



## FORMS: Forms Online Reporting Management System for Divisions and Local Sections

### Background

**Why Do We Submit Annual Reports?** The Constitution and Bylaws of the American Chemical Society require all divisions and local sections to submit an annual report to the Society by February 15<sup>th</sup> of each year. The Committees on Divisional Activities and Local Section Activities review the reports to learn of the health and vitality of these groups and to identify best practices. Each group that submits an annual report receives feedback from their respective committee. In addition, divisions and sections receive their annual allotment after the annual report is submitted.

**Why replace SOLAR?** In 2008, SOLAR began experiencing system outages and became unstable. Launched in 2000, the software needed extensive code rewriting in order for it to be compatible with current Internet browsers and to prevent system outages. Based on the reporting requirements set forth by LSAC and DAC, it was found to be more efficient to develop a new system that could be used to collect annual reports and other forms from ACS divisions and sections.

**Why was FORMS launched before it was completely developed?** One of the key elements to a successful IT project is to obtain complete requirements so that code can be written and tested. The FORMS project team was unable to obtain the complete requirements for this project until August 2010, which greatly compressed the time to develop, test and correct system functionality. Staff continues to develop and deploy enhancements for FORMS to increase usability and functionality. We will be testing these enhancements with larger numbers of volunteer users as the year moves forward, and we will have a more solidly performing system in place well before year-end.

### What were the results from the FORMS survey I was sent?

Total Invitees	1,528
Total Responses/Completed	489/462

Local Section Officers: 79%; Division Officers: 14%; both Section and Division officer: 3%; Non-officers: 4%

- Satisfaction with FORMS: 60% of the respondents were neutral to very satisfied with FORMS and 40% were somewhat dissatisfied to very dissatisfied.
- 54% of respondents were satisfied or very satisfied with staff support. 11% were somewhat or very dissatisfied with staff support. 34% were neutral on the matter of staff support.

### Functionality Receiving the Most Feedback in the Survey/Implemented or Planned Resolutions

#### SAVING

**Summary of feedback:** Overall, users found it difficult to save. FORMS would not allow a tab to be saved unless all tab details were completed. The system did not provide clear prompts that the data was not saved. Users also do not like having to save the tabs in order to activate the 'submit for approval' button.

**Resolution:** In mid-February, staff corrected FORMS to permit users to save partially entered data on a page (tab). A user is required to save all tabs within the system because the completion of the tabs triggers the 'submit for approval' button. This method was used because of the mandatory questions in the system and to prevent reports from being submitted before they are complete. Overall, saving in FORMS is now stable. Additional information about saving and completing a tab will be included in the User Guide.

## **APPROVAL PROCESS**

**Summary of feedback:** The approval functionality was not available by February 15th. As a result, division chairs and local section councilors had to submit their approval via email.

**Resolution:** The approval functionality is now in place. The email approvals have been entered into FORMS. We will need to provide additional training and documentation about this process for the next cycle.

## **TEXT FIELD LIMITATIONS**

**Summary of feedback:** The character limitations were preventing users from submitting complete narratives. FORMS also did not accept special characters.

**Resolution:** The character length increases were implemented February 12<sup>th</sup>. Special characters are now accepted. to the character limitations will be noted for each field in FORMS.

## **BROWSER COMPATIBILITY**

**Summary of feedback:** FORMS is not compatible with Safari, and a few users also found difficulty with some versions of Internet Explorer.

**Resolution:** The IT team is currently researching this issue. We need to identify the version of Safari where the problems are occurring. With newer versions of Internet Explorer, the user's security settings may be set at a level that is not compatible with FORMS. We will edit the User Guide to better address this matter.

## **IMPORT OF DATA, FILE UPLOAD and IRS COMPABILITY**

**Summary of feedback:** FORMS does not give divisions the option to import their Excel financial form. The IRS tax notations are not programmed into FORMS.

**Resolution:** In January, we made a 2010 Excel file available for divisions. If a division submitted an Excel file, staff keyed the data into FORMS. We will continue this practice. In addition, Excel documents can be uploaded as supporting material. We will also revisit the upload feature to ensure that commonly-used files (i.e., PDFs, Excel files, jpegs) can be uploaded into the system. The IRS notations are in the User Guide.

## **ADDING 2011 EVENTS**

**Summary of feedback:** Local sections and divisions want to enter 2011 events 'on the fly', rather than wait until year's end to enter all information.

**Resolution:** Functionality activated on Thursday, March 10, 2011. Sections and divisions may enter 2011 events now.

## **PRINTING**

**Summary of feedback:** FORMS users were unable to print their submissions when FORMS opened. Users have indicated that they need to be able to print their annual reports prior to submission to proofread/edit.

**Resolution:** The print feature was enabled on February 14th. Users can now print a PDF of their submissions. With the PDF functionality users may also post their report on a website and send it to others via email. The current print functionality allows a user to print a separate PDF of each part of the annual report. The PDFs can be combined using Adobe Professional. Instructions for combining the PDFs will be included in the User Guide.

## **SYSTEM TIMING OUT**

**Summary of feedback:** Users were being 'timed out' after a short timeout period.

**Resolution:** The timeout period has been adjusted. It is now set to time out after 30 minutes of inactivity.