

## Strategies for Deploying Forms With Reader Extensions

Jim Healy

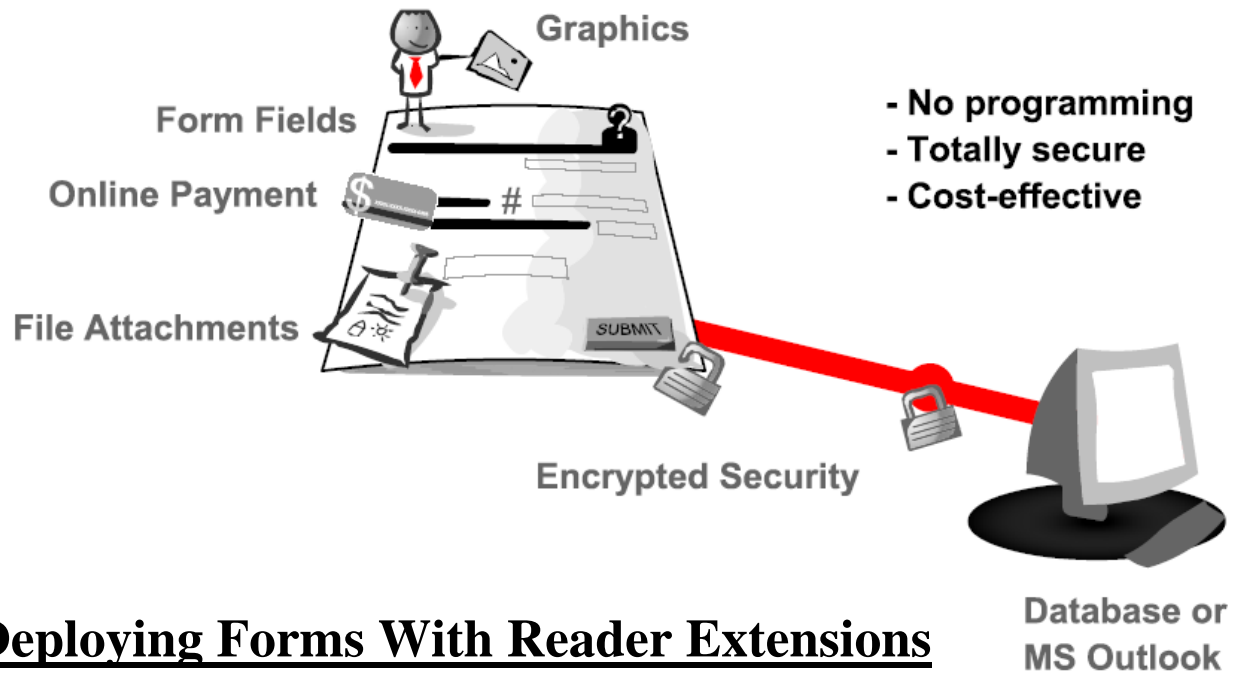
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**FORM**  
**ROUTER**  
INC



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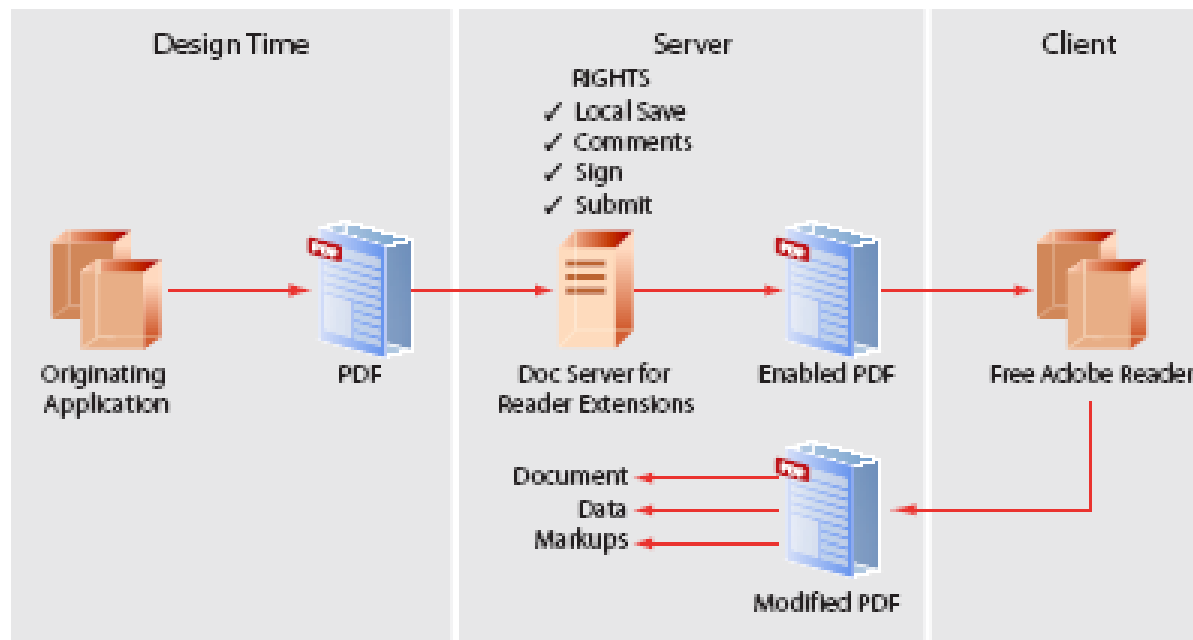
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# What are Reader Extensions?

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Reader Extensions allow you to embed one-time usage rights within an Adobe PDF document. These usage rights "turn on" hidden functionality within the free Adobe Reader software, so that end users can view and interact with intelligent Adobe PDF documents.






## Why would you want to use Reader Extensions?

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- By design, selected features and functions, normally available in Acrobat Professional / Standard, are disabled in the free Adobe Reader.
- Unfortunately not everyone has the full Adobe Acrobat software. But, over 800 million people have a copy of Adobe Reader.
- The ability to distribute PDF documents that activate Adobe Acrobat hidden functionality in the free Adobe Reader is of great value.

Document Status

-  Sign: Additional rights include adding your personal digital signature and saving the document.
-  Fill In Form: Additional rights may include filling in form fields, saving the document, and importing or exporting form data.
-  Review & Comment: Additional rights include adding sticky notes, stamps, text highlights, file attachments, saving the document, and importing or exporting comments.

# Where did Reader extensions come from?

- The IRS is a major distributor of PDF printable forms. They wanted the ability for people to locally save the forms with entered data.
- They needed a solution that would extend the functionality of PDFs within the free Adobe Reader.
- To meet the challenge, Adobe developed Reader Extensions.

**Income Tax Return for Single and Joint Filers With No Dependents** (99)

<b>Label</b> (See page 12.) Use the eGov label. Otherwise, please print or type.  Presidential Election Campaign (page 12)	<b>L</b>	Your first name and initial	Last name	Y
	<b>A</b>	If a joint return, spouse's first name and initial	Last name	S
	<b>B</b>	Home address number and street. If you have a P.O. box, see page 12.	Apt. no.	A
	<b>E</b>	City, town or post office, state, and ZIP code. If you have a foreign address, see page 12.		-
		<b>Note.</b> Checking "Yes" will not change your tax or reduce your refund. Do you, or spouse if a joint return, want \$3 to go to this fund? . . . . . ▶		C
<b>Income</b>		<b>1</b> Total wages, salaries, and tips. This should be shown in box 1 of your form(s).		

## What can a Reader Extensions do for PDFs?

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1. Allow completed forms to be saved locally
2. Add digital signatures
3. E-mail completed PDF forms
4. Capture 2-D barcodes without Adobe encryption
5. Add and delete fields with JavaScript
6. Create new pages via templates
7. Utilize Web services (Soap calls)
8. Export and import form data
9. Take advantage of file attachments and media clips
10. Add comments and field data at the same time
11. Submit entire forms to a server

# Allow files to be saved locally – offline and online

- The #1 most requested reason for Reader Extensions.
- Locally saving a form allows forms to be worked on it an offline or mobile environment.
- Saving forms locally allows users to have many instances of a form filed out and saved to their hard drive.

<b>Sign here</b> Joint return? See page 11. Keep a copy for your records.	Under penalties of perjury, I declare that I have examined this return, and to the best of my knowledge and belief, it is true, correct, and accurately lists all amounts and sources of income I received during the tax year. Declaration of preparer (other than the taxpayer) is based on all information of which the preparer has any knowledge.				
	Your signature	Jim Healy <small>Digitally signed by Jim Healy DN: cn = Jim Healy, o = FormRouter Inc., ou = CTO Date: 2005.09.12 11:07:33 -0400</small>	Date	Your occupation	Daytime phone number
<b>Paid preparer's use only</b>	Spouse's signature. If a joint return, <b>both</b> must sign.	Date	Preparer's SSN or PTIN		
	Preparer's signature	Date	Check if self-employed <input type="checkbox"/>	EIN	
	Firm's name (or yours if self-employed), address, and ZIP code	Phone no. ( )			



## Add digital signatures

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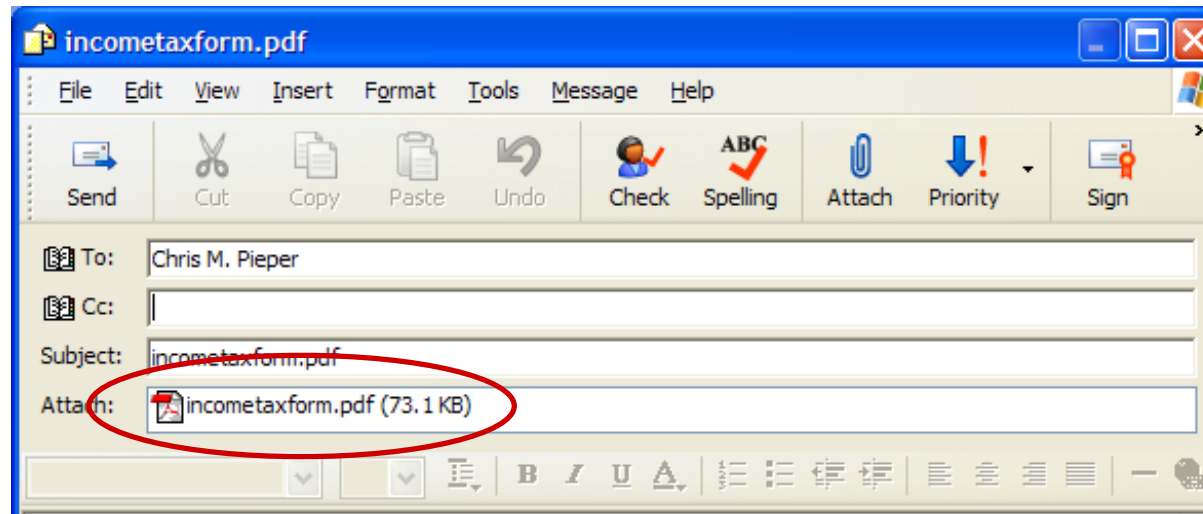
- Digital signatures allow for legally binding transactions to be signed in PDF forms.
- Reader Extensions are required for users of the Free Adobe Reader to and sign documents.

The image shows a portion of a tax form with a digital signature. On the left, there is a vertical instruction: "Sign here" in bold, followed by "Joint return? See page 11. Keep a copy for your records." A black arrow points from this instruction to a signature line. The signature line contains the name "Jim Healy" in a yellow box. To the right of the name is a digital signature block with the following text: "Digitally signed by Jim Healy", "DN: CN = Jim Healy, C = US, O = FormRouter Inc., OU = CTO", and "Date: 2005.09.12 11:07:30 -04'00'". Above the signature line, there is a line of text: "Under penalties of perjury, I declare that I have examined and accurately lists all amounts and sources of income I receive on all information of which the preparer has any knowledge." Below the signature line, there is another line of text: "Spouse's signature. If a joint return, both must sign." A red oval highlights the signature line and the digital signature block.

## E-mail completed PDF forms

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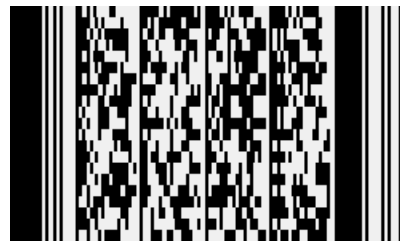
- For simple workflows, e-mailing filled PDF forms is any easy to deploy solution. Unfortunately, the free Adobe Reader will only email the data (FDF format) – not the filled in PDF form
- Reader Extensions make it possible to e-mail the completed PDF form it to another person to complete.



## Capture 2-D barcodes without Adobe encryption

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- End users complete forms with the Adobe Reader®, which dynamically updates the 2D barcode with user-supplied information. Form end users can then return the completed form electronically, by fax, or by mail.
- The Adobe Barcoded Paper Forms Decoder is required to capture user-supplied information from the form.
- Reader Extensions are required to process Adobe Barcoded forms with existing third-party scanner solutions.



# Add and delete fields with JavaScript

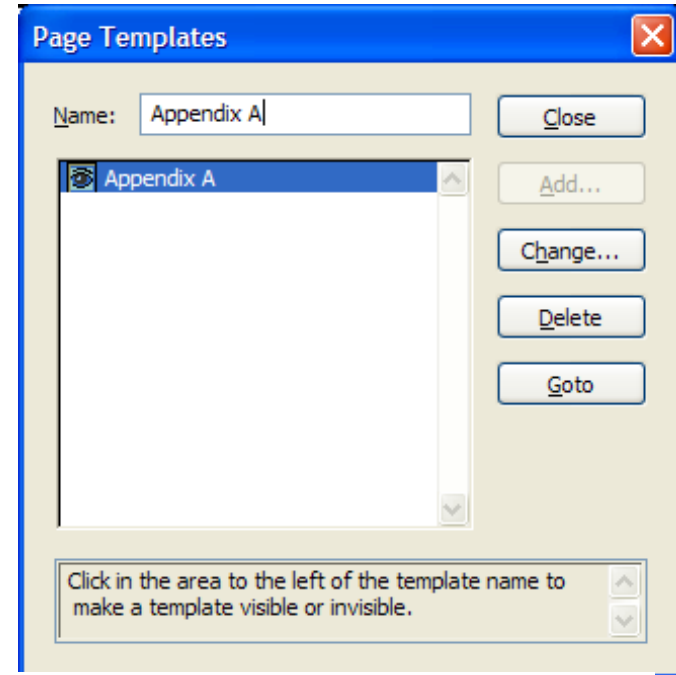
JAVASCRIPT METHOD/PROPERTY	ACROBAT APPROVAL 5.X	READER 6.X	READER 6.X (with Extensions)	ACROBAT STANDARD 6.X
setAction (Bookmark, Doc, Field, Link)	✓	✗	✗	✓
Field Object: buttonImportIcon	✓	✗	✗	✓
Field Object: setLock	✓	✗	✗	✓
Field Object: signature SetSeedValue	✓	✗	✗	✓
Link Object - all methods & properties	✓	✗	✗	✓
Template Object - all methods & properties	✓	✗	✓	✓
Doc Object: spawnPageFromTemplate	✓	✗	✓	✓
Doc Object: deletePages	✓	✗	✓	✓
app.addField	✓	✗	✓	✓
app.removeField	✓	✗	✓	✓
app.mailMsg	✓	✗	✗	✓
app.newDoc	✓	✗	✗	✓
app.newFDF	✓	✗	✗	✓
app.openFDF	✓	✗	✗	✓
Bookmark: createChild	✓	✗	✗	✓
Bookmark: insertChild	✓	✗	✗	✓
Bookmark: remove	✓	✗	✗	✓

**Source:**

Migrating from Adobe Acrobat Approval 5.x to Adobe Acrobat/Adobe Reader 6.0 Family

## Create new pages via templates

- A template is a page in a PDF document that can be dynamically added.
- For forms designed in Adobe Acrobat (not Adobe Designer) templates are used to dynamically add additional sections/pages of your form.
- Reader Extensions only works for spawned pages. Spawning page overlays are not supported.



- Create new pages
  - `doc.createTemplate()`, `doc.removeTemplate()`, `doc.extractPages()`, `template.Spawn()`
  - Property enabled: `template.hidden`

## Utilize Web services

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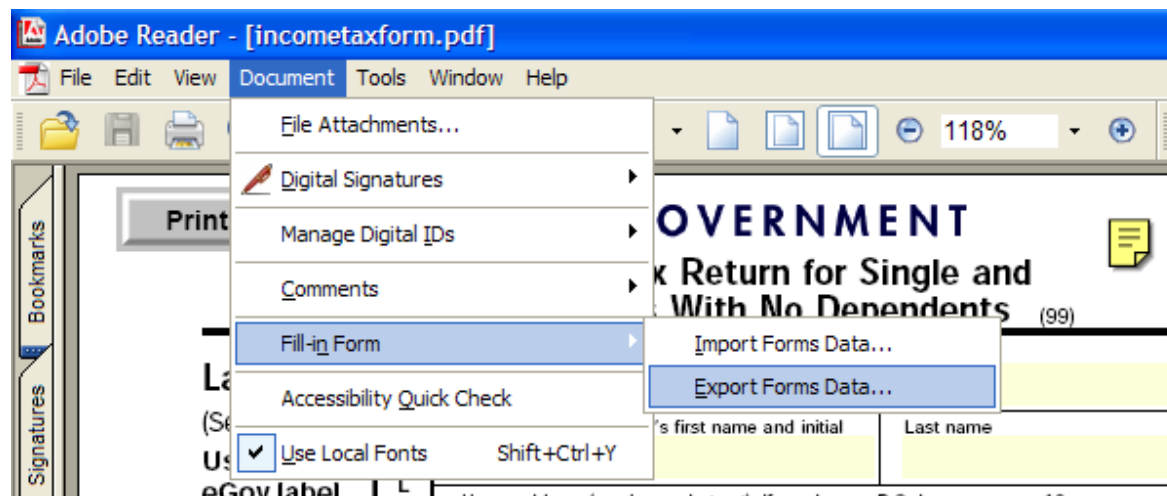
- Web Services allow programs to send data and retrieve results through the web.
- With Reader Extensions, PDF forms can send data and return results directly into a PDF document.
- This allows PDF forms to become act more like computer programs.

SOAP.connect(), SOAP.request(), SOAP.response()

# Export and import form data

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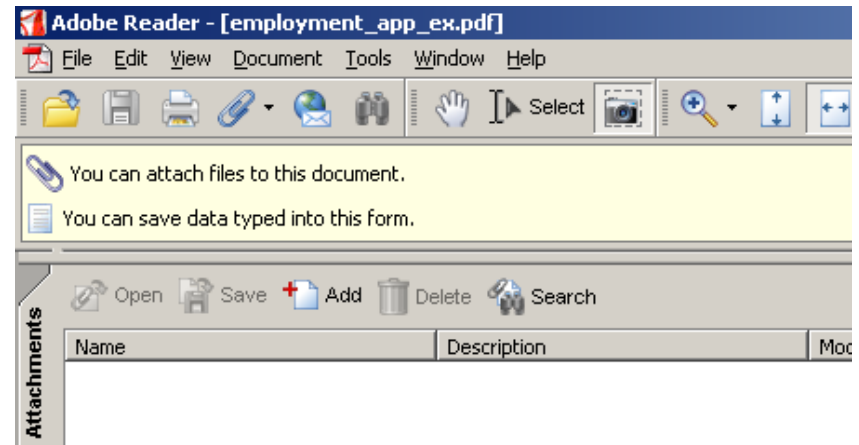
- PDF forms through the use of FDF have always been able to import form field data.
- Reader Extensions now allow the export for form field data.



## Take advantage of file attachments

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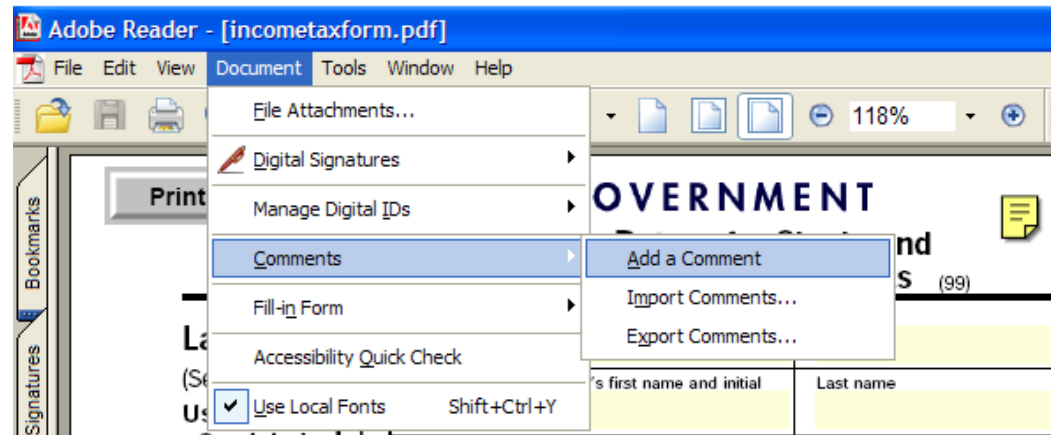
- It has always been possible to create a file upload field on a PDF to transmit a file to a Web server when a form is submitted.
- With Reader Extensions is now possible to directly attach files inside of a PDF document.
- This makes PDF documents a transport container for other files.



## Add comments and field data

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- With Adobe Reader 7 users can now add comments to PDF documents. But, if you choose to add comments, the form fields become deactivated.
- Adobe Reader Extensions make it possible to add comments and fill out form fields in Adobe Reader 6x and 7x.



## Submit entire forms to a server

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- If you use file attachments and digital signatures you will need to submit the entire PDF forms to a server.
- Reader Extensions are required to submit entire forms to server. This is required to take advantage of attachments and digital signatures.

Submit Form Selections

Enter a URL for this link:  
http://www.formrouter.net/processpdf.aspx

**Export Format**

EDF Include:  
 Field data  
 Comments  
 Incremental changes to the PDF

HTML

XFDF Include:  
 Field data  
 Comments

PDF The complete document

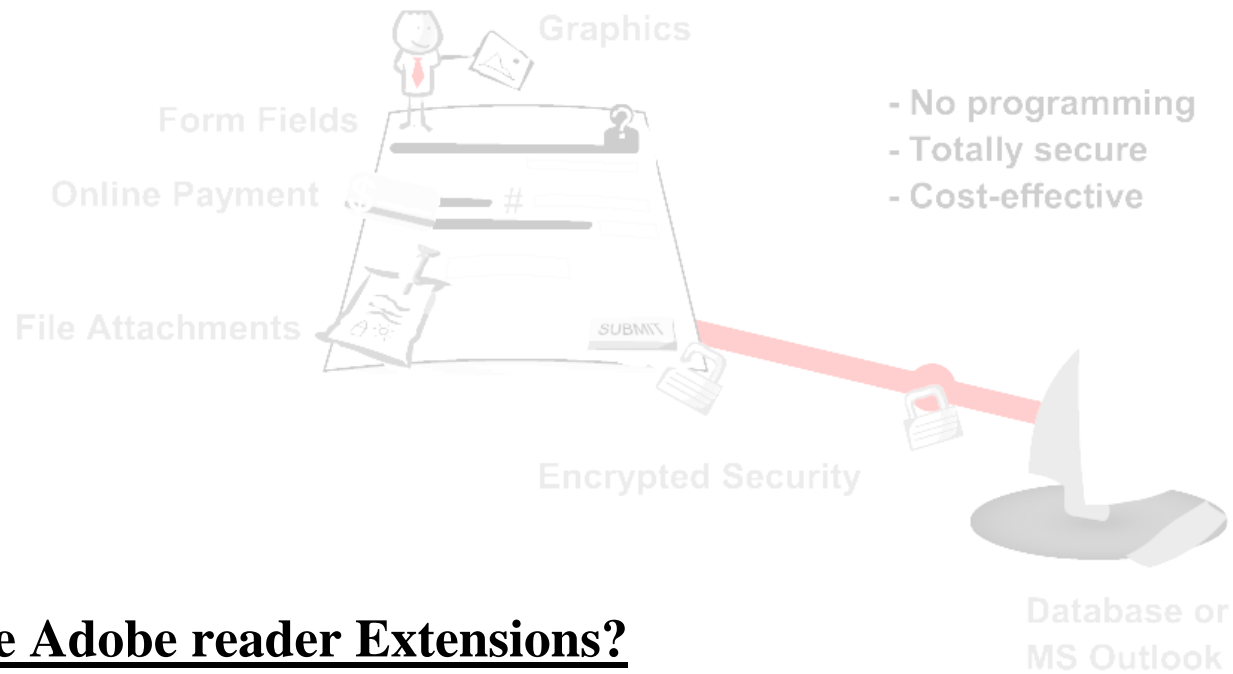
**Field Selection**

All fields  
 Only these...

**Date Options**

Convert dates to standard format

Dates are submitted in D:YYYYMMDD format instead of passing the user typed values through unchanged.



## How to Acquire Adobe reader Extensions?

## How to acquire Reader Extensions

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- Adobe sells Reader Extensions as part of the LiveCycle enterprise servers product line.
- Adobe field sales are tasked with selling enterprise server solutions. ARES options are packaged and priced accordingly.
- Reader Extensions require installation and administration on a Java J2EE compatible server like WebSphere (IBM), WebLogic (BEA) or JBOSS.
- Reader Extensions are available as an ASP service through a licensing relationship with FormRouter.

## Reader Extensions – License or Subscription?

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- Perpetual Licensing:
  - ✓ Requires dedicated hardware and IT administration.
  - ✓ Per-Form: single form unlocked for unlimited number of users. Maximum flexibility – highest per form cost.
  - ✓ Per-User: un-limited unlocked forms can be used by a fixed group of named users. Best value for a know user population.
  
- ASP Subscription:
  - ✓ No dedicated hardware or IT administration.
  - ✓ Perpetual licensing (per-Form and per-User) and Activity-Based subscription option.
  - ✓ Version 6.x and 7.x ARES options.

# What version of Reader Extensions is required?

- Version 6x unlocks will work with versions of Adobe Reader back to version 5.1.
- Version 7x supports documents designed in both Adobe Acrobat and Adobe Designer.
- Version 7.x unlocks will only work with Adobe Reader 7 and higher.
- Version 6x can be achieved through API's and a custom GUI.

**Features**

- Reader 6.0 Compatibility (DO NOT CHOOSE ANY PDF 1.6 OPTIONS)
- Basic form fill-in
  - Import and export form data
  - Submit outside web browser
  - Database and web service connectivity **PDF 1.6**
  - Add and delete form fields
  - Create pages from templates
  - 2D barcode decoding
- Digital signatures
- Commenting: add, delete, modify, copy, import, and export
  - Online comments in web browser **PDF 1.6**
- Addition of and changes to embedded files **PDF 1.6**

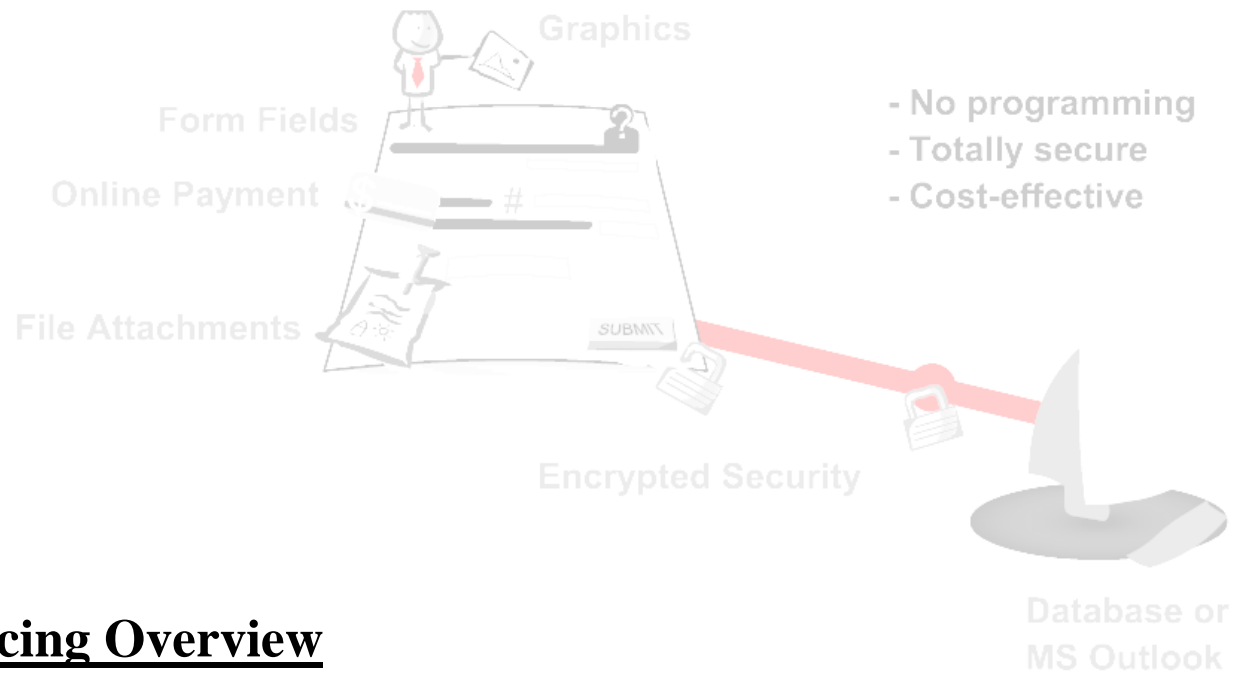
**Draft Level**

- Draft (digital watermark will be added and the process count will remain unchanged)
- Final (no watermark will be added and the process count will be incremented)

**Message**

Enter the message to be displayed when a user opens the file in Adobe Reader.

Cancel Next



## ARES ASP Pricing Overview

# New PDF options– Reader Extensions service

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FOR IMMEDIATE RELEASE

## FormRouter Licensed to Offer Adobe® LiveCycle™ Reader® Extensions Service

*Lower Cost of Ownership allows more PDF users to fill, save and digitally sign forms in Adobe Reader.*

CARY, N.C. (October 12, 2004) – FormRouter, Inc., announced today that it has signed a license agreement with Adobe Systems Incorporated, allowing the company to activate usage rights in PDF documents and forms as a for-fee customer service. Chris M. Pieper, CEO and Chairman for FormRouter commented, “We are very pleased to be the first Adobe partner to offer Adobe LiveCycle Reader Extensions as a service. FormRouter customers can now have Reader Extensions usage rights applied to individual forms as needed – without the need to acquire, install and support a dedicated solution.”

## Per-Form ARES License - overview and pricing

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- \$10,000 unlock fee. 20% maintenance after first year.
- 25% discount for public sector and non-profit organizations.
- Changes and/or document substitution allowed per Adobe guidelines.
- Per-form unlocks work with Adobe Reader 5.1 and higher.
- No restrictions on form distribution (unlimited anonymous users).
- Per-Form extensions are perpetual. Maintenance is optional.
- No monitoring or restrictions regarding off-line usage.

*\* Option limited to FormRouter subscribers in North America.*

## Per-User ARES license - overview and pricing

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- \$100 per named user. 20% maintenance after first year.
- 25% discount for public sector and non-profit organizations.
- \$100 processing fee per form unlock.
- Per-user unlocks work with Adobe Reader 5.1 and higher.
- Form may only be distributed only to ARES named users.
- No monitoring or restrictions regarding off-line usage.

*\* Option limited to FormRouter subscribers in North America.*

# New Subscription options– Activity-Based pricing

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*For Immediate Release*

## FormRouter and Adobe Team to Offer Expanded Subscription Pricing for LiveCycle™ Reader® Extensions Service

*New subscription pricing targets small and medium business, non-profits and departmental decision makers.*

CARY, NC — June 7, 2005 — FormRouter, Inc. announced today new subscription pricing for its LiveCycle Reader Extensions Service for organizations seeking to deploy PDF forms with advanced usage rights such as digital signatures and ability to fill and save offline.

FormRouter became the first PDF Application Service Provider (ASP), to be licensed by Adobe, to activate PDF usage rights via Adobe Reader software as a for-fee service in October 2004. “Market reaction to our LiveCycle Reader Extensions service has been strong, however the one-price-fits-all approach has kept many small and medium sized organizations from realizing the power of rights enabled PDF forms,” said Chris M. Pieper, CEO and Chairman for FormRouter. “With our new subscription pricing options, LiveCycle Reader Extensions unlocks now start at under \$500.”

## Activity-Based ARES subscription - overview and pricing

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- Graduated pricing based:
  - Document complexity – measured by the number of pages/templates in a form.
  - Document usage – measured by the number of times the form is opened on any given day.
- Usage (daily form opens) is measured by an Adobe Policy Server.
- Form opens (count) is the only data tracked by Policy Server.
- ARES activity-based unlocks require Adobe Reader 7.0 or higher.
- ARES functionality is available off-line for a 7 consecutive days.

## Activity-Based ARES - annual subscription fees

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500+ form opens on any day	\$3,000	\$6,000	\$9,000
<= 500 form opens on any day	\$1,500	\$3,000	\$4,500
<= 100 form opens on any day	\$500	\$1,000	\$1,500
	1-2 pages	3-10 pages	11+ pages

*\* 25% discount for FormRouter subscribers. ARES subscriptions limited to organizations within North America.*

## FormRouter's ASP-ARES Options (comments & observations)

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*Story by Robyn Weisman, April 20<sup>th</sup> 2005*

“FormRouter is a terrific partner for Adobe because, unlike Adobe, whose sales force in this space focuses on large enterprises, FormRouter does a great job at taking Adobe PDF solutions to small and medium-sized businesses and to departments within larger corporations.”

***Ryan Hunter***

***senior product marketing manager for Adobe  
LiveCycle Reader Extensions***

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The logo for FormRouter Inc. features the word 'FORM' in a black, sans-serif font above the word 'ROUTER' in a bold, red, sans-serif font. The letters 'INC' are in a smaller, black font and are positioned to the right of 'FORM'. The entire logo is set against a white background with a thin grey crosshair.



Call Toll Free

**1-866-GOT-FORM**

Open an account at [FormRouter.com](http://FormRouter.com) today. 1-866-468-3676

