

## Don't File in Triplicate: Use Eforms

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Among the chores people hate most—following closely on the heels of navigating interactive phone voice menus—is filling out forms, paper or electronic. When completing forms, it can be tough even to understand what's being asked. Erasing (or undoing) might be possible, but hit the back button and you may have to reenter more information than you'd bargained for. And you just know that after providing information in one place, you'll be asked to repeat it somewhere else. Complicating things further, some paper forms have a familiar look and feel (think IRS) but their electronic counterparts—if available—may differ in subtle, error-inducing ways. To battle all this, vendors have struggled to develop usable eform products for years. About a decade ago, I saw a VAX VMS form system from a company called JetForm (later named Accelio). Since this product ran on a minicomputer system with character-based terminals, it was difficult to use and not a big hit.

Fast forward 10 years to the era of XML, personal computers, and Web services: At this year's FOSE IT conference, I talked with three major vendors about their eforms products. Each approaches electronic forms from their own strengths, and each has promise. The ones I looked at were Microsoft's InfoPath, Adobe's XML/PDF Forms Designer (built on a product acquired from Accelio), and Verity's LiquidOffice, which Verity acquired earlier this year via its acquisition of Cardiff Software.

Let's start with InfoPath, which was first released as part of Microsoft Office 2003 Professional Enterprise Edition. InfoPath emphasizes flexible information capture, XML support, and tight integration with Office and other Microsoft Web products. InfoPath is both a rich form designer and the end-user client for filling out InfoPath forms. A major upgrade, expected during the second half of 2004, will be part of Office 2003 SP1. InfoPath SP1 will include functional enhancements, better security, and faster performance. It allows changes to the underlying XML schema used to develop the forms already deployed, better Tablet PC support, and rich support for InfoPath forms in Visual Studio.Net. Microsoft has also begun releasing Office Solution Accelerators, using InfoPath and other Office products, for focused applications like Sarbanes-Oxley compliance. If you emphasize integration with Microsoft products, are attracted to Microsoft's Office Solution Accelerators, or are willing to purchase and

manage InfoPath clients and licenses as well as Microsoft security in general, look closely at InfoPath.

Adobe's XML/PDF Forms Designer builds on well-known Adobe strengths: electronic support for rich page layouts, XML, and of course Acrobat, one of the most pervasive applications running on Windows, Macs, UNIX, and PDA environments. The IRS's recent IRS Tax Products CD-ROM included an Adobe eform for the K-1 form. Users need only Adobe Reader to complete the form, and as they do so, the barcode changes dynamically and includes the new information. When finished, users print the form, sign it, and mail it to the IRS, where the barcode is scanned. Barcodes speed processing and eliminate transcription errors at the IRS. If print fidelity is important, if you are a cross-platform enterprise, or if you are already a heavy user of other Adobe products, consider Forms Designer.

Verity is the surprise eforms vendor, as it is best known for its enterprise search solutions, particularly its OEM bundles with products like EMC's Documentum and (until recently) with Acrobat. Verity saw a need to expand its offering into knowledge management and recently acquired Cardiff Software, including LiquidOffice. Cardiff, until Adobe's acquisition of Accelio, was Adobe's premier eforms partner. Cardiff brought to Verity a variety of vertical industry solutions and boasts 8,000 customers worldwide, including the U.S. Army and British Petroleum. LiquidOffice works with any XML schema, emphasizing W3C standard XForms. Cardiff's suite of products captures dynamic content from forms and documents, both paper and electronic, then automates the associated processes driven by the forms data. Cardiff's eform products provide the ability to enter information directly into an online form and submit it using a standard Web browser, which allows dynamic content to be captured and initiates real-time workflow processes for online reviews and approvals. Cardiff also supports several security capabilities: LDAP, PKI via Adobe, and HTML electronic approvals. If you already use Verity, are already building applications accessed via browsers, or your environment includes the gamut from paper to XML, consider LiquidOffice.

In spite of the Byzantine twists and turns in the evolution of eforms, we are now witnessing a watershed in capable new products. Some common themes are the ability to work with current enterprise business processes and to evolve as they do, integration with knowledge stores, and leveraging XML. Now if only someone would do something about those interactive phone voice menus.