

Laserfiche Forms and Workflow - Vision Goals and Objectives

Project Vision Statement

ITS will provide Cabarrus County streamlined, efficient and effective business process automation using electronic forms and content management.

Project Goal Statement

Create an intuitive electronic forms management system that uses existing resources, provides secure management, follows business process requirements, and automates record retention policies.

Objectives:

- Existing Resources:
Forms management will be device agnostic.
All form fields that can be will be auto-filled from another source or calculated.
Access to data for auto-fill will be based on the existing user data access permissions.
- Data Management:
Unknown form data will be captured and edited via an intuitive responsive designed user interface. Form data will be stored in a manner that can be easily retrieved based on permissions and purged based policy.
- Forms Process:
The correct form for a business process will be easily located in a searchable centralized repository.
A workflow process that meets the business requirements will be automatically initiated for each form. Completed Forms will be stored where they can be easily retrieved based on permissions and purged based policy.
- Record Retention:
Meta data will be captured and a practice established for purging forms and data based on the Cabarrus County's record retention policies.

Strategies:

- Responsive Web Design to create application interfaces that work across the entire spectrum of digital devices, focusing on core content and functionality.
- Dynamic interfaces to capture form data
 - Interface does not need to look like paper or final form
 - Data input determines what is displayed
- Maintainability
 - Workflow definitions should be sustainable via existing
 - MUNIS data
 - AD Groups
 - No hardcoded permissions or decision points in workflow
- Create User Friendly Secure Centralized Online Presence
 - Blank Forms Repository
 - Workflow Status

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- Completed Forms Repository
 - Secure Completed Forms and data based on sustainable permissions
- Use Standard Naming Convention
 - Form Name
 - Department
 - Revision Date
 - Workflow Name
 - Department
 - Process
 - Form Metadata
 - Department From Owner
 - Submitter
 - Form Retention
 - Audience