

eForms Solution

Offline Mobile Electronic Forms Empower the Canadian North



NORTHWESTEL

Northwestel is a northern Canadian leader in advanced communications & entertainment solutions, delivering a broad range of telecommunications & television services.

Their 600 employees serve over 120,000 people in roughly 100 communities scattered throughout the Yukon, the Northwest Territories, Nunavut, northern British Columbia and Alberta.

NWTel's service area is spread out over four million square kilometres of rugged terrain, with 46 communities located in such remote areas that they are only accessible by air.

SITUATION

The field technicians at Northwestel are responsible for setting up and servicing Internet, TV, and phone services to clients in various communities.

Filling out hand-written, paper-based forms to document information is a key part of the job. Workers are required to document workplace hazards, track details of vehicle safety checks, and obtain sign off from a client that work is completed.

NWTel wanted to shift to have field techs use digital forms while out in the field.

CHALLENGES

NWTel was looking to work with a solution provider who had experience with managing change within an organization. They looked for **guidance on how to empower their staff** to build new habits and use the electronic forms on their mobile devices when they were comfortable using the paper-based system.

The primary challenge for NWTel was that their field technicians are often working in remote Northern communities with **limited or no access to reliable, mobile data or Wi-Fi connections**. Most electronic form solutions require users to use mobile data or Wi-Fi to submit a form data. The Forms Solution would need to work offline.

Another priority for NWTel was working with a team that could design electronic forms that were simple to **use**, as Field Techs need to be able to get their job done quickly and with minimal training.



NorthwestTel delivers a broad range of telecommunications solutions & television services to northern Canadians.



Company: NorthwestTel
Website: <http://nwtel.ca>
Industry: Telecommunications

Mission: We're driven by a vision of a highly-connected North where every northern Canadian can prosper and thrive. We're getting there by delivering the most innovative communications solutions for the North.

Vision: Focusing on offering innovative technology to customers - making connections happen in their lives.

SOLUTION

itgroove created an **eForms Solution** with **offline functionality** to allow field technicians to fill out forms and have those forms automatically submit when they return to an area with Internet or data reception.

The eForms solution has a **simple, easy to navigate interface** for field technicians to quickly find the form they need.

The blank forms are **easy to complete** because the layout responds to **fit the screen size** on the chosen device of the user – mobile phone, tablet, or computer – and all of the eForms were designed to be short and clutter-free.

Using electronic forms produces **clean, complete data** allowing NWTel to have **quick returns** on producing rich reporting when it is required. Required fields are clearly labelled, and the user can see when a field has been missed or not filled out correctly.

BENEFITS

Additionally, the benefits of adopting an electronic system included:

New Functionality:

- Field techs can now provide visual documentation by attaching a photo to a form.
- Numeric data is automatically calculated to simplify field technicians' work.
- Forms are automatically converted to PDF format via workflows.
- Email notifications are automatically sent when a new form is completed.

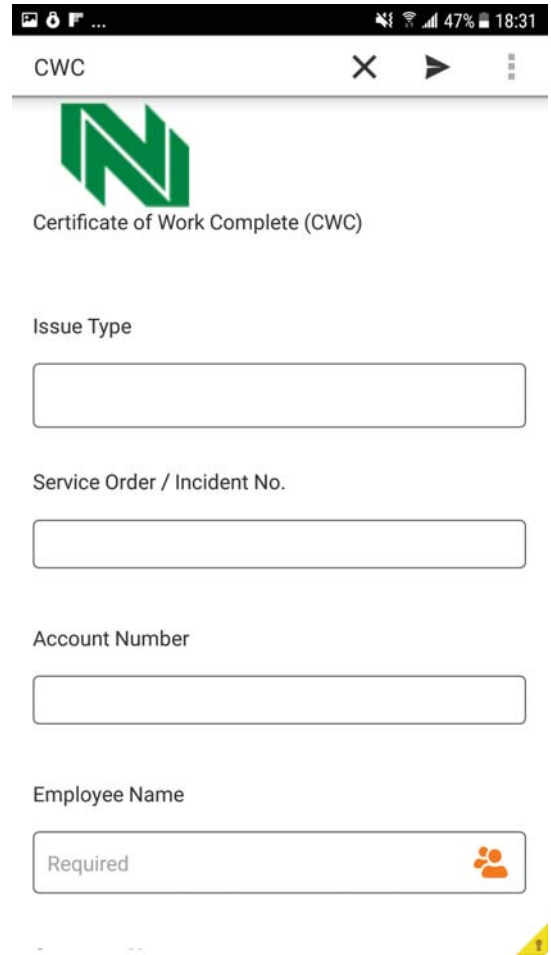
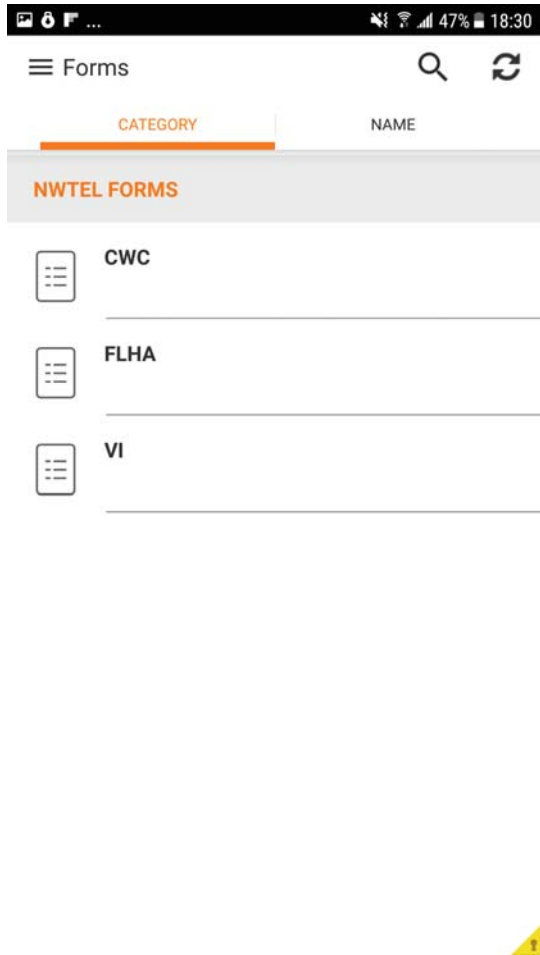
Enhanced Privacy and Security:

- Customer information is kept secure as devices and the eForm App are locked and require Field Technicians to login with a password.
- NWTel controls the device and the data stored on it. All data on the device can be remotely deleted should a device be lost or stolen when out in the field.
- Form Information can be shared with clients without showing confidential information – for example, a copy of their Certificate of Work Complete Form can be sent to a Client without having to use the Field Technician's work email.

Flexibility:

- The eForms solution was intentionally designed to allow NWTel to switch forms providers should they choose in the future as the market evolves, without data loss or data integrity issues.

SCREENSHOTS



This solution was built using: Microsoft SharePoint, Nintex Workflows, Nintex Forms, Nintex Mobile, and Muhimbi PDF Converter.