



# Mobile Data Collection Checklist

What does it take to succeed with the migration from paper or PC-based data collection to mobile data collection? Based on our experience with hundreds of customers making this move, we recommend getting prepared using the following mobile data collection checklist.

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## 1. Know Your Workflow

Think through all the ways mobile forms will integrate with business applications and work management tools. Start by mapping out each step of your workflow. Think about what forms you have and what information you need to collect for a particular task.

## 2. Build Mobile Forms that Align with Business Processes

Mobile devices offer an opportunity to align data collection more closely with business processes by rethinking the structure and content of data collection forms. Replicate manual steps in the form design and application integrations and you'll make the process more streamlined and efficient.

## 3. Consider What Additional Types of Data You Need to Collect

Mobile devices can add rich media to your form inputs. Forms can consume barcodes, signatures, images, geo-location and other non-text types of data. Collect any type of data all within the same form and send it to the correct destination.

## 4. Define Data Delivery Formats and Destinations

Where does your mobile form go when it's complete? Specify who gets the form as well as what should happen with the form data. Connect your systems to your mobile forms during the form building process and send data into them directly. Choose your data delivery format from text, JPEG, PDF, .DOC, XML, JSON and more.

## 5. Be Prepared for Offline Data Collection Scenarios

The world is more connected than ever before, but your mobile data collection devices will inevitably venture into places without cellular or Wifi service. Be sure to find a data collection solution that offers offline data collection functionality.

## 6. Define and Implement Security Controls Over Data Collection

Today's security threat environment is dangerous and intense. Define and implement security controls to protect data and remove points of vulnerability. Consider encrypting form data in transit or establishing strict authentication requirements for mobile devices that connect to your network.