

Five factors for choosing software

Caroline Jarrett
Usability Consultant
Effortmark Ltd



1. INTRODUCTION AND DEFINITIONS

There are so many great forms products—and some not so great. In the Appendix, I have put some edited extracts from conversations on Formspace about various products available - and they don't even include all the different ones out there. Last year, posts on Formspace mentioned at least 17 different products.

It can be daunting making the choice of the one that will be right for your organization.

This paper considers five factors for choosing software:

- Features: What does the software do? Can it do the things you need it to do?;
- Fit: How will the software fit in with other products that you use, and with your organisation's IT strategy?;
- Futures: Where is the market going? Is this product going to leave you in a proprietary niche or without support?;
- Flexibility: What changes can you foresee for your organization? Do you need to plan for different needs or working practices?
- Funds: What's your budget? Can you afford the product, the licenses, the training, the upgrades?

2. FEATURES

I do a lot of forms design in Photoshop, like this:

- capture an image of a web form or pdf using SnagIt, a windows capture program
- use Photoshop to move bits of the image around and maybe add a little text
- save the amended image
- send the amended image to my client, for comment and discussion.

I was pretty excited when the launch materials for Adobe Photoshop CS came out. Ten new features! Sounds great! Fortunately, the hefty price tag stopped me from buying it immediately. I checked the new features instead - and found that I did not need any of them. Worse, I did not even understand some of them.

Table 1 New features in Adobe Photoshop CS

Improved File Browser	Integrated digital camera raw file support
Match Color command	Comprehensive 16-bit support
Histogram palette	Layer Comps
Shadow/Highlight correction	Macromedia Flash file export
Text on a path	Customizable keyboard shortcuts

FIVE FACTORS FOR CHOOSING SOFTWARE

Lesson learned? Don't get dazzled by 'featuritis'. Instead, document your forms design process:

- list all the types of forms you need to create
- take two or three of the most important ones, and note down all the different things you need to do
- review your list of types of forms to see if there is anything else hidden in it
- now you have a list of features that you currently use.

When you are investing in new software, you can plan to do some things in a new way, and some new things. But it helps a lot to know that you are getting the features that you really use frequently.

Here are some features that may want to look for in your new forms software:

- load a pre-defined template with gridlines already set, so that forms have a consistent alignment
- pull text for the form out of a database (helps if you have to translate forms or make annual changes)
- use Pantone® colours, or output 4-colour separations, for printed forms
- build in digital signatures, or a specialist 'signing ceremony', for electronic forms
- preserve a copy of the form alongside its data, for contractual electronic forms
- share drafts of forms with co-workers or other stakeholders
- keep track of different versions
- allow more than one person to work on parts of the same form or form family at a time

You know what? I don't know a single product that does all of those things. But it is possible that you don't need all or them - or even any of them. So that is where your own list of features is so valuable.

3. FIT

In 1992, the Communications Research Institute of Australia brought out a wonderful piece of software called "Forms Designer". It was built entirely around principles of usable forms design, and its manual (if you can find one) is packed with good advice. But to run it, you needed a high-end Macintosh, and those were rare and expensive. Forms Designer never got the success it deserved.

So irrespective of the features that a product offers, you need to think about how well it fits in with the equipment that you already have and with your organisation's IT strategy. Some points

FIVE FACTORS FOR CHOOSING SOFTWARE

to discuss with the IT department (or to think about yourself, if like me you *are* the IT department).

- How much storage will you need, and where will it be located? Good quality graphics still demand lots of storage and a high-speed network to get them to it.
- What specification of computer is needed to run this software speedily? A touch too little RAM and a slightly slower processor and you may find that your new software becomes horribly slow or even starts to crash a lot.
- When do you next plan to upgrade? and will you be staying with your current platform and operating system, or making a change?
- Will you need any specialist input devices such as a tablet or digitiser? Will your IT department agree to support them?
- Will you need separate, slower speed computer(s) to test electronic forms on multiple browsers, platforms or operating systems?
- Forms design software often needs a really great screen to work well: high resolution, big (so that you can see those tiny dots) and sharp. Will your current monitor be good enough or will you need to upgrade?

4. FUTURES

If it seems difficult to gaze into the crystal ball of what your organisation plans to do with its IT, then the next F will be even worse. This is 'futures', where we try to pick products that are going to survive in the cut-throat world of the marketplace. Where is the market going?

Do you remember WordPerfect or WordStar? I knew WordStar so well that my fingers had all the control codes learned into the muscle memory. Then along came Microsoft Word, and those two competitors were history. It didn't matter that Word in its early days was nowhere as good as WordPerfect (and some might argue about whether it has ever caught up). WordPerfect and WordStar lost, Word won, and we all had to get used to it.

If you are planning to spend \$29.95 on a piece of shareware, don't sweat it. Your time in learning that software is going to cost more than you're spending, so you may as well try it and throw it away if you don't like it.

This 'futures' problem really matters if you are investing five- or six- figure sums. Those are decisions that require lots of approval and create embarrassment if you get it wrong.

It helps if you can do a bit of 'future-proofing', to ensure that you have a forward path if your chosen product gets left behind:

- Make sure that you can export to a good selection of 'vanilla' formats such as CSV (comma separated values), plain ASCII text, rich text files, Acrobat .pdf, and/or .png (portable network graphics).

FIVE FACTORS FOR CHOOSING SOFTWARE

- Equally, make sure that the product offers you a good range of import options. This shows you that its developers look outside their own business and realise that they have to work with other products.

Then try to find out all you can about the financial and technical state of your vendor: Some questions to ask:

- Who are your customers?
- How much have you sold?
- What are your longer-term plans for this product?
- How do you see your business in five years?
- How do you see your major customers changing in five years?

Finally, try to find out who loves and who owns their product and think about the implications.

If geeks love it:	fine if this is a new company that can transition to a stable enterprise, worrying if the product is stuck in phase where you have to be an early adopter and an engineer to use it
If investors love it:	are they in for the long-term or looking for a quick buck?
If it has recently been acquired:	are the new owners buying to invest, or to kill of the competition?
If it is still owned privately:	is the owner planning to invest, or to sell to get bigger backing, or to sell and grow roses?

5. FLEXIBILITY

We have limited ourselves to the features we need today, we've checked that we have the right technology so that it fits, and we've satisfied ourselves that this product has a future. What could possibly go wrong?

Change, that's what. How many of us are doing the same job today that we did five years ago?

- Five years ago I got my first Internet email account - now I run three websites and fight spam all day.
- My best customer has done two major acquisitions, reorganising each time.
- My husband has worked for the same business throughout. It's a major public company. They've been through a change of platform, a reorganisation (and return to the old organisation) and now they are up for sale after a boardroom-level financial scandal.

Even if you're still working for the same organisation, chances are that you've seen some changes in working practices: the type of forms that you develop, or a change from purely paper to a mixture of paper and e-forms.

FIVE FACTORS FOR CHOOSING SOFTWARE

So here are some questions about the flexibility that you'll need to look for, so that the product will help you through the internal changes that may come along:

- Working across more than one site, or allowing some staff to work from home or remotely
- Supporting different logo templates, or offering some other way of changing logos and style easily across many forms
- Adding new types of product (such as brochures or flyers) or different channels (such as electronic forms)
- Adapting to new work-flows or working practices, such as changed routes for sign-off

6. FUNDS

Finally, I'd like to mention money. We can all dream about the perfect suite of software that will jump through every hoop - but can we afford it?

Here are some things that you may need to take into account when working out how much you'll have to spend:

- The licensing cost, or the purchase price. Is it per site, per seat, or an all-in price?
- If you are developing electronic forms, do you have to buy a filler and if so for how much?
- Do they have a cheaper or free 'reader' software available (e.g. like Acrobat Reader)?
- What about importing your back catalogue of forms? If you plan to do it internally, who will do that work and do they have time? If you plan to outsource it, how much will it cost?
- Is training included, or will you need to pay extra for it? How many people will you need to train and how long before they are up to speed?
- Will you have to pay royalties on the forms that you use? (This one applies mainly to some of the on-line forms-on-demand tools).

7. FINAL THOUGHTS

There is no 'one size fits all' in software for developing forms. I do a lot of forms design using paper, scissors and a glue stick. They are cheap, effective, and it's really quick to get through lots of iterations of design and testing - but they lack a certain something when it comes to producing high-quality output.

Then there are the ordinary office tools such as Word. Easy to find, easy to exchange designs with colleagues, and a complete pain when it comes to trying to make the form look like a form rather than a clumsily-designed Word document.

At the top end of the scale, there are some wonderful software options that will help you to deliver and manage great forms. You will have had the opportunity to talk with some of the vendors at Symposium, and they will work hard to win your business.

None of these is the ideal solution for everyone, but if you remember the five Fs: features, fit, futures, flexibility and funds, then you're likely to end up with a tool that works well for you.

8. THE AUTHOR

Caroline Jarrett is an independent usability consultant. She specialises in improving forms, and in designing efficient processes for dealing with forms.

Caroline can be contacted at:

Effortmark Limited
11 Bridge Street
Leighton Buzzard
Bedfordshire
LU7 1AB

Telephone within the UK 01525-370379

Toll free from the USA 1-866 6 370379

All other countries +44 1525 370379

Caroline.Jarrett@Effortmark.co.uk

www.effortmark.co.uk

Caroline's forms advice web site is www.formsthatwork.com

9. APPENDIX: FORMSPACE DISCUSSES DIFFERENT FORMS SOFTWARE.

These are extracts from typical conversations on Formspace about software for forms design.

Fred Sakr

"I am currently researching tools (applications such as Adobe InDesign) that can be used to create Online -Fillable forms (PDFs) that meet with accessibility standards as well. The forms in question are government forms, affidavits et al.

I have read on the list that people are using Adobe Form Designer and InDesign. Are there any other applications available that can be recommended? Is there an industry standard that people are using?"

Jason Wise, Access Business Group

"There are many good tools out there. We use a combination of Quark and even some older files in F3.

I understand the attraction to Microsoft products because they exist on the desktop of most people. But that doesn't make them great solutions. We all have Notepad on our desktops too...but I wouldn't suggest laying out a form using it!!! :o)

I think the key is realizing that just as a skilled craftsman has specialized tools to create great workmanship, know that good form tools are going to cost a little more than your average end-user desktop software. But the end result is worth the investment. And if you know that your company is going to move into eForms (even if it is eventually), purchase a solution with that in mind."

Robert Barnett, Robert Barnett and Associates Pty Ltd

"You can't go past FileNet Forms Manager (previous Shana Informed) for ease of use and diversity of deployment method. In addition to Desktop Filler forms and saving as PDF, you can also use the forms in a standard web browser without any plug-ins or other downloadable add-ons. It might no longer be with Shana, but it's still the same old easy-to-use stable product that's been around since the early 1990's"

Marvin Beriss MB Associates, Inc.

"There used to be many different products, but now there are less. Have you tried Omniform? We have not used that in a while, but I understand it still is around."

Karen Puehn GOG Statistical and Data Center Roswell Park Cancer Institute

"Another option is the cardiff teleform product. However, in order to post the forms on the web, you need to use the cardiff add on module of pdf + forms. Form design, export to pdf format, transfer of form data to odbc compliant database tables are very intuitive and the learning curve small. It is the development side of prefilling the pdf forms with data from several different odbc compliant tables which encouraged and required me to go beyond what the package offered. However, I still use the product for the above functions. The pdf form list servers have been a life line as I stretch for greater pdf form functionality. "

Mark Cook Santee Cooper

FIVE FACTORS FOR CHOOSING SOFTWARE

"For us we wanted/needed the ability to have our web based forms look as close as possible to the paper version of the form. ASP pages are fine for collecting information but it can be lacking when rendering a final printed prouct. It can more difficult and time consuming to try to design the form via programming than using a form design package. I still have to program ASP pages to handle serverside functions such as submitting XML data back to our Oracle tables and navigation between pages, redirect, etc. but I am able to spend most of my timeworking on the forms themselves, not programming asp pages. If anyone need a change to a form I can quickly modify the design of the form and publish it. Our Web Master came on board about 6 months ago and wanted to program jsp pages to handle all our "Internet" forms but once we showed him how quickly the forms dept was able to produce web based forms with all the client or server side functionality he needed AND it would print almost exactly the same as our paper stock, he agreed to let us handle the forms."

Alec (AppEze creator)

"For beautiful HTML eForms that preserve the form structure and data EXACTLY as submitted PLUS use hash key verification to detect if any data was changed after submission checkout AppEze.com. Added bonus: HTML loads a lot faster than any plugin-based solution and uses universally understood controls and widgets. You can also add your own interactive FAQ to cut down on end-user support. And you don't have to be a programmer to setup these forms!"

Ray Killam Essociates Group, Inc

"I have used (and now represent) OneForm Designer Plus for several years. I can draw any form required, output that file to negative (for printing), compile it as a VB executable form, compile it as a HTML/JavaScript form, compile it as a PDF form, connect to any ODBC database, automatically generate required server scripts (it generates Perl CGI, as opposed to ASP)and end up with a ready-to-deploy form that looks and acts like a form - all without writing any code. Revisions are simple - I just change and regenerate as needed. Plus, users do not need any licenses to use the forms!

ASP "forms" are not really forms - they are "caption-blank" arrangements for collecting data. If that's all you need, and you are comfortable writing the code - then they will work fine. But, please, don't call them forms! They remind me of Microsoft Access Forms - limited functionality and poor records of transactions.

I think FileNet (formerly Shana), Omniform, and others are also good design packages, although I have not had near the same level of experience with them that I have had with OneForm.

When you find something that works for you, go with it!"

Mark Barratt, Text Matters

"There isn't (yet) an industry standard and as far as I can see there are no applications which are good enough to be compelling choices. ('Good enough' being subjective from the point of view of a designer/author/analyst) We tend to use Adobe FrameMaker for writing/designing forms for our customers (mostly in government), with InDesign as a second choice and Quark Xpress or MS Office apps (Word, Excel, Access) a distant third. FrameMaker's not designed for making forms but, as DTP packages go, it has some features which make life much simpler for the form designer. To make fillable PDFs, we use a FrameMaker plug-in from Shlomo Perets (www.microtype.com) which allows us to define fields in the FrameMaker design file rather than the PDF it creates. This is no faster for the first iteration/proof of a form, but it saves huge amounts of time/cost as a form evolves and gets modified. FrameMaker also supports

FIVE FACTORS FOR CHOOSING SOFTWARE

XML, which allows us to generate HTML web forms and to meet requirements which call for XForms (the XML forms system which has recently become a formal WWW Consortium standard). FrameMaker-plus-plugin is a good combination for fillable PDFs, but it's not perfect. If we did more of this type of work we'd go back to Microtype or to Max Wyss (www.prodok.com) and get their engineering expertise engaged to build a better solution. The grail here is a single master form which allows automated production of form 'instances' as accessible PDF, artwork for usable paper forms, XForms and HTML forms. The problems in achieving this are in the realms of engineering, user experience design, the law, and the resistance of organisations to change. So quite challenging. "

Lee Hernly Dynamic Technology Systems, Inc

" Liquid Office is also a great tool for developing fillable PDF's. It is available from Cardiff software. <http://www.cardiff.com>"

Behdad Payami CERENADE

" Cerenade has a forms designer program that is used for creation of interactive PDF forms that are accessible as well.