



Adobe® LiveCycle™ Forms for IBM®

Integrating forms and documents with process management

Readable forms and documents—both paper and electronic—are often necessary due to customer preferences, reporting requirements, and government mandates. To streamline processes, organizations need to integrate electronic versions of paper forms and documents with processes. Among the many challenges involved with increasing efficiencies, satisfying constituents, and meeting compliance mandates, you need to:

Adobe LiveCycle Forms for IBM extends IBM middleware to integrate Intelligent Documents and forms with portals, enterprise applications, and content management systems. The solution enables enterprises to:

- Create intelligent forms pre-populated with data and business logic
- Extend processes outside the fire-wall with intelligent forms
- Deploy intelligent forms with portals for personalized access
- Integrate intelligent forms with core systems
- Provide a single, open, and resilient foundation to manage all types of content

- Unify disparate processes, systems, and applications. Gain access to information trapped within different applications.
- Reduce transaction costs and delays. Establish more efficient data capture and reduce re-keying of data.
- Satisfy expectations for better services. Make the best use of your information assets and make critical information available more securely over the Internet.
- Meet regulatory requirements and mandates. Comply with legislative mandates that require proper routing and approvals for documents in reporting processes.

Adobe LiveCycle Forms for IBM combines Adobe Portable Document Format (PDF) forms with eXtensible Markup Language (XML) data schemas to create intelligent forms. As part of the Adobe Intelligent Document Platform, it automates and accelerates the flow of business-critical information across an enterprise through its integration with IBM middleware—including the IBM WebSphere® platform and IBM DB2® Content Manager.

Extend your middleware investment

Adobe LiveCycle Forms for IBM offers Adobe Document Services to extend your middleware investments, by integrating documents into the business processes that connect employees, customers, suppliers, and constituents.

Adobe LiveCycle Forms for IBM is built on the flexible Sun™ Java™ 2 Platform, Enterprise Edition (J2EE™) architecture and is optimized for the IBM WebSphere Application Server and middleware. The standards-based architecture ensures interoperability with user systems, applications, and processes. Adobe Document Services work with IBM WebSphere Business Integration Server to connect forms to processes, IBM WebSphere Portal to use forms as interfaces to applications, and IBM WebSphere Studio Application Developer to accelerate custom application development.

Create intelligent forms with business logic

An Intelligent Document can interact with core applications and trigger automated business processes based on predefined rules. Adobe Document Services enable the flow of information by integrating Intelligent Documents—deployed as intelligent forms—with business processes. Intelligent forms can be pre-populated with information from core applications to make them easier to fill out. Forms can also include business logic to provide automatic calculations, data validation, and document routing and approval.

CHALLENGES FOR FORM-BASED PROCESSES:

- Limited interoperability among disparate systems
- Transaction costs and delays due to re-keying data
- Customer expectations for better service
- Regulatory requirements and mandates

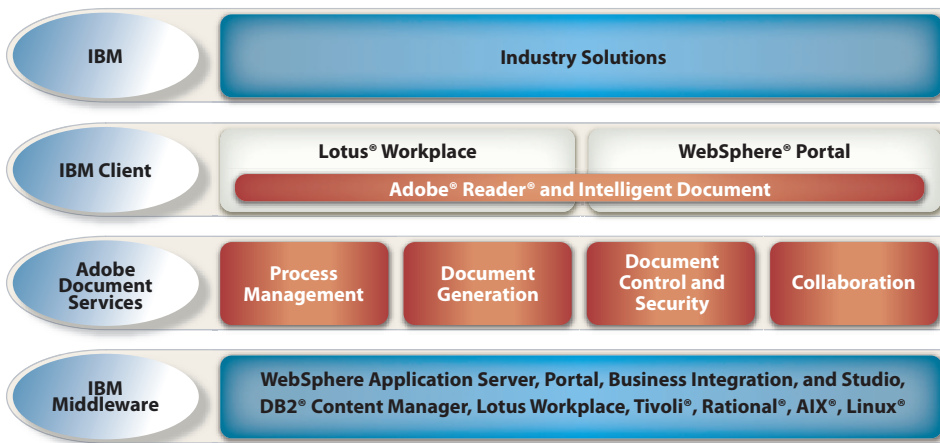


Figure 1. Adobe Document Services extend IBM middleware solutions

Adobe LiveCycle Forms for IBM offers document services for process management that extend business processes, provide better interaction between systems, and improve communications with partners and customers. Adobe LiveCycle Forms for IBM integrates with Adobe LiveCycle products to provide document generation, security enhancement, and collaboration services.

Use Adobe LiveCycle Forms for IBM with IBM WebSphere Studio Application Developer to create intelligent PDF forms using XML data schemas. Adobe LiveCycle Forms for IBM enables forms created in Adobe LiveCycle Designer to work with web services developed in IBM WebSphere Studio Application Developer to link form completion activities with back-end transactions.

Extend processes to people outside your firewall

Adobe LiveCycle Forms for IBM is optimized for IBM WebSphere Application Server, which maximizes your investment in WebSphere interoperability between Web services and J2EE applications, and enables high-volume transaction form processing for mission-critical applications. By deploying Adobe LiveCycle Forms for IBM with IBM middleware, enterprises can extend processes to people inside and outside the firewall with more secure, intelligent forms. The combination of IBM WebSphere system-level security and the document-level security of Adobe PDF forms ensures that forms and documents are protected from unauthorized access, and form data is kept confidential.

Deploy intelligent forms with portals

IBM WebSphere Portal offers personalized integration of people, business processes, and information—conveniently, from any device. Adobe LiveCycle Forms for IBM offers sample portlets for accessing and listing forms. With Adobe LiveCycle Forms for IBM and IBM WebSphere Portal, you can deliver personalized access to forms and documents, and enable intelligent form completion and submission as features of a portal.

Integrate forms with core systems and applications

Adobe LiveCycle Forms for IBM is integrated with IBM WebSphere Business Integration Server, enabling your enterprise to build and manage complex business processes that span multiple enterprise applications. Simplify your business processes with intelligent forms that directly interact with server-side business logic. Respond faster to customer requests with online forms that automatically generate internal review and approval processes. Enterprises can connect to the J2EE Connector Architecture (JCA) to integrate intelligent forms with SAP, PeopleSoft, Oracle ERP Financials, J.D. Edwards, IBM CICS, IBM IMS, and IBM Host On-Demand applications.

Manage forms and content across your enterprise

Use Adobe LiveCycle Forms for IBM with IBM DB2 Content Manager or other content repository to manage forms and drive business processes. Link Intelligent Documents and forms to supporting documents, such as e-mails, project files, scanned images, and audio and video files. Enhance records management by using Adobe intelligent forms as records that can be more securely managed by IBM Records Manager and its access controls and rules.

BANKING—ENHANCE CUSTOMER RELATIONSHIPS

Banks need to target the right customers, at the right time, to sell services today and build relationships for the future. How do banks improve revenue with fewer resources and deliver greater value? Consider the mortgage application process. Today, this manual process provides the perfect opportunity to enhance existing customer relationships and build new ones. By leveraging customer information with intelligent form capabilities, banks can change today's mortgage application process into a personalized, dynamic one that attracts new customers and introduces new mortgage services.

GOVERNMENT—MEET NEW E-GOVERNMENT INITIATIVES

The pressure to reduce the efforts and costs associated with government compliance has resulted in e-government initiatives such as the Government Paperwork Elimination Act (GPEA) in the United States. The Internet can deliver faster, more responsive constituent services at lower cost. Government agencies can now replace cumbersome, high-cost, paper-intensive processes with online submission, approval, reporting, and archiving to dramatically reduce the compliance burden on citizens and businesses, and between levels of government, while delivering better service. Given the information-intensive nature of government, documents and forms are essential components in driving and supporting all types of processes. Forms are necessary for capturing information from individuals and organizations. Much of this information needs to be seamlessly integrated into core IT systems. By bringing documents and forms online and automating form-driven processes, governments can effectively and powerfully transform their agencies into leading-edge e-government organizations.

BENEFITS	
Improve customer service	Enrich relationships by establishing ongoing, intelligent communications. Create new web-based services, specialized portals, and self-service options to help build loyalty, and provide easy-to-use forms online that people can conveniently fill out offline. Enhance satisfaction by improving the quality and timing of responses to requests.
Improve efficiencies	Decrease processing time and transaction cycles by eliminating manual data entry and automatically transferring data to core systems. Save time and costs by automating many routine, redundant, and expensive tasks—such as finding, completing, processing, and routing forms for approval. Reduce costs associated with paper processing and handling.
Facilitate regulatory compliance	Quickly and cost-effectively deploy forms online for more accurate and more secure information gathering and distribution, and more complete reporting online or on paper. Streamline and simplify process compliance with searchable and archivable PDF files. By combining Adobe security capabilities and robust system-level security provided by IBM WebSphere, you can ensure that compliance rules are enforced inside and outside the firewall.
Reduce overhead costs	Reduce costs associated with paper use: printing, storing, archiving, securing, distributing, re-keying, and updating. Minimize ramp-up time by using existing development tools and technical standards. Reduce desktop software deployment costs by using Adobe Reader.
Maximize ROI	Integrate processes resident in core systems with intelligent forms using the industry standard J2EE architecture and IBM WebSphere Business Integration Server. Adobe forms offer multiple deployment options, including XML, PDF (for use with the free Adobe Reader), and HTML for web browsers. Use open standards defined in government and corporate purchasing requirements, including J2EE, XML, Electronic Business XML (ebXML), XML schema, Simple Object Access Protocol (SOAP), and web services.

INSURANCE—ACCELERATE CLAIM SETTLEMENT

In the insurance industry, filing a claim may be the only interaction customers have with their insurers. The claimant's experience lays the foundation for building customer loyalty. Rapid, responsive service and consistent follow-up help ensure a steadfast clientele. How do you manage the claimant, agent, adjusters, and vendors that participate in the settlement process and provide up-to-the-minute claim status? Empower your customers and partners 24x7. Integrate agents, adjusters, and vendors with role-based access, ensuring protection of business-sensitive information. Claim status is kept up to date, and all claim participants are engaged at the right time to ensure rapid settlement—and more satisfied customers.

FEATURES	
Easy-to-design forms	Adobe LiveCycle Designer integrated with IBM WebSphere Studio Application Developer offers a common work environment and easy-to-use tools. Intuitive form development capabilities include embedded calculations, self-help, and database validation. Multiple content types can be included in a single form, and one compound PDF can be developed with multiple associated forms, documents, and content types. Adobe LiveCycle Forms for IBM includes both rapid-start form templates and sophisticated, customizable form design tools.
Convenient form completion	Forms can be completed online and offline, with form completion and submission functions built into portals using IBM WebSphere Portal. Included are sample portlets for accessing and listing forms. Constituents can fill out browser-based forms or use Adobe Reader to fill in, edit, and submit forms, along with applying digital signatures. The standards-based architecture ensures interoperability with user systems, applications, and processes.
Intelligent data capture	Automate information capture and processing by adding business logic to forms. Adobe LiveCycle Forms for IBM enables enterprises to leverage existing IT systems to capture data across the form process lifecycle. This ensures that only accurate data will be transferred to back-end systems. Organizations can store and process form data as XML and use the form data to guide business processes. You can pre-populate forms with data from IT resources, and extract data from completed forms for back-end systems, increasing overall data quality while decreasing form cycle time and processing costs.
Enhanced records management	When used with IBM DB2 Content Manager, Adobe PDF forms can be declared and classified as records with IBM Records Manager and can utilize all Records Manager access controls and rules. You can use the IBM DB2 Content Manager administrative tools to manage forms, processes, reports, and searches. Forms and form data can be archived directly within the IBM DB2 Content Manager repository.
HTML and PDF viewing options	Adobe LiveCycle Forms for IBM offers HTML and PDF presentation options to provide universal access. For more advanced form capabilities, such as digital signature support and online and offline form completion, the ubiquitous Adobe PDF combines high-fidelity presentation with the power of XML for data.

CORPORATE COMPLIANCE—MEET INDUSTRY MANDATES COST-EFFECTIVELY

Emerging mandates such as HIPAA, USA Patriot Act, SEC, Basel II, Gramm-Leach-Bliley Act, and Sarbanes-Oxley are forcing companies to rethink the way they manage data and business processes. To meet new and existing regulatory requirements, enterprises need to generate and certify the validity of this data. To comply with these requirements on an enterprise scale, companies must implement auditable electronic business processes that can be controlled, managed, and archived across people and IT systems.

FOR MORE INFORMATION

For more information about the Adobe and IBM solution, please visit www.adobe.com/ibm and www.ibm.com.

Extend processes across your value chain

Adobe and IBM share a vision of e-business as a connected enterprise that responds with flexibility and speed to any customer demand, market opportunity, or threat. It is an enterprise whose business processes extend the integration of people, processes, and information to include the entire value chain. With Adobe LiveCycle Forms for IBM, organizations can integrate intelligent forms into business processes that connect employees, customers, suppliers, and constituents, and thereby maximize their enterprise infrastructure investments.

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