

WHITEPAPER

Adobe Experience Manager Form Features

In this document we review the different form features that exist within Adobe Experience Manager Forms and how they can be used to benefit an organization.

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DESIGN

Adobe Experience Manager Forms is designed to leverage a modular form methodology which lowers the cost of creating and maintaining forms, as well as elevating the stress on IT teams and form creators to be able to create and modify content. These core design elements handle structural configurations, commonly recurring elements, or text, as well as branding to pull together streamlined solutions.

Through the core design elements in Adobe Experience Manager Forms, organizations can leverage these pieces to create brand new forms 53% faster. Further to this, the core elements empower groups with specified skills to control aspects of the form relating to their specific responsibilities. For example, allowing marketing departments to manage the branding to be associated with the forms rather than forcing the responsibility onto the form creators to ensure they are meeting organizational branding standards or content experts to own specific text.

Leveraging the different design pieces together allows for changes to be made in a central location and pushed out to the required locations rather than having to create multiple versions of the same change, reducing the time to update forms by up to 79%. This also empowers content experts to be able to manage specific verbiage that must appear in an exact manner rather than requesting a form designer or IT member to modify text. For example, legal terms or conditions that must appear on a form can be written and maintained outside of the form by the appropriate parties.

TEMPLATES

Regardless of the type of form created in Adobe Experience Manager, Adobe has designed a base structural component, called a template, for defining commonly used elements on the form. As PDF and HTML5 forms are rendered from XDPs they use the same form templates, while Adaptive Forms have their own form templates.

The intent of these templates is to reduce the time to create a new form by adding the base elements onto the form right at the creation of a new form; typically, this will include headers, footers, and page specific layouts.

These templates can be further expanded on by embedding fragments within the template. For example, if the header added to the template was a fragment, and a change occurs in the header fragment, all the forms using the template would be updated with the change in the header. This creates a single change rather than having to manually adjust every instance of the form header.

FRAGMENTS

Fragments are created by grouping elements that are used in multiple locations into a single referenceable object. For example, an address block has the same grouping of elements and are regularly used together. Leveraging an address block as a fragment allows the form creators to add one object to the form rather than the multiple objects needed to capture the different elements in the address block: country, state, city, zip code, address.

Fragments are not only used for grouping form objects but can also be used for text specific pieces. Separating content specific text from the form displaying it allows content experts the ability to manage and control the specific verbiage which appears in the form. An example of this would be terms and conditions that may change and require the text to be very specific. Pulling the different terms and conditions out independently also allows them to be reused elsewhere in another form rather than maintain multiple instances of the same piece of text.

Similarly, you can create specific fragments with complex logic in them which content creators can reuse. This alleviates the demand on technical resources to have to build the form. Instead, technical teams can build out the fragment and the content creators can use the fragment where appropriate. For example, an employee lookup field which queries an internal database. Further to this you can leverage fragments within other fragments. This allows for content to be managed at the most granular level possible, reducing the amount of overhead to recreate aspects of forms and allowing for the highest level of flexibility when creating new content.

A new growing benefit to fragments comes from the advancement of Artificial Intelligence (AI) and Machine Learning (ML). Organizing content in small manageable chunks allows the AI/ML tools to detect and assemble content in the most appropriate way for the request or problem. As AI and ML based tools continue to expand their uses it is very realistic that these tools will be able to pull together new forms based on fragments, further increasing the speed of form development, and reducing the maintenance effort.

There are many uses to fragment but the overarching principle is having a single source of truth to maintain content rather than manually having to manage all the places a change would need to occur, while empowering each operational group the ability to focus on their specific responsibilities.

STYLE

Styles are used with Adaptive Forms to define the look and feel for a form. This is where organizations can ensure that the content being created matches the company's brand policies.

THEMES

Themes are instructions that define how every element of a form should appear; for example, text boxes should have rounded corners and the font face should be Arial throughout the form. Themes have nothing to do with the physical layout of the form or the logic found within the form. They are created independently to forms allowing the form creators the ability to focus on the specific functionality of the forms rather than the branding. Once a Theme has been created multiple forms can be assigned to the Theme creating a single location to manage the brand specific details for all the corresponding forms.

When any Adaptive Form loads, it will always check to see what the most recent version of the Theme is and loads that on top of the defined form. This ensures that any change made to the Theme is used.

The Theme editor is a user-friendly tool to allow business users, including marketers, to be able to define the look and feel for the organization's brand (s). This empowers brand experts to have governance over their specific area of expertise as well as removing the overhead of ensuring each form created meets the organizational requirements for branding. Themes are generally the recommended method for implementing styles for Adaptive Forms.

EXTERNAL CSS

Leveraging external CSS files is another modular way to separate the branding of a form from the actual content, logic, and functionality of the form. You can get the same technical benefits from external CSS files as you would with a custom theme, but you lose the user-friendly interface for creating and maintaining the styling details. This styling methodology is straight coding and requires technical skills to be able to create and maintain.

External CSS files are leveraged when existing CSS is already being used elsewhere, usually a website. This allows for a single location to maintain all the styling rules for the organization regardless of whether the styles are being used on a form or a website. There are some styling limitations that do exist when styling Adaptive Forms so considerations on how to adapt an external CSS file is required as part of the implementation process. Further to this the external CSS file must exist within the CRX repository to be accessible to the Adaptive Form.

IN-LINE CSS

Leveraging in-line CSS is not recommended when styling an Adaptive Form. This goes against the modular design structure Adobe has created with Adobe Experience Manager Forms as it allows the specific style to be associated to a specific element on a specific form. These changes would manually need to be tracked and create a lot of overhead to manage.

Implementing in-line CSS into your Adaptive Forms should be done very carefully with consideration on the long-term effects for your form implementation and are not recommended.

HEADLESS FORMS

Adobe Experience Manager Headless Adaptive Forms lets you make web forms on Adobe Experience Manager using APIs instead of a traditional interface. This makes form development and design more flexible and tailored to specific needs, improving user experience. You can integrate forms to various apps and websites, reuse UI components, and use any programming language or UI framework to render a form.

Examples of where headless forms could be useful is where a form needs to be presented within a website and within a mobile application. Headless forms allows both environments to connect to the same form and render the form in a manner appropriate for each environment. And any changes in the form would be automatically visible in both environments.

CREATE

Within Adobe Experience Manager Forms there are three types of forms which can be created: PDF, HTML5 and Adaptive Forms. Each has its own unique benefits and disadvantages; therefore, it is critical to understand the different form types that are available for the creation of new forms. Leveraging the correct form types in the right situations can lead to 28x faster form cycles and a 50% reduction in paper costs.

PDF

These forms are created using Adobe Designer and allow form creators the ability to build intelligent, dynamic, pixel perfect layouts.

HTML5

These forms are created using the Adobe Designer tool and are saved as XDP. They require a server to render the XDP as an HTML5 version of the form. HTML5 renderings for XDPs are a powerful tool to quickly generate web versions of forms.

There are configurations that are required to enable an existing XDP to render as an HTML but the transformation from PDF to HTML5 can be a faster process than moving from a PDF to an Adaptive Form. HTML5 forms are not mobile friendly.

As these forms are based on XDP they are designed with pixel perfect layouts and do not adjust to the size of the screen viewing the form. HTML5 forms that are loaded on a mobile device will require the user to pinch and slide to be able to access the content.

ADAPTIVE FORMS

These forms are used for data capture and have the built in intelligence that allows the form to dynamically adjust to the screen resolution viewing the form, making Adaptive Forms mobile ready. Adaptive Forms are web-based forms that are accessed through a web browser and do not require any additional software to be installed on a local machine to access the form. As these forms are web based an internet connection and a web browser are required to load, complete, and submit the form.

As the name implies Adaptive Forms will automatically adjust to the screen resolution that is viewing them rather than having to specifically build and maintain a version for specific breakpoints. Adaptive forms are also dynamic and can adjust on the fly to the responses given by the users to create a personalized experience for each interaction.

FIND

As content becomes more digital, 88% of users are expecting the independence of self-service options to be able to complete their interactions. Leveraging Adobe Experience Managers Forms features for locating digital content can empower these users to complete requests independently which can lower the organizational cost for these interactions from \$15 dollars an interaction down to \$0.10.

FORMS PORTAL

With an Adobe Experience Manager Forms license you have access to the Adobe Experience Manager Sites Form Portal component. This allows your team to create a single page site to be used for finding forms and documents. Utilizing a central form portal improves user experiences by allowing users the option of online self service, which 72% of users prefer.

The forms portal component is a customizable tool to list all the forms which the user has access to. From here users can start new forms, resume forms, see completed forms and see which forms are pending a signature. Built in search functionality quickly allows users to find the required forms with ease.



FILL

Leveraging Adobe Experience Manager Form features for improving, simplifying, and enhancing the individual user experiences can lead to 56% lower abandonment rates on form submissions and in turn a 40% growth in revenue.

Further to this, utilizing these fillable form features benefits organizations by reducing form completion times, increasing data quality and reduces errors up to 25%.

SIMPLIFY DATA CAPTURE

When structuring a new form, simplicity should be front of mind when designing the form. Leveraging logic in the form can be used to streamline the navigation of the form for the end user.

CORE COMPONENTS

Adobe Experience Manager Forms provides a robust list of core objects to use when designing forms. Leveraging the appropriate objects improves customer experience and simplifies the process of completing the data capture for the end user.

FIELD BINDINGS

Leveraging field bindings within Adobe Experience Manager allows the ability to share the value in multiple displayed fields as well as link elements with an external data source. Linking multiple display fields eliminates the need for users to enter the same piece of information providing a better user experience and reducing the chance of errors. The benefit of linking your elements directly to a data repository allows for simplified transfer of data to either prefill or store content after collection.

PREFILL

Adobe Experience Manager Forms can populate forms with data from a multitude of sources, databases, social networks, and other external systems. This simplifies the process of data capture for the consumers and creates links between existing pools of data for an organization rather than having duplicates of the same data stored in multiple locations.

From a technical perspective leveraging prefill with intelligent documents allows for fewer documents that adjust based on data being pushed into the form.

An example from a global manufacturer shows the value of form fragments, modular and reusable objects and a highly data driven architecture. This organization moved from an older style of one form per country, per language and per document type. This resulted in thousands of form templates and hundreds of additional templates that were customized for selected customers.

The original implementation covered 30 countries, 10 languages and 10 different document types. The new solution covers 65 countries, 25 languages, 10 document types and 20 customer level preference settings, but instead of increasing the number of templates the new solution was able to reduce the number of templates to 1 master, 1 for each language and then 200 fragments that would be inserted. In the new solution the document is assembled when needed based on the data provided so that it is always current, always accurate and always using the correct country-based requirements, language base requirements and customer specific requirements.

INLINE HELP

Leveraging Adobe Experience Manager Forms can save organizations 42x the cost per transaction by empowering users to stay online. Implementing the forms inline help features empowers users to stay in the form rather than having to resort to more costly means for assistance.

INLINE VALIDATION

Using Adobe Experience Manager Forms validation tools ensures quality data is being submitted into the system which can save organizations hundreds of dollars a day per dirty record. Leveraging the inline validation features rather than depending on a final validation before submissions delivers immediate feedback to users while they are completing the form, improving the user experience and lowers abandonment rates.

ACCESSIBILITY

An Adobe Experience Manager Forms provides tools specifically to help meet online accessibility standards and are implemented with author friendly features. Authors can specify what values a screen reader should use, define field precedence and alt texts directly in the authoring tool. Further to these form specific features, themes can also be used to ensure that the color and font details are also meeting accessibility standards.



PROCESS

No form is created without a process to handle the submission behind them. Leveraging Adobe Experience Manager Forms to automate these processes can reduce processing times by up to 50%. Organizations are also seeing a 66% higher productivity rating when adding automation to their form processes.

ROUTE

Regularly forms need to be sent from one user to another whether it is because an action is required or for informational reasons. Adobe Experience Manager Forms handles the logic behind this routing and will automatically handle the routing based on the defined organizational requirements; for example, requests needing to go to an employee's manager.

EXTRACT

Often data from a form submission must be extracted from the form and stored in another location. Adobe Experience Manager Forms pulls the data directly from the form and stores it into another system, such as a database or another application removing the need to retype data, lowering the chance of human error corrupting the collected data and reducing multiple instances of the same information by 25%.

INTEGRATE

Modern processes are vast and spread across multiple software solutions and Adobe Experience Manager Forms, being an agnostic solution, integrates with other business solutions creating seamless integrations. Whether it is being the front end to capture data, handling the process flow, producing final documents, or something in between, Adobe Experience Manager Forms empowers organizations by allowing the flexibility and fluidity each unique solution requires.

NOTIFY

Once a form has been submitted someone will need to be notified that the submission has happened. Perhaps there is an action for someone to take such as an approval or a physical action must be taken. Automatically having Adobe Experience Manager Forms notify the user of the submission reduces the overhead for the individual having to manually check for any new submissions.

Further to this initial notification, follow up reminders can also be managed and sent through Adobe Experience Manager ensuring that a transaction is not overlooked or missed. Also configure notifications to be sent to the original user who submitted the form so that they are informed as to where in the process the submission is.

Adding these notifications provides clarity to the organization and simplifies the day-to-day operations for users.

DOCUMENT SECURITY & ENCRYPTION

Processes often have sensitive information and with Adobe Experience Manager Forms organizations can protect PDF and office documents in real time for those in or outside of their firewalls.

DOCUMENT GENERATION

Through Adobe Experience Manager Forms organizations can create a variety of different document formats, including PDF, laser printer and label formats. Extend generated documents further by combining and rearranging other documents to create specific outputs for your business solutions.

EXTEND

ANALYTICS

Data is a critical resource for organizations to make business decisions. Integrating an analytics tool into your form solution will provide vital information such as which forms are being used and at what frequency, where users are struggling when entering data, and where users are completely dropping off.

This information informs organizations where the greatest areas of impact are, adding confidence and justification to business decisions. Further, these solutions can be designed in a more strategic fashion lowering maintenance costs and improving the end user experience.

Example of Analytics Solutions:

- Adobe Analytics
- Google Analytics

CHANGE PROCESS MANAGEMENT SOLUTION

A change process management solution helps companies to effectively manage change, ensuring that changes are implemented quickly and efficiently, while minimizing the risks and negative impacts of change on the organization. By automating the change management process, companies can reduce the administrative burden on their employees, reduce errors, and ensure that all stakeholders are informed and involved in the change process. This process helps to improve decision-making, enhance collaboration, and ultimately lead to better business outcomes. In addition, a change process management solution also provides a central repository for all change-related information, enabling companies to track and analyze their change management practices over time, identify trends and areas for improvement, and develop strategies to further optimize their change processes.

Example of Change Process Management Solutions:

- ServiceNow
- Workfront
- JIRA

DIGITAL ASSET MANAGEMENT

All organizations have digital assets that are required to operate their businesses, everything from pictures, videos, forms, documents, and audio files. Without creating a structured system to manage these assets organizations will find themselves creating duplicates, having issues locating specific assets, and wasting time recreating content.

Further to this when organizations grow and need to manage different access levels or create cohesive collaboration for creating and maintaining assets. An organization asset management system should consider the entire lifecycle of the assets being created and be flexible enough to grow with the organization.

Example of Digital Asset Management Solutions:

- Adobe Experience Manager Assets
- Bynder
- SharePoint

DIGITAL SIGNATURES

A common reason impeding form solutions from being completely digital is the need for a required signature. The solution to this problem is to leverage a digital signature solution in your forms rather than forcing users to print, sign and resubmit forms back into the system.

Signing a document with these digital signature solutions does not require any special tools or software for the signer and can be completed in a single transaction. Further to this, digital signatures are legally binding, with different solutions meeting different regulations.

Organizations can see a 95% faster signing time when digital solutions are implemented as part of the form solutions.

Examples of Digital Signature solutions:

- Adobe Sign
- DocuSign
- Capterra

MARKETING AUTOMATION SOLUTIONS

Marketing teams leverage a variety of different solutions to create custom journeys for their customers, but often any attachments such as forms and documents are left impersonalized. When integrated with Adobe Experience Manager Forms, automated marketing solutions can leverage intelligent, personalized, and dynamic forms to craft the best digital experiences for consumers.

Example of Marketing Automation Solutions

- Marketo
- Mail Chimp
- Brevo

ABOUT 4POINT

4Point is the global leader in documents and forms. We have helped customers move from paper to digital for decades. This unmatched experience makes us experts in digital transformation. Our incomparable knowledge facilitates successful transformations from paper to digital, giving organizations limitless opportunities to save money, increase efficiencies, and enhance end-user experiences.

4Point is an Adobe Gold Solution Partner that specializes in Adobe Experience Manager Sites and Adobe Experience Manager Forms. Our team is certified and trained by Adobe. This combination of Adobe training and our unmatched experience allows us to transform organizations' processes from paper to digital around the world.

In 2003, the founding members of 4Point combined their expertise in software consulting, project management and sales to develop and support leading-edge solutions based on Adobe enterprise technology. As the company grew, 4Point added decades of experience in documents and forms. As it stands today, 4Point employs many of the original architects of the Adobe forms technology used by major global organizations. This gives them unmatched experience in the application of these technologies to your business problems.

Our expertise and focus in Adobe-based enterprise level document and form solutions helps your organization meet modern business challenges through the transformation from paper to digital. 4Point gives organizations limitless opportunities to save money, increase efficiencies, and enhance end-user experiences.

As Adobe technology has evolved, so has 4Point. We've progressed from building solutions around document output to delivering online forms and workflow applications that are beyond compare. With changing technologies, 4Point continues to build smart solutions, rooted in exceptional user experiences for your business and customers.

