

K2's Saving Time With Electronic Forms



Course Description



Web portals, "low-code/no-code" data collection, and survey tools have changed how we collect data. Modern solutions like Microsoft 365 Forms, Zoho Survey, SurveyMonkey, Microsoft PowerApps, and legacy tools like Adobe Acrobat Forms allow users to create web forms and integrate the resulting data into business process workflows. This session introduces the range of available tools, demonstrates standard features, and shows how tools permit users to expose or conceal questions based on answers given earlier in the survey. Attend this session to learn how to use tools you already own to collect data from your team, customers, and vendors efficiently.



Learning Objectives



Upon completing this session, you should be able to:

- Identify the licenses or subscriptions required to use forms/data collection tools, including Microsoft Power Apps, Zoho Forms, Microsoft Forms, and Adobe PDF forms
- Identify examples of benefits and risks of using each approach to creating forms
- Identify which tool or approach would be the best fit for a particular data collection task



Overview Of Presentation

- Introduction/Products and categories
- PDF-based forms
- Office suite-based forms tools
- Survey tools
- Feature analysis and summary







PRODUCTS AND CATEGORIES



An Overview Of Major Survey/Forms Tools

PDF-Based Forms

- Adobe PDF Forms
- Adobe Cloud Forms

Office Suite Form Tools

- Google Forms
- Microsoft Forms
- Zoho Forms

Survey Tools

- Microsoft PowerApps
- SurveyMonkey
- Zoho Survey







Adobe PDF Forms and Adobe Cloud Forms **PDF-BASED FORMS**



PDF-Based Forms



- These tools generally center around the conversion of a paper or PDF form into an electronic form
- Users who prefer to receive completed, electronically signed individual documents will likely prefer these tools
- Users who need to aggregate data from hundreds of respondents across many different questions will likely not find these tools as helpful
- Tools include:
 - Adobe PDF Forms
 - Adobe Document Cloud Forms



Adobe PDF Forms



- Target user: Business employee (non-IT) who needs to create a form that can be saved to PDF or printed for use in a lightly structured or unstructured business process
- Typical User: An end user who needs to make it possible for someone to fill out a form and then print/sign/mail or e-mail the completed form to someone for processing
- Application Bundled With: Adobe Acrobat DC, uses Adobe Sign
- While this is usually not an optimal tool for surveys for a plethora of reasons, Acrobat brings a number of advantages for users who need to collect forms in a workflow process
- Every office worker has a mobile or desktop tool that fills out PDF forms



Adobe PDF Forms (Continued)



- Adobe Sign is simple to use and is incorporated into CPASafeSign, Liscio, and other platforms used by accounting professionals
- The tool is designed to create a completed document that can store data, can be forwarded or stored, and can be signed electronically
- There are Adobe tools that allow you to collect and aggregate data filled in a PDF form, but they are somewhat dated and clunky when compared to web forms, and the Adobe XF4 Forms require a separate subscription
- The data aggregation tools can work, but most organizations have too many security issues surrounding PDF files and e-mail to allow these data flows to work unmolested in a work environment

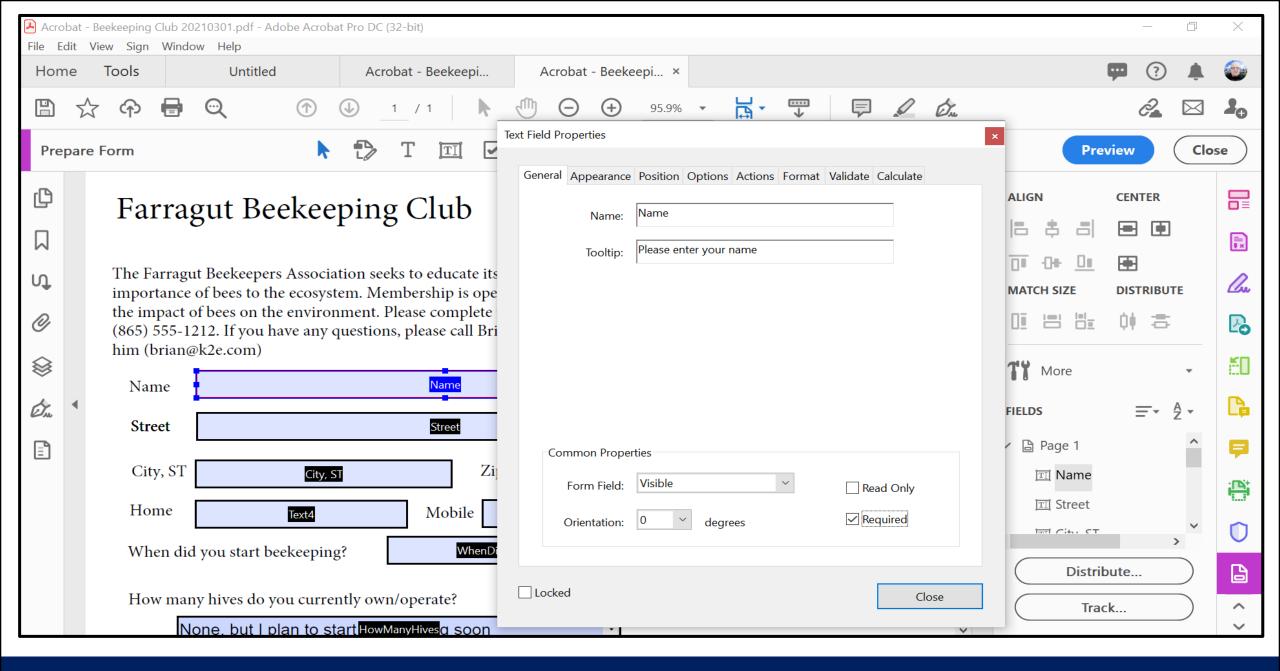


Adobe PDF Forms (Continued)



- While this is a possible solution for filling in forms, this tool is well beyond its prime, and is a little too difficult to use for most serious business workflows – but it works well where a paper form or an individual PDF must ultimately be submitted to someone
- We did not evaluate Adobe's Document Cloud for Enterprise, which is designed to create more robust forms like those created in previous versions of Acrobat Pro using LiveCycle Designer, but our experiences with that product suggest that the Enterprise solution forms and architecture setup is likely too complex for most users outside of corporate IT or information consulting



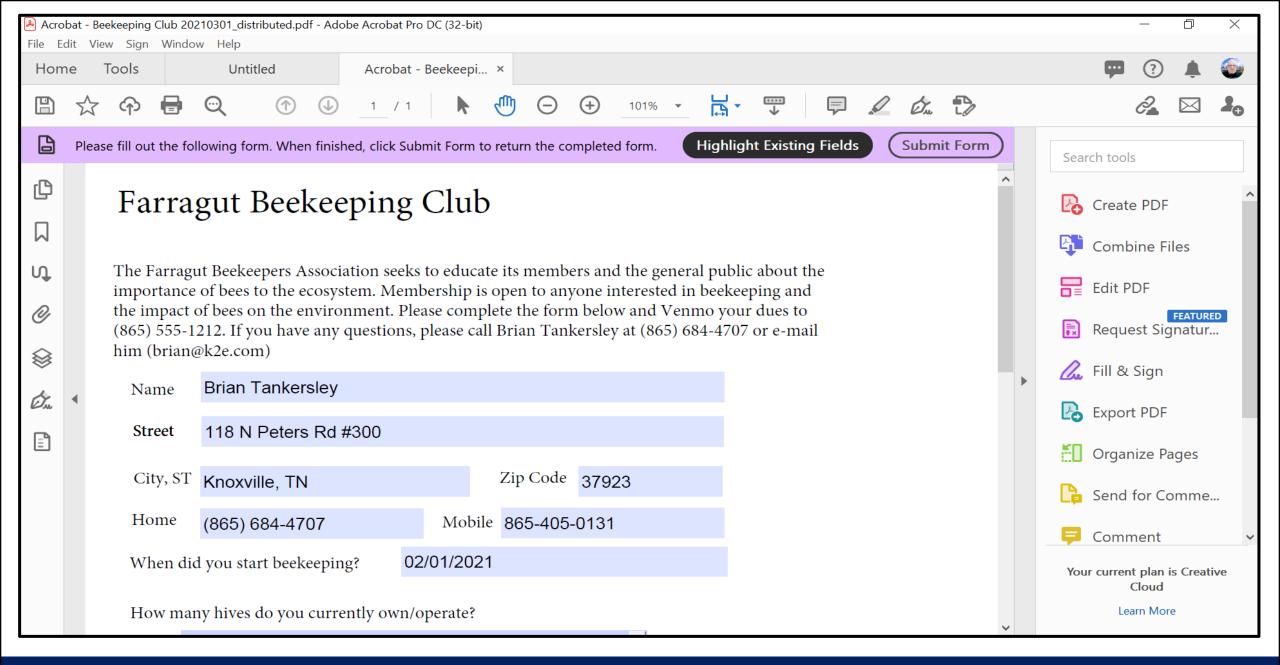




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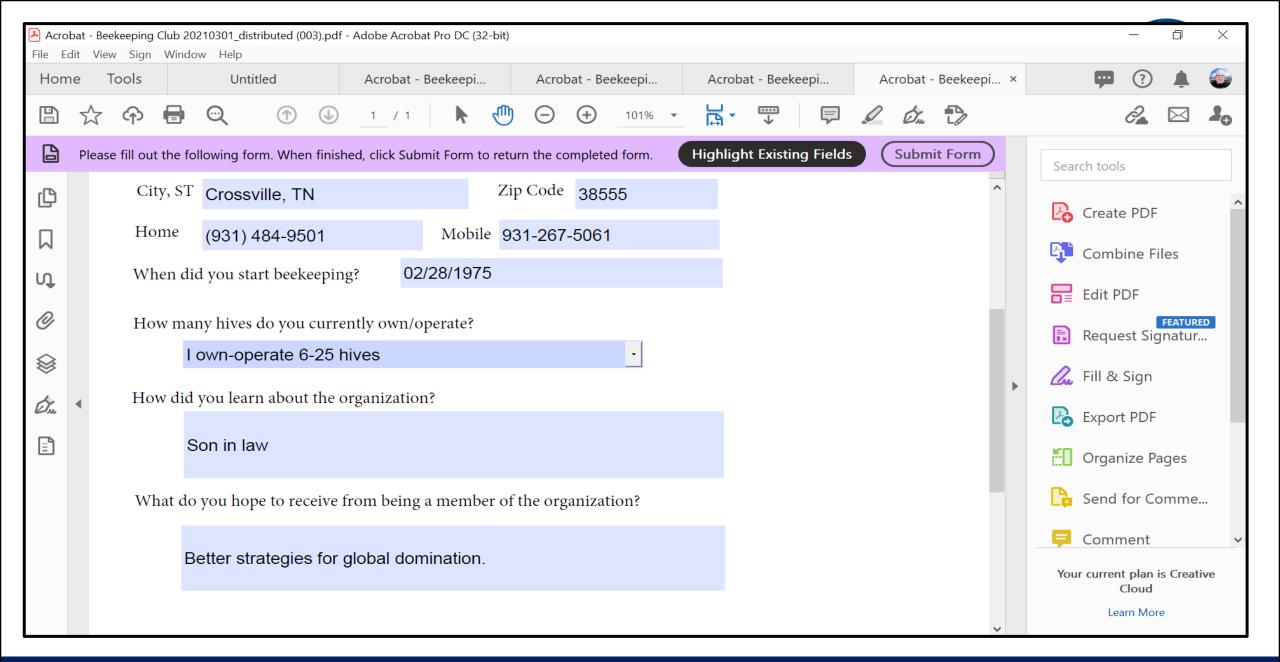
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Adobe PDF Forms (Continued)



- Demonstrate in Acrobat Pro DC:
 - Creating a new form
 - Editing field/control properties
 - Adding data validation to fields
 - Not allowing form submission until all "required" fields are entered
 - Special data formats dates, phone numbers, zip codes, etc.
 - Tracking the form data





- Target user: Business user who needs to get a digitally signed document from those inside/outside their organization
- **Typical User**: An end user who needs to make it possible for someone to fill out a web form, digitally sign that form (with e-mail validation), and then create a signed PDF version of that form
- Application Bundled With: Adobe Acrobat DC, uses Adobe Sign
- Works well for document workflows, requires data to be posted to Adobe's Document Cloud
- Every office worker has a mobile or desktop tool that fills out PDF forms



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	Home 931-484-9501 Mobile 931-267-9501	
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	How many hives do you currently own/operate?	
Next	None, but I plan to start beekeeping soon	
	None. I'm just a friend of the bees. How di None, but I plan to start beekeeping soon	
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	Email: bob@janetteburgin.com	
	Do not submit if you do not trust the requesting party or if you suspect phishing or fraudulent activity	
	By signing, I agree to this agreement, the <u>Consumer Disclosure</u> and to do business electronically with Brian Tankersley.	





Google Forms, Microsoft 365 Forms, and Zoho Forms **OFFICE SUITE BASED FORMS TOOLS**



Office Suite Based Forms Tools



- These tools are generally designed for ease of use by end users and are included in a publisher's suite of office productivity tools like documents, spreadsheets, and presentations
- Users who need basic data collection and simple forms creation capabilities without the need for cross-tabulated reports will find these tools to be most helpful
- Although some of these tools have more sophisticated capabilities like branching logic, these tools are not designed for large surveys or those with sophisticated reporting requirements
- All of these tools are available as part of a software publisher's office app suite
- Tools include:
 - Microsoft Forms
 - Google Forms
 - Zoho Forms



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Microsoft Forms

• Target user: Business employee (non-IT) who needs to create a form that can collect and export structured responses to the form

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Forms

• **Typical user**: Individuals, a parent collecting data for a volunteer position; any user in a Microsoft 365 deployment

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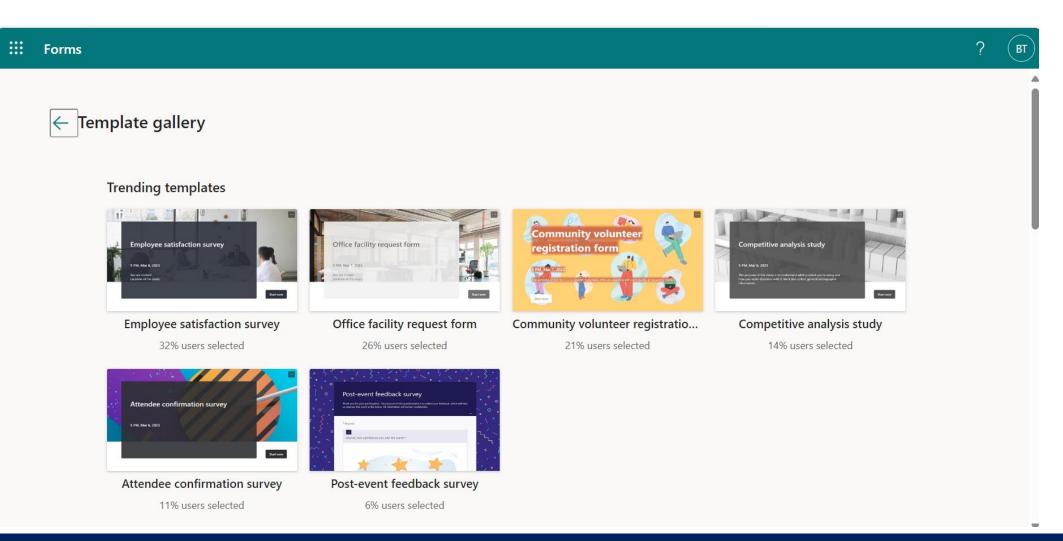




- Application Bundled With: Limited personal use of forms is free, but business use requires a Microsoft 365 business/enterprise plan, and can be used with Power Automate and other tools
- Easy to use/learn; limited to fairly simple forms
- Clearly designed for end users instead of IT pros and enterprises; those users will gravitate toward Teams, Power Platform, and SharePoint which has more robust integration and governance tools



Microsoft Forms – Templates





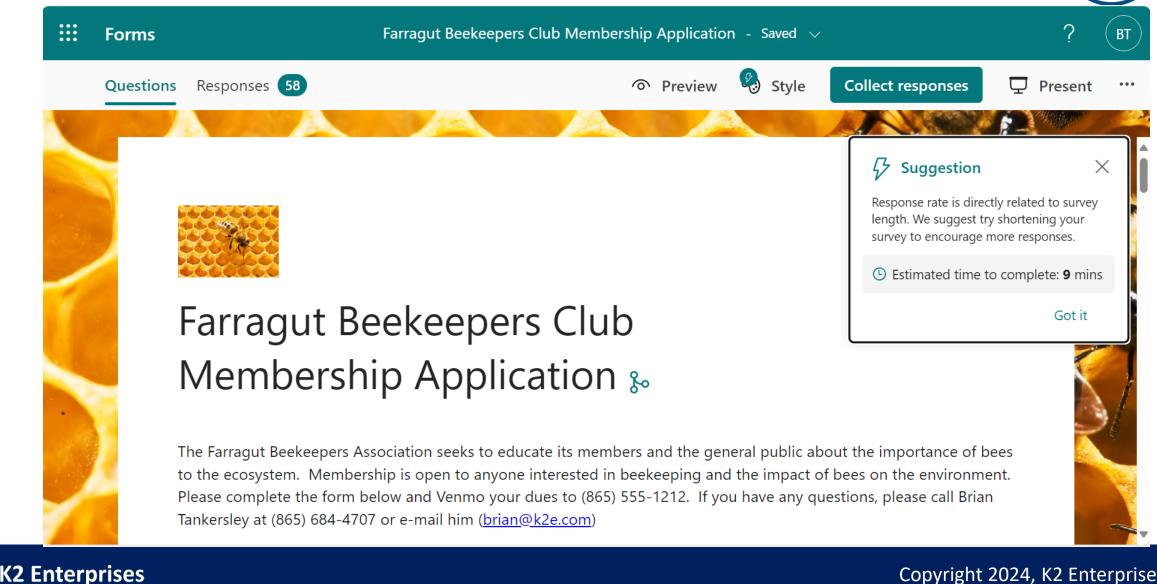


Microsoft Forms – Field Types

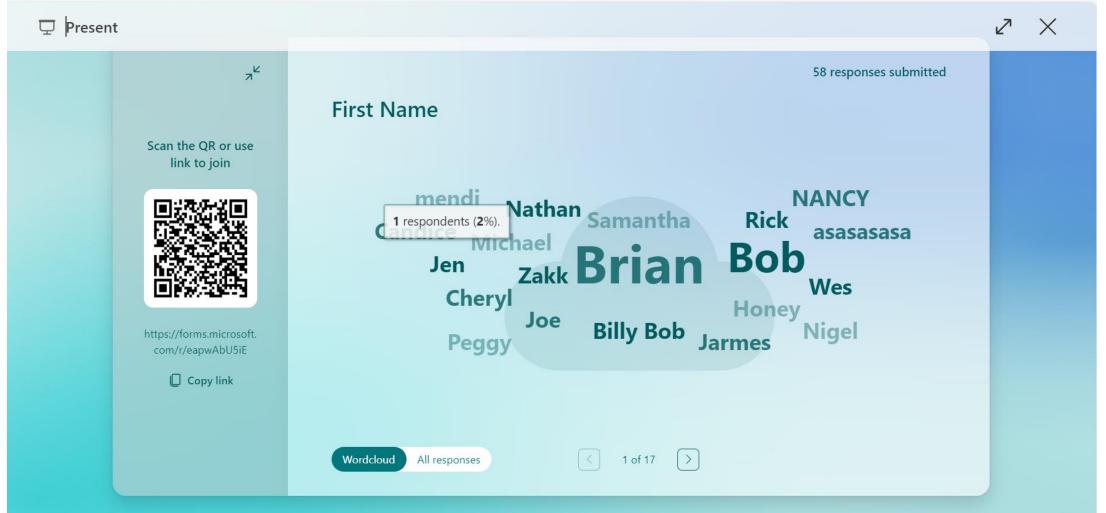


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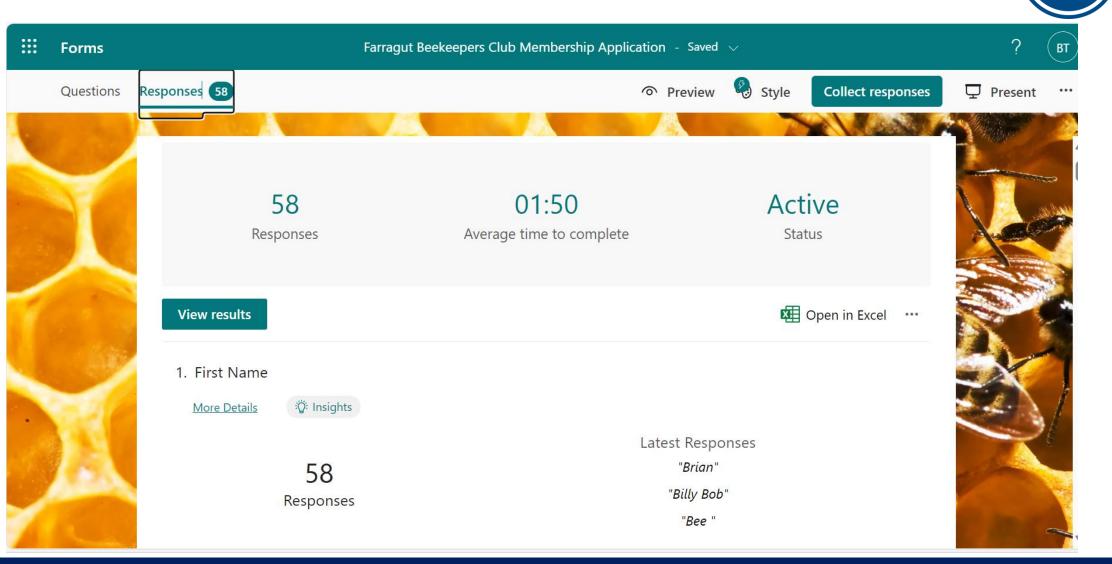














Google Forms

- Target user: Business employee (non-IT) who needs to create a form that can collect and export structured responses to the form
- **Typical user**: A parent collecting data for a volunteer position; any user in a Google Workspace deployment, up to IT users



Tankersley at (865) 684-4707 or e-mail him (brian@k2e.com)

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Google Forms

- Application Bundled With: Limited personal use of forms is free, but business use requires Google Workspace which starts at \$12/user/mo
- Easy to use/learn; limited to fairly simple forms
- Business use requires a paid Google Workspace account

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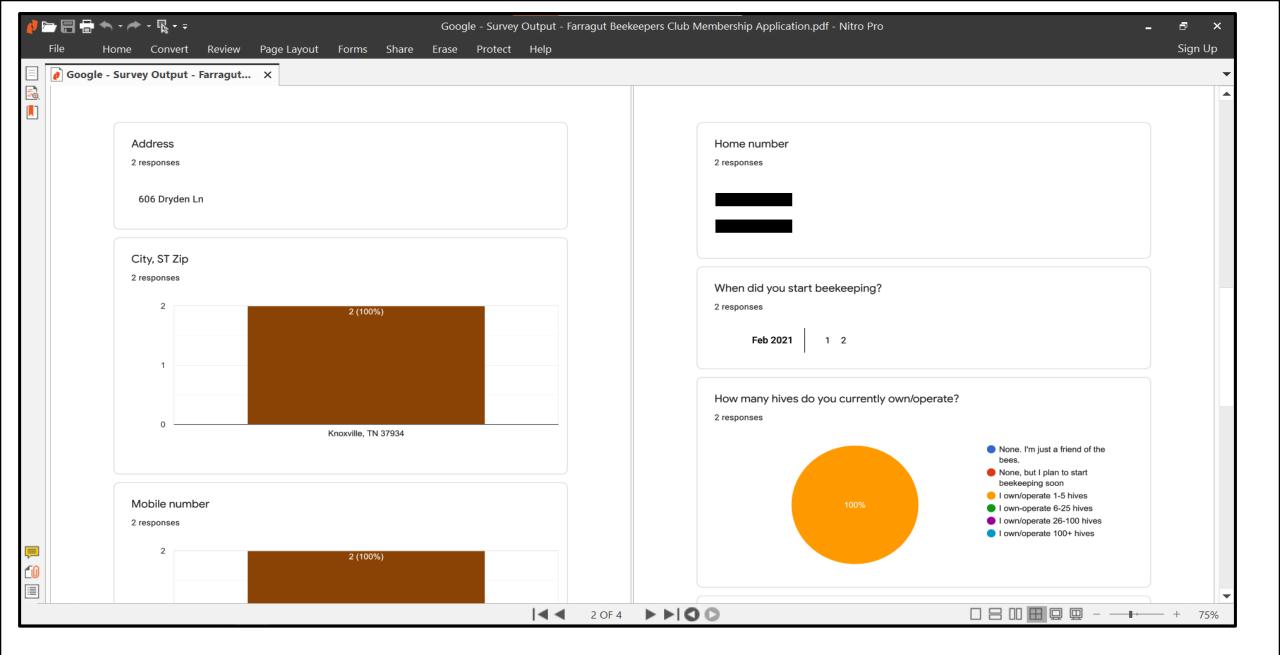
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Google Forms - Demonstrate

- Basic Interface
- Templates
- Creating a new form from scratch



Zoho Forms

- Target User: Zoho One Suite/Zoho CRM users, corporate IT admins, those using Zoho line of business apps internally
- **Typical User:** Some end users, but most users will be corporate power-users, process architects, or IT professionals
- Application Bundled With: Zoho One, some Zoho plans, also available as a standalone solution

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Zoho Forms

- More complex than all previous tools, but also easier to pick up than subsequent tools (Power Apps/SurveyMonkey)
- Very powerful when combined/integrated with Zoho One, Zoho CRM, Zoho Apps, Zoho Orchestly, or Zoho's Finance Suite
- Estimates the time needed to complete the form

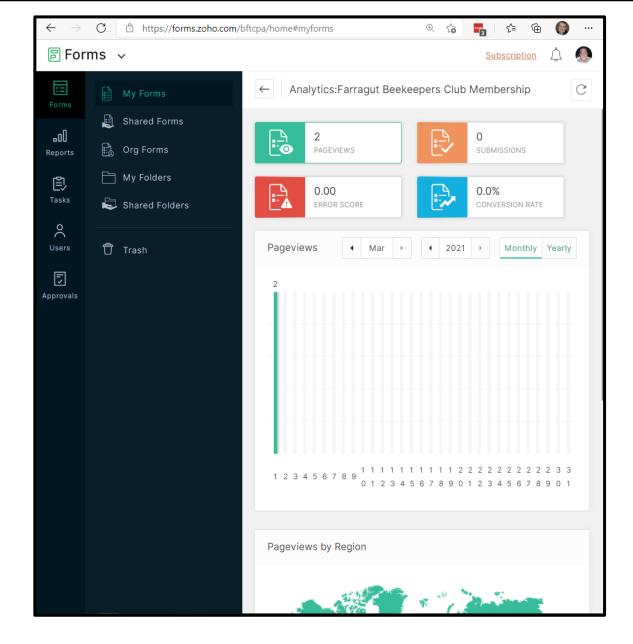
Farragut Beekeepers Club Membership

The Farragut Beekeepers Association seeks to educate its members and the general public about the importance of bees to the ecosystem. Membership is open to anyone interested in beekeeping and the impact of bees on the environment. Please complete the form below and Venmo your dues to (865) 555-1212. If you have any questions, please call Brian Tankersley at (865) 684-4707 or e-mail him (brian@k2e.com)

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First	Last	
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Zoho Forms

- Product has built-in analytics on day, time, and geography of respondents (shown) as well as good reporting on results
- Zoho's CRM tool and can do automated follow up e-mails through Zoho Campaigns, which can give you analytics on message opens as well as clicks
- Includes advanced features like question reordering, A/B testing, and useful tools like a built-in approval engine for workflows







Microsoft PowerApps, SurveyMonkey, and Zoho Survey SURVEY TOOLS



Survey Tools



- These tools are generally designed to meet the most sophisticated requirements like cross-tabulated reports and branching/looping logic
- The platforms can handle the largest surveys with thousands of respondents, but require a separate subscription
- These tools are generally more difficult to use and are only appropriate for the most technical/sophisticated users – they are too complex to use without training, and the extra cost of the tools will limit their deployment outside of specialist users
- Tools include:
 - Microsoft PowerApps
 - Zoho Survey
 - SurveyMonkey



Microsoft PowerApps

- Target User: Corporate workers or business partners who need to enter information into devices and feed it into its enterprise applications like CRM, accounting, HR, and line of business tools
- **Typical User:** Most users will be corporate power-users, process architects, or IT professionals

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Microsoft PowerApps

- Application Bundled With: Part of Microsoft's Power Platform – Power BI, Power Automate, and Power Apps, will require an additional subscription for most users
- Tool used primarily for data integration in internal use only workflows
- Does much better at integrating with existing data sets and uses existing ADFS login for users
- This is a mid-market to enterprise level tool which will provide sophisticated security, flexibility, governance, and integration

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SurveyMonkey

- Target User: Sophisticated big company HR/marketing/ researchers who need to create sophisticated surveys with branching logic, cloud integrations, and sophisticated automated summary reporting
- **Typical User**: Marketing, customer experience, or HR professional who sends out dozens, if not hundreds, of surveys which receive thousands of responses every year

С https://www.surveymonkey.com/create/?ut_source=dashboard_progress_create Ð to ••• Close Farragut Beekeepers Club Membership... Modified: 3/1/2021 **Farragut Beekeepers Club Membership** * Add to favorites Application You can always edit the survey later. Farragut Beekeepers Club Membership Ouestions Application 5 The Farragut Beekeepers Association seeks to educate its Responses members and the general public about the importance of bees to the ecosystem. Membership is open to anyone $\left(\right)$ interested in beekeeping and the impact of bees on the Time to complete environment. Please complete the form below and Venmo your dues to (865) 555-1212. If you have any questions, 3 minutes please call Brian Tankersley at (865) 684-4707 or e-mail him (brian@k2e.com) **Completion** rate 59% 1. Contact Information Name Company Address Address 2 City/Town State/Provin -- select state -се COPY THIS SURVEY -> 口 Device view



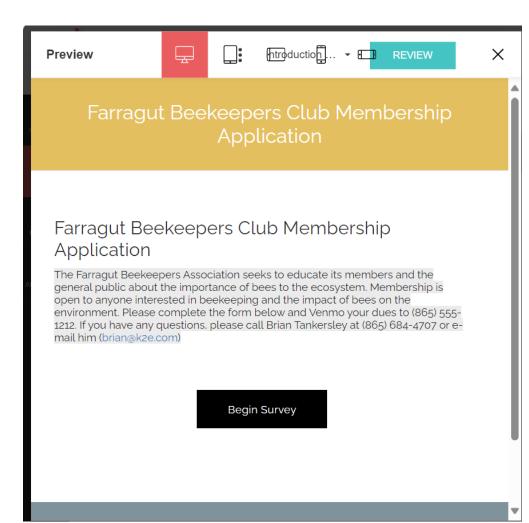
SurveyMonkey

- Application Bundled With: Nothing – separate purchase
- Some functionality is available for free, but most users will pay \$25/mo or more per user for those who design, administer, and analyze survey data
- This is one of the better tools on the market for sophisticated, high-volume surveys and research, and the reporting is best in class for this level of product

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- Target User: Sophisticated big company HR/marketing/ researchers who need to create sophisticated surveys with branching logic, cloud integrations, and sophisticated automated summary reporting
- **Typical User**: Marketing, customer experience, or HR professional who sends out dozens if not hundreds of surveys which receive thousands of responses every year





- Application Bundled With: Zoho One includes 50+ integrated enterprise class business applications for a low monthly cost
- Free version will allow surveys with up to 10 questions and up to 100 responses with 250+ templates
- Paid plans start at \$25/month
- This is one of the better tools on the market for sophisticated, high-volume surveys and research, and the integration into the other Zoho solutions makes this ideal for use by those who need a tightly integrated solution with automated responses

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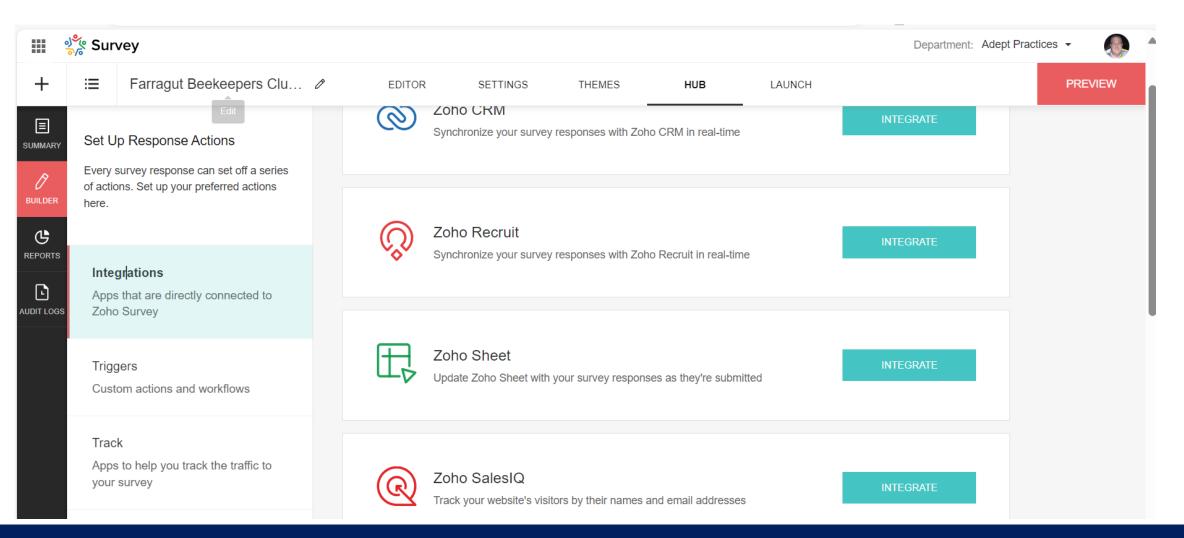




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E SUMMARY	Every survey response can set off a series of actions. Set up your preferred actions here.						-					
BUILDER	Integrations Apps that are directly connected to Zoho Survey		Triggers → Active Trigger Emails Trigger Emails The emails below are sent when a response is submitted									
AUDIT LOGS	Triggers Custom actions and workflows		Trigge Subje	er email to: \${Q-l ect: Than	_} k you for your int	erest						
	Track Apps to help you track the traffic to your survey											

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FEATURE ANALYSIS AND SUMMARY



Product Comparison



		Forms	Office Suites			Survey Tools			
Feature	Adobe PDF Forms	Adobe Web Forms	Google Forms	Microsoft Forms	Zoho Forms	Microsoft PowerApps	SurveyMonkey	Zoho Survey	Notes
General									
Ease of form creation	3	3	1	1	1	4	3	4	1-5, with 1=simplest, 5=technically difficult
Ease of collecting structured data	4	2	1	1	1	2	2	1	1-5, with 1=easy, 5=very difficult
Is a separate subscription to the survey/data collection tool required?	Y	Y	Y	Y	N	Ν	N	Y	
Will most new users require training?	Y	Y	Ν	Ν	Y	Y	Y	Y	
Are templated questionnaires for common uses provided by publisher?	N	N	Y	Ν	Y	Some	Y	Y	
How easily can end users customize fields in the tool?	1	2	3	3	4	5	5	5	1-5 with 1=no customization, 5=very customizable
How many templates are available?	N/A	N/A	~20	0	~50	~35	~180	>250	* - Acrobat can recognize and create electronic forms from Word, PDF documents
Can templates be shared internally with other users?	Y	Y	Y	Y	Y	Y	Y	Y	



Product Comparison



	PDF Forms		Office Suites			Survey Tools			
Feature	Adobe PDF Forms	Adobe W eb Forms	Google Forms	Microsoft Forms	Zoho Forms	Microsoft PowerApps	SurveyMonkey	Zoho Survey	Notes
Data export format availability									
Adobe PDF	Y	Y	N	N	Ν	N	Y	Y	
Adobe FDF	Y	N	N	N	N	N	N	N	
Comma Delimited (CSV)	Y	Y	Y	Y	Y	Y	Y	N	
Microsoft Excel (XLSX)	N	Y	Y	Y	Y	Y	Y	Y	
Microsoft Access (MDBX)	N	N	N	N	N	N	N	N	
Microsoft Power Platform	N	Ν	N	N	Ν	Y	Ν	N	
Zoho Analytics	N	Ν	N	N	Y	Ν	N	Y	
Advanced Features									
Automated compilation of results	N	Y	Y	Y	Y	Y	Y	Y	
Automated summarization of results (reports, tables, charts, histograms, etc.)	N	N	N	N	Y (w/ Zoho Analytic s)	Y (w/ Power BI)	Y	Y	
Multiple collector addresses/parameters to track source of a response	N	N	N	N	Y	N	Y	Y	



Product Comparison

	PDF Forms		Office Suites			Survey Tools			
Feature	Adobe PDF Forms	Adobe Web Forms	Google Forms	Microsoft Forms	Zoho Forms	Microsoft PowerApps	SurveyMonkey	Zoho Survey	Notes
Advanced Features									
Automated compilation of results	N	Y	Y	Y	Y	Y	Y	Y	
Automated summarization of results (reports, tables, charts, histograms, etc.)	N	N	N	N	Y (w/ Zoho Analytic s)	Y (w/ Power BI)	Y	Y	
Multiple collector addresses/parameters to track source of a response	N	N	N	N	Y	N	Y	Y	
Use Cases									
Make fillable printable forms from paper forms	Y	Y	N	N	N	N	N	N	Really important to get fillable right here.
Personal and departmental forms	N	Y	Y	Y	Ν	Ν	N	N	
Company-wide, external-facing forms	N	Y	Y	Y	Y	Y	Y	Y	
Company-wide, internally facing forms	N	Y	Y	Y	Y	Y	Y	Y	
Sales and marketing/CRM workflows	N	N	Y	Y	Y	Y	Y	Y	MS tool is likely D365 for Sales/Operations
Sophisticated surveys, polling, and high- volume customer-facing forms	N	N	Y	N	Y	N	Y	Y	MS tool is likely D365 for Sales/Operations

K2 Enterprises



THANKS FOR ATTENDING

