brighton consulting

Form Master

User Manual

Version 3.0
26 August 2009

Document version

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3.0	26 August 2009	All
2.0	28 August 2008	All
1.0	27 August 2007	All

Document authoring

Name	Role	Organisation	Date
Lorraine Marsh	Associate Director	Brighton Consulting	26 August 2009
Lorraine Marsh	Associate Director	Brighton Consulting	28 August 2008
Lorraine Marsh	Associate Director	Brighton Consulting	27 August 2007

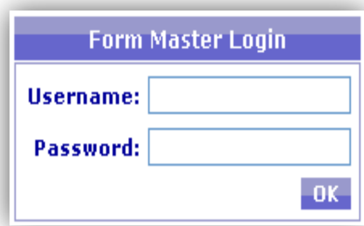
Contents

1. Introduction

This document provides the information required to enable a client using **Form Master** to effectively use the system.

2. Accessing Form Master

Form Master is accessed via the URL
https://forms.sharedservices.com.au/admin/login.php

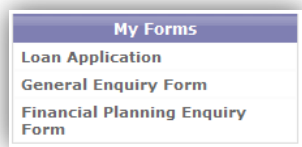


You will be required to enter a username and password. Please contact the Support Team at Brighton to establish or retrieve your username and/or password on (02) 8011 1400.

3. Home Page

The home page enables you to access form data and change your password. Form Master Administrators will also be able to review form statistics and manage users.

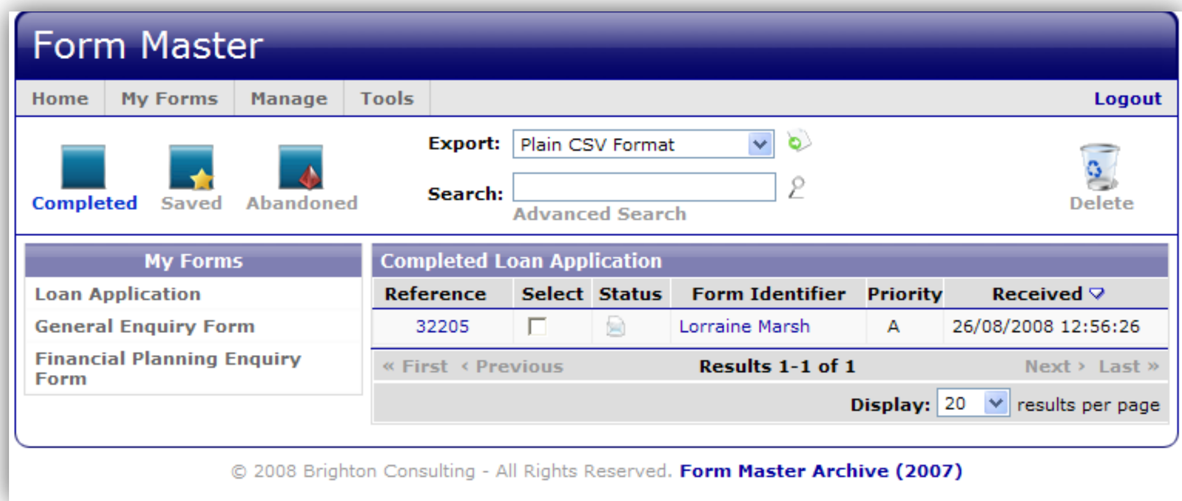
4. Accessing completed forms



To access forms, simply click on the required form name located in 'My Forms'. You will be presented with the first of three forms pages: Completed Forms, Saved Forms and Abandoned Forms.

The Completed Forms page displays all forms that have been fully completed and submitted by members. These forms are ready for actioning, assessing, etc.

The page looks like this:



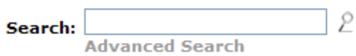
This page allows you to:

a) manage forms in various stages of completion (e.g. review, track, print forms);
b) process forms and keep track of the status of each;
c) easily locate forms (you can quickly scan through a list of forms, sort by received date or search for an individual form);
d) keep track of 'high priority' forms and process accordingly; and
e) export forms into excel for easy analysis.

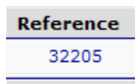
Navigate. These icons allow you to navigate between the Completed Forms page and the Saved and Abandoned Form pages (see later for explanation of what these pages are for).

Export. You can export all data into excel for easy analysis. The system offers two options: 1) 'Plain CSV Format' or 2) 'Predefined Column Format'. The second option enables the data to be exported into excel columns of a predefined width. Please contact Brighton Consulting should you wish to use option 2. Click on the green arrow to action your selection.

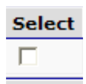
Search. You can find data easily using the search function. Click on the symbol to action your selection.



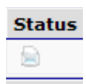
Reference. To view the details of a form click on the reference number of the form required



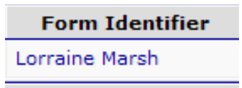
Select. To select a form for deleting or exporting just select the form's checkbox



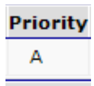
Status. The Status symbol next to each form changes from a closed envelope to an open envelope when the form data has been viewed. The name of the reviewer will be displayed when the open envelope is hovered over



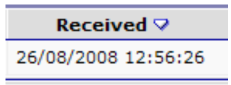
Form Identifier. This is the summary identifier of each form. Note: the contents of this field are determined at the time Form Master is set up. The field can contain the results of up to 2 data fields (for example, the respondent's first name and surname, or their surname and nearest branch).



Priority. This shows the assessed priority of the form so you can action it accordingly. (Form Master can assign a priority to a form based on a set of rules that are determined at the time that Form Master is set up (for example, length of membership or size of loan, etc. Note: this is optional within Form Master and may not apply in your case).



Received. This shows the date/time the form was received.

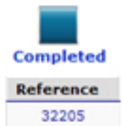


Delete. Form Master Administrators will also have the ability to delete form data (although this is not recommended), just select the form's checkbox and click on the delete icon.

5. Actioning completed forms

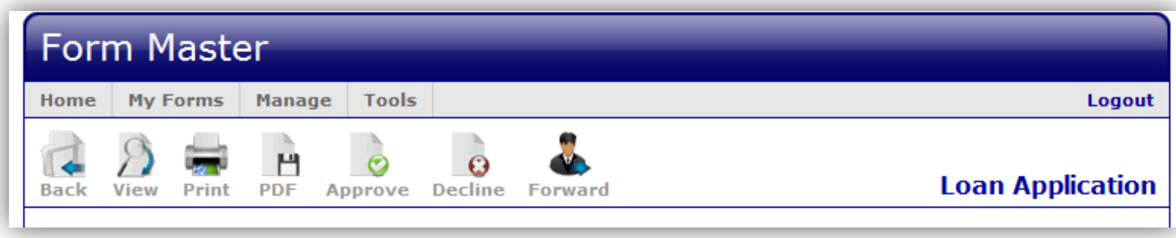
To action a completed form, you need to first view its details.

To do this just click on the completed forms icon and then the reference number of the form required.



This takes you to the Form Details page which displays all the contents of the form.

The top of the page looks like this:



Underneath this, you will see all the contents of the form.

This page allows you to:

a) obtain a separate record of the form by printing it or saving it as a .pdf. (Note: a signature strip can be automatically added to the form and included within the .pdf should a Member signature be required. This functionality will be established when the form is set up);

b) maintain a record of submission quality by marking submissions as 'approved' or 'declined' (if the form does not require approval, you can use this functionality to indicate that it has been processed); and

c) forward the form to another member of staff as required.

6. Accessing and actioning saved forms

Longer **Form Master** forms allow users to save a partially completed forms for subsequent completion (e.g. if they do not have all the relevant information at hand).

Form Master allows staff to access these saved (but incomplete) forms and contact users to prompt form completion (e.g. to increase application rates or ensure members are not experiencing problems).

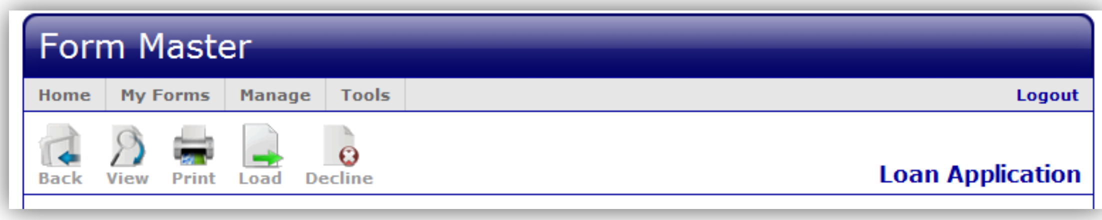
NB: This facility should only be used as directed by internal policies and procedures.

To action a saved form, you need to first view its details.

To do this just click on the saved forms icon and then the reference number of the form required.

This takes you to the Form Details page which displays all the contents of the form.

The top of the page looks like this:



Underneath this, you will see all the (partially completed) form data.

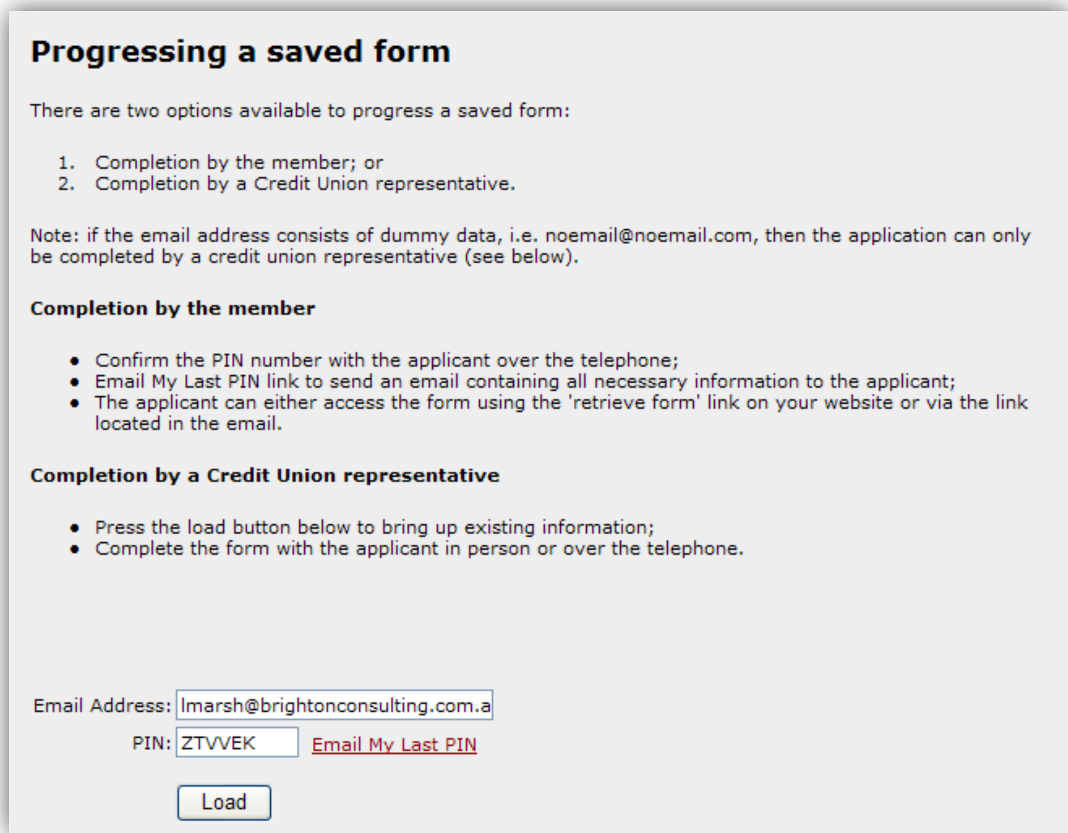
To action a saved form:

- review the form data to ensure you understand which fields have not been completed;
- contact the individual (considering their preferred contact method);
- investigate why the form has not been completed; and
- identify if the individual intends to complete an application.

If the individual intends to complete the form select the load icon: 

If not, select the decline icon: 

The load page facilitates the completion of the form in two ways. Please follow the appropriate instructions shown in the screen that is then displayed (see below for example).



Progressing a saved form

There are two options available to progress a saved form:

1. Completion by the member; or
2. Completion by a Credit Union representative.

Note: if the email address consists of dummy data, i.e. noemail@noemail.com, then the application can only be completed by a credit union representative (see below).

Completion by the member

- Confirm the PIN number with the applicant over the telephone;
- Email My Last PIN link to send an email containing all necessary information to the applicant;
- The applicant can either access the form using the 'retrieve form' link on your website or via the link located in the email.

Completion by a Credit Union representative

- Press the load button below to bring up existing information;
- Complete the form with the applicant in person or over the telephone.

Email Address: lmarsh@brightonconsulting.com.a

PIN: ZTVVEK Email My Last PIN

Load

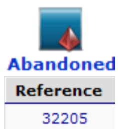
7. Accessing and actioning abandoned forms

Sometimes a member will abandon a form without saving it or completing it.

Form Master also allows credit union staff to access these abandoned forms and (if the initial contact details have been completed) contact users to prompt form completion (e.g. to increase application rates or ensure members are not experiencing problems).

NB: This facility should only be used as directed by internal policies and procedures.

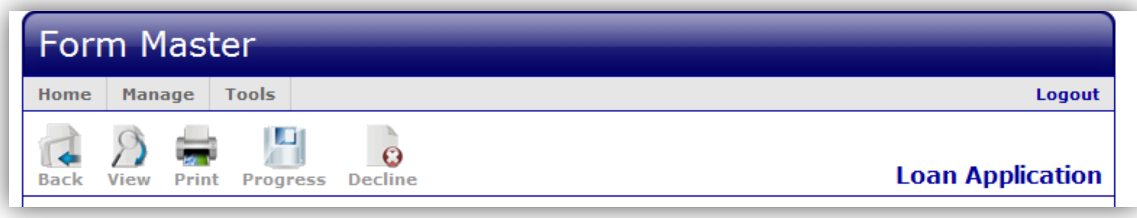
To action an abandoned form, you need to first view its details.



To do this just click on the abandoned forms icon and then the reference number of the form required.

This takes you to the Form Details page which displays all the contents of the form.

The top of the page looks like this:



Underneath this, you will see all the (partially completed) form data.

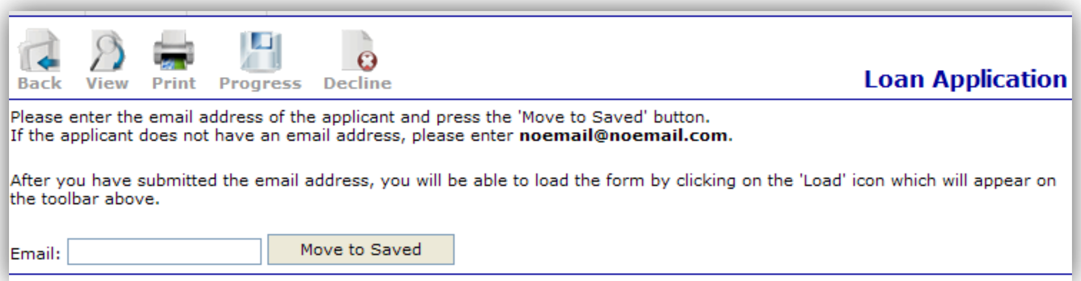
To action an abandoned form:

- review the form data to see if the user has completed the initial contact details (name, phone number, email address, etc);
- contact the individual (considering their preferred contact method, if specified);
- investigate why the form has been abandoned; and
- identify if the individual would like to complete the application.

If the individual would like to progress the form select the progress icon: 

If not, select the decline icon: 

When the progress icon is selected, the following content will be displayed. It enables the abandoned form to be moved to the 'saved' area and progressed as detailed above.



8. Any further questions

If you have any further questions, please do not hesitate to get in contact. Call Brighton Consulting on (02) 8011 1400 or email ebusiness@brightonconsulting.com.au.