



# Document and Forms Management with OpenOffice.org

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# Agenda

About

OpenOffice.org and the forms market

OpenOffice.org in a CMS/DMS environment

Forms creation and management with OOo

Benefits

- › This talk is about OpenOffice.org and its ability create and maintain electronic forms for office, industry and government use.
- › Relevance of the (electronic) form market.
- › Document/forms live cycle and OOo forms.
- › Live example of the use of OOo with the electronic forms management system icoya eForms that bridges the paper-to-digital divide.

## What is a form?

“A form is a document that contains some fixed text, but allows users to enter some items and perhaps take some actions on those items.” \*

From the book **Ooswitch: 501 Things You Want to Know About Switching OpenOffice.org from Microsoft Office**

1. U.S. corporations spend up to **\$15 billion a year processing business forms.**

Source: Forms Processing and Image Capture Study/ prepared by Harvey Spencer Associates and Wood Associates for The Association for Work Process Improvement, 2000

2. According to a 2004 study by GISTICS, the typical global enterprise uses approximately 400 unique business forms, averaging **\$75,000 per form and totaling \$30,000,000 in labor and materials** across the lifecycle of all 400 forms.

3. According to Gartner in the U.S. Market alone more than **\$6 billion is spent annually on the purchase of preprinted forms**; more than \$360 billion is spent capturing data submitted on paper forms every year.

4. According to statistics compiled by the Association for Information and Image Management, forms are the dominant way of doing business: **over 80% of all business documents are forms**, and an average of **more than \$60 billion is spent printing paper forms annually**, with **more than \$360 billion spent processing forms annually**.

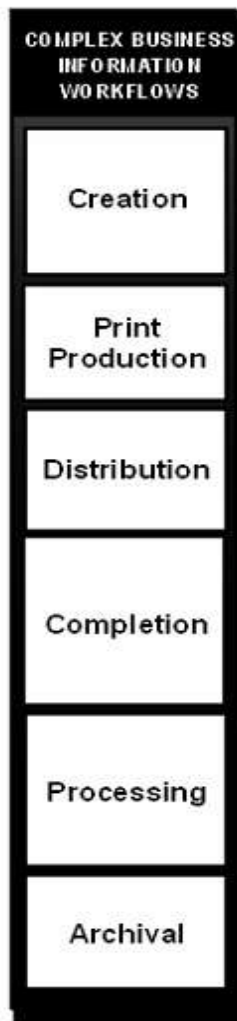
Source: <http://www.captivasoftware.com/products/formware.asp>

5. **Americans fill out 100 billion forms every year**, according to analyst firm CAP Ventures

Source: <http://www.capv.com/home/home.html>

... ,BUT

**WHO IS ACTUALLY USING OPEN  
SOURCE SOFTWARE TO CREATE AND  
PROCESS BUSINESS FORMS ??**



It is estimated that U.S. corporations spend up to \$15 billion a year developing and processing business forms\*

- › There are six stages in the business document & forms lifecycle
  - › At each stage, there is an opportunity to migrate from paper to digital to fully networked
- › Electronic forms software can help to:
  - › Displace costs in the creation, print production and distribution by eliminating the need for pre-printed forms, warehousing and transport
- › In the completion stage:
  - › Forms repositories eliminates the need to physically locate and retrieve a paper form
  - › Printing costs are reduced
- › In the processing stage, electronic or 2D-Barcode enabled paper forms eliminates manual data entry and error correction

\*Source: *Forms Processing and Image Capture Study* prepared by Harvey Spencer Associates and Wood Associates for The Association for Work Process Improvement, 2000



You can create OpenOffice.org forms in most of the OOo applications.

OOo offers a wide variety of form controls:

buttons, labels, boxes (group, text, combo, list),  
fields (date, time, numerical, currency, ...), tables

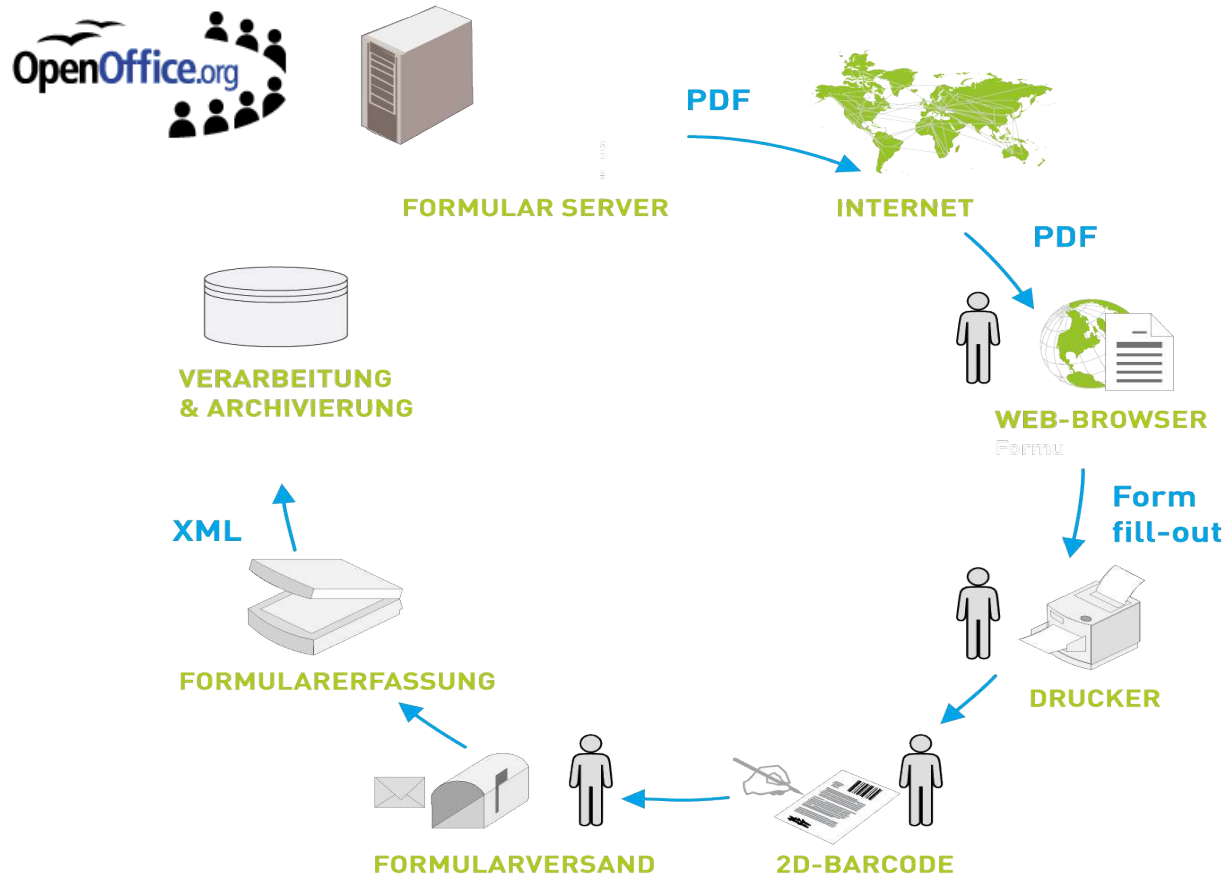
Data sources (for dynamic forms) can be attached to the form by specifying queries and SQL statements:

- Java Database Connectivity (JDBC), Open Database Connectivity (ODBC).
- The built-in dbase and Adabas source.
- ActiveX data objects (ADO) -only available on Windows.
- Text files, Spreadsheets, Address Books.
- MySQL, LDAP

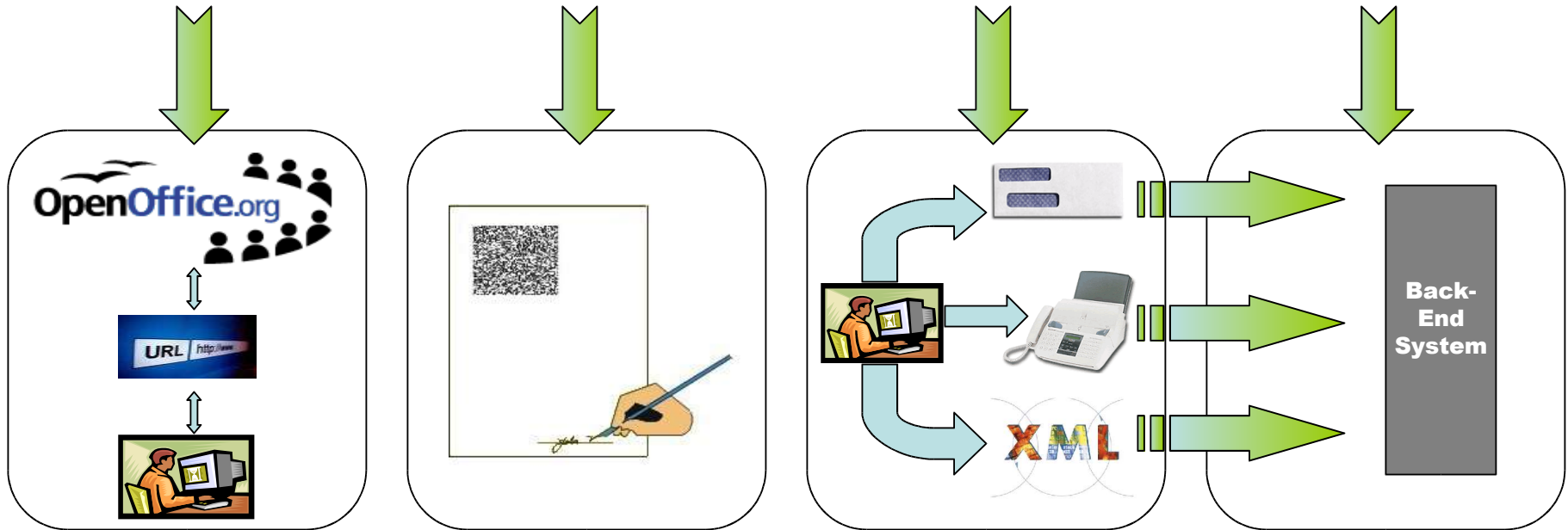
OOo forms are flexible and powerful.  
However OOo forms cannot be filled out by  
anonymous users within a web-browser.

Luckily, PDF forms have similar properties  
and can be easily filled-out in a browser.

## Electronic / paper forms process cycle



## icoya eForms Processing Engine



1. Form creation / PDF conversion

2. User goes to URL and fills out form

3. eForms server inserts data into 2D-barcode

5. User prints and signs form

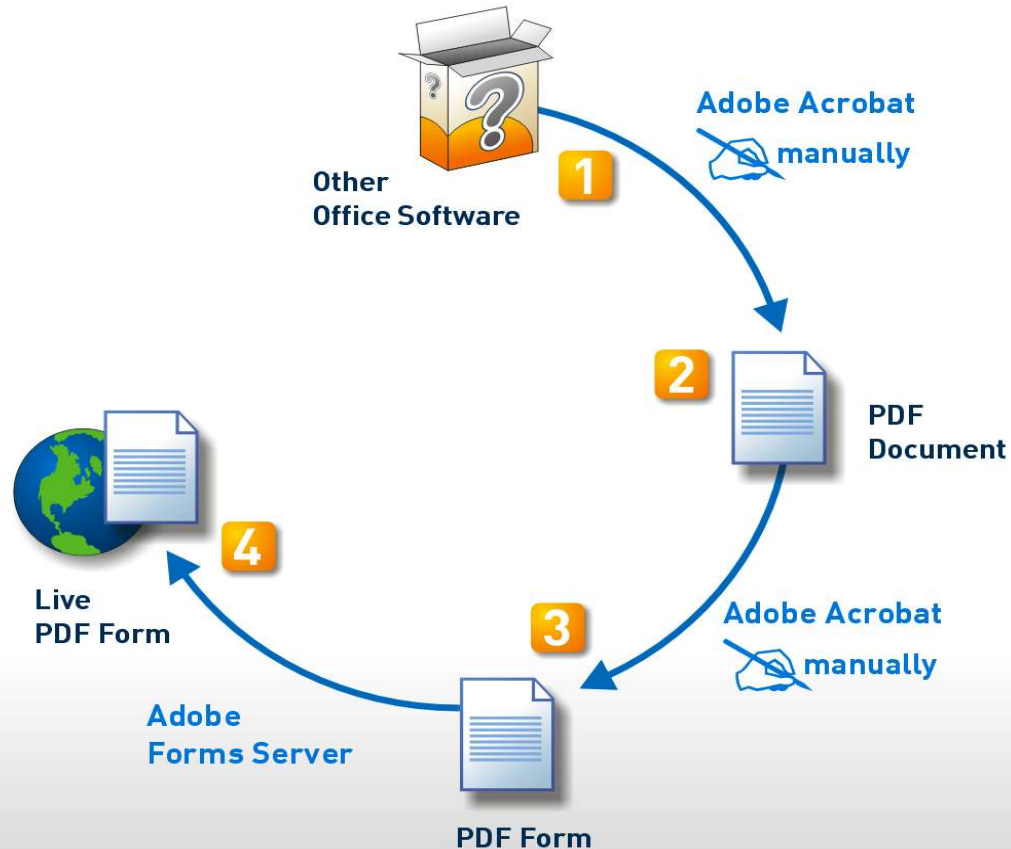
Optional:

- Digitized signature
- Digital signature

6. User mails, faxes or emails form to the company

7. Company processes 2D barcode form (paper form) and archives data

## Electronic Form live cycle with other Office Software

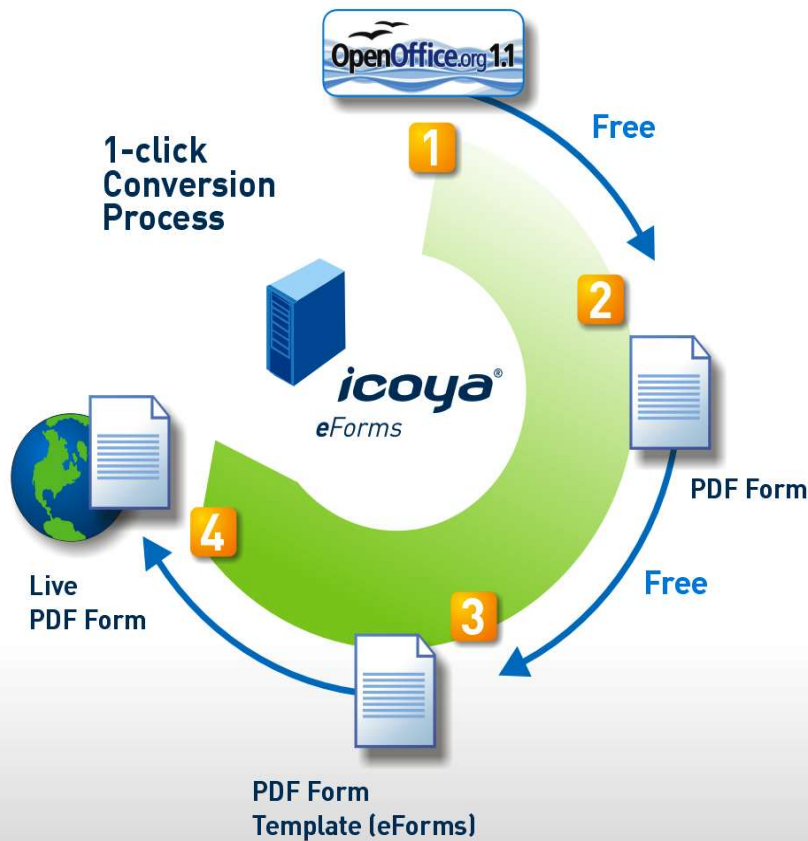


Steps to create PDF-forms:

- › Export to PDF
- › Assign form fields (time consuming!)
- › Upload PDF to forms server

Document changes require redoing of form field assignment.

## Electronic Form live cycle with OpenOffice.org



PDF forms are created with OpenOffice.org

- › No further PDF form field assignments required.
- › Document/form changes are updated immediately.



# Form creation / document management with OpenOffice.org

Live demo

- › PDF form creation with OpenOffice.org and UNO
- › Forms server and form fill-out
- › icoya eForms 2D-barcode enabled forms bridging the paper-to-digital divide

- › OpenOffice.org is an powerful and future-proof office solution for individuals, enterprises and public authorities.
- › Perfectly integrates with back-end systems and document live cycles, e.g. content/document management.
- › Allows easy creation of electronic forms / database enabled dynamic forms.
- › Compact: OpenOffice applications are utilizing the same XML format.
- › XML-based file format specification (OASIS TC).
- › OpenOffice.org with its open XML format is extremely well suited for the creation of technical and non-technical documentation and electronic forms.





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