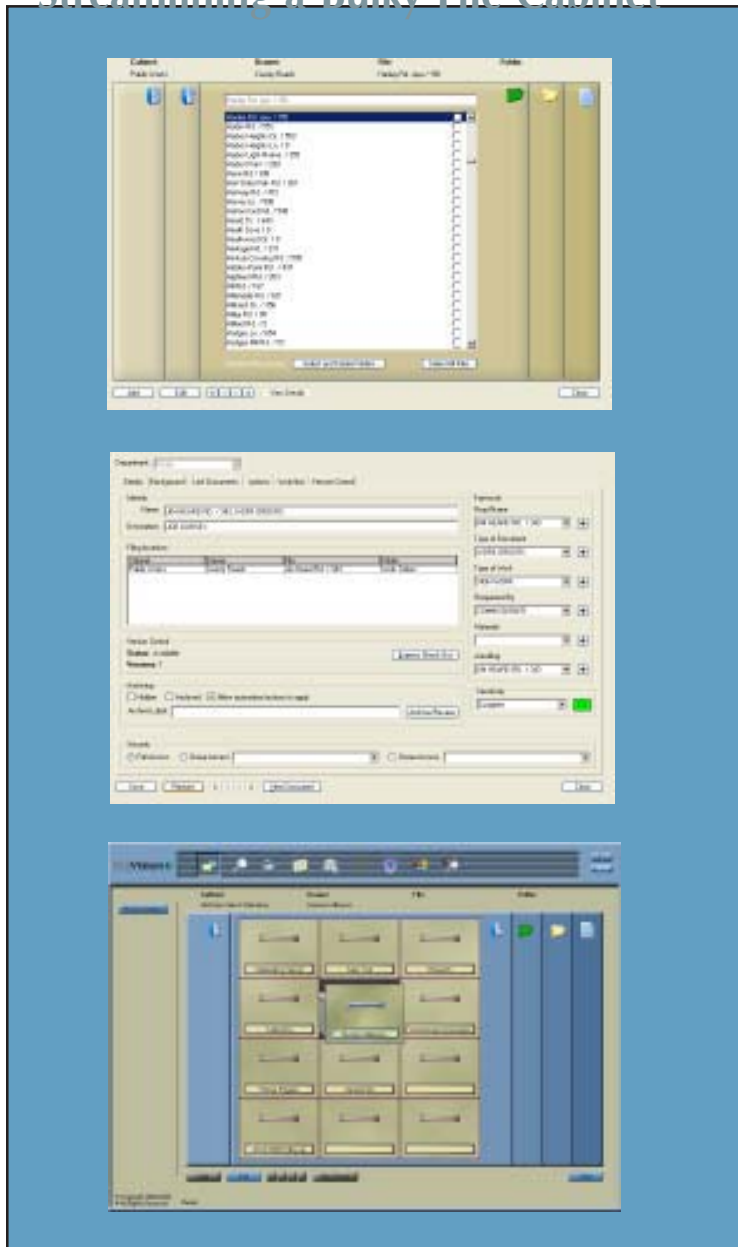
According to Mary Hughes, "The Commissioners receive many phone calls from concerned citizens at night and on the weekends. They appreciate having easy, 24/7 access to these reports. Now they can check their reports from home and respond to phone calls about the status of a road without having to wait for staff to return to work the next day or the following Monday. We consider this not only a time-saver but a process improvement, a surprisingly easy one."

Improved Bottom Line

Implementing the software has also contributed directly to the county's bottom line in the area of insurance claims. Insurance carriers often ask the Public Works department to furnish a history of road maintenance if an auto accident claim involves a particular road. If maintenance has been kept up on the road, then a claim against the county is denied, which keeps the county's insurance from skyrocketing, saving taxpayer dollars.

Hart County is also using FileVision for tracking beer and wine license applications, another paper-intensive process. The licensing process requires multiple paper documents to be

Streamlining a Bulky File Cabinet





completed and filed with the County Commission for review and approval. The new electronic workflow has turned this revenue source from an unwieldy process into a smooth and reliable one.

"It is impossible to tell exactly how much time and cost have been and will continue to be reduced with the use of FileVision. By streamlining our processes, we have significantly improved efficiency and customer service. And you can't discount the fact that we simply enjoy our work more", Mary Hughes said with good humor.

FileVision has been implemented with a positive return on investment in the following areas of Hart County Government:

- ⊙ Roads
- ⊙ Contracts
- ⊙ Certificates of Insurance
- ⊙ Grants Applications and Administration
- ⊙ Beer and Wine License Applications

Keeping track of records and information also played an important role in obtaining some types of financial aid in the aftermath of a disaster. When Hart County was hit with tornadoes in fall 2004, the information relationship management system helped the roads department receive

Federal Emergency Management Agency (FEMA) funds for road damage sustained.

"We created a keyword for storm damage, which we used to go into the system and get a report on exactly how much work was done," says Mary Hughes, an IT specialist for the county. "We gave that to FEMA to get our money. This saved us 40 man-hours of work, as the old way would have required searching through drawers to look at paper reports on every road."

Excited About the Future

Pleased with what adopting an electronic workflow has done for its Roads department, beer and wine license applications, and contracts and grants processes, Mary Hughes and her staff are looking forward to streamlining additional processes in other departments in the near future, such as Purchasing and Human Resources. "We're extremely happy with FileVision and see many possible uses within other departments," stated Hughes.

Laurie Shufeldt is the Vice President of Business Development of FileVision. Laurie joined FileVision in 2001, bringing more than 14 years of information technology industry expertise including a versatile background in sales and



marketing with a focus on channel, reseller and enterprise sales. She can be reached at lshufeldt@filevision.net.

FileVision is a new type of office productivity software -- Information Relationship Management -- that enables organizations to easily and strategically create relationships between important, disparate pieces of information. Government, healthcare and financial services organizations worldwide rely on our technology to help them

improve communications, enhance customer service and immediately access information and relationships within data. For more information, please visit www.filevision.net.



I'm disappointed that no one mentioned XForms, which is an emerging standard trying to standardize the interoperability of forms. I know proprietary software is good—it makes you all money, but I think there are ways to do that inside the set of standards that exists. I would like you to address not just the data side, but also the presentation side, and how we can make use of these standards that are emerging. It's still in a fairly immature state, but I think it's got good direction.



Gray Knowlton: I can address that a little bit. First of all, like for InfoPath and for Office, I would say

that we are heavily utilizing standards today. The InfoPath file format is based on XML and XML Schema. It is fully open, published file format. Anybody can actually get the license to use that format and develop on top of it.

I would also say that we support things like WSDL, UDDI, web services. We do have deep support for XML-based standards inside of our applications, so we do definitely recognize the value of standardized XML-based implementations in Office. It's the primary genesis of our XML investment in the Office system and it's really driving what we're wanting to do. We also publish the file formats for Word and Excel and other applications.

So with regards to XForms: Yes, it is an interesting standard. It has gotten a lot of attention for

sure. It's definitely something we consider when we look at forms, but I think at this point, because we're just based on XML 1.0, we are fairly open in the sense that people can derive whatever type of data they need from that form without another standard sitting on top of that. Not to say that we wouldn't in the future. It's definitely an interesting direction.



Mark Seamans: XForms is a topic near and dear to my heart and to our background

at formerly Cardiff. I know there's a person, Micah Dubinko, who, while he was at Cardiff, chaired the XForms Working Group. He wrote the O'Reilly book on XForms. We've done a tremendous amount of work, and I think that format holds tremendous promise. The key in that sentence is going to be "over time". That's a very nascent format right now. When you think in terms of the issues that

people in this room deal with, and in terms of pixel perfect fidelity—really getting things to look visually rich and perfectly laid out—those things just are not there today. If you look at the development that's going on around XForms, it's tremendous even a year or two years ago. I have a session tomorrow morning, where we'll spend some time kind of going over where the state of XForms is and what's going on.

Interestingly though, with some of these standards you have to ask yourself: in a standard's community, what's the motivation for some of these big manufacturers to spend time and support this thing? If they send tons of people to work on these Working Groups and then build these products, at the end of the day they are going to ask themselves: How do I turn that effort into a lot of money? Standards are a weird thing. To a certain degree, the evil side of standards is that they dilute the ability for individual vendors to make money. Being open doesn't give you the opportunity to have a proprietary piece you can charge people money for. It all of the sudden takes away your leverage. The customer could switch at any point from this product to another product, because it's just a totally open thing. I think that's one of the things it slows down the progress of some of these pieces.

Although, I think that XForms—with work that's being done by

IBM and by Oracle—has got enough inertia and momentum. But it's going to be an over time thing. I'll bet it will still be something we'll be talking about a couple of years from now as "coming along". In the meantime we'll deal with what's out there today, which are the formats: HTML, PDF, InfoPath that you see on a regular basis.



Phillip Yadianian: I had one more comment there. I think once you see XForms mature

enough and complete enough, especially on the presentation end, you will see that more browsers will support it. Once IE provides support for that, then there's going to be a big enough incentive for the form vendors to provide full support for XForms. Until that happens, it's just not there. ▶



We're looking for an e-forms package. What should be the most important feature we should look for in an e-forms package that will help us serve both the internal and external customers we have?



Phillip Yadian:

I think you need a complete end-to-end solution. You want a solution that assists

from inception—which would be form conversion and form creation—to deployment on the Internet, to good interface with your other enterprise backend applications. Make sure whoever you decide to go with, you talk to other clients who have used their technology to make sure that they are happy and that they do have the proper solution for the needs that they have for their organization.



Gray Knowlton:

I was listening to your question. My reaction to it was, "For what?" I think

that's a very important part of the equation. One of the challenges that we run into when we get inquires about forms, is people will say: "I want a forms package." We always have to say, "For what reason?" Internal/external forms, that's a clear scenario, but is the purpose for collecting records? Is it for integrating that information to a different process? It definitely changes the recommendation for which technology you choose based on the end application of the data you're collecting.

So I think that a general guidance is: Make sure that the data that you're collecting is portable. Make sure that you're also selecting a platform that's based on standards that will be around in five to ten years. Make sure that you're not buying yourself into a corner. I would also look for a solution that maximizes efficiency. I would be wary of things that require you to buy a lot of technology to surround other technology to manage these things. It becomes a difficult problem. You end up engineering yourselves right back into the problem that you originally meant to solve. So just good general technology hygiene: I would say, look for things that are efficient. Look for things that are complete and standards based, and so on.



Chris Ethier:

One of the things that's important for any forms solution is that you can develop forms

that will serve you both internally and externally. I think that's an important thing. When you develop a form, you want to develop a form once, and then use that form for both internal and external processes.

One of the things that you need from an e-forms platform is to be able to fit into your existing organization. You need to be able

to have that harmonize within your IT environment and not cause it to be on a separate application server on a different platform. Or, to have its own separate hardware requirements that are different from your existing hardware requirements. Then there's the connectivity back into your core application, whether it's PeopleSoft or SAP. To provide that end-to-end solution is very important, because then you'll get the support from IT in regards to your e-forms platform selection. An integrated solution is probably your best bet and a solution that's going to be able to be extensible once you solve your internal problems to move that to an external solution.



Mark Seamans:

The number one feature I'd look for would be two things: One, you've got to have

something that meets your needs as a forms design professional, obviously. But once you've got your base needs met, I would look for a package that can be demonstrated to you that it's going to enable you to be a collaborative partner with IT. Because, if IT views this thing as something that's coming in from leftfield, some weird system, then they're going to say: "We're a JAVA-based environment, a J2EE environment in our IT organization, and this thing is Dot Net-based, we don't have anyone who knows anything about that." That thing's going to be killed before it gets off the ground. Or it will be this pigeon-holed system that gets used for

four forms and never goes any further, and it's got an agenda now to kill it—right? They're going to try and replace these forms. So, don't let yourself get put into a box by not being viewed as a collaborative partner with IT.

The other thing that's increasingly going to happen—and I know there are people here from a lot of large organizations—is that as forms start to dovetail into business process, you are unavoidably going to get pulled into discussions around compliance. It could be Sarbanes-Oxley 404 compliance. It could be regulatory compliance of some sort. So the other piece is answering the question: "Hey, I just wanted to put a form online." Well now it's like: How do we have audit ability regarding what this form looked like when the person was filling it out? Who did it touch? How did it move through the process? What was it used for? And I think there's going to be a call to need to be able to answer more and more of those questions, or at least be part of a team with IT and maybe business owners that says, "Hey, we're all working together here."

I think gone are the days were you can say, "I'm going to go over here and I'm going to do my form system." I think that connection between forms, business processes, and now compliance is so inextricably made that it's got to be this you getting—as people in here working on forms—pulled into the rest of these pieces, contributing your expertise.



I am curious as to what others have regarding Forms Design Requests. Our company's Forms Design Request (FDR) has changed little over the past 15 years. So our FDR is best suited for a printed form, not an eForm. As a result our FDR has little information to assist a customer on providing what I would need to create their eForm, for example, Is there a specific tab order, or is this DATE field auto filled or manually entered?

What sort of information do you require on your FDR(s)? Does anyone use a separate FDR for Electronic or eForms?

I feel our FDR may be missing the big picture and I'm trying to figure out a way to convince my boss of the need of a major revision, or a new and separate FDR for eForms.

Michael Scheiman
Navy Federal Credit Union

A When I worked for Chase and we were implementing our Electronic Forms Catalog, I developed a couple of forms designed specifically for electronic forms.

The first was a survey type form for departments that weren't sure if they needed the form electronically. (You have to realize that this was 1995.) They answered questions and the form calculated each question to give a numeric weighted value—kind of like a Cosmopolitan Magazine love survey. At the end of the survey there was a summary sheet that explained the number ranges and if the form was a good candidate to be electronic. This form forced the requestor to think about what they were trying to achieve with their electronic form.

The second form was a field specification sheet, used to list fields needed, databases attached, and systems that needed to be integrated into.

Our paper forms request had all the bindery and finishing information on it. It might be tough to fit all this print information and electronic information on one form.

I will try to find copies of the old forms. Actually anyone out there that took my Symposium classes from 1998 to 2000 will have copies of the forms on the diskette that I distributed in my class, "Chase Bank of Texas & Electronic Forms: The Divine Comedy". Somebody print them as PDFs and send them to me. I'm growing misty-eyed with nostalgia.

Kevin B. Shaw, CFSP
Administaff

A I would consider the Forms Design Request for an electronic form (as well as for a paper form) the result of the analysis for the form.

The analysis (in my understanding) contains a functional description (this information is needed in this way, this information results, and that information gets submitted in this way), as well as internal logic, etc. The

second part of the analysis defines the look of the form (the visual presentation), using, for example, a particular style sheet. And a third part of the form is the interactivity, meaning which other interactive elements have to be on the electronic form.

All this is essentially part of the design request.

It may also contain the sentence that the form must also be usable as level 0 form (meaning that you can print it out and fill it out manually).

The whole thing may start to look more like the detail specifications for an application.

Max Wyss
PRODOK Engineering

A To add to the interesting comments from others, here are a few thoughts on the topic of FDRs.

1. This form is the crucial one that advertises your services within your organization. I wonder how much of the problem of 'bootleg' forms arises because people think 'going the official route is overkill for this form'? So your FDR needs to be a real model of the best possible work that you can do - short, simple, attractive, easy for people who use it to fill in... all the good stuff.

2. I had a client whose FDR was a horror. It was packed with technical forms terms that only people knee-deep in forms design would have any idea about.

For example, even the term 'finishing' is foreign to most people in business. If you don't know the difference between NCR (the paper) and NCR (the old cash-register business) - then you'd have been really in trouble with this form. And when I asked the client what they wanted to



achieve with the FDR, they said, "All we really want is for them to come to talk to us." Something that could have been achieved with a two-box form:

"When do you want your form to be ready?"
 "When can you come to talk to us?"

(Well, perhaps the many expert forms designers on this list could improve my drafting, but you get the general idea).

3. I would really encourage you to treat your new FDR as a form request that goes through ... the FDR. It may give you some insights into how well the present FDR works. For example, you mentioned that it doesn't suit the e-forms part of the process. Well, maybe trying to fill the old FDR out for your new FDR (which will presumably be available as an e-form) might give you some insights into what parts of the FDR aren't necessary. Etcetera.

Caroline Jarrett
Effortmark



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Come to the desert for inspiration and career rejuvenation. Join your forms and business process peers May 21-25 as they converge at the Pointe Hilton Squaw Peak Resort in Phoenix, Arizona to exchange ideas and advance the collective knowledge of your industry.

Below is the schedule of educational and networking events planned for Phoenix-Symposium '06. You can read full course and event descriptions under Training at BFMA.org. Registration is also available online.

Phoenix-Symposium '06 Conference Schedule

Saturday, May 20

10:00 a.m. - 5:00 p.m.
Registration

1:00 p.m. - 3:00 p.m.
BFMA International Board of Directors Meeting

Sunday, May 21

9:30 a.m. - 6:00 p.m.
Registration

10:30 a.m. - 11:30 a.m.
LT BFMA Leadership Training

1:00 p.m. - 2:00 p.m.
NR Newcomer's Reception

1:30 p.m. - 2:00 p.m.
CT Convener Training

2:15 p.m. - 3:45 p.m.
01 Writing Your Symposium Report
02 The Four Components of a Form
03 Methodology for Managing Business Processes

4:00 p.m. - 5:30 p.m.

04 The Benefits of BFMA Membership
05 Is it Obsolete? Are You Sure? - NEW
06 Using Detail Process Charts to Support Effective Improvement Programs

7:00 p.m. - 10:00 p.m.
Icebreaker Reception

Monday, May 22

8:00 a.m. - 9:30 a.m.
Opening Ceremonies and Keynote Breakfast

10:00 a.m. - 11:00 a.m.

07 Increasing the ROI from Forms and eForms within Enterprise Applications - NEW
08 Strategically Aligning Forms Management with Corporate Objectives
09 Vendor Session: FileNET Corporation
10 Vendor Session: Microsoft Corporation
11 Vendor Session: Formatta Corporation
12 Vendor Session: IBM

11:30 a.m. - 1:00 p.m.

13 Barcodes and Eforms - NEW
14 Mayo Clinic Forms Program
15 Document Security - Protecting Company Resources - NEW





- 16 Iowa State University: Using eForms to Automate Paper Forms Processes - NEW
- 17 Effective Form and Data Management on the Web - NEW
- 18 Forms Analysis and Design - NEW

1:00 p.m. - 4:00 p.m.
Vendor Exhibits and Luncheon

- 4:00 p.m. - 5:30 p.m.**
Special Interest Groups
- S1 Insurance
 - S2 Health Care
 - S3 Forms Distributors/Manufacturers
 - S4 Energy/Utilities
 - S5 Financial
 - S6 Federal Government
 - S7 State/Provincial Government
 - S8 Web Development
 - S9 Other Industries

5:30 p.m. - Ongoing
Vendor Suite Showcase

Tuesday, May 23

- 8:00 a.m. - 9:30 a.m.**
- 19 End Users Panel
 - 20 Printed Forms Session I: Creating Production Ready Forms Designs
 - 21 What's in a Name? Customization and Personalization - NEW
 - 22 A Broader Perspective On E-Forms (It's More Than Just Forms...)

- 8:00 a.m. - 11:30 a.m.**
- 23 Forms Management Basics
 - 24 HTML for Forms Professionals - NEW

- 10:00 a.m. - 11:30 a.m.**
- 25 E-Forms Panel
 - 26 Get More From Your Acrobat Investment - NEW
 - 27 Printed Forms Session II: Forms Manufacturing 101
 - 28 Aligning Forms Management with Corporate Policies and Compliance Partners - NEW



11:45 a.m. - 1:00 p.m.
Recognition Luncheon

- 1:15 p.m. - 2:15 p.m.**
- 29 Vendor Session: Adobe Systems, Inc.
 - 30 Vendor Session: Verity, Inc.
 - 31 Vendor Session: FormSoft Group, Ltd.
 - 32 Vendor Session: Texcel Systems, Inc.
 - 33 Vendor Session: Amgraf, Inc.

1:15 p.m. - 4:15 p.m.
34 Running a Forms Management Program: The Proposed Canadian Standards - NEW

- 2:45 p.m. - 4:15 p.m.**
- 35 Using Microsoft Word 12 for Structured Document Authoring and Data Collection - NEW
 - 36 2D and RFID Barcode Technology for the Forms Professional
 - 37 Business Case for Eforms: Calculating ROI - NEW
 - 38 Reduce Print Cost Using Unique Economic Order Quantity Model - NEW
 - 39 Carbonless Form Sheets for Laser Printers!

6:30 p.m. - 1:00 a.m.
President's Banquet and Dance

Wednesday, May 24

- 8:30 a.m. - 10:00 a.m.**
- 40 How to Manage Electronic Forms in an Enterprise - NEW
 - 41 MS Word as an E-Forms Design Tool: Making the Best of What You Have
 - 42 The Esso Gas Plant Explosion Lessons for Forms Management - NEW
 - 43 "Do Something" with the Data - NEW
 - 44 eSignature Requirements Gathering for Effective Requests for Proposal - NEW

8:30 a.m. - 12:00 p.m.
45 Forms Management Database 101 - NEW





10:30 a.m. - 12:00 p.m.

- 46 Building Efficient Business Processes around Intelligent Documents - NEW
- 47 XML for Forms Professionals - NEW
- 48 When Forms Matter
- 49 Understanding the Power of Web-Based, Distributed Capture for Forms - NEW
- 50 Everything You Wanted to Know about the IRS Tax Forms Composition Process But Were Afraid to Ask - NEW

12:15 p.m. - 1:15 p.m.

Networking Luncheon

1:30 p.m. - 2:30 p.m.

- 51 CFSP: Certification for the Experienced, Accelerated Learning for the Beginner
- 52 Vendor Session: Quask
- 53 Vendor Session: Cerenade
- 54 Vendor Session: Essociates Group

1:30 p.m. - 4:30 p.m.

- 55 The Boeing Forms Library and Forms Online Retrieval Management System
- 56 Basic Forms Analysis and Redesign

3:00 p.m. - 4:30 p.m.

- 57 Productivity Gain without Downsizing - NEW
- 58 Automating and Securing Enterprise Document Workflows - NEW
- 59 Developing Adobe LiveCycle Designer 7 JavaScript - NEW
- 60 Mayo Clinic Forms Management Database - NEW

4:45 p.m. - 5:30 p.m.

General Business Meeting

Thursday, May 25

8:00 a.m. - 9:30 a.m.

- 61 A Single Business Process for Paper and Electronic Forms - NEW
- 62 Forms packaging with automated checklists using Adobe Designer 7.0
- 63 Forms Without Signatures Are Dead
- 64 Managing Forms Through Data Stream Integration
- 65 Accessibility - Are You Prepared for It? - NEW
- 66 Forms Central: One Stop Shopping for Forms

10:00 a.m. - 11:30 a.m.

- 67 XForms for the Enterprise - NEW
- 68 Viewing Forms from a Data Perspective - NEW
- 69 SEC's SOX and You or... "Yeah, But Sarbanes-Oxley Doesn't Apply To Me"
- 70 Developing an Enterprise Forms Repository - NEW
- 71 How to Turn Electronic Forms into Enforceable E-Contracts - NEW
- 72 Basics of Mailpiece Design

12:00 p.m. - 1:30 p.m.

Closing Ceremonies Luncheon

2:00 p.m. - 5:00 p.m.

- SS1 Introduction to Usability Testing
- SS2 Process Management and Flowcharting
- SS3 Advanced MS Word E-Forms Design





Business Forms Management Association

PHOENIX - SYMPOSIUM '06 REGISTRATION



➔ Online Registration: www.bfma.org

ATTENDEE'S DETAIL

Type of registration	<input type="checkbox"/> Full registration	<input type="checkbox"/> Partial/Guest registration
BFMA Member?	<input type="checkbox"/> Yes <input type="checkbox"/> No	First symposium? <input type="checkbox"/> Yes <input type="checkbox"/> No
Name, First/Middle/Last	Mr. <input type="checkbox"/> Ms. <input type="checkbox"/> Dr. <input type="checkbox"/>	
Job title	Professional designations	
Company/Agency name		
Mailing address		
City	State/Province	Select a State
ZIP+4/Postal code	Country	
Phone number	FAX number	
Email		
Name as you would like it to appear on your badge		

REGISTRATION FEES

Full Registration - (includes meals, events and Symposium proceedings)				
Type of Applicant	Before April 9	April 9 to May 13	After May 13	Amount
BFMA Member	\$1,089	\$1,249	\$1,349	\$
Non-Member	\$1,339	\$1,499	\$1,599	

Special Sessions - \$100 per	<input type="checkbox"/> Thursday	\$
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Partial Registration - (for guests and those with limited attendance)	
Daily education sessions (includes lunch) - \$385 per	\$
<input type="checkbox"/> Sunday <input type="checkbox"/> Monday <input type="checkbox"/> Tuesday <input type="checkbox"/> Wednesday <input type="checkbox"/> Thursday	
Daily events	\$
<input type="checkbox"/> Sunday icebreaker - \$35 <input type="checkbox"/> Tuesday lunch - \$35	\$
<input type="checkbox"/> Monday breakfast - \$35 <input type="checkbox"/> Tuesday banquet - \$60	
<input type="checkbox"/> Monday lunch - \$35 <input type="checkbox"/> Wednesday lunch - \$35	
<input type="checkbox"/> Thursday lunch - \$35	
<input type="checkbox"/> Complete meals and events package (no educational sessions) - \$260	\$
Symposium proceedings (available in CD format only)	\$
<input type="checkbox"/> Extra copy for attendees - \$50	\$
<input type="checkbox"/> Non-attending member - \$75	
<input type="checkbox"/> Non-attending non-member - \$100	

Discount (specify): _____	\$
Total Fees	\$

PAYMENT DETAILS

<input type="checkbox"/> Check - Please make checks payable to BFMA
<input type="checkbox"/> Government Purchase Order #:
Credit card: <input type="checkbox"/> Visa <input type="checkbox"/> Mastercard <input type="checkbox"/> Amex
Card Number
Expiration Date
Cardholder Name (please print or type)
Authorized Signature

Indicate your first and second choices (where applicable) for the events that you plan to attend. Classes will be filled on a first come, first served basis as payment is received. We cannot register you for any session that begins prior to the scheduled ending of your previous session. For three hour sessions, place the same session number in both spaces to indicate the three hour period.

Sunday, May 21

10:30 am - 11:30 am	<input type="checkbox"/> LT BFMA Leadership Training
1:00 pm - 2:00 pm	<input type="checkbox"/> NR Newcomer's Reception
1:30 pm - 2:00 pm	<input type="checkbox"/> CT Convener Training
2:15 pm - 3:45 pm	1 2
4:00 pm - 5:30 pm	1 2
7:00 pm - 11:00 pm	<input type="checkbox"/> Icebreaker Reception

Monday, May 22

8:00 am - 9:30 am	<input type="checkbox"/> Opening Breakfast
10:00 am - 11:00 am	1 2
11:30 am - 1:00 pm	1 2
1:00 pm - 4:00 pm	<input type="checkbox"/> Vendor Exhibits & Luncheon
4:00 pm - 5:30 pm	<input type="checkbox"/> Special Interest Group: _____
5:30 pm - 8:30 pm	<input type="checkbox"/> Vendor Suite Showcase

Tuesday, May 23

8:00 am - 9:30 am	1 2
10:00 am - 11:30 am	1 2
11:45 am - 1:00 pm	<input type="checkbox"/> Recognition Lunch
1:15 pm - 2:15 pm	1 2
2:45 pm - 4:15 pm	1 2
6:30 pm - 1:00 am	<input type="checkbox"/> President's Banquet & Dance

Wednesday, May 24

8:30 am - 10:00 am	1 2
10:30 am - 12:00 pm	1 2
12:15 pm - 1:15 pm	<input type="checkbox"/> Networking Lunch
1:30 pm - 2:30 pm	1 2
3:00 pm - 4:30 pm	1 2
4:45 pm - 5:30 pm	<input type="checkbox"/> GBM General Business Meeting

Thursday, May 25

8:00 am - 9:30 am	1 2
10:00 am - 11:30 am	1 2
12:00 pm - 1:30 pm	<input type="checkbox"/> Closing Lunch
2:00 pm - 5:00 pm	Special Session: <input type="checkbox"/> SS1 <input type="checkbox"/> SS2 <input type="checkbox"/> SS3



September 7, 2005 will go down in history as the beginning of the virtual study group era for the CFSP (Certified Form Systems Professional) exam. A total of 17 participants committed to this new adventure to prepare for the December test.

Thanks to the generous sponsorship of WebEx and teleconferencing services by a study group member's employer, the group quickly formed of participants from companies such as Boeing, Mayo Clinic, Premera Blue Cross. The group spanned two time zones, four states, and even crossed an international border to British Columbia, Canada. Thanks to BFMA's Northwest Chapter hosting a "study hub" on their chapter website, the group had a centralized location for CFSP information, copies of weekly quizzes, and speaker presentations to help keep them organized. Speaking of speakers, thanks to Margaret Tassin, Al Howick, Ben Graham, Ray Killam, Scott Beckman, Cheri Cason, Pamm Colbert, and Paul Showalter for volunteering their time to present the hot topics for each scheduled week of study.

With the combination of technology, specialized speakers, and group-created quizzes, each week of this virtual study group was an environment of questioning, challenging, and learning from each other. Just like traditional CFSP study groups in the past, the group was faced with the same challenges of studying for this exam. Reference materials are plentiful and digging through can seem overwhelming. As moderator for the group and a prior test-taker herself, Tami Gutscher worked to allay fears and guided participants toward increased confidence in their ability to master the knowledge necessary to sit for the exam:



Tami Gutscher, CFSP, CFC, Study Group Moderator

Hello, CFSP Virtual Study Group!

I want to address the big issue that has been plaguing the group since we started --- how to know which reference materials to study for each CFSP outline topic. First, I do know your frustration as I was once preparing for an exam too. However, the answer is not an easy solution, or at least may not be an answer you want to hear, but the reality is as follows.

You are not studying for a textbook certification. This certification is geared towards the seasoned professional where you are tested on what you already know, as well as what you should know to be a form systems professional. The CFSP outline indicates all topics that you should know. The CFSP recommended materials list as found in the CFSP Handbook is your guide on where to find and study up on those areas you are not familiar with, as well as those areas you do know, but want to read someone else's perspective to enforce your existing knowledge. Unfortunately, there is no one or two master books written on our industry. Nor are the test questions based on one or two books as they are randomly written by experts in our industry that have sited several different reference sources. Because of this, the recommended materials list is long.

Preparing for this exam takes research. It takes your time and energy to read through the varied materials and soak up all the information you can. We do have a planned area of study each week to keep us organized, but don't let this limit your research. It would be extremely helpful for yourself, the group and future groups if you document all the sources you find that apply to each outline item. If you send this to me, I will record it into a master document that you all have access to on our study hub. This tool will be invaluable now and in the future.

To address the cost of materials, please know that there are free/inexpensive materials available. Read the inFOCUS on www.bfma.org. Sign up for formspace on www.bfma.org and learn from the topics flying around as well as posting your own questions to get valuable feedback you can use to prepare for this exam. Find someone with a copy of symposium proceedings over the years and read what each instructor provided. Go to your public library and see if you can find publications on our topics, even if they are not written by authors on our suggested materials list. Look for trade publications that may be lying round your office, doctor's office, etc. If all else fails, purchase a book or two that covers

topics you are weakest in. It was suggested last night that you check out Amazon's used book options. And don't forget about tours. Find facilities that you can tour to learn more about each of the outline topics.

The BFMA is known for its members sharing knowledge and that is exactly what you need to do to prepare for this test. Share with each other, help each other, and talk to each other. This group is not the traditional instructor/student, lecture-type environment. The speaker and the test should be treated as tools for discussion. If someone says something you don't understand, stop them, ask them, and get clarification. You're not being fair to yourself if you let a conversation go on that you don't understand.

Please remember that you are all the guinea pigs for this virtual study group and we are all learning how to capitalize on this venture together. This is the first experience for a lot of our speakers as well. They are 100% volunteering their time to share their knowledge with you. Take advantage of this and ask them questions, get clarification, and even challenge their opinions if your experiences differ from theirs. Speakers should not necessarily be considered the ultimate being of their specific topic; they simply have knowledge to share with you based on their experience. Please feel free to suggest



better ways to handle a virtual study group and/or offer up different techniques to try. We are building the foundation for future virtual study groups to work from.

Please also remember that it is you guys writing your quiz questions. They will not always be perfect. And in reality, it is the "bad" questions that sometimes spark the best discussion to hammer out an issue. Please don't get tied up on how a question should have been written, but focus your attention on the topic itself and learn from what the question was intended to teach.

I have copied the folks on the FSCB (Form Systems Certification Board) on this email so they can see what your concerns are. I sincerely believe in this group and believe that you can get through this and you can pass that test. Let's all work together to make this happen!



The Results

The group diligently researched their material, participated in the virtual study sessions, and learned a lot along the way. Of the 17 participants, 5 sat for the test...and 4 achieved their CFSP designation! An 80% success rate is something the whole group can take pride in. Whether they chose to sit for the exam or not, all of the participants benefited from the exchange of knowledge and research.



Frank P. Meadors, The Boeing Company

The study groups were helpful preparation for the exam in a few ways. I think the first was to define the material needed to study, then force us to think enough about aspects of the subject to formulate questions, and then to become familiar with the question format through practice tests. I think taking the practice tests as a group was the most helpful, because everyone brought an opinion from their reading and/or experience. It was a great group with everyone working toward the same goal.



Pamm Colbert, The Boeing Company

I could not have done this without the study group, especially the last night when we had a free-for-all Q&A session. The Q&As provided by our study group were thought-provoking and educational. The walk-through at Kaye Smith and all the presentations were extremely helpful. Thank you all for helping me do what I have wanted to do for many years. A special thanks to Tami for making the virtual team a reality; without your perseverance, leadership and facilitation this could have never happened.



Susie Cook, Premera Blue Cross

The web site with the weekly presentations and questions were invaluable to me so I could follow along with the study group. The outline was my best tool because it covered every possible topic that appeared in the test itself. In addition to reading the narrative for each item on the outline, taking the time to research each topic was a great study tool. The virtual experience is a wonderful way for those who are not in the everyday workplace to participate or follow the study group progress.



Bonnie Harper, Premera Blue Cross

To those of you taking the test this weekend, good luck! Be confident. You'll do great. To all of you, it's been a delight being in this group with you — educational, sometimes controversial, but always fun. I'm sure our paths will cross again and I look forward to it. Most of all, I want to thank Tami and Pamm for putting so much work into helping us achieve this goal. Your hard work and good humor are appreciated more than you know.

Join the Ranks

Thoughts are already stirring for the next round of virtual CFSP study groups. The challenge is to find sponsorship for the tools: WebEx, teleconferencing, and a website study hub. Would you or your company be interested in hosting these services? Or are you interested in being a participant? Group(s) should begin the first part of February to study for the June 3, 2006 exam. Contact Tami Gutscher at tami.gutscher@premera.com for further information.



Fall Forms Institute '05

The 2005 Fall Forms Institute was held October 13th and 14th at the Doubletree Hotel & Executive Meeting Center in downtown Omaha, Nebraska. Attendee Carol Casper shares her experiences as a first time speaker at the Institute:

“It was a privilege to be asked to present at the Fall Institute in Omaha. I have attended many BFMA educational seminars; however, this is the first one I presented at. I was a bit nervous even though I knew I was among friends.

“I was excited to see so many friendly faces at the presenta-

tion, eager to hear about Mayo Clinic's form program. There was open discussion, good questions, and commentary. As usual, I learned much and met many new forms professionals from all over the world. The networking was invaluable.

“I will be presenting at the BFMA Phoenix-Symposium '06. Having presented in Omaha, I will just be that much better prepared for Symposium!”

Read more about Symposium or the upcoming Canadian and Spring Forms Institutes on BFMA.org under "Training".

**a little
preshow jitters**



**fun with
computers**



**BFMA
Prez con-
venes the
course**

**a dynamic
new
speaker**



**rousing
conclusion**



**taking
questions**



Submissions for the BFMA 2005 Professional Award are due by January 31, 2005. This prestigious award recognizes innovation and well-honed form systems analysis skills applied in the workplace. No project is too large or too small to qualify for submission. The only requirement is that the project took place within the last three years.

Everyone who is interested in gaining visibility within their company as an expert in their field is encouraged to visit the BFMA.org Clubhouse Trophy Room to download the submission form and review the submission guidelines.

The trophy room also contains the case study from last year's winning submission from Strathcona County. A

worthwhile read even for those not participating in the awards program, this paper outlines the powerful affect good forms and business process analysis can have on a struggling piece of workflow. We hope to see your submission posted alongside it this summer!

Winners will be announced at the Phoenix-Symposium '06 and will be posted during the month of June.





May 21 - 25, 2006
 Pointe Hilton Sqaw Peak Resort
 Phoenix, AZ
 Members: \$1,089 / Nonmembers \$1,339 (before April 8th)



January 26-27, 2006
 Toronto Marriott Bloor Yorkville
 Toronto, ON
 Members: \$299 CND / Nonmembers \$359 CND



March 15-16, 2006
 Radisson Hotel City Centre
 Indianapolis, IN
 Members: \$249 / Nonmembers \$299



The following awards programs have the deadline of January 31st:

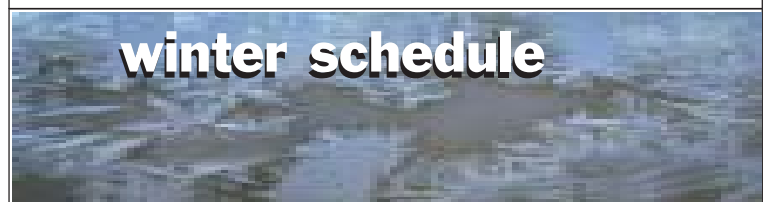
- ⊙ BFMA Professional Award
- ⊙ Member Awards
- ⊙ Communications Awards
- ⊙ Chapter Awards

For more information on these programs and previous award winners see the Trophy Room in the BFMA.org Clubhouse.

Events Calendar

Submit event listings at www.bfma.org/training/

SUNDAY	MONDAY	TUESDAY
		11/3 NW Washington Chapter Board Meeting Contact Pamm Colbert: (425) 750-9704/pamela.j.colbert@boeing.com
	11/10 Mid-Michigan, Lansing Chapter Seminar Design's Basic Trio: Fonts, Color, and Graphics Contact Juli Price: (616) 464-3344 x2009/juliann.price@harlandfs.com	
	11/10 NW Washington Chapter Meeting Vendor: Microsoft Contact Tami Gutscher: (425) 918-6038/tami.gutscher@premera.com	
	11/17 Minnesota, Minneapolis/St Paul Chapter Meeting Contact Angela M. Parks: (612) 303-6471/angela.m.parks@pjc.com	
	11/17 Madison, Wisconsin Chapter Board Meeting Contact Cyndie Rindfliesch: (608) 458-3002/Cyndierindfliesch@alliantenergy.com	
	12/15 NW Washington Chapter Board Meeting Contact Pamm Colbert: (425) 750-9704/pamela.j.colbert@boeing.com	
	12/1 BFMA International Phoenix-Symposium '06 Deadline Budget Buster Special Contact Tonya Macalino: (503) 227-3393/tonya@bfma.org	
	12/3 BFMA International CFSP Examination Testing Date Contact Tonya Macalino: (503) 227-3393/tonya@bfma.org	
	12/6 Madison, Wisconsin Joint ARMA and BFMA Chapter Meeting New Skills Needed for Records & Forms Management Professionals Contact Carol Henry: (608) 242-4100 x31532/chenry@amfam.com	
	12/8 NW Washington Chapter Holiday Social Contact Tami Gutscher: (425) 918-6038/tami.gutscher@premera.com	
	12/11 Associates Group' Traveling Training Course - North Vancouver, BC Focused Forms Training Contact Associates Group, Inc.: (913) 284-6573/inquiry@associatesgroup.com	
	12/13 Central Ohio, Columbus Chapter Meeting Tour of the Relizon IDEA Center Contact Steven C. Hager: (614) 445-2930/HagerS@Grangeinsurance.com	
	1/12 NW Washington Chapter Meeting Premera Forms Management Database Update – come see how we have grown! Contact Tami Gutscher: (425) 918-6038/tami.gutscher@premera.com	
	1/26 BFMA International 2006 Canadian Forms Institute Toronto, ON Contact Tonya Macalino: (503) 227-3393/tonya@bfma.org	
	3/15 BFMA International 2006 Spring Forms Institute Indiana, Indianapolis Contact Tonya Macalino: (503) 227-3393/tonya@bfma.org	
	3/22 The Ben Graham Corporation Process Improvement Workshop Building Better Business Processes Contact Ben B. Graham: (937) 667-33810/graham@worksimp.com	
	4/8 BFMA International Phoenix-Symposium '06 Deadline Early Registration Rate Cut Off Contact Tonya Macalino: (503) 227-3393/tonya@bfma.org	
	5/21 BFMA International Phoenix-Symposium '06 Contact Tonya Macalino: (503) 227-3393/tonya@bfma.org	
	6/14 The Ben Graham Corporation Process Improvement Workshop Building Better Business Processes Contact Ben B. Graham: (937) 667-33810/graham@worksimp.com	





knowledge on demand

**BFMA International presents
Phoenix-Symposium '06**



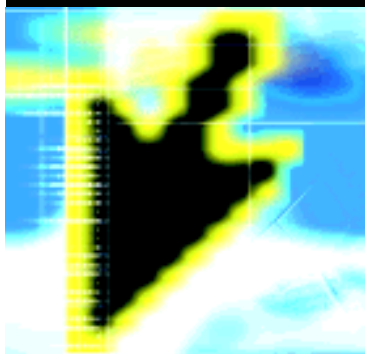
TRAINING FOR
FORMS AND BUSINESS PROCESSES

May 21-25, 2006

Pointe Hilton Squaw Peak Resort

Phoenix, Arizona

- Forms Design**
- Usability Testing**
- Workflow Analysis**
- Electronic Data Capture**
- Information Routing**
- Backend Forms Coding**
- Project Management**
- Inventory Control**
- Forms Management**
- Print Production Supervision**
- Intelligent PDF Forms**
- Web Forms Catalogs**
- Data Capture Regulations**
- Mailpiece Design Regulations**
- Upcoming Technology**
- Product Demonstrations**
- Industry Peer Networking**



Register before April 8th and Save! Member Rate: \$1,089



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