ActiveDocs

DOCUMENT AUTOMATION SOFTWARE

ACTIVEDOCS V MICROSOFT® INFOPATH

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Abstract: This document provides a high-level comparison of the document-generation capabilities of ActiveDocs and InfoPath. For clarity, the role of "templates" in Microsoft® SharePoint is also noted.

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1   Introduction

The primary purpose of this document is to compare features and capabilities of ActiveDocs and Microsoft® InfoPath & Forms Services under SharePoint Server, in the context of document automation.

A secondary purpose is to examine what the term "template" means in the context of SharePoint, InfoPath and ActiveDocs.

2   ActiveDocs

ActiveDocs provides a complete and integrated package for creating and using document Templates, providing:

- Fully structured, modular Template Design using Design Components

    - Templates

    - Template Sets (fixed or on-demand combinations of multiple Templates)

    - Common content (Snippets) which can also be used in Microsoft® Office

    - Common fields and rules (Design Item Sets)

    - Common access to data sources (Data Views)

- Design Component management, Version Control, and Publishing Control

- Security and management of user access to templates and documents

- Profile fields associated with users and the (optional) business areas to which they have access, providing pre-set values for incorporation into finished documents

- Web interface for Document Creation and Management

- A structured, interactive, web-based document creation interface – the ActiveDocs Document Wizard – which is dynamically and automatically created from each template on demand

- Document and Answer storage in a variety of locations and applications

- Document assembly and production in multiple formats including all Microsoft® Word formats, XPS, PDF, ODF(T), HTM, TIFF, and Named Drivers

- High-performance scale-up and scale-out capability

- Document delivery through multiple channels

- A well-defined programmatic interface for document generation, answer data consumption, etc, allowing integration with other applications

3 InfoPath, Forms Server, and SharePoint

InfoPath is part of the Microsoft® Office product suite. InfoPath is a forms tool that enables the design, creation, and use of sophisticated XML-based data capture forms that can reference external data stores as both sources and destinations for data. Unlike previous desktop-focused versions, InfoPath enables development of forms for so-called "symmetric" deployment in both Windows client (desktop) and server (web) environments, subject to a few design element restrictions.

Forms Server, also known as Office Forms Services, integrates with Microsoft® Office SharePoint Server. Using these services, InfoPath web forms may be accessible through intranets, extranets, and the internet, in much the same way as ActiveDocs templates may be accessible through the same channels from the ActiveDocs Composition Server services.

InfoPath provides a built-in tool for importing and converting existing Microsoft® Word and Excel forms developed using the respective out-of-the-box products.

InfoPath enables the creation of PDF output based on the form and its data. InfoPath requires the use of Microsoft's "Visual Studio Tools for Office" for such adaptations as the creation of Word documents.

Worked examples that show the complexity involved in creating Word documents from InfoPath 2007 are at http://enterprise-solutions.ikreate.nl/infopath2007/convert-infopath-form-into-word-2007-document-xslt-c-sharp.htm and http://blogs.3sharp.com/davidg/archive/2008/08/08/4935.aspx.

4   Templates

Templates are a core concept in document creation. They are patterns used to create actual documents. Microsoft® Word ships with some simple templates for creating various letters, faxes, and other documents.

ActiveDocs significantly extends Template functionality by adding new field types, data links, and logic. ActiveDocs Templates are usable for interactive or programmatic creation of documents.

InfoPath refers to all of its forms as templates, generically.

So-called "application templates" are available for SharePoint Services. The key term is "application". Application Templates simply assist SharePoint developers to create vertical applications like Call Centres. SharePoint Application Templates typically employ InfoPath forms for data capture and editing.

5 ActiveDocs v InfoPath Comparison

This section outlines differences between ActiveDocs and InfoPath in the context of creating documents.

5.1 Template and Form design

Template/Form Design is the fundamental technology underpinning both products. ActiveDocs Designer – the ActiveDocs Template design and management suite – and InfoPath forms designer are powerful and comprehensive tools in their respective fields.

Both products can enable the acquisition data from external sources, prompt users for manual input, provide various controls (buttons, check boxes, lists, etc), calculate and set defaults, and validate supplied data.

ActiveDocs Designer facilitates the creation and management of sophisticated Document Templates. For data capture in the user-driven document creation process, the ActiveDocs Document Wizard automatically generates data capture forms from the Templates. This approach greatly simplifies the end user's task by providing a dynamic interview process that eliminates direct interaction with the Template. It satisfies all of the Template's data requirements while optimising data capture, providing appropriate access to external data sources, and applying comprehensive validation. It also makes for easier maintenance of the Template, with the interview process adjusting automatically if required.

InfoPath's Forms Designer can only create data capture forms. The creation of documents from such forms is limited to PDF rendering of the form itself. Even if such a limitation is tolerable, the form must exactly match the required document layout and the end user's interaction is therefore more complex. Changing the document requires changing the form, and changing the form means that the document will also change. To create documents that differ from the form layout (or in any file format other than PDF) requires expensive, additional, specialised software development. This, in turn, adds significant additional overheads whenever the document requirements change.

5.2 Template and Form deployment

Servers typically deploy ActiveDocs Templates and InfoPath forms over intranets, extranets, and the internet.

ActiveDocs Composition Server provides built-in access to deployed Templates. For interactive document creation (User-Driven Mode), users interact with Templates via the web-based ActiveDocs Document Wizard that renders the Template's data requirements as an interview manifested as questions in a series of simple web forms. Access to Templates and the Document Wizard may be via the ActiveDocs Express Wizard browser interface, or other applications such as Microsoft® SharePoint can invoke the Document Wizard directly. For programmatic document creation (Automated Mode), other applications may use the same Templates to create documents.

Deployment of InfoPath forms is usually via Forms Server integrated with SharePoint. They are forms and so only support interactive use. It is possible to develop InfoPath forms for so-called symmetric use to enable access as client objects with InfoPath installed on the desktop.

ActiveDocs does not rely on forms, and the ActiveDocs Document Wizard is usable from both web and desktop applications, including Microsoft SharePoint.

5.3   Template and Form end-use (Interactive)

The ActiveDocs Document Wizard renders any ActiveDocs Template as questions in a series of simple web forms, with the purpose of conducting an interview with the user to acquire, and/or compute, the necessary answers for creating the end document. The Document Wizard performs all of the necessary accessing of external data sources, calculations for default values, type and value validation, optional rule-based processing, etc.

The Document Wizard's abstraction insulates the user from the complexities of the Template and focuses on the data required to build the document. The presentation is deliberately simple and depends only on the Template Designer's labelling, typing, sequencing, and grouping of prompts. The Document Wizard optimises data capture by prompting only once for Answers appearing in more than one place.

ActiveDocs end users access the Document Wizard from the built-in web interface (ActiveDocs Express Wizard) or from another application such as SharePoint or a CRM.

ActiveDocs Composition Server's configuration includes delivery options (print, email, and fax) and a fully featured integrated Delivery Service. Storage of completed documents may be into the built-in database, to the file system, to Microsoft® SharePoint, to any WebDAV-compliant applications, or to customisable web services.

InfoPath forms render according to their design. End users access InfoPath forms via the Forms Server. Typically, Forms Server integrates with SharePoint.

5.4   Template and Form end-use (Non-interactive)

ActiveDocs Composition Server provides a Web Service interface that enables programmatic document creation (Automated Mode) using XML and a comprehensive collection of methods for document creation and task monitoring. The XML is a set of instructions specifying the Template(s), Answer data, and a rich set of optional parameters including the required output format, storage location, and delivery channel. ActiveDocs Templates do not require special design for use in Automated Mode instead of, or in combination with, User-Driven Mode.

While it is possible to use InfoPath Forms to create documents interactively (despite their file type and layout limitations and the additional expense), non-interactive use of an InfoPath form makes no sense. Yet, it may be desirable to produce the same types of documents non-interactively. The Document Generation (Non-interactive) section below addresses this important point.

5.5   Document Generation (Interactive)

ActiveDocs has designed ActiveDocs for document generation. The ActiveDocs document compiler generates Word (Open XML) format by default and then optionally converts to older Word formats and non-Word formats such as RTF, XPS, PDF, and ODF (T). Assembled documents may be stored within the ActiveDocs database, on the file system, within SharePoint or a WebDAV-compliant application, or to a Web Service.

InfoPath forms are for data capture and the subsequent storage of the captured data in databases or by export to Excel. It is possible to render completed forms as PDF but to create well-formatted documents, let alone determine their delivery and storage, requires IT expertise for significant additional behind-the-scenes development of the form itself and additional processing of the data, typically to merge it with an XML representation of the basic document. Any change to the form or document requirement will incur further development. This intensive, costly, and specialised additional effort is in significant contrast to that required by ActiveDocs.

5.6   Document Generation (Non-interactive)

ActiveDocs Composition Server provides a Web Service interface that enables programmatic document creation (Automated Mode) using Job XML and a comprehensive collection of methods for document creation and task monitoring. Job XML is a set of instructions specifying the Template(s), Answer data, and a rich set of optional parameters including the required output format, storage location, and delivery channel. ActiveDocs Templates do not require special design for use in Automated Mode instead of, or in combination with, User-Driven Mode.

Generation of documents from within InfoPath, while difficult, is not impossible, but this is the result of an interactive process. InfoPath's interactive forms cannot by definition support non-interactive use, yet there may be a requirement for automated generation of those same documents produced via the interactive process. This raises interesting issues for maintenance of the code (that must be developed using IT expertise) which creates such documents. Two particular aspects of this that would require special care:

(1) the code which generates documents from within an InfoPath form (interactive mode) and the code which generates documents from outside the InfoPath environment (programmatic mode) need to be kept aligned, and

(2) problems for developers and users can occur when the basic document needs changing, as the InfoPath form and the document-generation code within the form and in the external environment all need to be changed, just to keep the end user experience and automatic use aligned

Contrast this with ActiveDocs' automatic rendering of the Document Wizard for User-Driven Mode (interactive) use and the absence of additional work required to make template changes effective for Automated Mode (non-interactive) use.

6   Conclusion

ActiveDocs is an integrated and complete solution from Template Design to Document Delivery. The product provides a fully featured solution for document creation out-of-the-box. The ActiveDocs Document Wizard automatically abstracts Templates and renders an interview for interactive document creation (User-Driven Mode). Programmatic document creation (Automated Used) may use the same Templates.

InfoPath is a solution for data capture using forms, not for document creation. Forms require significant behind-the-scenes development and skills to generate documents, and there are clear challenges in the parallel development and maintenance of "templates" and InfoPath forms, especially where non-interactive document generation is required.

To quote from a Microsoft source: "It's almost an apples and oranges comparison, as InfoPath is best at the data collection but can be extended to create Word Documents based on the data collected, whereas ActiveDocs excels at the creation of those Word Documents."

Summary: InfoPath requires intensive, costly, specialised additional effort to create useful documents. It lacks the dedicated functionality of ActiveDocs, and is not a full and integrated solution for document automation.