



# *Avoka Form Factory for Adobe LiveCycle ES*

## *Overview White Paper*



*Empowering Business Teams*

*Overcoming IT Resource Constraints*

*Delivering SmartForms in Hours, Not Days or Weeks*

*Without Sacrificing the Control Needed by IT*

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## *Moving Customer Interactions Online*

Does this sound familiar? You've got a great customer, partner or supplier website but then, when users need to open an account, order a product, register for a service, or transact in any way – they are presented with an electronic form to be printed on paper, filled in and mailed back to your organization. If so, then you're delivering the most costly, time consuming and least satisfying way to interact with your users.

Forms are used everywhere. In fact Gartner estimates that 85% of all business processes begin with a form. Most organizations use forms to allow customers to enroll in, or apply for, their service or product. More often than not, an electronic form is the primary transactional interface to your organization and its brand.

### **The High Costs of Processing Paper**

From the business perspective making print-and-fill or fill-and-print forms available over the web is extremely expensive. According to primary research we've done the costs of just mail handling, data entry and simple error correction by mail or phone (excluding postage and printing costs) ranges from \$5.78 for a simple form (a 250 character credit card application) and just over \$9.00 for more complex forms. If your mail room processes 500 of forms a day then your annual forms handling/processing costs will range from \$750K - \$1.2M. Read the full report and download the calculator at <http://www.avoka.com/blog/?p=791>.

If you keep the paper forms then the costs escalate significantly more. Research from PricewaterhouseCoopers shows that organizations spend, \$20 in labor to file a document, \$120 in labor to find a misfiled documents (3% get misfiled), and \$220 in labor to reproduce a lost document (7.5% get lost).

### **The Poor User Experience**

And from the customer and overall brand perspective, you couldn't deliver a worse user experience because all research shows that users increasingly prefer the convenience of a complete online self-service experience. The days of making customers download a PDF, print it, complete it by hand, mail or fax it back for processing and then wait days, often weeks for an answer are numbered.

### **Solving the Problem**

The solution is to stop the problem at the source by making data collection a complete electronic process. Instead of customers hand-writing forms, give them the ability to enter the information online. SmartForms have the interactivity and intelligence needed to ensure that users can open accounts, order products, or register for services online, without errors or costly intervention from support agents. Online forms such as HTML web forms and Flash Based web forms are great for online

only forms – and PDF SmartForms are fantastic for longer more complex forms that could be completed in multiple sittings (save and come back to it) and those forms requiring signatures or where a PDF receipt of the submitted form is required. You'll save a lot of money and your customer satisfaction will increase significantly.

## SmartForms

When Adobe originally created Reader and the PDF standard, it was just for reading documents. Since then PDF has grown and evolved much further and it now has the ability to create intelligent and interactive SmartForms.

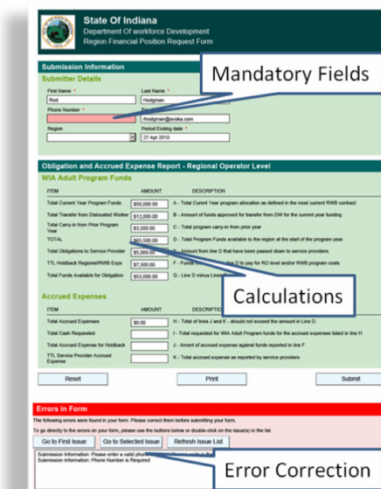
SmartForms have the interactivity and intelligence needed to ensure that users can open accounts, order products, or register for services online, without errors or costly intervention from support agents. PDF SmartForms are a kind of Rich Internet Application. They use advanced features such as dynamic content, data validation, data lookups, in-form calculations, secure electronic submission, offline capability, and easy access to assistance so that users can complete online interactions without intervention from support staff.

SmartForms can contain business logic and other advanced features to achieve two primary goals:

- make it as easy for the user to fill out the form, improving customer satisfaction;
- ensure that captured data is as high quality as possible (by using validations, mandatory fields, etc), reducing the amount of expensive error work required by the organization.

SmartForms, which can re-create the look and feel of existing paper-based forms, turn even the most complicated, multi-step business process into a simple, engaging and successful online experience. Users can even save SmartForms to their local hard drives, fill them out offline, and submit the completed forms the next time they are online. And if users prefer to submit completed forms by mail or fax, LiveCycle's dynamic 2D barcode technology, makes it possible without slowing down the processes. You simply scan the barcode—no risk of human data-entry errors.

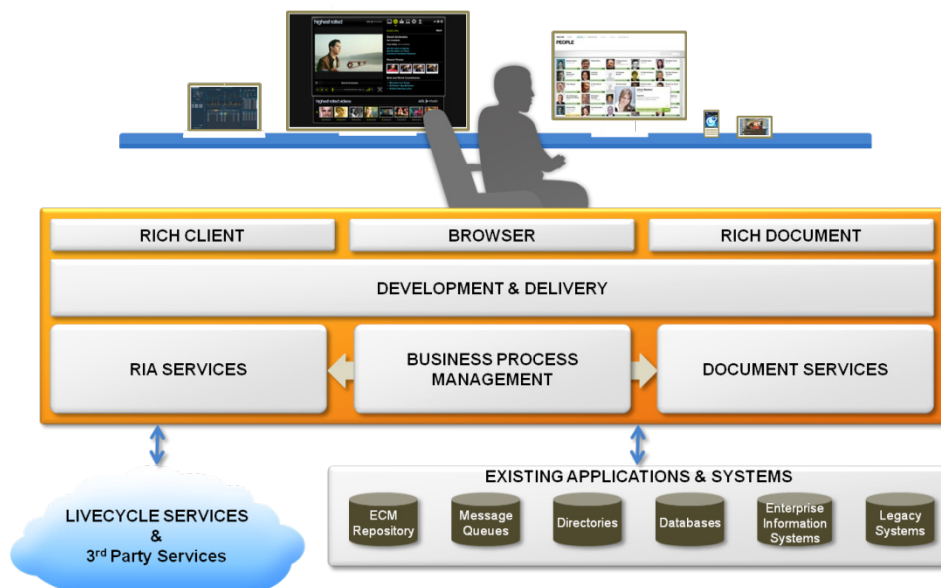
Support for XML lets you leverage existing enterprise applications for rapid form deployment and data exchange with core business systems. You can embed SmartForms with content and data from key applications and add calculations and validations that automatically verify information as a user completes a form. By providing the capability to return captured data via SOAP-based interfaces, LiveCycle



ES further leverages existing applications and processes, to lower cost, speed-up processing times and reduce the risk of human error.

## Adobe LiveCycle ES

Adobe LiveCycle ES is a scalable, unified platform that blends data capture, business process management, document security, and document generation to help enterprises create and deliver rich and engaging applications that reduce paperwork, accelerate decision-making, and ensure regulatory compliance. It enables the development of “customer experiences” for the industry’s leading universal clients—the Adobe Reader®, or Adobe Flash® Player, or a web browser.



LiveCycle ES suite can be comprised of a number of different modules, including:

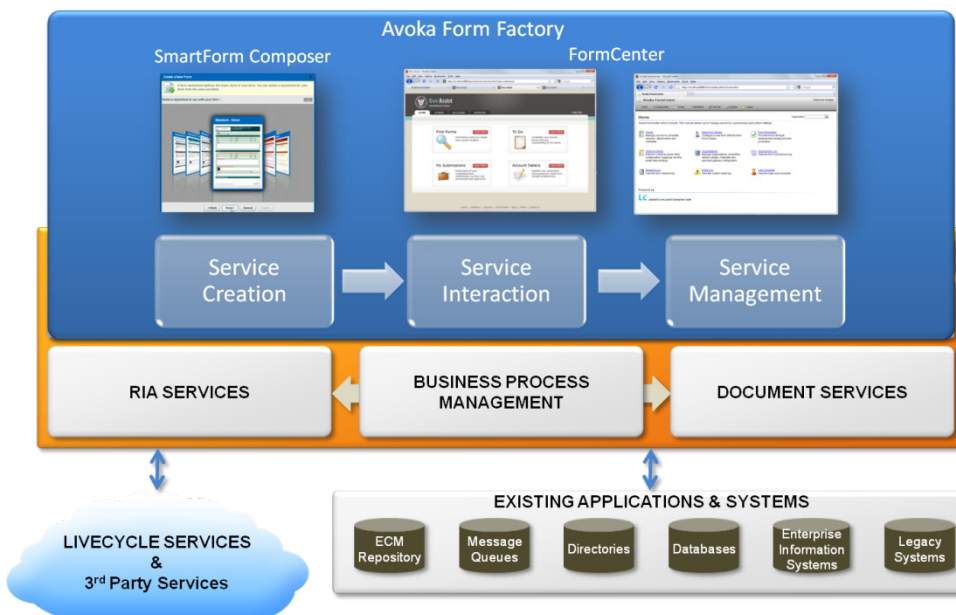
- LiveCycle Foundation – is included with most LiveCycle ES modules and provides the underlying server capabilities that enable the deployment, execution, and management of LiveCycle ES2 modules.
- LiveCycle Forms - serves as the central hub for the design, deployment, processing, data extraction and archiving of PDF or HTML forms or Flash guided experiences.
- LiveCycle Process Management – Enables the design, deployment, and monitoring of end-to-end business processes — with no coding.
- LiveCycle Digital Signatures – Establish the identity and intent of vendors and buyers, contracting parties, process approvers, and others by ensuring that transactions have not been altered and cannot be repudiated.

- LiveCycle Digital Rights Management – Protects information, improves regulatory compliance by enabling policies that control users' access and privileges.
- And much more such as, Business Activity Monitoring, Mosaic, Production Print, Data Services, Collaboration Services.

The various LiveCycle server components run within a Java server within your organization’s network, or in the cloud. LiveCycle Server provides API’s (application programming interfaces) that allow you to call LiveCycle from any application.

## Avoka Form Factory for Adobe LiveCycle ES

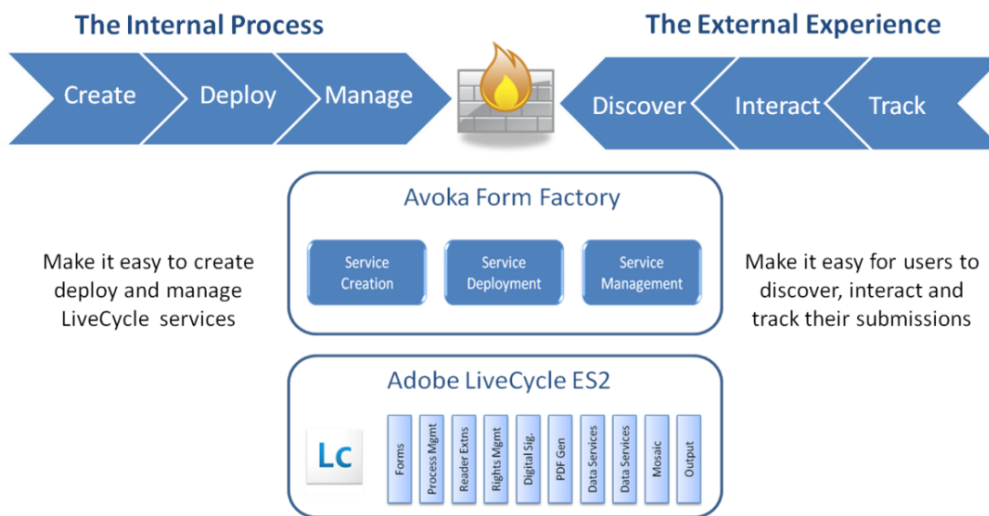
The problem is many organizations lack access to the skills needed to create, deploy and manage *effective* LiveCycle SmartForms. Many times it’s because the IT department is over-committed on major initiatives like data center consolidation and server virtualization. Other times it’s because the IT organization’s skill sets are heavily focused on “back-office” tasks so they lack the skills needed to create effective user experiences. That’s why we developed Avoka Form Factory for Adobe LiveCycle.



Just as a highly automated manufacturing facility gives organizations a competitive cost advantage, Form Factory gives organizations the ability to mass produce and mass customize LiveCycle SmartForms without a corresponding increases in operating cost. It achieves this by opening up the innovation process to business teams, the people closest to the customer and the people that understand the needs of the customer better than anyone else.

## Open Innovation

Opening up the innovation process is part of a larger industry movement that is driven by the recognition that IT departments are over-committed and resource constrained. Open innovation focuses on providing solutions that can distribute innovation beyond the boundaries of IT so that organizations can be responsive to changes in external market forces such as supply, demand, price, quality, regulations, and service levels.



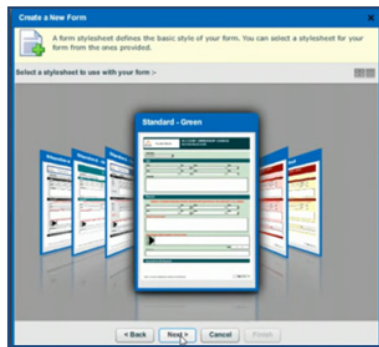
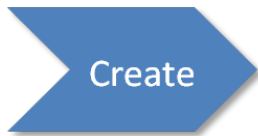
Avoka Form Factory encapsulates all of the knowledge, experience, and best-practices we developed from delivering LiveCycle solutions to hundreds of customers. We've packaged those assets in a solution that automates and simplify both the SmartForm creation/deployment and consumption processes, while giving IT the command-and-control they need as described below:

- **Business teams** - need solutions that can quickly respond to competitive threats, new opportunities and changing customer requirements. Form Factory's wizards, templates, and style sheets make it easy to create, deploy and manage effective LiveCycle SmartForms.
- **Customers** - are looking for convenience and that translates into an online experience that allows them to quickly and easily open accounts, order products, or register for services online. Form Factory's search capabilities, configurable guided interactions and submission tracking ensures that users can successfully complete online interactions - without intervention from support agents.
- **The IT department** - cannot deliver services unless it can enforce command-and-control. Both Avoka Form Factory and Adobe LiveCycle ES2 are managed components within the organization's application server. Both products are built on SOA principles and adhere to key standards including HTTP, XML, SOAP and WDSL, so that integration is fast and easy.



## SmartForm Creation and Deployment

**SmartForm Creation** – Avoka SmartForm puts the power of an expert SmartForm developer/designer into the hands of business analysts, forms designers and others. You simply select one of our pre-defined Smart Templates, and you'll end up with a highly interactive and intelligent SmartForm that looks great, no matter what your design skills.



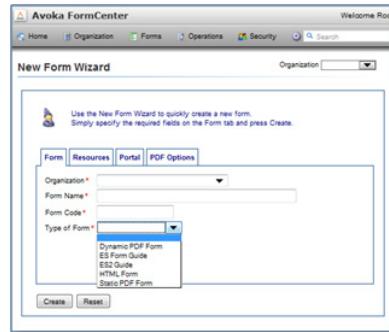
You can easily embed professionally coded business logic into your form, without programming, using Composer's intuitive rules editors. Click the "Publish" button, and Composer will generate an Adobe XFA compliant PDF SmartForm. Need to change something across all your forms? Simply change the master Style Sheet to change colors, fonts, margins, logos and other visual aspects of your form.

SmartForm Composer's Data Dictionary ensures the consistency of data across forms by ensuring that any element will always have the same label, tooltip, list of drop-down values, etc. no matter what form it appears on. A common vocabulary provides developers with a clear and unambiguous definition of the data within their LiveCycle SmartForms.

Up till now, the process of building forms in multiple languages has been extremely tedious and costly. Form Factory's comprehensive multi-language support dramatically reduces the time and costs associated with deploying forms in multiple languages.

SmartForm Composer supports multiple approval/publication workflows that are defined visually in Adobe LiveCycle Workbench ES2. Publishing and promoting forms into LiveCycle starts by clicking the Publish Form icon in SmartForm Composer which initiates the LiveCycle approval process. Each user involved in the approval process will be assigned a task in their To-Do list. At any point in the process, the form could be rejected and sent back to author with comments on the reason(s) for rejecting it.

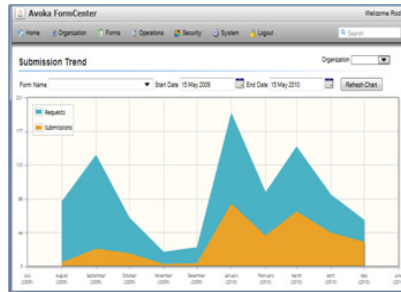
**SmartForm Deployment** – Avoka FormCenter enables business teams to deploy LiveCycle SmartForms. Its intuitive wizard-based user interface makes it possible for business users to deploy new services in minutes instead of days. Once a



service is deployed FormCenter’s guided interactions make it easy for users to find the form, complete the form without errors or assistance from support staff and stay informed and track status throughout the entire process.

FormCenter’s configurable roles and permissions enable precise audited control over the management of the system. It carefully manages promotion and deployment to ensure that only tested and approved forms and related services are released into production.

**SmartForm Management** – The FormCenter Administration console enables business users and operations staff to manage, measure and optimize their

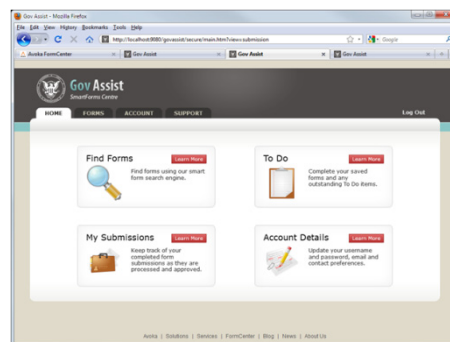


environment by making it easy for them to generate reports that ensure reliable services.

The administration console provides operations staff with a wide variety of tools and reports to enable business or operations teams to continuously manage and optimize their approach to acquiring and servicing customers.



## Optimizing the Customer Experience



The business imperative is clear because all research show that moving paper-based or low value human assisted interactions online will both significantly reduce cost while increasing customer satisfaction

Avoka FormCenter enables users to locate, use, manage, and track electronic forms that initiate business processes so that users can open accounts, order products, or register for services online, without

errors or costly intervention from support agents. It.

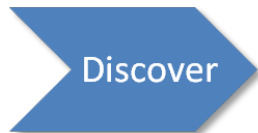
Any number of self service web applications can be linked to the FormCenter server - creating a multi-channel self service solution. These capabilities can be integrated with your existing enterprise portal or run as a stand-alone web application.

Avoka FormCenter enables users to quickly and easily:

- Self register and manage profiles;
- Locate services using guided wizards;
- Electronically submit forms that automatically initiate business processes
- View previous form submissions, track their processing status, and access copies of submitted forms and submission receipts;
- Save partially completed forms both online or offline;
- Assign and deliver personalized (pre-populated) forms to registered users for field force enablement.

**SmartForm Discovery** – FormCenter manages some of the world’s largest SmartForm environments and as a result we know how important it is for the user to find the right SmartForm quickly and easily. Attempting to find the right form is

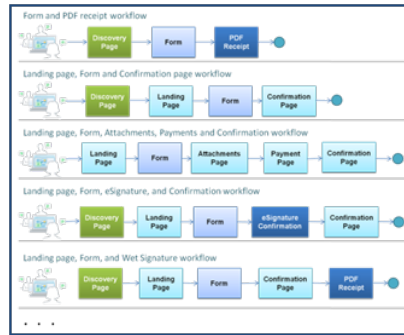
the first experience the user will have with your online self-service solution and you need to make sure the user doesn’t abandon the search or call the support line at this part of the process.



The Australian Department of Innovation uses FormCenter to deploy and manage the hundreds of SmartForms that are provisioned to Australian businesses. They provide

businesses with online access to government services making it easier, faster, and more convenient for businesses to work with government. To keep costs low and customer satisfaction high they use FormCenters advance search wizard allow users to interactively search for the forms they need. This interactive search wizard allows users to drill down into the repository to quickly find the needed service. The wizard updates the search results in real-time – without hitting the refresh button - as the user specifies new or additional search terms to give users the feedback they need to complete the search online. Avoka FormCenter’s comprehensive and intuitive search capabilities make it easy for users to find the relevant LiveCycle SmartForm – keeping the user in the online channel for this part of the process.

**Guided Interactions** – In many instances the SmartForm is part of a larger process and that process needs be wrapped around the form. For instance a SmartForm

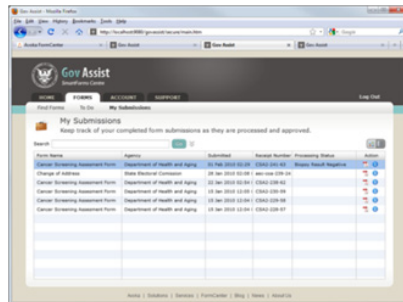
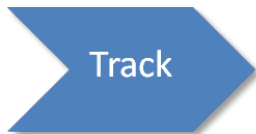


may require the generation of a receipt, a copy, a payment, an attachment or an electronic signature to name but a few. FormCenter’s configurable guided experiences make it easy to deploy a SmartForm into a multi-step guided process that manages and controls the user’s interactions through the entire extended process.

Managed, guided interactions ensure that the entire business process can be exposed to the user and that users can successfully complete the process - without errors or intervention from support staff – enabling the transition to low-cost, unassisted Web interactions.

**Submission Tracking** - What happens after the user submits their SmartForm?

The answer to this question will be a key determinant in the success of your online initiative. Users need to be kept informed of status and any actions that may be required of them to complete the process.



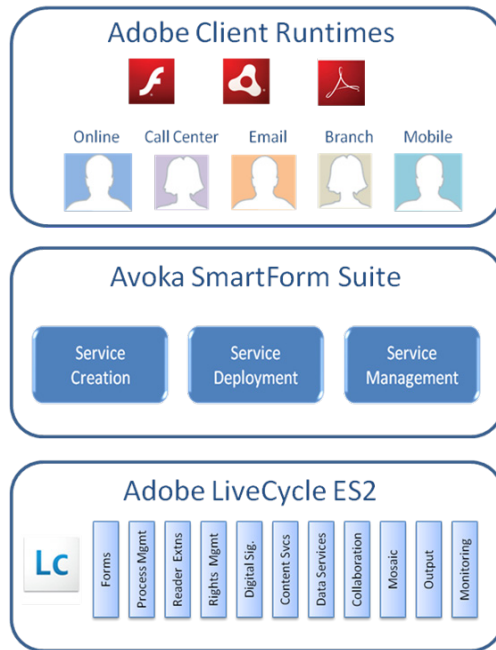
FormCenter enables customers to view their submission history including viewing or downloading receipts, and to track the progress of their form submissions through your business processes. Communicating to the user after their submission greatly

increases customer satisfaction and eliminates unnecessary and expensive burden on your call centers from frustrated customers.

## Summary

Avoka Technologies is an Adobe Gold Solution Partner that has helped some of the world's largest organizations significantly reduce costs, streamline business processes and increase customer satisfaction by moving paper-based business processes or low value branch-office or call-center interactions to low-cost, unassisted web in interactions.

Our flagship product offering, *Avoka Form Factory for Adobe LiveCycle ES*, automates and simplifies both the SmartForm creation/deployment and consumption processes.



**SmartForm Creation** - Form Factory's Smart Templates, style sheets and wizards allow business teams to create, deploy and manage LiveCycle SmartForms without having to write code. Opening up the LiveCycle innovation process to business teams enables organizations to create more SmartForms in significantly less time and less cost. It also makes organizations much more responsive to competitive threats, new opportunities and changing customer requirements. Form Factory enables organizations to mass produce and mass customize SmartForms without a corresponding increase in operating costs.

**SmartForm Consumption** - Form Factory manages and controls the entire user experience – from finding forms to tracking

submissions - so that users can successfully interact online, without errors or costly intervention from support agents.

Contact us [info@avoka.co](mailto:info@avoka.co) or visit our web [www.avoka.com](http://www.avoka.com) site to learn more.