

SAP White Paper
SAP NetWeaver



SAP AG AND **ADOBE SYSTEMS**

ENABLING COLLABORATION WITH INTERACTIVE FORMS

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EXECUTIVE SUMMARY

All digital documents are not created equal. While some of today's digital documents offer faithful representations of static printed material, others promise far greater rewards. For example, the advantages of intelligent digital documents loom when you see them used as interactive forms that are customized with application data specifically personalized for the targeted recipient – forms that can be completed and returned online or offline. That is the level of intelligent digital document technology today, and it points the way to the fully digitized document world of tomorrow.

The fact is, the ability to output intelligent digital documents like these is a crucial business advantage: It allows companies to reduce the costs of printing, storing, and distributing paper brochures, direct mail pieces, and other customer-facing materials. By tying digital documents and forms directly to their enterprise applications, organizations can reduce operational costs, streamline communication with internal and external audiences, ensure their materials are accurate and current, and reach millions of new customers and constituents. They can also sharpen their competitiveness, enhance customer satisfaction, minimize their total cost of ownership (TCO) in SAP® systems, and remove layers of time-consuming bureaucracy from their business processes.

To bring all of these benefits to every customer worldwide, SAP AG and Adobe Systems, Inc. are jointly collaborating on a next-generation solution that enables an automated, completely digital “round-trip” for forms. This is made possible with **straight-through processing** – the end-to-end automation of workflows and processes. With it, companies can not only generate personalized forms directly from SAP applications, but once the forms are completed, they can also flow new and updated data directly back into the application. With this new solution, customers can eliminate the most cumbersome and time-consuming aspects of traditional document processing.

Together with this solution comes a new development environment – one that features a full complement of design, data-extraction, and deployment tools to benefit SAP users. New and versatile components include a WYSIWYG form design tool that simplifies the creation of customized, interactive forms and templates, along with document services that facilitate the two-way transfer of XML data into and out of SAP applications.

A key enabler of this new joint solution is the Adobe Portable Document Format (PDF) – the de facto standard for digital document exchange and collaboration. In broad use throughout the world, Adobe PDF serves as a container for dynamic Extensible Markup Language (XML) content, and retains the visual format of recognized paper forms. The result is a live digital document with the “look and feel” of its paper-based original, but contained within it is the dynamic data that resides within SAP systems.

Now, businesses worldwide can embed their best practices into documents that are delivered online and offline, and that accurately mirror the paper forms they represent. This gives them the power to serve millions of Web users, enabling anyone equipped with the free and ubiquitous Adobe Reader to easily complete complex forms and then instantly return the data to an SAP application. With such advanced forms technology, organizations can establish a new and efficient way to connect their customers to their applications, while substantially streamlining their business processes.

FROM PAPER DOCUMENTS TO INTERACTIVE FORMS

Sitting on nearly every desktop is evidence that organizations still depend on paper for some types of communication. While the migration from paper to digital documents continues unabated, paper will have a place in business for the foreseeable future. It is difficult, for instance, to imagine invoices, packing lists, or checks that, at some point, do not appear on paper. Physical documents have universal appeal, because viewing a paper document is purely intuitive, requiring no special equipment or software to read it.

Despite these advantages, paper documents are becoming less crucial to today's business environment. This is particularly true in recent years, as the Internet has evolved to become the backbone of transaction processing, business intelligence systems, and other mission-critical processes. That is why organizations that continually adapt to the demands of the marketplace are also continually adopting new technologies as they rely, more and more, on digitally based information processing. At the same time, they recognize the significant costs associated with procuring, printing, storing, delivering, and retrieving paper materials. The logical result: Companies are gradually relegating paper to a highly specialized place in business.

As business processes become increasingly automated, this trend will only escalate. Meanwhile, companies are increasingly recognizing how digital documents can drive business and generate revenue. They are, for example, targeting customers with content-specific brochures or offers, which can substantially improve response rates. And importantly, they are also leveraging their interactive forms and surveys to improve customer service, satisfaction, and loyalty.

THE INTERACTIVE FORM AND THE POWER OF COLLABORATION

Among the most useful of digital documents are interactive forms. These dynamic files incorporate customized data extracted directly from enterprise systems. They allow companies to bring carefully personalized information or offers to a meticulously qualified audience, thus creating a one-to-one connection through a completely automated process. Recipients can then complete the form online and return it electronically.

A significant advance in business collaboration, interactive forms help organizations cut costs, boost productivity, and enhance customer satisfaction and competitiveness. By incorporating the use of interactive forms, companies can expect these benefits to follow:

- Reduced operational costs stemming from the elimination of time-consuming, error-prone paper document processing
- Increased competitiveness through the more rapid delivery of crucial materials
- Improved efficiency, thanks to customized forms that come complete with personalized customer information, local currency calculations, and geographically specific data
- Better communication with extended teams and external parties

Even in situations where recipients must complete and return their forms on paper, interactive forms offer significant streamlining benefits. For instance, the printed form will automatically include the most current information relevant to that recipient, with several fields already completed using known data. And when the form returns to the issuing organization, administrators can scan the document and quickly identify which data must be updated in the system.

BROADENING THE BOUNDARIES OF BUSINESS

Today, companies are seeking ways to bridge the gap between the raw data that exists in a database or application and the interactive form that must be created with that data. They realize that, in doing so, they will broaden the boundaries of business by accelerating personalized communication and data gathering.

To make this vision a reality, organizations desiring to truly gain the advantages of straight-through processing require a new generation of interactive forms. This is the goal of the jointly developed interactive forms solution from SAP and Adobe Systems, Inc.

With this new solution, companies can bridge their highly structured transaction data stored in powerful enterprise systems with their unstructured, document-based information and processes. For the first time, they can have an all-inclusive approach to interactive forms – one that enables them to master a document once and then deliver it in multiple formats, including online or offline interaction using Adobe PDF, as well as HTML, print, fax, or e-mail. The new joint solution, however, provides another crucial capability – one not offered by any existing solution: automated, round-trip processing of interactive forms based on open standards, such as Extensible Markup Language (XML) and Simple Object Access Protocol (SOAP).

Now, companies around the globe will have numerous new interactive forms capabilities, including an intuitive design environment that is so easy to use, it is a pleasure. The new solution will empower customers to:

- Easily and automatically extract information from SAP systems and securely deliver it to a recipient with data tuned specifically to their needs, location, or requirements.
- Activate key end-user functions, such as the ability to comment on or digitally sign the form, which can be customized for each recipient of an Adobe PDF file. Any recipient can interact with the form: They need only double-click on the file to launch the popular and no-cost Adobe Reader. And since the form data follows the document, recipients can work online and offline.
- Return the completed form to the SAP system to automatically update the business data with the new information. Even when a representative must review a form, the system will generate an easily readable paper document, thus streamlining further the processing of traditional print documents.
- Create custom templates to format SAP data as an intelligent interactive form deliverable in multiple output formats, including PDF, e-mail, fax, or Web pages, and add corporate branding elements, such as logos or images.

This is an entirely new kind of interactive form – one that no longer burdens vital business processes with the limitations of paper delivery, manual keying in of data, or costly human intervention of any kind. Instead, the future of forms is one in which intelligently automated processes seamlessly move data in and out of SAP systems, effectively extending enterprise systems to the very point at which an end-user responds to a request for proposals (RFP), places an order, or applies for a loan.

PDF: THE DE FACTO STANDARD FOR DIGITAL DOCUMENT EXCHANGE

The Adobe Portable Document Format (PDF) is a vital component of the new, joint solution. Recently enhanced to allow integration with XML data, Adobe PDF files are readable across all major computing platforms, making electronic documents universally accessible to anyone using the no-cost software. In fact, more than 500 million copies of Adobe Reader software are deployed worldwide, with nine of the world's top 10 PC manufacturers preloading the Adobe Reader on every new system. In widespread use among governments and enterprises, Adobe PDF is the digital format of choice for most important documents and forms. And its popularity continues to grow.

Open standards. Adobe PDF documents can travel across organizational boundaries and from device to device without losing visual appearance, data, internal logic, or security. Any authoring tool can use Adobe PDF as its exchange agent. Adobe PDF documents and forms look exactly like their original paper counterparts, locking in all the original fonts, graphical elements, and layout formatting – an enormous advantage when government or financial forms must conform to specific formats. Users can also work with PDF documents online and offline, and can save them locally to enhance collaboration with others.

XML integration. Because of its ability to faithfully serve as a “container” for business data, Adobe PDF is an ideal choice for enabling more homogenous document handling. For instance, Adobe PDF can now be integrated with Extensible Markup Language (XML) data – the common exchange format and open standard for leading enterprise applications. By retrieving XML data from an enterprise application or database and flow-

ing it into document templates, users can create data-rich forms and documents capable of conveying information to machines, while the document retains the rich visual fidelity needed to easily convey information to human beings. In the solution from SAP and Adobe, changes made to any interactive form are automatically stored in the Adobe PDF document and returned to the enterprise SAP system as XML data.

Digital archiving with XML data. Even creating a digital archive is easy by adding XML contextual information or metadata to an Adobe PDF file. This allows companies to establish digital archives of documents that extend well beyond interactive forms to include database reports, spreadsheets, word processing documents, images, or electronic transactions. Simply by saving each document as an Adobe PDF file and adding XML metadata to the appropriate field, organizations can create long-term archives that enable fast and easy search and retrieval.

Multiple levels of protection. Adobe PDF also supports multiple security capabilities. For instance, companies issuing an interactive form can allow recipients to embed their own unique digital signature upon completion. As good as a handwritten signature, this ensures that the form was completed and approved by the authorized recipient. Adobe PDF access controls also allow companies to determine who is allowed to view, print, share, or modify a document. Any company that deals with personal or financially sensitive information will find these protections to be essential.

THE BENEFITS OF AUTOMATED, INTERACTIVE FORMS

With the new SAP and Adobe joint solution, forms have shed their time-consuming past and moved to a real-time future. By providing every essential component of a round-trip forms process, the new solution saves more than time: Indeed, the benefits impact. TCO, productivity, customer satisfaction, and competitiveness.

TOTAL COST OF OWNERSHIP

A crucial consideration for any company is reducing the total cost of ownership of its applications. Definition of business forms is a significant portion of total system cost. For small and medium businesses, the forms definition process can amount to one of the largest expenses of implementing a new system. The new joint solution is designed to significantly reduce this cost and the overall TCO.

Hundreds of government agencies and industry associations worldwide have standardized on Adobe PDF for communication with citizens and businesses. This allows SAP customers to collect Adobe PDF files from industry associations, non-profit organizations, regulatory agencies, and government bodies, and then import them for use by their SAP applications. By generating always-current documents only when needed, organizations can eliminate the expense associated with maintaining inventories of preprinted forms, including printing, storage, obsolescence, and administrative costs.

Staffing and inventory costs can be reduced by repurposing the same fundamental information for many uses, while on-demand printing allows organizations to maximize their use of printing resources. Once primary communication goals are achieved, archiving important forms as Adobe PDF documents saves space, time, and money.

PRODUCTIVITY

Closely tied to containing costs, enhancing productivity is another benefit of the joint solution. It does this by turning time-intensive processes into streamlined operations. For example, by immediately collecting data from the user, SAP customers can use scripts that validate the data before it is submitted. This reduces errors, exception handling, and manual reentry. While not only saving time and operational costs, it also improves the quality of the data for “downstream” use.

Organizations can also streamline their interactions with key third parties by ensuring that communication with partners and customers is always compelling, clear, and accurate. Design teams can make document changes – no programming skills required – in minutes, instead of hours or days.

Finally, the ability to create sophisticated, multipage Adobe PDF documents allows automation of business scenarios that rely on complex, personalized documents. These documents draw content from multiple sources, including SAP applications, so organizations spend less time designing and maintaining multipage or multipart documents.

CUSTOMER SATISFACTION

Several aspects of the new solution are designed to help organizations build loyal, lasting relationships with customers. For example, organizations can improve customer service and boost retention by providing easily understood, professional documents in the recipient's preferred digital format.

In addition, faster response to applications and customer requests – enabled by an automatic round-trip for every form – means organizations can react more quickly to customer needs and concerns.

COMPETITIVENESS

The new solution allows streamlined organizations to move more quickly in response to market forces. Because companies can separate the data extraction and organization processing from the visual design via easy-to-use tools, they can sharpen their ability to respond to changes in products, business processes, and marketing messages.

Additionally, organizations can stay ahead of the competition by offering their customers easy opportunities to take advantage of timely, personalized offers – all through an automated process that allows each member of the transaction chain to move quickly.

Response rates can also be maximized by adding logos, bar codes, and other graphic elements that clarify the content and brand in any enterprise communication. By supporting multiple currencies, the new solution enables more nimble business units to generate dual-currency documents without changing line-of-business applications.

COLLABORATION CASE STUDY: STREAMLINING THE RFP PROCESS

The joint solution is targeted at streamlining those business processes that often demand large commitments of time and resources. An excellent example is the generation of an RFP – a historically paper-intensive process used by governments and large contractors to secure bids for major projects:

- An automated round-trip for an RFP package begins with an organization easily creating a set of documents that comes complete with information pertinent to the RFP project and its issuer. Readily distributed to anyone and requiring only the free Adobe Reader, the package includes active form fields to enable recipients to quickly and efficiently complete required information, annotate where necessary, digitally sign the RFP, and return it via secure e-mail.
- Once the completed RFP is received, the SAP system automatically retrieves from the document all the data and attachments required to secure an official bid, and then incorporates that information into its database of RFP responses.
- This groundbreaking sequence relieves organizations that issue RFPs from the enormous burden of manually customizing RFPs, shipping the documents to vendors, tracking proposals, compiling and entering data, and manually reviewing the results. Each of those steps is automated by the solution, and the costly labor associated with the RFP process is substantially reduced.

DESIGNED WITH CUSTOMERS IN MIND

Any solution that can relieve the cost-draining inefficiencies that plague most business processes requires new technology on an enterprise scale. This technology enables customers to take advantage of user-friendly components and carefully charted migration paths to bring new levels of efficiency to the forms-based aspects of their business.

CORE COMPONENTS: FORM DESIGN TOOL AND DOCUMENT SERVICE

The new joint solution incorporates two core components: a design tool and a server-based document and data transfer service.

Form design tool. Accessible from a single button-click, the WYSIWYG form design tool is capable of vastly simplifying the creation of fully customized and interactive forms and templates, which can be stored on a server and easily retrieved when needed. While Adobe PDF will be the primary output format, the form design tool will allow SAP customers to interact with forms in their preferred format, including HTML pages.

The form design tool builds upon multiple decades of Adobe experience creating intuitive desktop layout tools, and brings the simplicity and power of drag-and-drop functionality to data binding within SAP. This tool will also facilitate the reuse of PDF forms created by external entities – including, for example, government agencies or industry standards bodies – enabling customers to integrate existing PDF files into SAP workflows.

Document service. This Web-based service automates the process of moving XML data from SAP applications into online forms. Further, these forms can then be enriched with capabilities latent in the Adobe Reader, such as the ability to apply a digital signature. The document service also facilitates the return of completed form data to the SAP system.

Provided via a server integrated within the SAP landscape, the document service ensures the integrity of business logic in every form. It validates relevant data before the form is delivered and again when it returns. If the structured data returned to the document service passes the relevant validity checks, the XML stream is handed to the pertinent application or applications. These applications could then make a return call to the document service – to prepopulate a second form, for example. The service can then apply a digital signature, giving the recipient a higher degree of confidence in the authenticity of the second partially completed form.

Although this service will be carefully integrated with the SAP system, it is an open system based on Web services that can be accessed by other applications.

INVESTMENT PROTECTION AND MIGRATION

At the same time that the new, joint solution enables advanced interactive forms capabilities, it also protects customers' existing investments in SAP solutions and forms. The shared development undertaken by SAP and Adobe guarantees an evolutionary path from today's existing solutions – including SAPscript and SAP Smart Forms – while protecting previous forms creation efforts and output.

Using Existing Forms

SAPscript and SAP Smart Forms incorporate numerous best practices; therefore, it is vital that the company's investment in existing forms solutions be preserved. The new joint solution enables defined migration paths for forms previously created. The popular aspects of existing SAP solutions are also retained. Among these is the ability to output forms in various formats, including print, fax, e-mail, Web browser, and Adobe PDF.

The new, joint solution provides several migration strategies, each designed to accommodate the specific needs of our customers based on the technology and tool sets they use today. For customers who want to begin their migration prior to the availability of the joint solution, we recommend starting with Smart Forms. This will allow them to convert their output automatically to the new solution. Here is how:

- **Migrating from SAP Smart Forms.** The solution enables automatic conversion of previously created Smart Forms. Migration tools are available with the new solution to further ease the transition.
- **Migrating from SAPscript.** Semiautomatic conversion from SAPscript to Smart Forms allows customers to begin the transition to Smart Forms, which can then be migrated to the new solution with data-binding revisions.
- **Migrating from Adobe Output Pak.** The new solution enables customers who use the Adobe Output Pak to preserve their form designs in the new solution. When delivered, the form design tool will open existing Output Pak forms and preserve the layout, text, and graphics. New data binding will be required. This is particularly important for customers who made a significant investment in customer-facing communication materials, enhancing many of these documents with logos and graphical elements to strengthen branding and speed form comprehension.

COLLABORATION CASE STUDY: SIMPLIFYING TAX EXEMPTIONS

Many local and national governments exempt religious, charity, and nonprofit organizations from certain business taxes. To qualify for these exemptions, however, organizations must complete forms requiring information that confirms their not-for-profit status. With the joint solution, this process can be dramatically streamlined.

Initially, a case is opened and processed by a local government authority as a public service to the organization that is seeking exemption from certain business taxes. The government authority will document all activities – including correspondences, direct communications with the constituent, internal notes, approvals, and access history – for later use in reporting, statistical evaluations, and outcome analysis. After resolving all case-related issues, the case will be closed. Financial data is also fed into SAP's tax revenue forecasting solution, permitting the jurisdiction to more accurately predict next year's revenues.

Submitting a Web Request for a Tax Exemption

When using the new solution, the HTML form for requesting the tax exemption service appears, as does the Adobe PDF file. The Adobe PDF file can now be shared with tax advisors and completed offline. For the most efficient process, of course, the form is completed online. This step provides multiple benefits:

- Nonstop availability of Web request forms leads to better service for constituents. The constituent need not have to rely on specific office hours to access and complete forms, thus saving time and expense, in addition to reducing workload for in-office personnel.
- Online validation of entered data reduces data entry errors and leads to more accurate data, reporting, and forecasts.
- Automated routing to the person in charge, based on entered data, leads to faster case processing.

APPENDIX A: GLOSSARY

Transferring the Case to the Revenue Caseworker

This otherwise labor-intensive step results in additional benefits by incorporating online forms processing. These benefits include:

- No transporting of paper files is needed, which saves costs for distribution and storage of files.
- If authorized, online access to Web request data, status information, notes, comments, and all other linked data is enabled. Most actual status information can be given to the constituent, as well as to colleagues, thus improving service and speeding processing.
- Online transfer of the case to any colleague – especially for substitute processors during vacation or illness – is enabled. This avoids deadlocks due to absences and saves time on case processing.
- Additional forms can be prefilled with the same data – a major convenience for constituent organizations. The system can use all data from the business partner record.

Generating an Official Letter and Sending a Reminder

Traditionally, follow-up correspondence is a manually-driven step, which can be dramatically streamlined using interactive forms. Advantages to government authorities include:

- The automatic generation of documents, which are filled with data from the case and any involved object, avoids errors in official letters.
- The jurisdiction can establish a “look and feel” for their forms, complete with graphical elements, such as seals and stamps, which reduce user fraud concerns.
- Boilerplate disclaimers, Web addresses, office opening hours, and other community-related notices can be inserted automatically.
- Immediate electronic archiving is enabled simply by handing the completed letter in Adobe PDF format to the organization’s data retention tool.

Adobe® Output Pak. An SAP preferred and recommended solution from Adobe Systems, this tool enables organizations to further optimize their investment in SAP by creating personalized, customer-facing documents. The tool expands the scope of SAP to allow businesses to easily create and integrate high-quality electronic documents with their SAP business processes. Originally created by JetForm®, it provides an easy-to-use WYSIWYG document template design tool that tightly integrates with SAP’s raw data interface (RDI), providing printing, archiving, e-mail, and fax selection directly from SAP. Additionally, it is certified for the SAP Smart Forms XML (XSF) interface.

Adobe Reader. Free software for viewing and printing Adobe Portable Document Format (PDF) files on major hardware and personal operating system platforms, including PocketPC, PalmOS, and Symbian OS. With the new SAP and Adobe joint solution, Adobe PDF forms and documents can be “activated” to enable end users to annotate or digitally sign the document.

Document service. This Web-based service automates the production of complex Adobe PDF forms by assembling XML data with professionally formatted templates, incorporating rich visual content. By using form fields defined in Adobe PDF documents, the document service lets organizations customize documents down to the individual user. The document service supports all industry-standard Web services, enabling easy integration with any existing enterprise platform.

PDF. Adobe® Portable Document Format (PDF) is the open de facto standard for electronic document distribution worldwide. Adobe PDF is a universal file format that preserves all the fonts, formatting, graphics, and color of any source document, regardless of the application and platform used to create it. Adobe PDF files are compact and can be shared, viewed, navigated, and printed exactly as intended by anyone with free Adobe Reader® software.

PKI. An abbreviation of Public Key Infrastructure – a trust hierarchy on the World Wide Web that involves a system of digital certificates, Certificate Authorities, and other registration authorities that verify and authenticate the validity of each party involved in a transaction.

SAPscript. SAPscript provides a full range of options to determine the layout and the logic of printable forms. SAPscript incorporates a raw data interface (RDI), which connects external text management systems to control individual requests. The RDI contains all form data from the SAP system, but no layout information such as font or page size. The external system is responsible for the layout and administration of the document data. The RDI is a certifiable interface.

Smart Forms. Smart Forms was introduced in SAP® Basis 4.6C as the tool for creating and maintaining forms within the SAP solutions and portfolios, such as mySAP Customer Relationship Management, mySAP Supply Chain Management, mySAP Supplier Relationship Management, and SAP for Healthcare. Smart Forms provides an easy-to-use graphical user interface that, without programming skills, enables users to carry out the crucial tasks of creating and adjusting forms. Using the Smart Forms XML (XSF) interface, users can connect external form printing tools to control individual requests, for example, thus optimizing postage expense. The interface contains all form data from the SAP system, but no layout information, such as font or page size. The external system is responsible for the layout and administration of the document data. The XSF interface is a certifiable interface.

SOAP. An abbreviation for Simple Object Access Protocol, a lightweight, XML-based protocol for the exchange of information in a decentralized, distributed environment.

Straight-Through Processing. The end-to-end automation of workflows or business processes, which leads to new levels of efficiencies and reduced costs.

Web Dynpro. Web Dynpro technology provides a development and runtime environment for Web applications and enhances classical Web development to build easily adaptable user interfaces. SAP's Web Dynpro technology closes significant gaps between typical Web development tools and the needs of cost-effective, responsive, easy-to-use, maintainable, and professional browser-based user interfaces for business solutions.

XML. An abbreviation of Extensible Markup Language – a specification developed by the W3C. XML is a pared-down version of SGML, specifically designed for use on the Web. It allows designers to create their own customized tags, enabling the definition, transmission, validation, and interpretation of data between various organization applications.

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