smarter drafter PRO
by tensis

Testing, Publishing and Releasing Forms

Module 6 - Testing, Publishing and Releasing Forms

Version 1.0

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1. Finalising a Form

1.1 Testing a Form

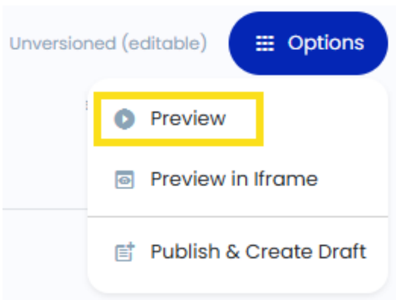
The form should be tested to ensure that the functionality and fields behave as expected. This is an opportunity to see the form in action to determine:

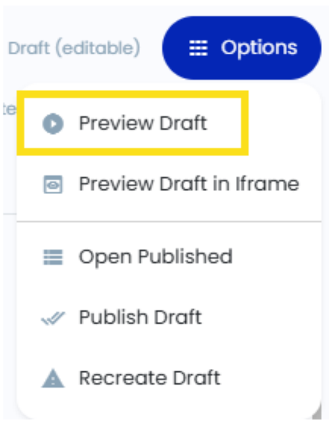
- Have the fields been separated into sections correctly?
- Have the correct field types been used?
- Have the sections been split across pages correctly?
- Has logic been applied to direct the form correctly?
- Are the sections/fields in practical order?
- Have you designed the form to provide the best form-filler experience?

The above is a list of the basic elements to check. The testing process is far more extensive when you are using the advanced features of Smarter Drafter. See the comprehensive checklist and tips list at the end of this guide.

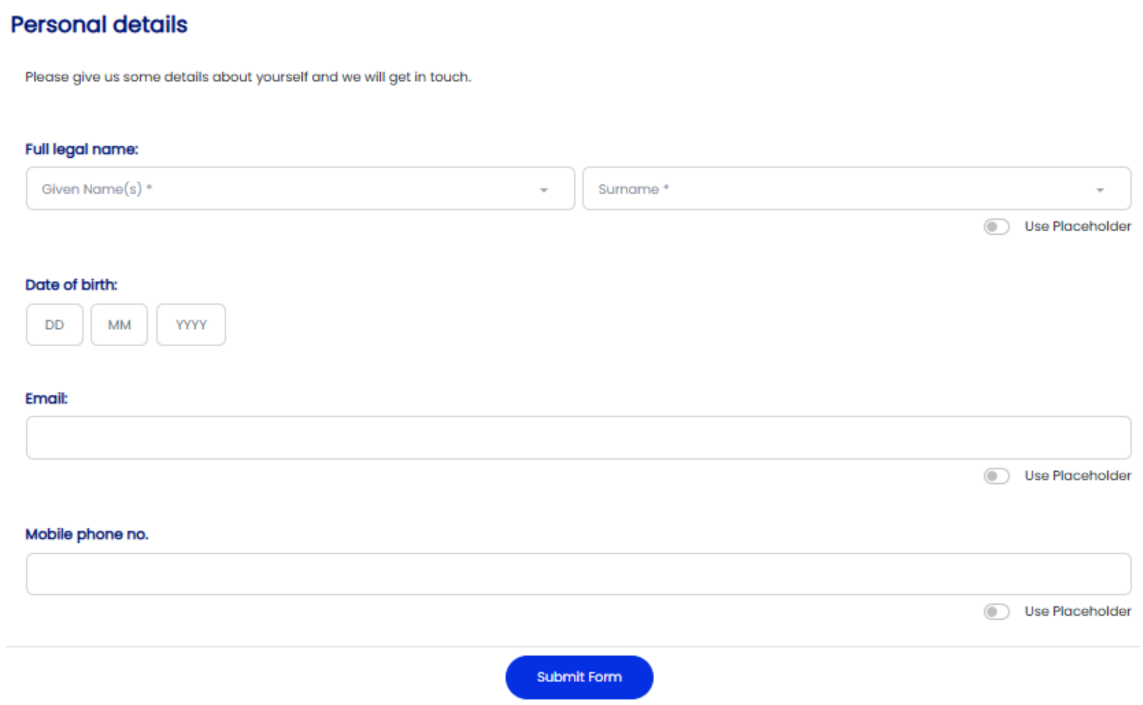
To test the form, you need to run a preview which will take you through the submission process without having to generate a real document into your PMS/DMS.

To run a preview, click on the **waffle Options** button. Depending on the status of the form, the preview option will be either:





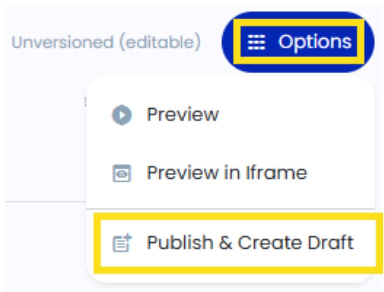
The questionnaire will open as a filler, allowing you to answer the questions and review the build of the form. See the testing guidelines and tips at the end of this guide for recommended testing procedures.



1.2 Publishing a Form

A form will remain in the initial 'unversioned' status until it is 'published'. By publishing a form you lock down the version of the form and allow for a draft version to be worked on separately.

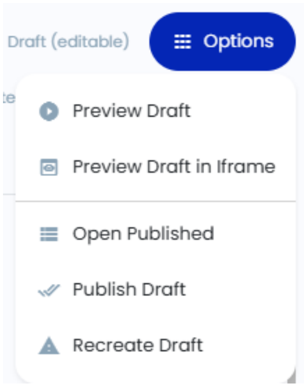
To publish a form, click on the **waffle Options** button and select **Publish and create draft**.



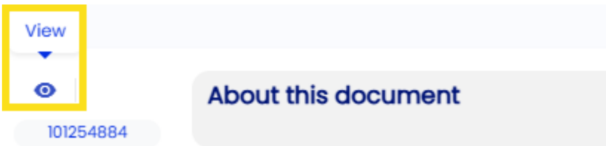
The current version will be published and the draft version will open. You can close the draft version if no further work is required.

The published version will be what form fillers use.

Once a form has been published, the waffle Options menu will change to include options for the published and draft versions.

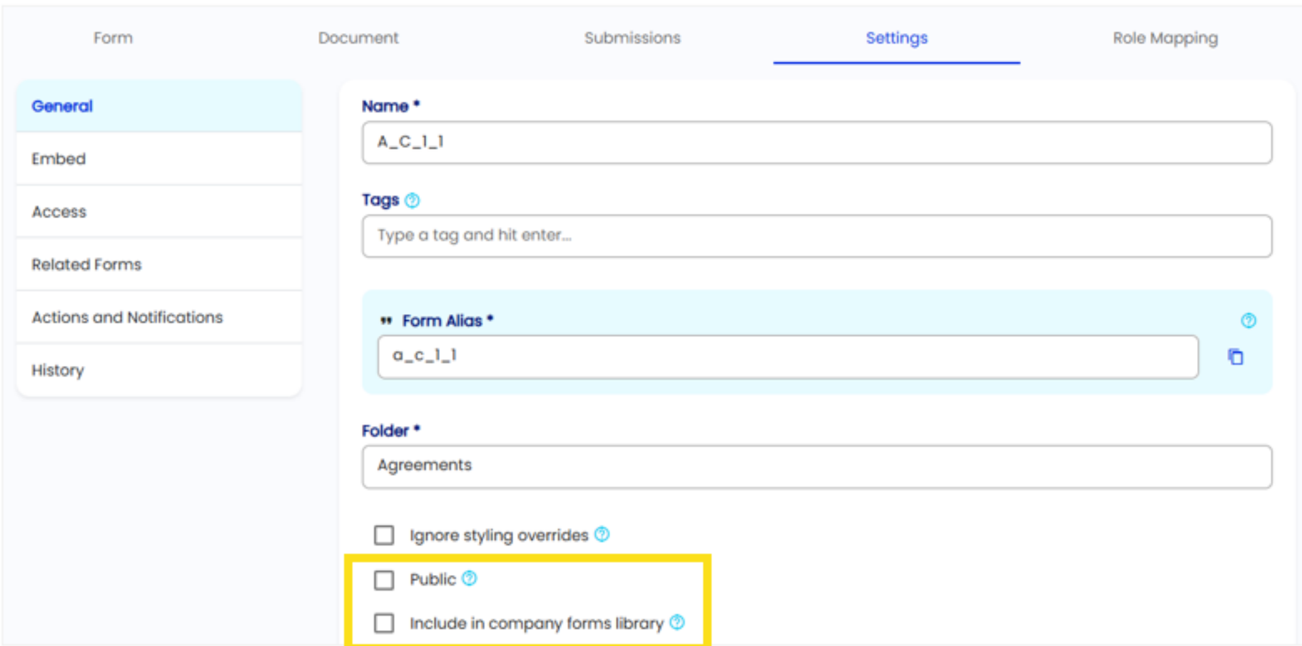


If you open the published version, you will be able to see the form but instead of the edit pencil button appearing in the section and field banners, you will see an eye icon. You will be able to open the section and fields, but will only have view access.



1.3 Releasing a Form

In the Form Builder, there are checkboxes in the Settings Tab to set a document to **Public** and **Include in the company forms library**. Users will only be able to see a document in the forms library when these boxes have been ticked and the settings have been saved. If you need to hide a document from users, untick these boxes.



2. Testing Guidelines

2.1 Form Checklist

- ☐ Has the form been created in the appropriate folder?
- ☐ Has the form been named according to your organisation's naming conventions?
- ☐ Have the fields been separated into sections correctly?
- ☐ Have the sections been split across pages correctly?
- ☐ Do all sections have an alias?
- ☐ Have contact and user mapping been applied?
- ☐ Do repeating sections have the correct settings, limitations and calculations?
- ☐ Are the sections/fields in practical order?
- ☐ Have the correct field types been used?
- ☐ Have the questions been worded appropriately?
- ☐ Are the optional fields correctly set?
- ☐ Are the mandatory fields correctly set?
- ☐ Are any fields displayed that could be hidden – or vice versa?
- ☐ Are any guidance fields required?
- ☐ Has logic been applied to direct the form sections and fields correctly?
- ☐ Have roles been applied to the appropriate fields?
- ☐ Have all required conditional rules been created?
- ☐ Are any unique replacement rules required to be created or universal rules to be removed?
- ☐ Have the correct templates been attached?
- ☐ Have all required settings been completed?
- ☐ Have you designed the form to provide the best form filler experience?

We encourage your organisation to develop internal best practice guidelines to ensure consistency across the automation team.

2.2 Tips

When developing a form, run a preview in unison so that you can test the behaviour of the form as you are working on it. As you fill in the preview, click 'save and resume' to save the answers entered. Then, as you make changes in the form, return to the preview and press F5 to bring in the form changes and continue testing.

- From the Word add-in, run testing to check the structure of your questionnaire, use of fields and performance of conditional rules.
- Run various submissions to try to capture as many variations of the document as possible. Use this opportunity to check the alternative results of calculations.
- Run a submission with all answers as Yes/Positive/Inclusive to check the maximum result.
- Run a submission with all answers as No/Negative/Exclusive to check the minimal result.
- Run a submission using placeholders wherever available to check the resulting highlights. Ensure you check the result of rules that relied on fields where placeholders were used.
- Run a submission with all optional fields left blank.
- Run a submission as a form filler and check the data sharing process.
- Run a submission as a form filler and check the full general front-end user experience.
- Create 2 groups of contacts that hold set positions during testing to assist in identifying where data comes into the wrong place. This helps to quickly review results by anticipating what you expect to see:

  John Doe - always the APPLICANT / PLAINTIFF / INSTIGATOR / PARTY 1
  Jane Doe - always the RESPONDENT / DEFENDANT/ RESPONDER / PARTY 2
  Jake Doe - always the THIRD PARTY / GUARANTOR / WITNESS / PARTY 3 / CHILD 1
  Jill Doe - always the OTHER ROLE / PARTY 4 / CHILD 2
  James Doe - always the OTHER ROLE 2 / PARTY 5 / CHILD 3 etc
  Doe Enterprises Pty Ltd – COMPANY 1
  Doe Logistics Pty Ltd – COMPANY 2

  Do the same for a second group (eg the Smith family).

  Create contacts for other roles, eg:
  Sally Solicitor
  Barry Barrister
  Test Law Firm etc

  When naming test submissions, include what was being tested, eg:
  Letter to client RE appointment - LDG Test 1 - all YES with digital signature
  Letter to client RE appointment - LDG Test 2 - all NO without signature
  Letter to client RE appointment - LDG Test 3 – single repeat
  Letter to client RE appointment - LDG Test 4 – 2 repeats
  Letter to client RE appointment - LDG Test 5 – 3 repeats
  Letter to client RE appointment - LDG Test 6 - 3rd option for select fields
  Letter to client RE appointment - LDG Test 7 - 4th option for select fields etc

Note: You can use multiple combinations in the one test to reduce the number of submissions to run.