



Adobe® and EMC Documentum™ Integrated Forms Solution

Intelligent forms and enterprise content management combine to automate forms-driven business processes

BY INTEGRATING ELECTRONIC FORMS AND ECM SYSTEMS, ORGANIZATIONS CAN:

- Manage, version, and secure form templates
- Process forms and data with related content
- Use captured data to initiate workflow processes
- Ensure easy adoption of forms and software
- Leverage the full value of form data
- Retrieve data for reporting or reuse
- Utilize data across other enterprise systems
- Comply with audit and regulatory requirements
- Manage completed forms for search and retrieval

Most business processes involve capturing data from customers, partners, and employees using paper or electronic forms. Unfortunately, traditional manual data capture results in data errors, redundant efforts, processing delays, and increased costs. Overcoming these limitations requires an integrated solution that combines a scalable, dependable, and secure enterprise content management (ECM) platform with the reach and flexibility of interactive, intelligent forms processing. Adobe Systems and EMC Documentum enable organizations to automate and manage forms-driven business processes using an intuitive and powerful integrated solution.

Streamline forms-based process management throughout the enterprise

Many organizations use a combination of paper forms and partially automated workarounds to capture data electronically. Paper forms, however, are expensive to print, store, and distribute, and electronic workarounds often lack tools to extract the captured data and documents for use in ECM systems. In both cases, there's no connection between forms-based business processes and the ECM environment.

But now, organizations have another option: they can standardize their content management and forms-based processes in a single, integrated, enterprise-wide system. Adobe and EMC Documentum offer a joint solution using Adobe Form Server for Documentum that enables your organization to leverage intelligent Adobe forms to easily and securely capture data from customers, partners, and employees. You can then use this data to drive complex workflows that include additional diverse content types managed by the Documentum ECM system. You can store the captured data within the content repository for reporting or reuse. With the unified solution, you can streamline forms-driven processes within and beyond your enterprise to increase productivity, simplify customer interactions, and eliminate inefficiencies.

Built on J2EE and XML, Adobe Form Server for Documentum easily integrates into enterprise infrastructures through its APIs and support for Web services. The integrated forms solution enables you to:

- Deploy a single system for creating, managing, and deploying enterprise-wide content, including electronic forms
- Standardize both structured and unstructured content in the secure, reliable, and familiar Portable Document Format (PDF)
- Leverage PDF and HTML forms to optimize dynamic data processing
- Increase efficiencies by combining forms and other types of content for more complete automation of complex business processes
- Broaden and extend the reach of the Documentum ECM platform to both online and offline users, across multiple platforms and devices

Benefits of the unified solution

Adobe Form Server for Documentum and other components of the joint solution provide enhanced control and management of critical information and documents enabling your organization to:

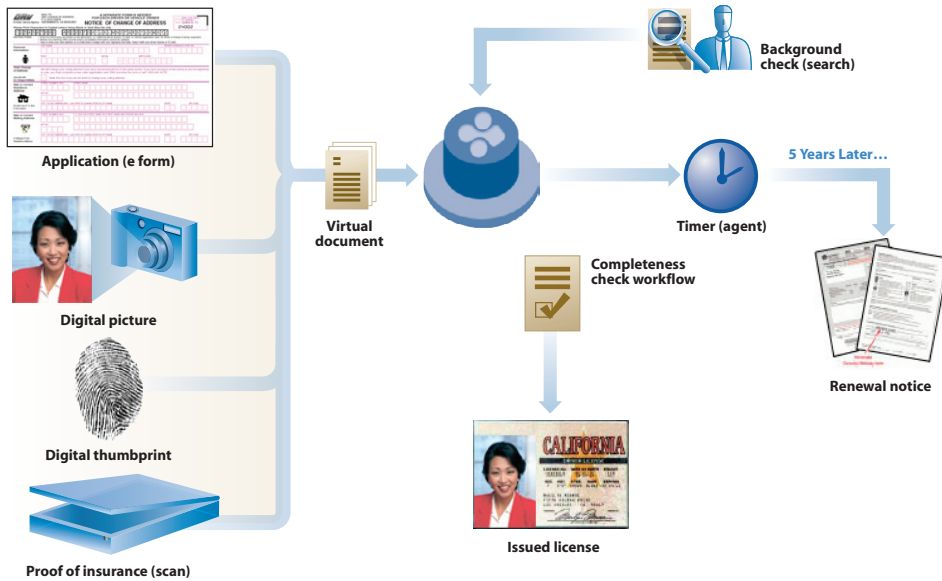
- **Extract additional value from the Documentum ECM platform and improve data accuracy**
Store and process XML form data in your enterprise content repository, and repurpose the form content for back-end systems and content applications. Use captured form data to automatically initiate business processes, such as routing a form to the appropriate person for approval.
- **Cut costs by simplifying the design and management of forms**
Create, manage, deliver, and control versions of intelligent Adobe XML form templates directly within the Documentum content repository. Create a single template design using the integrated Adobe Designer graphical design tool, and then deploy the form as Adobe PDF or HTML, so users can work in the most appropriate format for their environment. Simplify forms development by applying Documentum workflows to any process involving creation and approval of forms and by using Documentum administrative tools to run reports and searches using form data.
- **Optimize productivity by providing a single working environment for forms and other types of content**
Enable users to access and interact with content stored in the Documentum repository through Adobe Reader® or any standard Web browser. Access and launch forms via Documentum Webtop and Desktop clients. Streamline collaborative reviews by using the Adobe Acrobat® family to exchange documents more effectively with customers, partners, and colleagues. Allow constituents to enter information directly into the form—online and offline—for accurate and efficient data collection.
- **Comply with requirements**
Support regulated and legal workflows with the enhanced security, reliability, and fidelity of Adobe PDF. Deploy digital signature options from multiple public key infrastructure (PKI) providers and Certificate Authorities for signoff and approval processes using Adobe LiveCycle Document Security. Store digitally signed documents more securely in the Documentum repository, and create archives of all form submissions in Adobe PDF. Track form-related events in the Documentum repository to help ensure audit compliance. Meet record management regulations such as DoD 5015.2 with the Documentum Records Manager, which creates records of form templates and form submissions.

ADOBE FORM SERVER FOR DOCUMENTUM

Further leverage your Documentum ECM platform by repurposing data captured in forms for back-end systems and other content applications to guide business processes and workflow decisions.

THE ADOBE PDF ADVANTAGE

From PCs to PDAs, Adobe PDF files preserve the original look and integrity of original documents. With PDF, you can share documents with anyone electronically, regardless of hardware or software platforms.



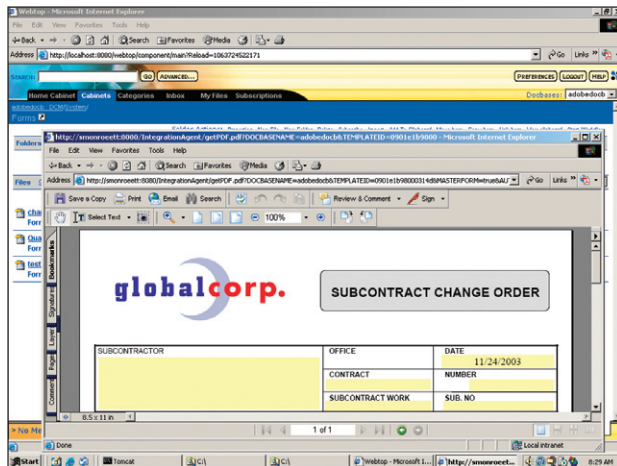
This unified solution enables the creation of a “virtual document” that integrates a variety of content types, including captured data and business logic that helps route the document through the workflow.

The solution at work

Adobe Form Server for Documentum is a powerful process management solution that automates and streamlines document-based processes for a variety of highly regulated industries, including manufacturing, financial services, health care, and government. Here are some examples of processes that the Adobe Form Server for Documentum solution enhances and streamlines:

Engineering change order (ECO)

Project management within engineering, manufacturing, and design environments depends heavily on the engineering change order (ECO), a document commonly presented as a form that often includes ancillary materials delivered electronically or on paper.



Those materials—which include 2D and 3D drawings, bills of material, engineering specs, and other content types—must be shared with various internal departments, as well as customers, suppliers, and other external parties. Yet not everyone in the review cycle can be counted on to have the same applications used to create the disparate content associated with the ECO.

By adding intelligent PDF forms and documents to an existing ECO process built on the Documentum ECM platform, companies can:

- Combine multiple documents into a single Adobe PDF package that can be managed through the Documentum ECM platform
- Route the ECO package for comments and approvals using the ECO form as a vehicle for obtaining third-party input
- Exchange drawings, models, and other content with partners and customers as attachments to PDF forms, no matter what hardware or software they use
- Allow designers and operators to view and navigate designs in a way already familiar to them
- Simplify review, commenting, and approvals
- Ensure every phase of the project life cycle is approved, with fully auditable records.

Adobe Form Server for Documentum helps manage and control the ECO process, improves efficiency throughout the project life cycle, and provides every stakeholder convenient access to the ECO workflow. The organization manages all content—forms included—throughout the automated process.

SIMPLE, SECURE DATA CAPTURE

With support for digital signatures and standard PKI technologies, Adobe PDF forms can provide multiple levels of security to help protect the sensitive information stored in your ECM system and to provide an auditable electronic paper trail. Within the Documentum repository, the digital signatures captured in PDF forms are stored as properties of content objects.

Compliance with industry requirements

Many companies must meet government mandates, including guidelines for securing and controlling active, as well as archived, content. In the pharmaceutical industry, for example, in which a missed deadline can delay a new drug introduction by six months, enhancing ECM processes with Adobe PDF forms makes it easier to adhere to stringent Food and Drug Administration (FDA) guidelines. This is an enormous benefit for pharmaceutical and other companies that are required to:

- Consolidate disparate content into a single process management system, securely and efficiently control flow of content, authorize and verify recipients, and track changes relating to submissions and compliance.
- Manage multiple types of content collected from multiple sites worldwide
- Adhere to strict rules governing manufacturing, operating procedures, and training documents
- Produce documents on demand, lowering the likelihood of unscheduled audits
- Facilitate and control electronic information capture from doctors, clinical workers, and researchers to help ensure data accuracy and privacy
- Provide strong auditing capabilities for keeping track of every user action

FOR MORE INFORMATION

To learn more about how you can automate forms-driven business processes by integrating your ECM solution with Adobe forms, visit www.adobe.com/documentum or www.documentum.com/adobe.

Adobe Form Server for Documentum addresses all these challenges. Using XML-enabled Adobe PDF forms, companies can capture data from clinical trial participants and practitioners directly in the online form for maximum accuracy and efficiency. Adobe PDF provides the familiar and intuitive look and feel of paper forms, thus increasing user adoption of automated processes. XML delivers powerful data exchange and business logic capabilities, while digital signatures aid in creating an auditable electronic paper trail. Form fields are dynamically filled based on user input, which decreases the time it takes to complete forms and leads to a better user experience. Seamless integration with the Documentum ECM platform enables managers to administer the flow of research, from initial discoveries through submission to FDA, while streamlining development and distribution of supporting product collateral across multiple Web sites and repositories.

Adobe Form Server for Documentum also makes it easier for researchers to provide drug trial results. By filling out forms online or offline, in either Adobe PDF or HTML format, researchers worldwide can comment on studies and identify potential problems. Through its capabilities for electronic archiving and retrieval of forms data, Adobe Form Server for Documentum streamlines electronic submissions to the FDA and expedites delivery of compliance documentation during audits.

Adobe helps people create, manage, and deliver the highest quality digital content in the world.
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