GRANICUS

OpenForms Live Demo:
How to Transform Resident Interactions & Internal Workflows

Wednesday, 13 September 2023 – 1pm AEST
Presented by Shannon Wells and Jordan Gesundheit
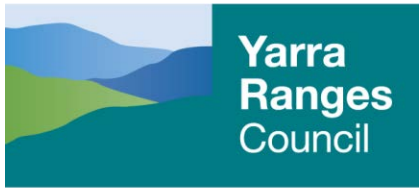
Presenters

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bangthetable + OpenCities

now part of

GRANICUS

Proof in the Numbers

6,000+
Governments served globally

300+
Government organisations served
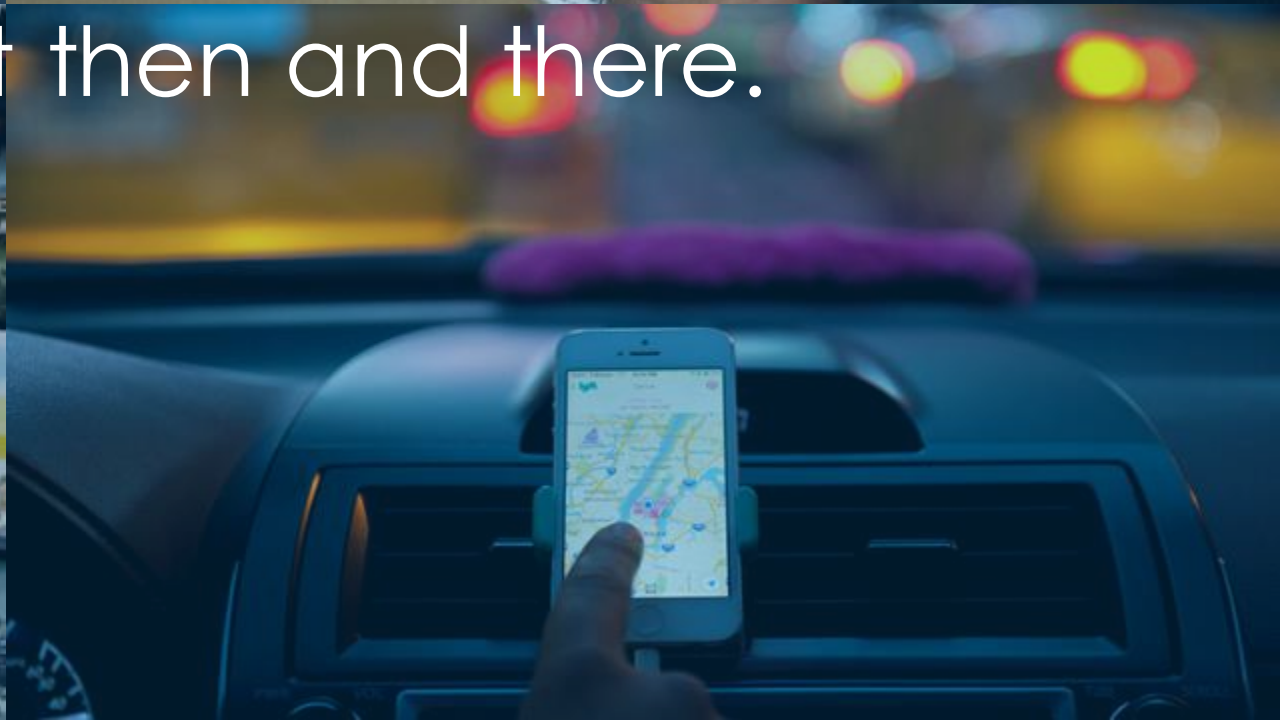
28b
Interactions powered annually

Over 40%
Local Governments across Australia & New Zealand use Granicus products

We're all used to quick online experiences - getting things done right then and there.

With government, it can sometimes feel like using a universal remote.

It has all sorts of buttons that we're sure must be useful to someone, but we have no idea what they all do and which one we really should click on.

We'd rather have this experience where every action is clear, and we're not confused by surrounding content or actions that might feel irrelevant to our task at hand.

Why we should persevere...

Increase trust

Satisfied customers are

9x

More likely to trust the agency providing the service

Reduce Risk

Dissatisfied customers are

2x

More likely to publicly express dissatisfaction

Boost employee morale

Long-term organisational success is

50%

Driven by organisational health and is mutually reinforced by customer experience

Cost to serve, by channel

Price per transaction by channel

Face-to-face	Correspondence	Telephone	Online
$16.90	**$12.79**	**$6.60**	**$0.40**
per request	per request	per request	per request

When putting the resident journey first, understanding their experience of using your website and digital services, we can see that OpenForms sits right in the middle of that experience, helping residents do exactly what they came for, within just a few minutes, getting it done right then and there.

Let's see how it all works

Click the play button below
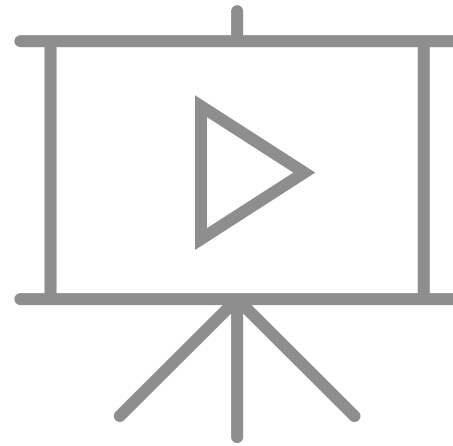
2023 and beyond for OpenForms

Launched in 2023

Response Management & Reviewing

✓ Office use only fields for Workflow

Connectors

✓ **Azure AD** Connector for SSO

✓ **Esri ArcGIS Online** Connector for street address search and validation

Coming soon

+ Request changes from the respondent while their form is moving through **Workflow**

+ Connector: **SharePoint Lists** for response data sharing and analysis

Remainder of 2023 and beyond

+ Tools that help Managers do their jobs and make decisions more effectively

+ Further expansion of Workflow

+ More tools for authors to create forms catering to a wider range of use cases

+ Create deeper connections into the Granicus ecosystem

Q&A

Questions & Answers from the Audience

TOPIC: Form authoring tools and best practices

1. How do you manage language? We have a large number of other languages.
   In OpenForms you can tell the system which language you are writing content for that form. This configuration is passed to the web browser when the form is displayed, making it easier for screen readers to correctly interpret the written content. When creating a form, write it in one language first, then duplicate that form and swap out all written content for the second language, making sure to update the language configuration for that form in the settings

2. Can file/document uploads be made mandatory?
   Yes, all input fields can be made mandatory for the respondent to fill in. By default, fields are optional but can be changed to mandatory in the field settings.

3. Can you close forms at a particular date / time?
   Yes, forms can be set to deactivate at a particular date and time and should be followed up by authors to archive the form if no longer needed. If the form has been embedded in a webpage through your CMS you should also update the page on the same schedule so that the display of that page is also an appropriate experience for residents and visitors. The OpenCities CMS, for example, enables automated content publishing, deactivating, and reminders to update.

4. If you update a field set, do existing forms update?
   Yes, forms using that field set will auto-update as soon as changes in the field set are saved.

5. Can you duplicate existing forms rather than start from scratch each time to create a form?
   Yes, you can duplicate an existing form in your account rather than starting from scratch each time. You can also start from an imported form as well.

Questions & Answers from the Audience

TOPIC: Form user (Respondent) experience

1. What's the best way to encourage customers to save their information in another format (e.g. Word), if they're going to fill in a complex form and they forget to save their progress? This happened recently with a resource consent application.
    Using custom styling for text content or providing an image that captures attention with instructions is a great way to ensure respondents are aware of processes that make their life easier (whether it's saving at each section, keeping responses saved in another location, etc.). Another consideration is breaking down the application process into multiple forms, and sending the response data back to the customer for their records as they progress.

2. Can OpenForms be used internally?
    Yes, you can link to or embed OpenForms forms on your Intranet or Extranet sites and we've seen it used frequently for digitising and simplifying internal processes.

3. Does OpenForms have the ability to recognise an authenticated user and pre-populate the contents?
    OpenForms is designed for use by anyone without the blocker of needing to login to a portal or similar experience. As an example of a site with logged in users though, in an Intranet you can embed forms and use one of our tools to pull data into the field value from hidden HTML fields on the webpage. This is most useful for data such as employee ID / name / email address.

Questions & Answers from the Audience

TOPIC: Connectors

1. How does a submitted form integrate with existing software like TechOne?
   A custom integration can be created using our Data Connection and Web API tools so that your forms and data connect seamlessly with your TechOne platform setup as many of these systems are highly customised. OpenForms also offers a range of out of the box connectors, and we are always engaging with our customers to understand which to prioritise next on our roadmap.

2. Can you derive values from existing data sources, e.g. gender already defined in our HR system?
   Our Data Connections feature is best used for this scenario, connecting to your internal systems while the respondent is still in the middle of filling out the form, rather than this data being collected manually later on after form submission.

3. Can data from incoming forms populate an SQL table?
   Yes, our Data Connections and Web API are best used for transmitting form response data into an SQL database within your office network.

4. Can I get more information relating to the Web API as we have 151+ existing API interfaces into our existing form engine and want to migrate without changing the API interfaces.
   As each system has a different Web API structure there would most likely be some work needed to alter the middleware that sits in between your applications. The middleware acts like a translation service talking the language of each product and passing information between each app in the language it understands.

5. Will the forms integrate with existing CRM systems, or would a staff member need to review responses and manually enter them into the CRM system?
   Using the OpenForms Web API can automate this process so that a staff member doesn't have to spend time manually copying/pasting data from one system to another.

Questions & Answers from the Audience

TOPIC: Workflow & custom documents

1. Do the people in the workflow use up a user license?
   Yes, any user who logs into the OpenForms interface is a user account counted towards the user limit of your subscription.

2. Where are the field names in Custom Document templates defined?
   You can determine your own placeholders within your document templates. After uploading to OpenForms the author will map each placeholder to a field or system data from the form. Document templates can be created in either Microsoft Word or Adobe. Generate custom documents from response data - OpenForms Help Center

TOPIC: Response data, response analytics and organisation insights

1. Can you get an export of the finalised process out for storage in records?
   Our default Response PDF can include the Workflow history timeline which includes internal comments. This document can be used as a collection of all data to then be stored along with any additional files in your records management system.

2. Are test forms still included in the insights in terms of time saved and revenue?
   No, test form submissions shouldn't be included in the organisation Insights data as this would skew the data from realistic form submissions.

3. Are draft forms counted in the total of forms allowed for particular license types?
   No, the limit in our OpenForms subscriptions is for the number of currently published forms. You can have other forms in draft/deactivated/archived status which are not currently published.

Questions & Answers from the Audience

TOPIC: Response data, response analytics and organisation insights (continued)

1. Can an analytic report be run from a consolidated position - ie results across all forms?
   The Web API would be the best place to pull form response data from multiple forms at once. This is because each form collects various field data and has permissions applied to limit visibility to a particular role and group of users.

TOPIC: Future OpenForms enhancements

1. Are there any plans to easily create printable versions of forms that have payments and calculations in them, so that we can have a single source of truth for our forms? For some of our forms we have to create a copy, remove payments/calculations and then save them as a 'Print' version, which works but gives us two versions of a form to maintain.
   We don't currently have this on our roadmap but we will certainly add it to the backlog of ideas to pick up.

2. With custom documents, is there any plan to make them be able to be retroactively generated for previously submitted forms data?
   We don't have this on our roadmap but we'd love to hear more information about the use cases this would assist.

3. Are there any plans to implement workflow approval between the different user types; ie, an admin can only approve/publish a form?
   We have been hearing this a little more often recently. We don't currently have it on our roadmap but would very much like to hear more about the ways a form publishing workflow will help your internal processes.

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Want to know more?
– chat to one of our team members

Book a demo