

# Guide for Planning Interactive PDF e-Forms



## Interactive e-Forms for Simplicity and Accuracy



## *Why and how to plan for interactive e-Forms*

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# Introduction

## *Paper-forms augment costs – electronic-forms augment value!*

### Purpose

The purpose of this guide is to convey the importance of utilizing interactive electronic PDF forms (e-forms), and to provide general guidelines for specifying form-filling requirements so that they may be programmed by a [professional form developer](#). This guide discusses the benefits of interactive e-forms, the different types of e-forms, and the importance of properly planning for them. It does not deal with the detailed design or ergonomics of e-forms. The focus is to provide guidance on how a form designer/requestor should instruct a form-developer to ensure that the data filled in the e-form being requested is as accurate as possible based on specific functional requirements.

### Overview

All productivity-oriented organizations are making a special effort to reduce their reliance on paper forms to conduct business activities. The most popular and effective direction is to institute interactive e-forms in their business practices. This powerful and extremely flexible alternative is largely made possible because Adobe PDF e-forms can be easily designed and custom programmed. Once published, they may be readily viewed and filled by anyone using a free downloadable Adobe Reader.

After the form is filled electronically and saved, it may be submitted via email or printed and mailed for processing. Although printing should be done sparingly, in some cases legal or compliancy directives dictate the need for a wet signature on the completed paper form so as to be recognized as “official”. The key benefit for e-forms is especially derived when the data captured from filling the form is also submitted electronically as part of the process. Therefore it is always worthwhile to submit the captured data, regardless of whether the filled form must be printed. The printed paper version received should immediately be scanned prior to processing and [OCR technology](#) can be used to bind the resulting scanned image with the e-form data that was submitted electronically.

In order to get optimal benefit from using interactive e-forms, the forms must be designed and planned diligently so that they are easy to fill and that the chance of filling-errors are minimized if not completely eliminated. If the form designer knows exactly what information must be filled, it is a simple matter of providing instructions so that a professional form developer can program the form to respect the preset rules. The rules may be relating to formula-based calculations, date validations, inputs as defined by dropdown lists, input format validations, etc... The end result is that the individual that fills the e-form will have very little choice but to fill it properly. This renders the information that has been filled more accurate and reliable and thus increasing the efficiency of processing the form and thereby reducing the overall processing time and cost.