



Office 2003 InfoPath and MS Word Professional: EContent Decision Maker Review

By Robert J. Boeri - November 2003 Issue, Posted Nov 14, 2003

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Company: [Microsoft Corporation](#)

Purpose: General productivity software

Starting Price: Suggested retail price for the Office Professional Edition 2003 has been set at \$499. Upgrades will cost \$329.

Reviewer's View: By adding XML capabilities to Office 2003 professional versions, Microsoft has elevated content-centric XML to a mainstream choice. Microsoft Word and InfoPath are richly functional—even dramatic components—of this Office release. Although these products are not perfect, they are very good. Microsoft's reputation for improvements through successive releases should make them even better.

Microsoft Corporation's Office 2003 offers bold and innovative support for XML. The professional version of Microsoft Word gives office workers a tool for creating valid XML. InfoPath, a new office product, makes it easy to develop and use XML-enabled forms. Both require training and a change in business processes to accommodate the special requirements of XML. It is hard to overstate the impact these products will have on the mainstream use of content-centric XML.

In The Details

This review examines two products in the Office 2003 Enterprise release: The professional version of Microsoft Word and InfoPath, a forms-design and forms fill-in program. Office 2003 also provides extensive support for XML in Excel and Access, Microsoft's database tool. Microsoft's Office Professional Enterprise Edition 2003 (available in Volume License and Academic Volume Licenses) includes both the professional version of Word and InfoPath. The professional version of Word is also available in other licensed editions, including retail.

To date, XML has proven very useful improving business processes and interchanging information between programs and computer servers. Deriving the benefits of XML at the office desktop—where most information originates—has been a different issue with only niche success stories. InfoPath and MS Word accomplish what no vendor has come close to achieving for XML at the desktop: The ability to use the world's most popular word processor, and also a Word-like forms utility, to create valid XML content in the office. Excellent XML authoring tools have been available for several years, but they have always lacked the broad-market appeal necessary to make XML a credible choice for general enterprise use.

MS Word builds on familiar features in previous releases, while offering an XML capability called "Word XML." Word supports XML models called XML Schema Definitions (XSDs). Power users can build schemas to structure information in whatever way makes most sense for their enterprise. Companies can integrate this information with other XML content and business applications. Authors can also incorporate extensive formatting and then save or omit that formatting with the XML content.

The major new features in MS Word for users and developers include:

- Support for content-centric XML, including industry-standard XSD schemas as defined by the World Wide Web Consortium.
- New "ink" capability, allowing you to

make notes and sketch ideas directly on top of Word documents.

- Research pane to help users perform information searches either within or outside the firewall, then insert that information into their documents.
- "Smart Documents," highly customized XML solutions that developers can create to integrate content with business processes and help users complete forms and other documents.
- "Smart tags," another means for developers to automate actions related to specific content or XML elements in documents, such as sending an email message or inserting a stock quote.

How well do these features work? I tested the second beta version of Office 2003 and I used Altova's XML Spy as a tool to double-check results. I found Word XML to be a good—not yet excellent—XML authoring tool. The first screenshot shows an XML document I created based on a schema developed by Altova to author datasheets. The main editing area is shown to the left, in a "tags" view. To the right is an XML structure showing a hierarchical view of the elements. The currently available elements are shown in the lower right pane. Word XML can display XML documents with or without tags, and with highly visual formatting if you develop a companion XSL style sheet. Wavy purple lines indicate either an error or incomplete document, as does the circled "?" shown in the XML structure pane. You can save an incomplete or invalid document as I did, and then resume work on it later. This capability is important in both a dynamic office environment, as well as for teams working on sections of larger documents. Entering available attributes to XML elements (if your schema defines attributes) is as simple as a right-click within the element. Note the Acrobat toolbar icons in the screenshot. When I installed Acrobat 6, it automatically integrated into Word's toolbar.

On the negative side, unlike other systems like Corel's XMetaL, there is no way to view the XML document and its tags as text. This shortcoming is like Word's inability to show word processing codes. There are times when revealing codes facilitates quick diagnosis of document problems. Word XML also lets you inadvertently insert elements (or values of attributes) that render your document invalid. You may not find this out until you try saving the document. Even when I corrected invalid attribute values, Word XML displayed errors. The only way I could remove the error message was to delete the element and re-insert it.

Info on InfoPath

If you want to create XML content in an application that is more constrained than in a typical document, Microsoft's InfoPath may provide a solution. Today, business forms information is usually captured in a document or spreadsheet, with limited if any reuse of the form data. Moreover, you can consider many documents that have limited types and sequence of content as forms, too. Treating simple documents as forms that authors can fill out is a good strategy for creating valid XML. Whether creating forms or simple documents, InfoPath can make XML content creation an easy experience and applications developers can tie the form data to enterprise systems.

InfoPath comes with several dozen business form templates that you can either use directly or modify. I took the Status Report template and modified it by doing such things as dragging controls (such as date fill-ins) and modifying the look-and-feel of the form. Creating fields in a form is a simple drag-and-drop process, reminiscent of Microsoft's Visual Studio. Moreover, formatting those fields is very much like using Microsoft Word. Tables, rows, and cells have properties such as horizontal and vertical justification. Technically adept business users can create forms that traditional forms designers can reformat.

There are three ways to use InfoPath: Design, Preview, and Forms-fill in. I modified the sample Status Report template by enlarging some of the fonts and adding a picture for the project manager. The form's design is guided behind the scenes by a Microsoft form XML schema, and the form you save (called the "instance") is itself an XML document.

When you fill out this form, InfoPath puts today's date in the date field automatically, although you can click the calendar icon to pick a different date. Also, when you fill in the "single name" field, other instances of that name automatically receive the same name. I did notice that the views of form fields in the design and preview modes differed slightly.

If your content and applications architectures integrate well with Microsoft tools and systems such as .NET, consider InfoPath. Consider total cost of ownership since

InfoPath is available only through a volume licensing agreement. If your content and applications architectures emphasize integration with Adobe tools (especially Adobe Acrobat and Form Designer), consider evaluating this competing forms solution.

A Last Word on Word

Office 2003 supports only XML schemas, not DTDs. If your XML models are expressed only as DTDs and you have no current plans to migrate to schemas, consider other XML authoring products. Note you can convert DTDs to Schemas with tools from other vendors such as Altova's Spy.

If you use MS Word today and want XML authoring with the familiarity of Word, seriously evaluate the professional version of Word for your XML content needs. Analyze the total cost of ownership in applicable Microsoft licenses and channels for the professional version.

Do not underestimate the training—even cultural change—required to use this or any other XML content authoring tool. Your organization will also need to acquire core competencies in schema design, XSL, and XSLT, the XML formatting and transformation standards. If you use another XML authoring tool like Arbortext Epic or Corel XMetaL for large, complex, modular documents, you may be able to use Word for authoring some modules, but probably will continue to benefit from your current XML tool's ability to work with large documents.

Sidebar: Key Features at a Glance

MS Word	<ul style="list-style-type: none"> Valid XML content within familiar Word system Digital ink to annotate Word documents Integrated online research Enhances usability with smart tags and smart documents
MS InfoPath	<ul style="list-style-type: none"> Easily create and deploy visually rich forms Reduce redundant and repetitious entry of information Share common information by leveraging the power of XML Integrate forms with enterprise applications that are also XML-aware

Sidebar: Business Profile

Founded in 1975, Microsoft is headquartered in Redmond Washington and has offices worldwide. Microsoft is a leading vendor of software, services, and Internet technologies for personal and business computing worldwide. Microsoft describes itself as "offering a wide range of products and services designed to empower people through great software—any time, any place, and on any device."

Sidebar: WordPerfect Office 11 an XML-Based Office Option

WordPerfect Users: You too have an XML option. WordPerfect Office 11 builds on previous editions offering increased value for office suite users. Besides WordPerfect, Office 11 standard edition includes the Quattro Pro spreadsheet and Perfect Presentations professional presentation tool. The Professional edition also includes the Paradox relational database system. WordPerfect offered support for SGML (the precursor to XML) in the early '90s, and now as part of the Corel product line has continued to refine that capability. Corel has enhanced the suite's XML integration, offering "Publish to XML" in the standard products and an enhanced XML editor in WordPerfect, to "allow casual users to create XML." The WordPerfect XML editor also lets users validate the correctness of both SGML and XML files. Office 11 ships with various Document Type Definitions (DTDs), but does not support schemas. XML authoring requires developing a WordPerfect Template, although WordPerfect ships with the ability to publish using the version 4.2 of the DocBook DTD. The template file contains DTD information, a layout file, and an alias file providing meaningful names for XML elements. Office 11 also publishes to Acrobat PDF and HTML. All this is available in a product whose basic file formats remain unchanged since version 6.1, providing broad compatibility with legacy files.