



Form Set-Up

Module 8 – Data Sharing

Version 1.0

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1. Data Sharing

1.1 What is Data Sharing?

Data sharing is a tool to store the data entered during the document generation process so that it can be reused in future documents. When a builder develops a form, they assign section and field aliases, and role labels to create a data path so that the information can be located and reused. See the **Section and Field Aliases** guide, and the **Roles** guide.

1.2 How Does Data Sharing Work?

When a form filler generates a document, the answers provided in the questionnaire are held against the relevant aliases and roles assigned in the form by the builder. The answers are retained against the matter so that they can automatically populate into other documents that require the same information.

2. Set-Up a Form for Data Sharing

2.1 Tips

- Consider fields that are too general or random to be effective in data sharing, e.g. an alias of 'amount' doesn't define the type of amount being asked for and so that alias will likely never be reused as you can't determine what data it will populate. Instead, use descriptive labels such as `amount_deposit`, `amount_broker_net`, `amount_broker_gst`, `amount_broker_gross` – in a property transaction, these descriptions will be clear. Applying an alias is purely for data sharing purposes and is not mandatory.
- When assigning roles, like fields, it is not mandatory. By grouping fields by a role it helps to label the fields and categorise them, which in turn helps to identify how the field alias is being used. For fields that are general/random, assigning a role will have no benefit and could potentially cause confusion.
- Form fillers will choose where to share data from (contacts or previous submissions). On the first submission, contacts will be the only useful option but once documents have been generated, then previous submissions will be more beneficial. Some authors like to create a main source document to use as a matter record. As data becomes available, it is first entered here which keeps the matter record developing, and the matter record becomes the key document to reference in subsequent submissions. Consider whether any departments would benefit from adopting this process.

2.2 Check List

To ensure that a form has been set-up correctly for data sharing, check:

- All sections have an alias
- All relevant fields have an alias – consistent with the organisation’s naming conventions.
- All relevant fields have a role assigned – consistent with the organisation’s naming conventions.
- Any general/random fields where you specifically don’t want to retain the answers – don’t have an alias.
- Any general/random fields that don’t align with a specific category of data – don’t have a role.
- Contact/user mapping has been applied.
- All other form and template set-up requirements have been followed.