

How to plan Form Creation work for Lاسernet

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Lاسernet

Before undertaking any Form Creation project, it is important to plan the work and ensure that all the information needed to complete it is available. This helps to set realistic expectations and timelines for the completion of the work.

The following items need to be thought about and finalised by the business, then handed over to the implementation team before any Form Creation begins:

- Document design
- Company logos, branding, headers/footers, contact details
- Input data file
- Any calculations needed to be performed as part of the Form processing
- Regional profiles (dates, numbers and currencies)
- Output format
- Output channels (printer/file/email/FTP/archive)
- Metadata keys to archive

These items are outlined in more detail below:

Document Design

The document design is the central point that drives the Form Creation process, therefore it needs to be clear and concise. It should show the overall layout of the document, including items like the position of logos, headers, address blocks, paragraph placement and disclaimers.

The document design should look exactly as you wish the final document to look, including exact wording and paragraph content. The key difference between the document design and the final form output, is the use of field names from the input data file instead of real data.

The document design should also include any dynamic paragraphs or sections that may change based on variances in the data. They should also be marked with the data variance that triggers the dynamic content. For example, different repayment terms for different

borrowing accounts.

As an example, your opening paragraph could be as follows:

Dear <CustomerForename>,

We're updating the terms for your Account <AccountID>, please find the details of the new terms attached. These terms will take effect from <TermsDate>.

A full [Document Design Example](#) is available to download, which further illustrates how they should look.

Company Logos/Branding/Headers/Footers/Contact Details

All company logos, branding, header/footer and contact details should be provided to the implementation team as part of the handover pack.

All images should be provided in a vector-based format, as this reduces file size and allows images to scale without losing detail.

If one is available, a corporate branding/style guide is also very useful.

Input Data file

The input data file used for the form should be from the source system and include *all the data points that are needed* for the document design. It is key that this is correct from the outset, as going back to make changes to the input data file after form creation has been started, generally results in additional form configuration changes which then end up delaying delivery.

It is vital that the input data file contains a data point for identifying what type of document it is - this is known as a **Form Criteria**. This value allows Lasernet to automatically detect what type of document the data represents (statement, advice, letter), and apply the correct form configuration to it.

It is also important to provide a wide range of input samples that cover all likely variances within the data. This allows the Form to be configured to deal with these differences, which in turn will lead to fewer issues when testing. Common data variances that we see include:

- Product Type
- Account Type
- Multi-line addresses
- ID Lengths (Customer, Product, Account, etc)
- Currency formatting
- Date formatting
- Languages

For the design and testing phase, it is advisable to use sanitised or "dummy" data. This is

data that adheres to your normal data output format but does not include production data (data about real items or real customers).

Formatting restrictions should be adhered to, even if the data isn't "real". Dates should still be valid dates, reference numbers should adhere to your standard format (the correct amount of letters and numbers), numerical amounts should be valid. By using representative data, it ensures that the design and testing of the form output will yield accurate results.

This is even more important if you are not carrying out the creation of the form inside your own organisation, as you would risk breaching data protection legislation by passing on sensitive data.

An example [XML File](#) is available to download, this corresponds to the document design example provided in the [Document Design](#) section of this page.

There is also an [Output Document example](#) to download, which shows the XML File example inserted into the Document Design example.

Calculations

In some cases, there may be a requirement to perform calculations on some of the fields from the Input Data file, in order to produce some new data to put on the Form output. For example, this could be a running balance that is calculated after every transaction. It is important to include these calculations as part of the Document Design, so that the implementation team can make sure that they put the correct calculation in place.

Although Lasernet has the capability to perform such calculations, please be aware that these will impact form processing times. For the best results, we recommend that all the information needed on the Form output is included as part of the Input Data file if possible.

Regional Profiles

Regional profiles define what format to display information such as dates, currencies and numbers in. They can also be used to define the format that the values from the data are recognised as, so Lasetnet knows how to translate the data from its original format to the desired Form output format.

It's important to define these before the Form Creation work begins so that the implementation team know what formatting rules to use.

Output Format

Lasetnet has the ability to produce documents in multiple formats; these can include .PDF, .docx, .xls, and .html among others.

The desired output format of the document should be defined based on the requirements.

Output Channels

Lasernet can output a document to multiple locations, depending on the requirements. The required outputs should be defined for each Form. Common outputs include:

- AUTOFORM DM Archive
- Email
- File output
- FTP
- Printer

Metadata keys to Archive

This is a list of metadata items to save to the AUTOFORM DM archive alongside the Form output. These will allow you to easily search for the document in the future. It's important to think about your processes and workflow, as that will help determine what information to save alongside the Form output.

Examples of common metadata keys are:

- Customer ID
- Document Date
- Reference Number
- Transaction ID

Furthermore, the Document Definition of the Form will also need to be defined. This is used to save the Form as a particular type of document in AUTOFORM DM. Common Document Definitions include:

- Advice Note
- Invoice
- Statement

Comments (0)