

When it comes to implementing online forms on an intranet, there is a 'rule of thirds' that can be used to guide overall strategy and implementation activities.

This rule of thirds describes three different types of online forms, and highlights the specific technology approaches that might be appropriate for each.

This information can then be used when selecting new IT solutions, including content management systems and portals.

Value of online forms

There are considerable benefits to be gained by replacing paper-based forms with true online forms on the intranet. More than just replacing paper with a PDF equivalent, these online forms provide efficiency benefits for both the end user and back-office areas.

For this reason, the implementation of online forms is often a key element of an overall intranet or portal strategy.

It quickly becomes apparent, however, that not all the forms are the same. Some are very simple, while others have complex business, process or security issues surrounding them.

Despite this complexity, practical steps can be taken to implement online forms, and progress is greatest when it is recognised that there are several clear categories of forms.

Three types of forms

In practice, the 'rule of thirds' can be used to categorise the different types of forms within organisations:

- One third are very simple forms, with no logic or complex rules.
- The second third have some underlying rules, such as simple workflow or basic form logic.
- The final third are best considered as applications, such as employee self service (ESS).

Each of these categories of forms are implemented using different technologies, as discussed in the following sections.

First third: simple forms

At least a third of the forms on a typical intranet are very simple, consisting of a single page that generates a message to a specified department or person.

These forms can be easily implemented using the out-of-the-box capabilities of a content management system (CMS) or portal solution.

By tackling these forms first, many paper-bound processes can be automated with little (or no) effort, providing key benefits such as mandatory fields and pre-filling of user details.

Second third: more complex forms

The second category of forms contains greater complexity, such as the need for simple approval workflow, multi-page forms, or conditional logic.

These forms may need to be tied into LDAP or Active Directory to support workflow, or may require storing results in a database (rather than generating an email).

These forms should be evaluated on a case-by-case basis, as the required functionality may not be provided by standard CMS or portal tool.

In practice, some forms may be easy to implement, while others may require custom-development or specialist applications.

Final third: complex applications

The classic examples of more complex forms are HR, travel booking and e-commerce systems, all of which are best served by specialist applications.

It is unlikely that any generic forms ability (provided by a CMS or similar system) would be suitable for managing these types of situations. Instead, they should be treated as *applications*, and implemented as such.

Further reading

The earlier article *Step-by-step: implementing online forms* provides an in-depth look at how to implement the first two categories of forms, starting from the simplest possible technology solutions and building up from there.