PROCESS FLOW FOR PLACING WAREHOUSE FORMS ON ONLINE MANUAL

Analyze PDF of warehouse form to determine if it can be placed on Online Manual. To be considered for placement, the form must:
1. Be a Deposit Operations form.
2. Be determined by the FC Help Desk to be a critical form that requires a back-up version if the hardcopy is not in stock at the FC.

If yes → Determine if the PDF can be placed directly online or if an alternate electronic version must be created. Reasons the PDF may not be acceptable are:
1. Requires special paper stock that does not acceptably print on 8.5"x11".
2. Requires multiple copies, in which case an Excel form will be created with form-fields linked to twin fields on mirror version(s), so that the form needs to filled out only once to create multiple versions.

If yes → Create an HTML landing page that the form will be launched from in Online Manual. The page will have a summary describing the use of the form, as well as the following verbiage:

"**The primary version of this form is available from the forms warehouse.**
Open this version only if there are no hardcopy versions of the form and a customer requires immediate assistance.

Order a new supply of this form from the forms warehouse immediately."

If no → Do not place on Online Manual.

If no → Create new electronic version of the form using the original PDF as a model. Work with Purchasing to determine if the the electronic version will have the same form number/rev date as the warehouse version or a unique one.

Submit the landing page and form to business owners for review. Specify that this is the backup version for the hardcopy form.

If yes → Post the form/landing page on Online Manual.

Post the form/landing page on Online Manual. → As each warehouse form comes up for reorder, submit existing version to business owners for review. If it is determined that revisions are necessary, mirror revisions on Online Manual version and resubmit for review using same process.

If no → Redesign form/landing page based on business owners' notes. Resubmit for review.

If no → Do not place on Online Manual.