



Be the Designer

Our new, optional FileDirector FormDesigner provides a graphical user interface for designing custom forms for usage within your company or providing your customers.

You are only a few clicks away from e.g. digital Support Engineer Report forms, time sheets, procurement or holiday applications.

A lot of standard elements – e.g. textboxes, drop-down box, checkbox and lines can be found in an icon bar and simply selected and placed on the form. Each element can be customised, e.g. setting a background colour, changing the font type or adding an image is done within a few clicks. Of course, adding a signature element is possible as well.

Provide Forms

Forms created in FileDirector FormDesigner can either be used within your FileDirector ECM or sent to your customers. The option “anonymous”, combined with the ability of creating download-links, offers you the chance of providing forms to your customers, without granting them access to your FileDirector ECM. The created forms can be either provided in PDF or HTML format for download.

The filled forms are automatically sent back to your FileDirector ECM system by simply clicking a submit button. Of course, an option allows to prevent a multiple submission of the same form.

FormDesigner

The screenshot shows the FileDirector FormDesigner interface. On the left is a vertical toolbar with icons for text (ABC, a i, aaa aat), a mail icon, a list icon, a color bar, a line, a box, a signature, a left arrow, a right arrow, a redaction, a wrench and screwdriver, a magnifying glass with a plus sign, and a magnifying glass with a minus sign. The main workspace is a dotted grid. At the top left of the workspace is a gear icon. Below it is a title box containing the text "Support Engineer Report". The form contains several fields: "Customer:" with the value "Our Customer Ltd", "Address:" with "Company Street 1, AB12 3CD", "Contact:" with "Mrs. Grey", "Engineer:" (empty), "Supported:" with a "from:" field containing "08:30" and a "to:" field (empty), "Product:" with a dropdown menu showing "FileDirector Enterprise", and a "Valid software assurance" checkbox which is checked. At the bottom of the form is a "Report:" field (empty) and a "Submit to FileDirector" button.

Manage Content

The form and the information stored on a form is automatically stored in FileDirector as soon as a form is submitted. This is achieved by a connection of form elements and FileDirector index fields.

This content can be used for further business processes managed by FileDirector, e.g. by FileDirector BusinessProcessManagement.

