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electronic publishing solutions for business
consulting – designing – training

***IS A GOOD
FORM ENOUGH -
Who thinks it's a good form?***

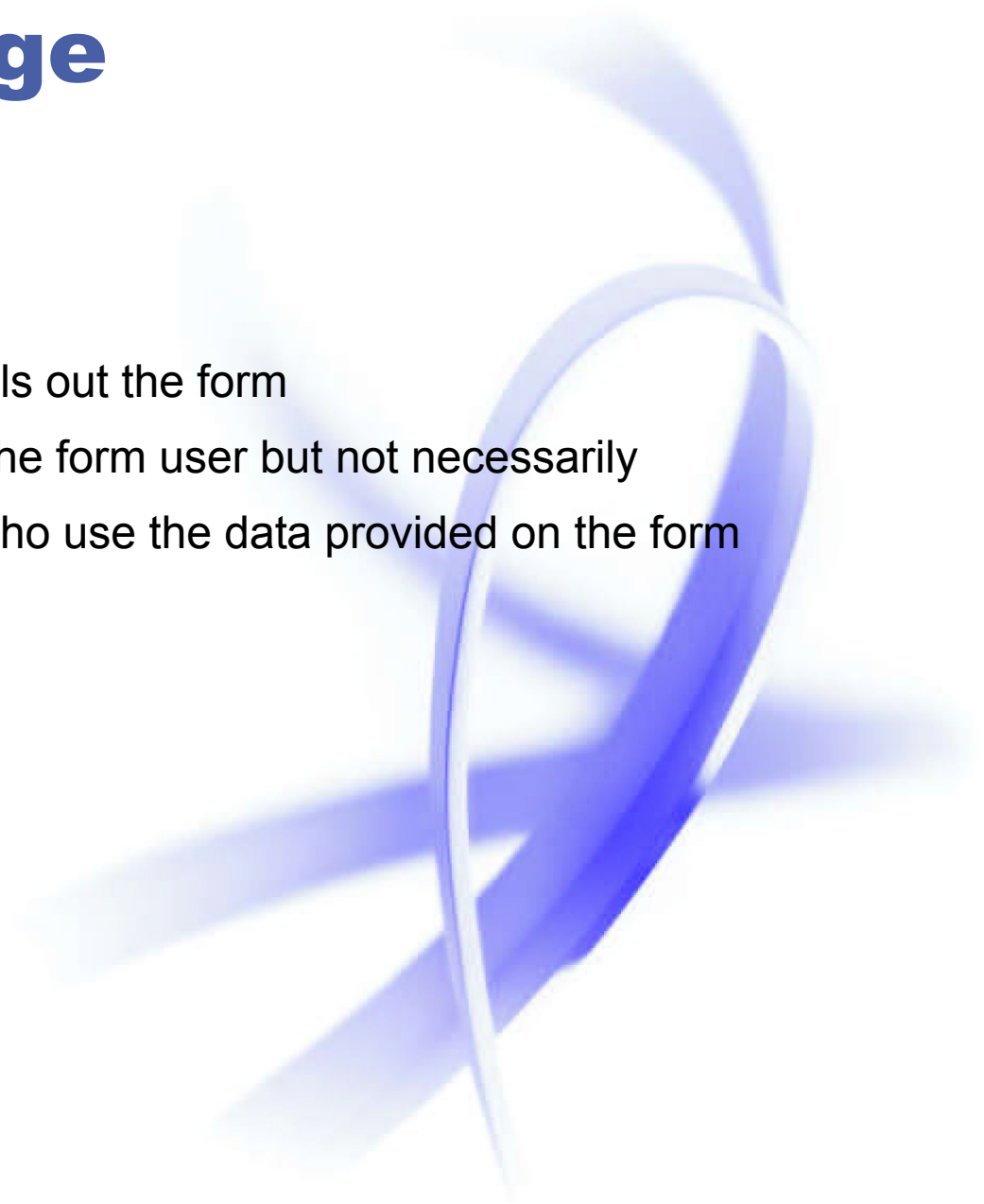


AUTHORIZED
Training Center

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Setting the Stage

- The players
 - Form Creator
 - Form User - The person who fills out the form
 - Information provider - May be the form user but not necessarily
 - Form Receiver(s) - The ones who use the data provided on the form
- The form
 - Intent/Need
 - Container
 - Data/Content
 - Look/Image
- The process



The Process

What is a process?

It is the gathering and the documenting of:

- A set of defined goals and objectives
- A methodology to meet the defined goals and objectives. This is sometimes called the workflow.
- A set of measurable metrics to determine accomplishment in meeting the defined goals and objectives
- A means to evaluate the process against the metrics and facilitate process improvement

The process should follow design concepts as encouraged by ISO, Six Sigma, and others.

The Process

A form or a group of forms comprise only one part of a workflow defined in a process!

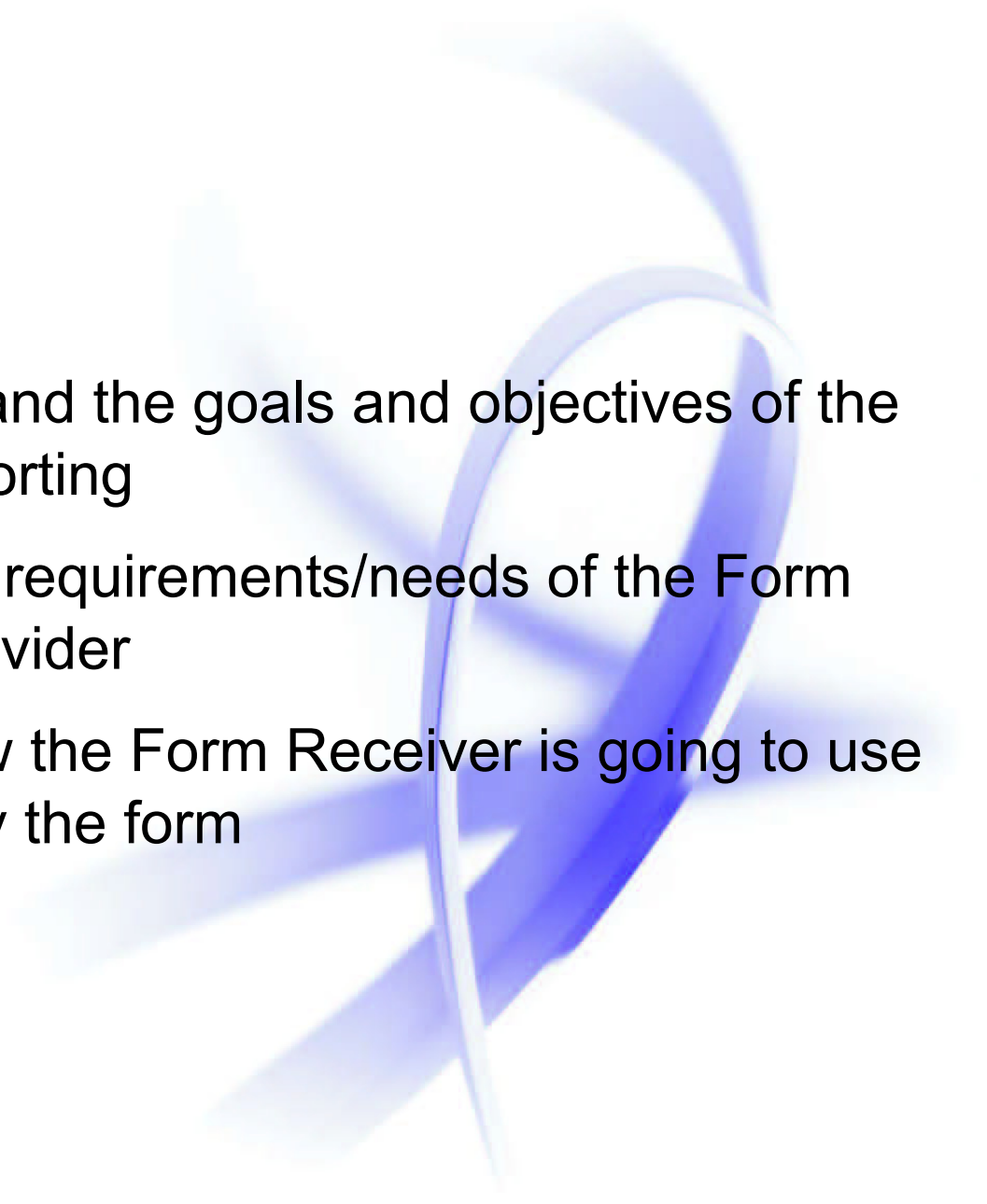
Form designers and users too often get wrapped around the axle with their form and forget the reasons for the existence of the form.

This is the cause of many poorly designed and executed forms!

Remember the story about draining the swamp.

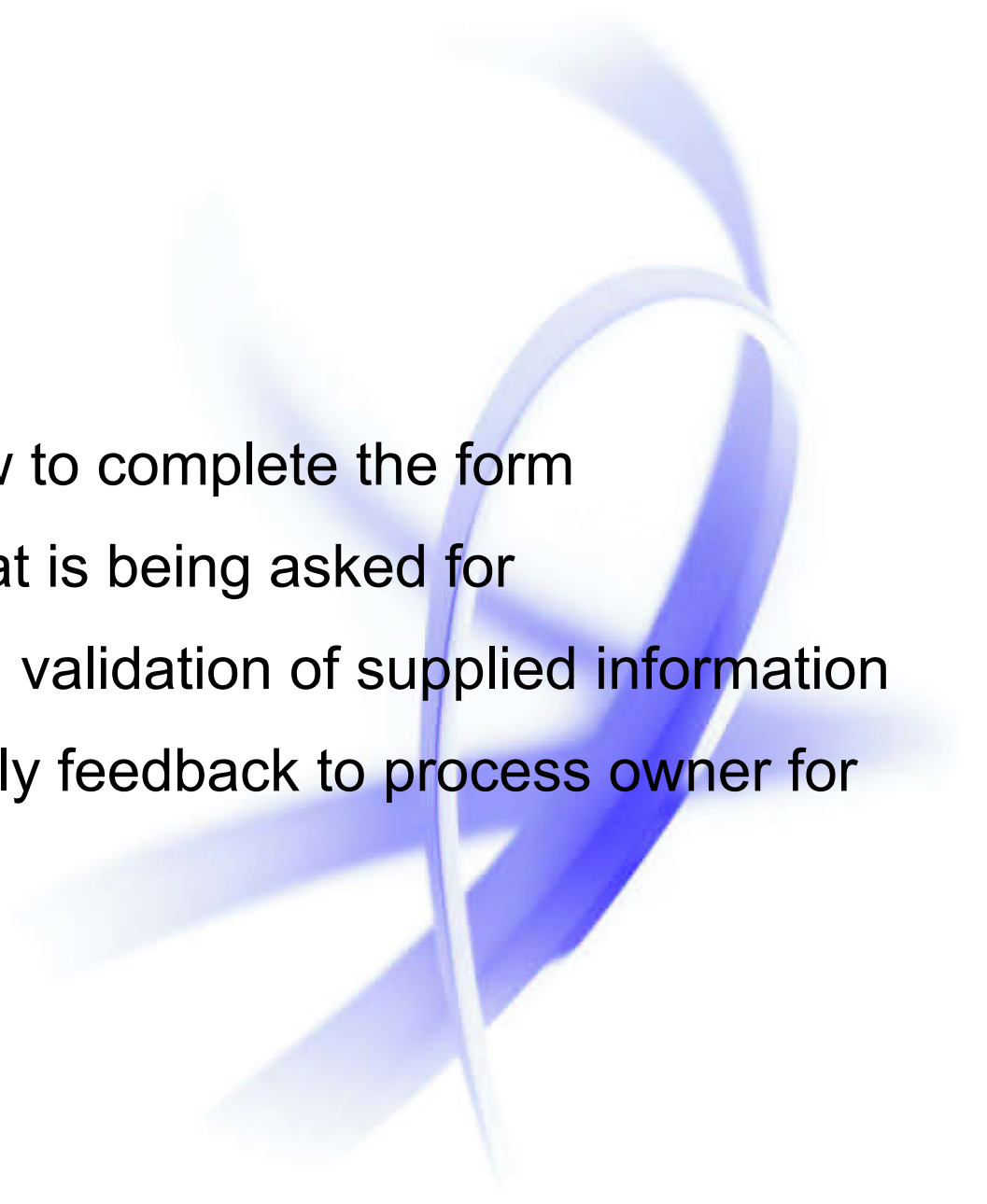
The Players

Form Creator

- Needs to clearly understand the goals and objectives of the process the form is supporting
 - Needs to understand the requirements/needs of the Form User and Information Provider
 - Needs to understand how the Form Receiver is going to use the information carried by the form
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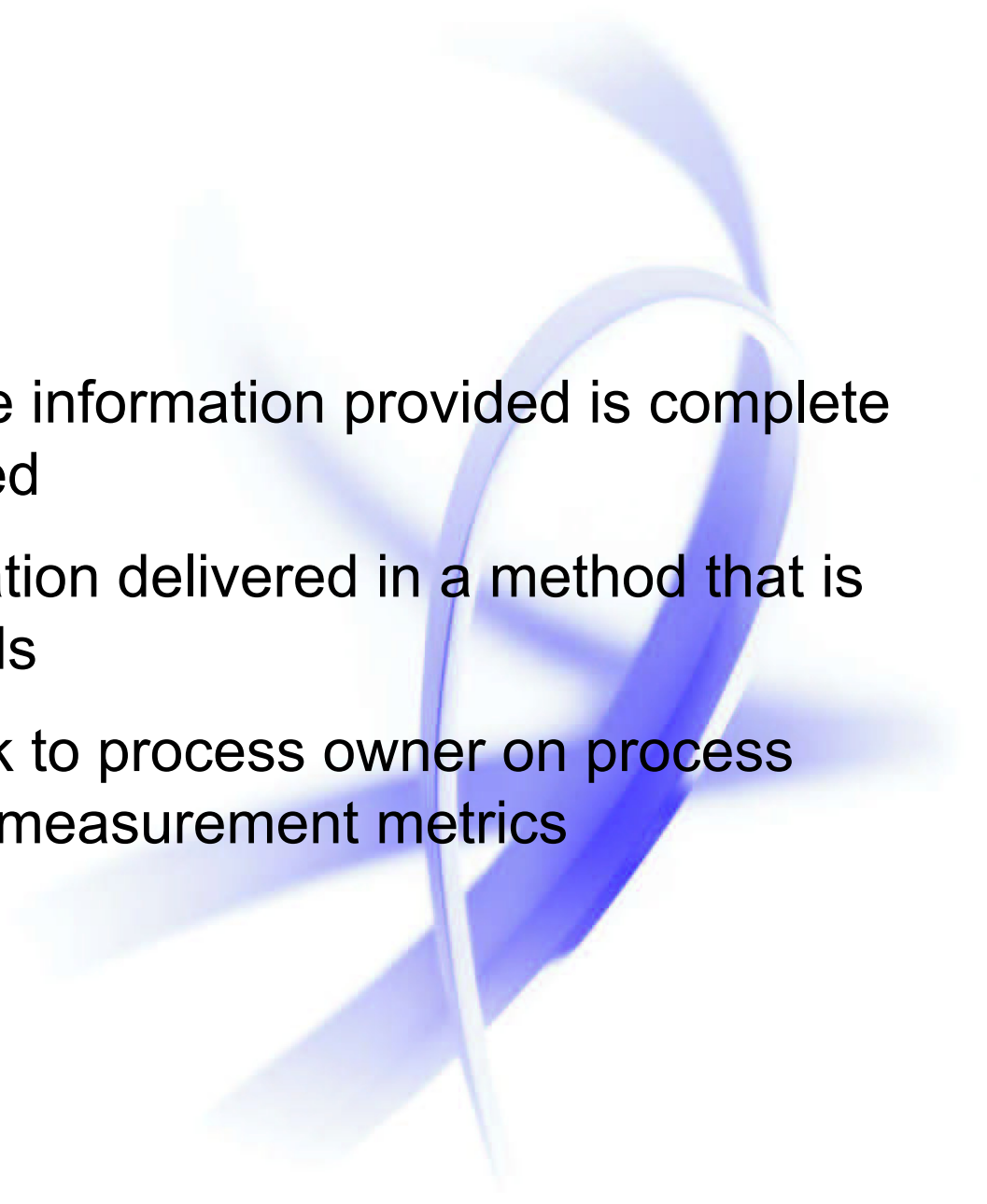
The Players

Form User Information Provider

- Needs to understand how to complete the form
 - Needs to understand what is being asked for
 - Needs reinforcement and validation of supplied information
 - Needs to be able to supply feedback to process owner for analysis
- 

The Players

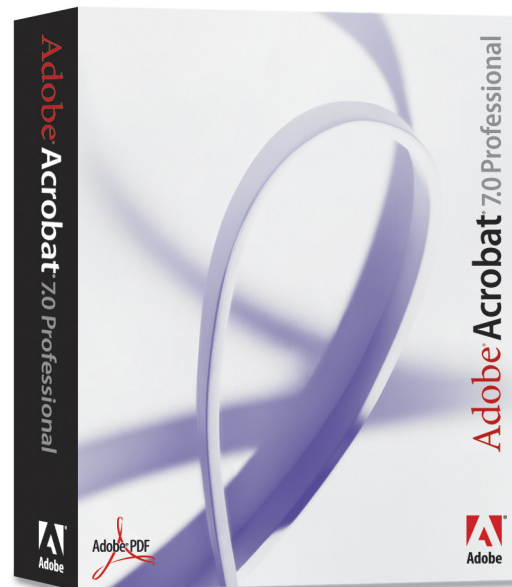
Form Receiver(s)

- Needs assurance that the information provided is complete and formatted as expected
 - Need to have the information delivered in a method that is consistent with their needs
 - Need to provide feedback to process owner on process performance against the measurement metrics
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The Form

Four components to any form

- Intent/Need
- Container
- Data/Content/Information
- Look/Image



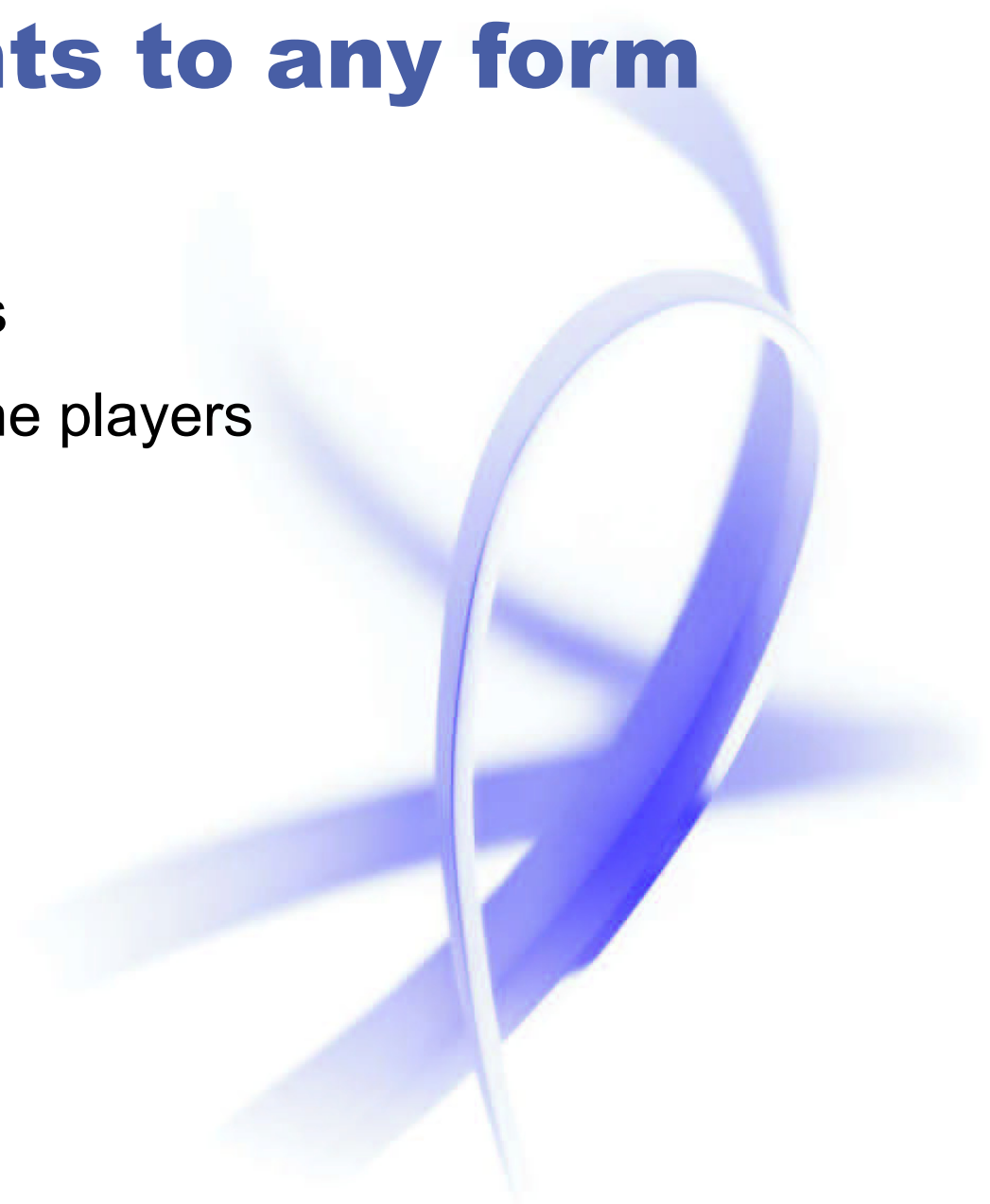
Four components to any form

Intent/Need

- Is it supporting a process
- Is the intent clear to all the players

Container

- Delivery vehicle
 - HTML
 - PDF
- Delivery method
 - Email
 - Internet
 - CD-ROM



Four components to any form

Data/Content/Information

- Is it supporting a process
- Is the intent clear to all the players
- Is the data gathering clear and concise

Look/Image

- Is there a Logical flow
- Is your organization reflected in a positive manner
- Is the content dynamically displayed

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The Process of Collecting Information

Abstract blue and purple swirling lines in the background.

The Process of collecting information

THINGS WE KNOW — Paper-based form processes are outdated and inefficient — But they seem to be here to stay!

- Filling out, circulating and processing forms is cumbersome and time consuming
- Significant costs for copying, handling and storing paper
- They go out of date
- Poor use of skilled workers - takes valuable time away from more productive tasks
- Errors are common and unavoidable
- It's expensive!

The Process of collecting information

SOME QUESTIONS — Many companies are moving to electronic distribution of manuals and other information... Why not the same with forms? Are there challenges or it is the lack of good information?

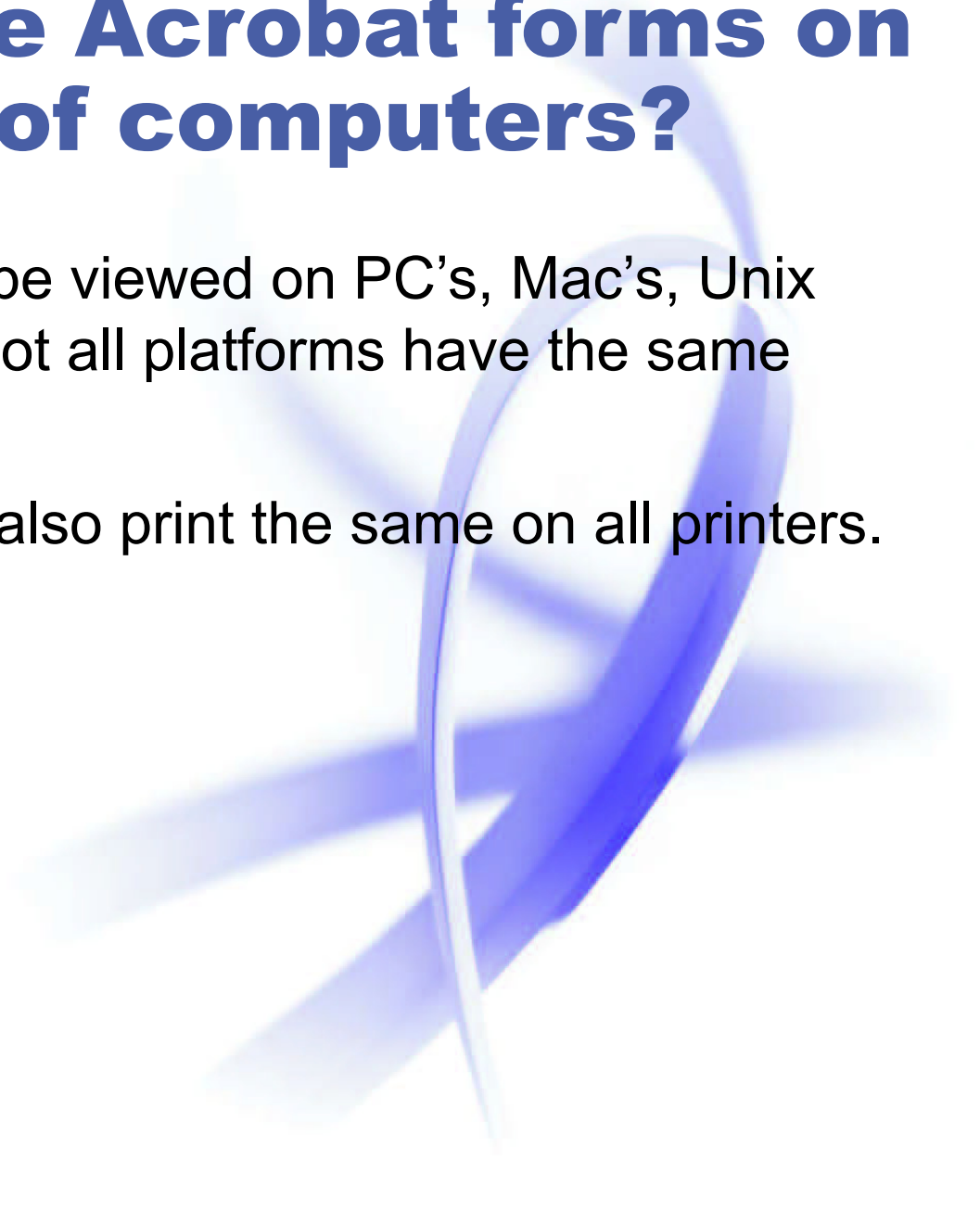
- Form looks - can we use our favorite forms online?
- Can we view the forms on different types of computers?
- How do we sign the online form?
- How do we know who really signed the form?
- Are they secure? Can they be changed after they are signed?
- Can the information be shared from the online forms?

Form looks - can we use our favorite forms online?

Yes, but you probably should not want to.

- You can scan or convert a form that was electronically created into a pdf file. Data fields can then be added to the eForm to allow online completion of the form.
- Online eForms can allow dynamic display of questions and fields based upon prior answers. This can allow the creation of much more compact and less confusing forms.
- You may want to design the eForm to fit the screen instead of a piece of paper.
- Can be very difficult to make the eForm accessible.

Can we view the Acrobat forms on different types of computers?

- Acrobat pdf eForms can be viewed on PC's, Mac's, Unix boxes and even PDAs. Not all platforms have the same features however.
 - The Acrobat eForms will also print the same on all printers.
- 
- An abstract graphic consisting of several overlapping, curved, translucent blue and white lines that sweep across the lower right portion of the slide, creating a sense of motion and depth.

How do we sign the online form?

- LiveCycle Reader Extensions enables users of the free Acrobat Reader to sign eForms.
- Acrobat allows the capture of a wet signature using the very common PDA technology. (May not work in Acrobat 7)
- Acrobat provides a very secure process for affixing digital signatures to eForms.
- When a person digitally signs an eForm, they might need to provide a password to do so. If the password is secure, the digital signature is secure.
- The digital signature may be validated at any time to be sure that it is real.

Are the forms secure? Can they be changed after they are signed?

- You have a choice of 40 bit or 128 encryption.
- You can apply access rights to protect against unauthorized viewing and modifying.
- You can easily verify if the eForm has changed after it has been modified.
- You can now revoke rights after the fact with the LiveCycle Policy Server.

Can the information be shared from the online eForms?

There are many ways to share the information.

- Information can be directly transferred to most databases.
- Information can be exported in the following formats:
 - XLS – MS Excel Spread sheet.
 - HTML – integrate with an existing HTML forms solution HTML but does not support, digital signatures and templates.
 - FDF – FDF supports digital signatures, scanned images, and using templates for dynamic eForms. Data can be moved and used via CGI scripts.
 - PDF – a way of archiving a final, completed form with all of its data.
 - XFDF – integrate eForms data with XML products on the server.
 - XML – Standard schema supported compliant XML.
 - XDP – XML data package.



Acrobat 7 Forms — What's New

Acrobat 7 Forms — What's New

Designer

- LiveCycle Designer 7 ships with Acrobat 7 Pro
- Significant cost savings

Traditional Acrobat Forms

- Improved performance
- Improved multimedia support
- Improved XML support



Acrobat 7 Forms — What's New

I have a significant number of traditional Acrobat forms — Should I convert them to LiveCycle Designer forms?

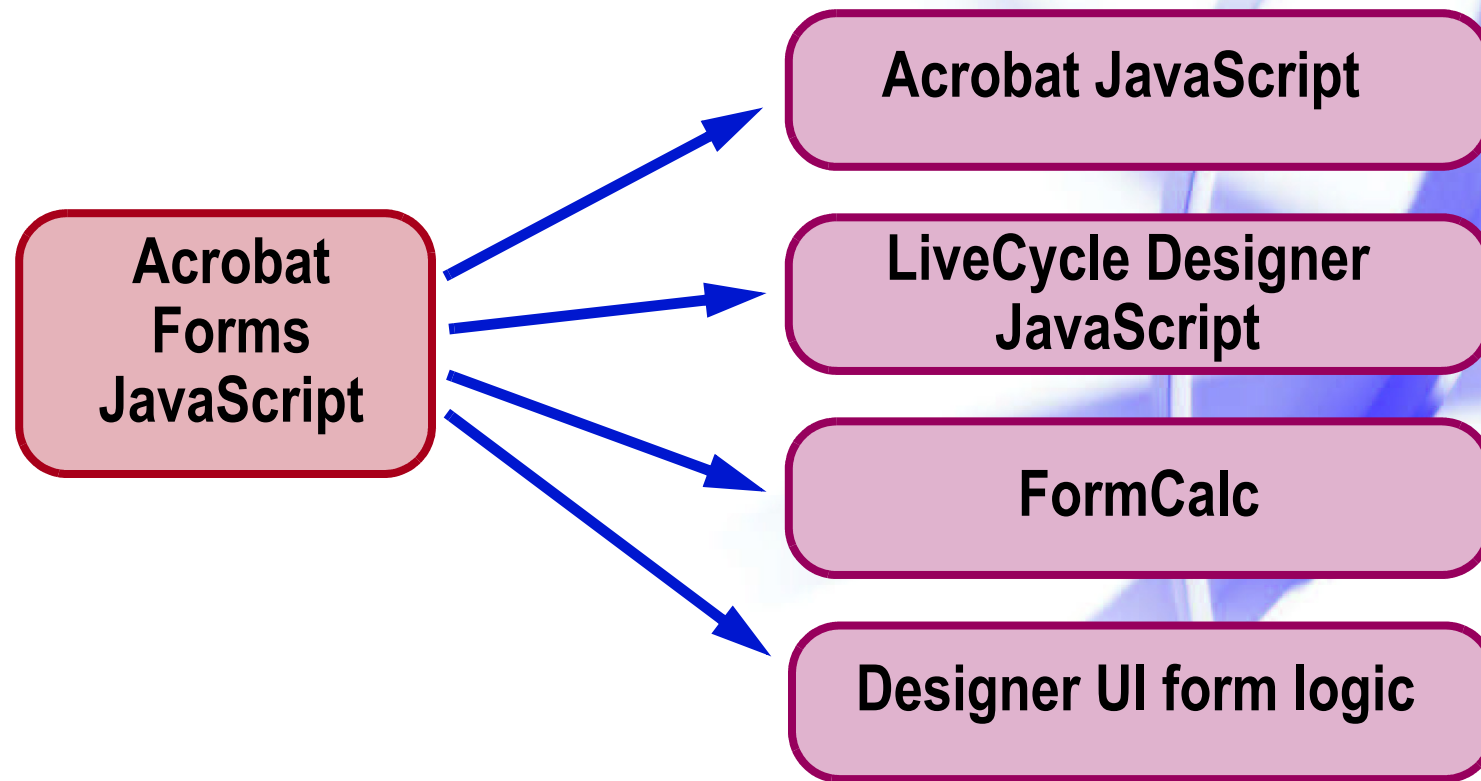
This is not a yes or no question. Some issues:

- Templates do not convert
- LiveCycle Designer uses a XML scripting object model for JavaScript which means that significant amounts of existing JavaScript will not convert without a lot of rework
- LiveCycle Designer has a form assistant to assist with the conversion but it does not assist with JavaScript conversion
- LiveCycle Designer provides much greater accessibility support
- LiveCycle Designer and its full XML support is apt to be the choice of the future

Acrobat 7 Forms — What's New

Conversion of Acrobat forms to LiveCycle Designer forms

JavaScript Conversion Options:



Acrobat 7 Forms — What's New

LiveCycle Designer forms — Is it the right choice?

I think so....

- XML based allowing for different look by changing the XSLT template
- Embedded support for 1D bar codes and option of adding 2D bar code support
- Greatly enhanced accessibility support
 - Section 508
 - ADA
- Can use a building block approach for creating new forms by using established subforms

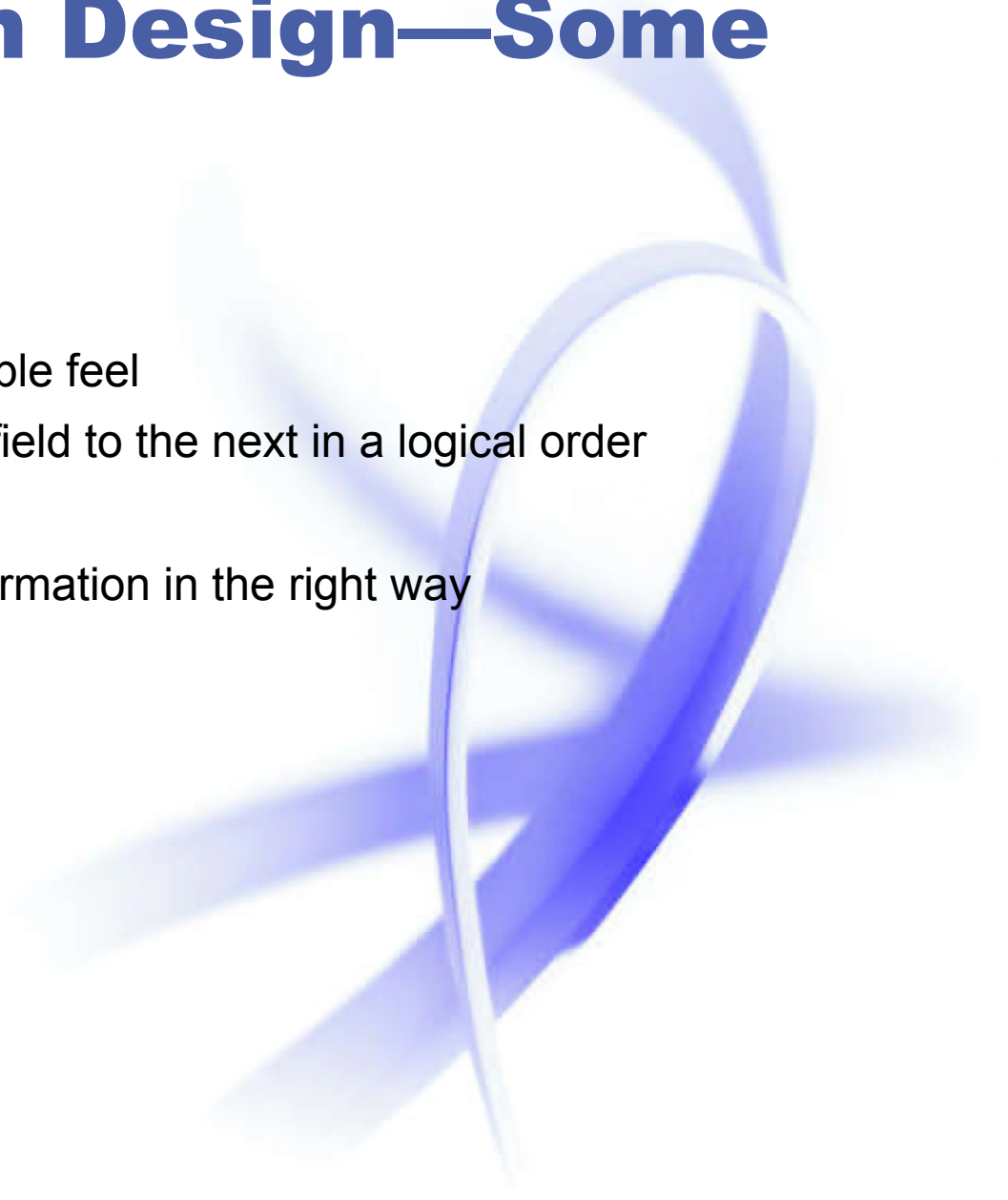
Acrobat 7 Forms — What's New

LiveCycle Designer forms — Is it the right choice?

- Greatly improved web connectivity to data repositories through:
 - SAP
 - IBM Websphere
 - Oracle
 - JBOSS
- XML based data interchange is an industry standard

Intelligent Form Design—Some Thoughts

- Form function
 - Does the form have a comfortable feel
 - Does the cursor flow from one field to the next in a logical order
 - Do the fields make sense
 - Are you asking for the right information in the right way
- Field function
 - Format
 - Validation
 - Calculation
- Field naming
 - Descriptive
 - Parent-child relationships



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An abstract graphic consisting of several overlapping, flowing blue ribbons that create a sense of movement and depth, positioned on the right side of the slide.

Demo and Questions