

UP105

## Introduction to SAP Interactive Forms by Adobe



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**SAP** TECHED 09

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## Learning Objectives



### **As a result of this lecture, you will be able to**

- Understand the requirements in forms-based processes
- Explain the background of the SAP/Adobe partnership
- Identify business scenarios using Interactive Forms
- Know the technological foundation of Interactive Forms
- Comprehend customer rationale for using the solution
- Understand how to use the forms design tool (Adobe LiveCycle Designer)
- Understand new and upcoming enhancements to Interactive Forms

This is a beginner session.

## Agenda



### 1.Introduction

- 1.1. Technology Basics
- 1.2. Usage Scenarios

### 2.Use Cases for Interactive Forms

- 2.1. Time Recording Scenario – Combination of online and offline
- 2.2. Vendor Account Creation – Offline Scenario

### 3.Introduction to Form Design

- 3.1. Adobe LiveCycle Designer
- 3.2. Form Design Demo
- 3.3. Enhancements with Adobe LiveCycle Designer 8.2

### 4.Outlook

- 4.1. Interactive Forms & SAP Business Process Management
- 4.2. New Developments From Selected Areas
- 4.3. Strategy & Roadmap



## SAP and Adobe Strategic partnership since 2002



Making user experiences with SAP software *easy and engaging - everywhere*

### PDF forms

- Integrated as "Document Service" in SAP NetWeaver
- Available in SAP ERP and CRM as print and interactive forms
- Interactive forms enabling new, forms-based engagement model for SAP users



### Enterprise learning

- Acrobat Connect Professional integrated in SAP Enterprise Learning and available standalone
- Enabling virtual classrooms and meeting rooms for SAP users



### Rich Internet Applications

- Components of Adobe Flex integrated in SAP Visual Composer
- Enables easy creation of engaging Flash dashboards for SAP Analytics



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SAP the leader in business software and Adobe the leader in creating engaging user experiences teamed up to bring PDF forms processing capabilities to SAP users.

The partnership began in 2002 with SAP Interactive Forms by Adobe. The product was first release in the market in 2004 with SAP NW 640. Since then the Interactive Forms technology has been used in various SAP solutions such as SAP ERP, CRM, HCM etc. Today SAP delivers more than 2300 standard forms covering different scenarios in various SAP applications.

After the success of Interactive Forms, SAP and Adobe extended their partnership in the area of virtual meeting rooms and classrooms for SAP Users, through the integration of Adobe Acrobat Connect Professional into SAP Enterprise Learning. The product named SAP Connect is also available standalone.

SAP and Adobe further collaborate to bring in Rich Internet Applications capabilities to SAP customers through the use of Adobe flex in islands of high interactivity offered through SAP WebDynpro Islands. These Islands offer cool highly interactive graphics typically for reporting and monitoring dashboards.

## Challenges in Forms-Based Processes



### **Paper-based form processes have limitations.**

- Error-prone and easily outdated
- Manual data re-entry
- Process status is hard to track
- High costs (e.g. production, storage)
- \$30 million per year for a global organization\*

### **Casual users (including executives) are typically unfamiliar with enterprise software.**

- Access to enterprise applications needs to be intuitive.

### **External users (suppliers etc.) are disconnected from the process.**

- System-relevant data capture is cumbersome.

\* GISTICS independent study, 2004

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According to a recent study, each form you use costs about \$75,000 per year to manage because of the cost to print and distribute and collect and capture the data and correct the errors and store them and recall the old versions and shred them. A typical global organization manages 400 forms. That adds up to \$30,000,000 every year.

And they slow your business down. Mailing something or putting a paper form into a physical inbox will guarantee latency in your business processes.

But forms are a simple and intuitive interface solution for low tech users and for mobile workers who are working off-line. Forms are excellent for many casual users such as executives and for users who are not employees, such as customers and suppliers. But even for these users, getting the right data into the form (for example part numbers on an order form) can be very time consuming and you have to correct many mistakes.

## The Solution: SAP Interactive Forms by Adobe



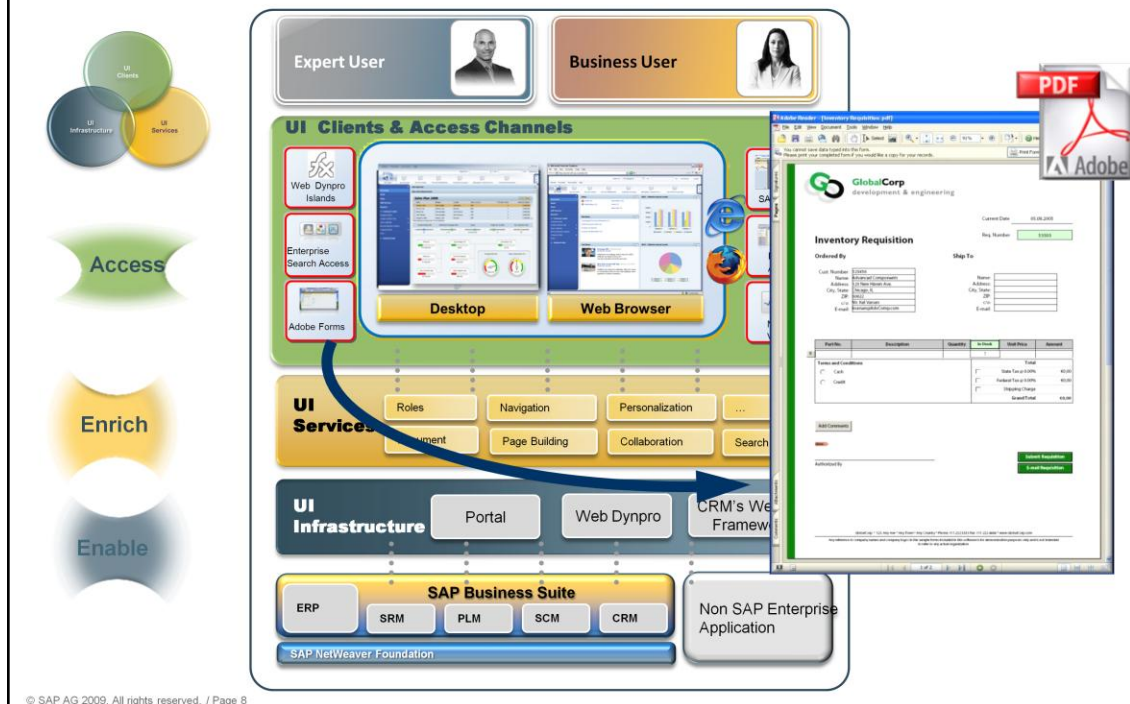
### Key Capabilities

- 1 Integrate interactive PDF documents into business processes driven by SAP applications
- 2 Allow forms-based input combined with workflow to start automated follow-up steps
- 3 Generate forms that contain data extracted from SAP systems
- 4 Use dynamic or static forms
- 5 Complete forms online or offline
- 6 Submit data from the form back to SAP systems
- 7 Frontend and backend printing

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SAP and Adobe Systems have teamed up to provide a solution. Interactive forms integrate with SAP data and business processes. Forms can be pre-populated, accessed through Adobe Reader software (available on most computers), and the captured data can be submitted back to the SAP systems for processing. Forms can be filled in off-line or on-line, saved, printed, e-mailed, and archived. You can even build rules into the form to make sure users do not enter incorrect data.

# User Productivity With SAP NetWeaver Empowering and Connecting People



## User Productivity with SAP NetWeaver

SAP NetWeaver already enables simple and harmonized user collaboration for business user and expert user. The above slide depicts the UI building blocks and main channels that enable a service oriented UI strategy for harmonized user interaction across different, tailor-made user channels.

To enable a harmonized UI development SAP supports different types of UI Standards. Standard UI building blocks streamline user interface development and result in harmonized user experiences. Other technical standards like Java Server Faces allow open standards based, highly productive UI development.

These UI technologies are used by SAP, partners and customers to develop user interfaces that enable a consistent user experience. By embedding emerging web UI technologies like Adobe Flex, SAP combines harmonized UIs for high user productivity with islands of high interactivity.

The two main access channels for SAP applications are SAP NetWeaver Portal (standard Web client with zero footprint) and SAP NetWeaver Business Client (standard smart client for enhanced user productivity). However, there are some scenarios where additional access channels are required to fulfill business requirements:

- Widgets come in handy for users that only need sporadic access to SAP applications. They can keep widgets on the desktop all the time that inform them about all relevant events in SAP systems.
- Mobile & voice address scenarios for mobile devices and voice access to SAP applications.
- Forms – more precisely, SAP Interactive Forms by Adobe (IFBA) – address online and offline scenarios for end users especially when pixel perfect printing is required. The PDFs that are used in this product with Adobe as partner can be populated from SAP systems and can send data back to SAP systems.
- Microsoft Duet – allows end users to directly interact with SAP systems from within their office applications. A standard example here is a leave request directly posted from the Outlook calendar.

A standard UI services layer allows to use central UI services for different UI channels (e.g. re-use role and menu definitions in the Business Client and in the Portal). This re-use reduces the costs to run and operate different user channels. On the UI infrastructure side, SAP provides a UI run-time and development on the JAVA and ABAP stack with integrated design-tools.



## Adobe Reader Demo Summary



### Interactive PDF demo

- Demoed interactive PDF form: "Lead Management by Partner" – Shipping with CRM 5.0
  - Difference between print PDF and interactive PDF
    - Interactive form fields
    - Drop-down list and submit button
  - Explained usage rights
    - Unlocking functionality in the free Adobe Reader



## Forms Scenarios



### Online Interactive Form Scenario

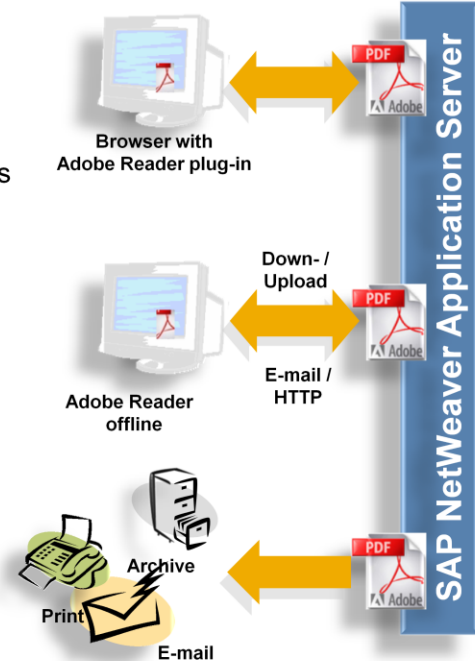
- SAP system access needed
- Full integration into Web Dynpro for Java and ABAP frameworks
- Context-sensitive value help, online checks

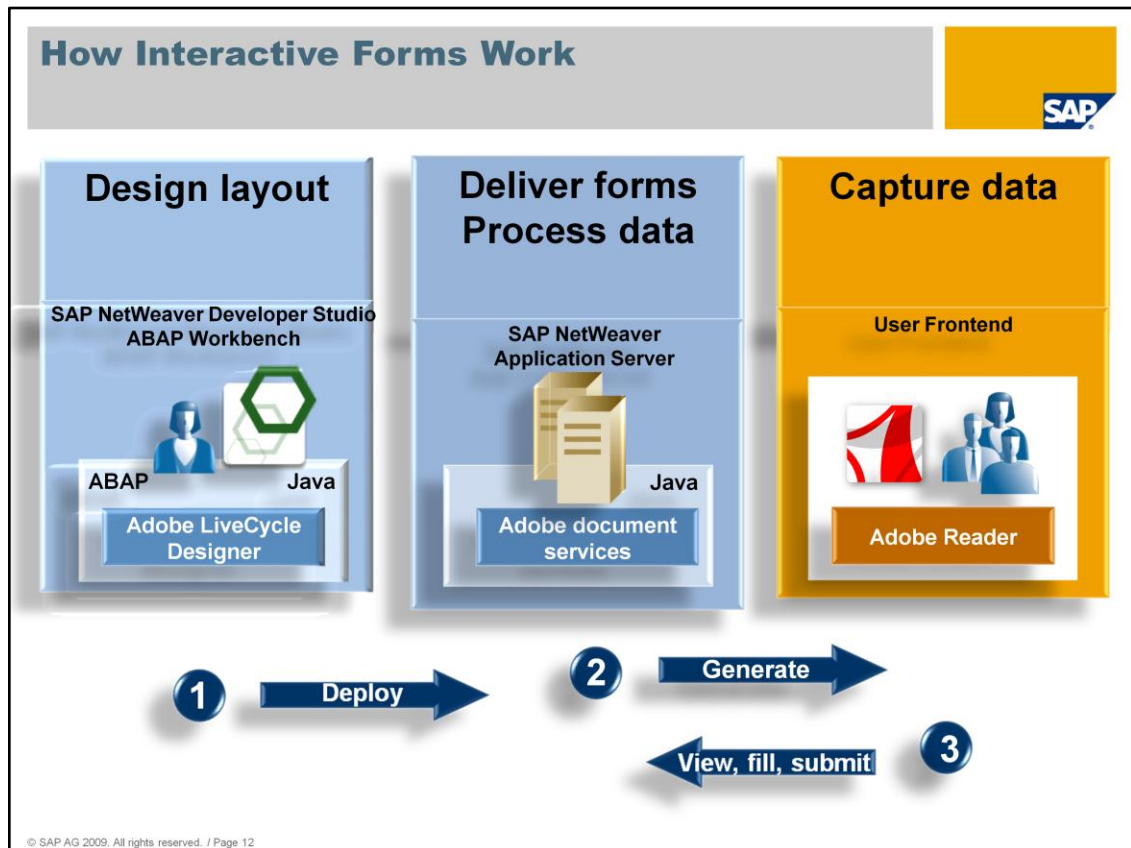
### Offline Interactive Form Scenario

- No SAP system access needed
- Static value help, static checking, simple arithmetic calculations
- Self-contained PDF (XML data+layout)

### Form Printing Scenario

- 'Classic' form processing, not interactive
- Output documents are printed, e-mailed, archived or faxed





Now let's look at how forms work in your environment. Interactive Forms are easy to build, deploy and use.

As we just saw, forms can be imported or built in SAP's Java and ABAP developer environments. Drag-and-drop form layout and drag-and-drop integration between the form and SAP Web services makes design and integration easy.

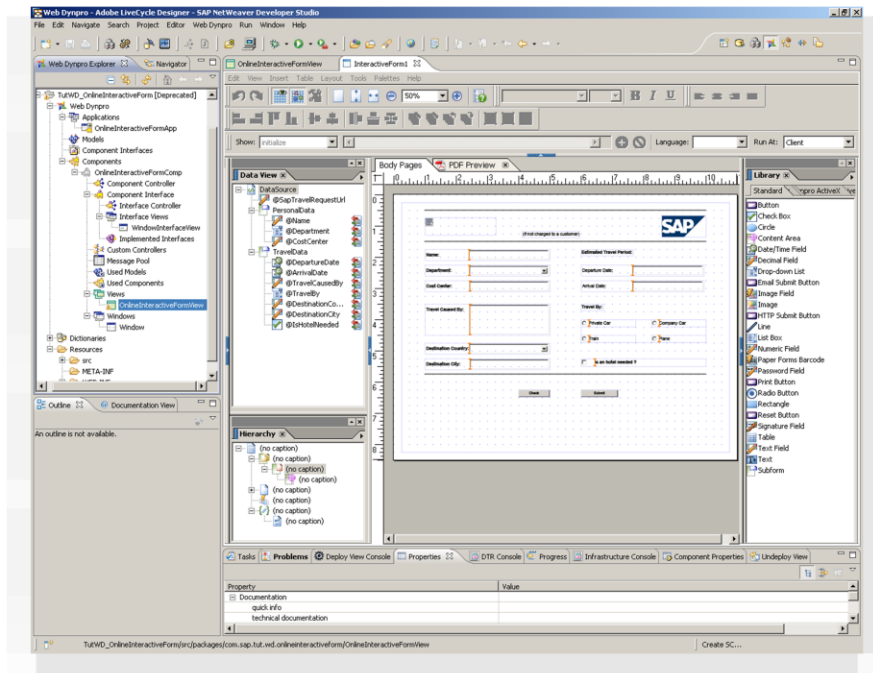
The forms are then deployed via SAP NetWeaver, where they can be accessed from SAP applications, the SAP NetWeaver Portal and routed to other interfaces such as e-mail.

Forms are generated as needed, with data populating the forms from the SAP system via Web services at the time they are generated. The user completes and submits the forms, and captured or updated data is passed back into the SAP system.

It is very simple. All of the advantages of paper, without the errors and high cost.



## Design-Time Integration SAP NetWeaver Developer Studio



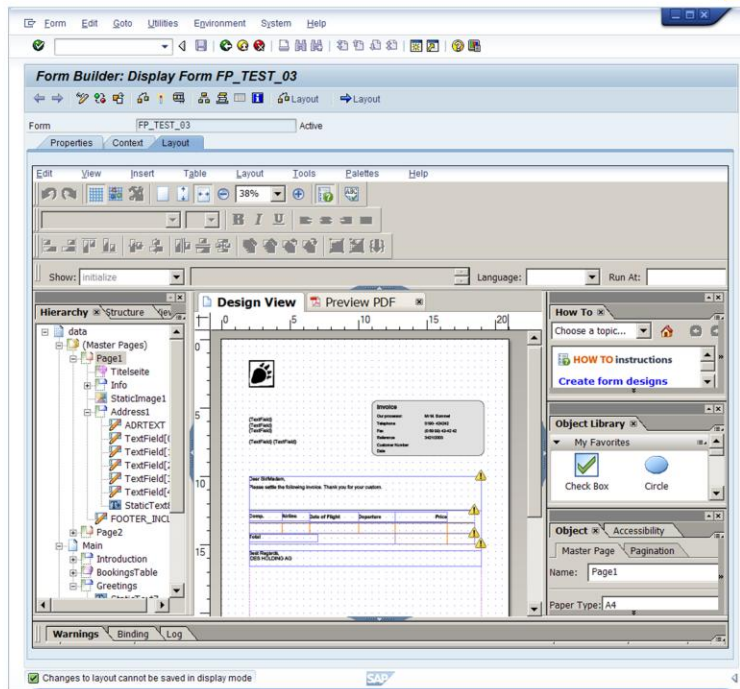
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Development is also integrated. Developing interactive forms has been made very easy, with the Adobe forms designer integrated into the SAP development environment. You can import existing forms, modify them, and integrate with SAP applications using drag and drop to connect fields on the form with SAP Web Services – to populate the field, or to return data back to the SAP system after it has been entered.

The Adobe LiveCycle Designer is a easy to use GUI tool for designing forms. For Java developers the Adobe LiveCycle designer is integrated into the SAP Developer Studio in the Web Dynpro Java perspective. The designer is part of the SAP NW Developer Studio installation.

The Web Dynpro context data is available to the designer in the Data View. This data can then be dragged and dropped onto the form to create a data mapping between the form UI element and the data in the backend.

## Design-Time Integration SAP GUI



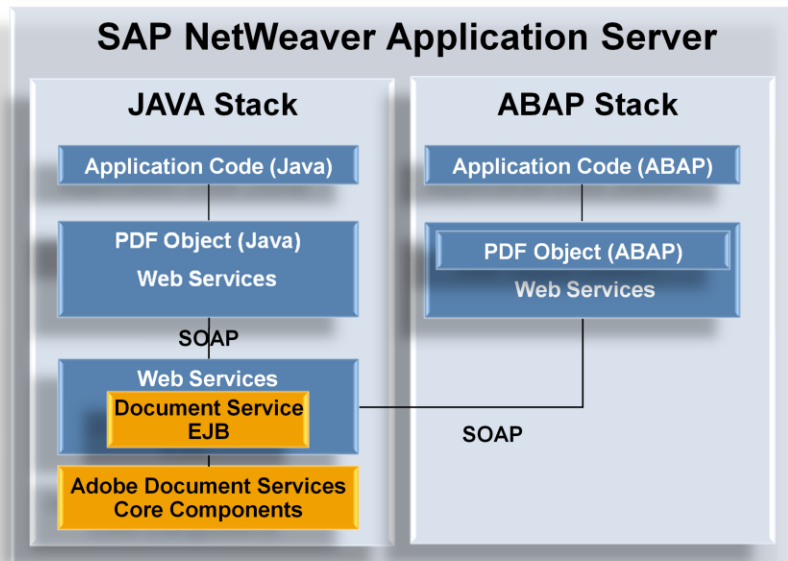
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For Abap developers the Adobe LiveCycle designer is also integrated into the Abap Workbench. The designer is not part of the standard SAPGUI installation and need to be downloaded from the service market place and installed separately.

The Abap Data Dictionary can be exposed to the designer in the designer data view. The data can be mapped to a forms UI elements.

We shall see more on this in the Adobe LiveCycle demo in the later section.

## Run-Time Architecture



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The components that you see here in orange are Adobe components specially developed for SAP and integrated into SAP Netweaver Application server.

The ADS is the core component of the forms technology and is responsible for writing data into the PDF, reading data out of the PDF and also rendering the document. The ADS is available only on the Java Stack i.e the SAP J2EE server.


The Document Service EJB encapsulates the ADS and interprets and delegated incoming soap requests to the ADS.

The PDF Object is an API SAP offers to application developers to interact with the PDF. This API is available on both the Abap and Java stacks.

The general protocol used for communication is SOAP.

## SAP Integration Environments



Environment	Available since
Web Dynpro for Java (for application development with standard UI technology)	SAP NetWeaver '04
ABAP Workbench (for printing & offline forms, transaction SFP)	SAP NetWeaver '04
Internet Service Request (for online forms-based workflow processes)	SAP ERP ECC 5.0
Guided Procedures (for offline forms-based workflow processes)	SAP NetWeaver 7.0
Web Dynpro for ABAP (for interactive application development in ABAP)	SAP NetWeaver 7.0
Business Process Management (for online and offline forms based workflow processes) 	SAP NetWeaver Composition Environment 7.2

## Identifying Business Processes for SAP Interactive Forms Usage



**Business Processes that have the following requirements are good candidates for adoption of SAP Interactive Forms**

- Offline forms interaction with business users
- Simple UI for interaction with occasional SAP users
- Flexible forms-based UI which can be easily customized
- Communicate/collaborate with external parties ("external community")
- Form layout to match the exact print layout ("well known forms")
- Approval processes before data is stored in the backend
- Transformation of paper-based processes into electronic processes

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- 4.1. Interactive Forms & SAP Business Process Management
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- 4.3. Strategy & Roadmap

Last part of our presentation is an outlook where we want to look at what's coming next. It helps you understand what will be available in short term but also what the long term strategy for Interactive Forms is. I will cover the short term part and hand back to Nikhil for the strategy.

## Initial Situation and Requirements



### Initial Situation

- Time recording in ERP via CAT2 transaction
- Foreman enters working time for his crew on a weekly basis on a paper form
- HR department re-keys working time from paper form in ERP (which is inefficient and error prone)
- Paper form is misused (additional information provided in writing)

### Requirements for a modern solution

- De-central time recording without SAP GUI
- Elimination of re-keying
- Data entry everywhere anytime (online and offline)
- Keep look and feel of existing paper form to minimize training effort
- Pre-filled form, value help and local validations to increase data accuracy

**Custom development using SAP Interactive Forms by Adobe is the solution meeting all requirements**

This is a scanned copy of the real form used by our customer. We apologize for the fact that the form is in German but this was a real form in a German company and unfortunately there was no translation for it. We however have some explanation tips for you'll.



## Vision for the Solution



### Vision

- Replacement of a paper-based process with an automated electronic process
- Keep well-known layout of existing paper form (because people are used to it)

### Required functionality

- Pre-filling of form in case working time is already entered into the system via portal
- Mass data-entry of CATS data in ERP including customer specific fields
- Online and offline data entry

## Weekly Report

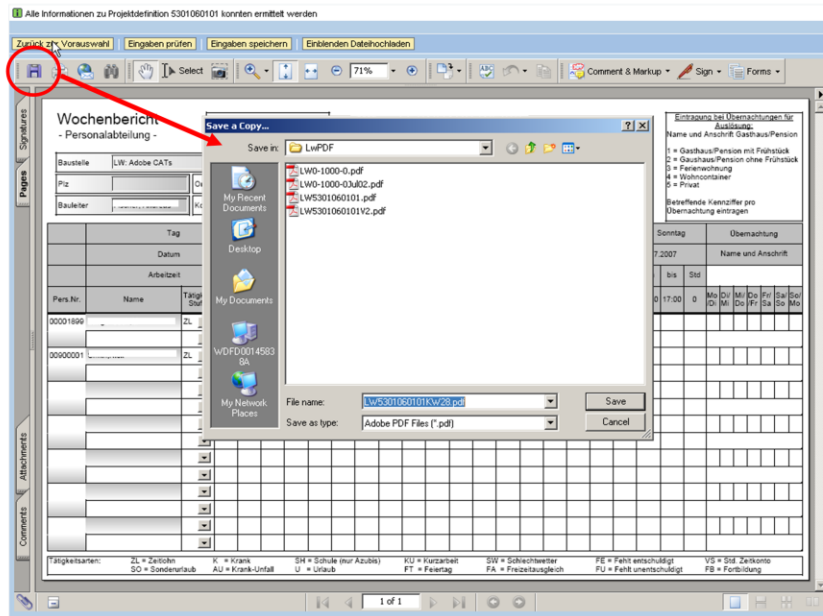
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This is a 1:1 replica of the paper based form. As you can see that the foreman doesn't really need any training/instructions to use this form since the UI is absolutely the same.

## Taking the Time Sheet Form Offline



### Save current time sheet for offline use



The foreman can either fill in the form online if he feels like or download the form on his laptop for filling it offline later.



## Offline Value Help on SAP Interactive Form



### Value help for the time rate type

Tätigkeit	
Stufe	
ZL	
ZL	
ZL	

### Additional value help for non-time rate types

Tätigkeit	08:00
Stufe	
ZL	08:00
SO	
AU	
FA	
PE	
PT	
FU	
K	
KU	
SH	
SO	

The form can further offers value help for different inputs types.

## Offline (Local) Validations



Dienstag	Mittwoch	Donnerstag	Freitag	Samstag	Sonntag
10.07.2007	11.07.2007	12.07.2007	13.07.2007	14.07.2007	15.07.2007
von bis Std	von bis Std	von bis Std	von bis Std	von bis Std	von bis Std
08:00 17:00 8	08:00 17:00 8	08:00 17:00 8	08:00 17:00 8	08:00 17:00 0	08:00 17:00 0
09:00 17:00 10	08:00 16:30 9,5	25			

### Validation of time formats

**Adobe Reader**

Uhrzeit im Format HH:MM eingeben!

OK

### Validation of category identifiers

Dienstag	Mittwoch	Donnerstag	Freitag	Samstag	Sonntag	Übernachtung
10.07.2007	11.07.2007	12.07.2007	13.07.2007	14.07.2007	15.07.2007	Name und Anschrift
von bis Std	von bis Std	von bis Std	von bis Std	von bis Std	von bis Std	Hotel Astoria
08:00 17:00 8	08:00 17:00 8	08:00 17:00 8	08:00 17:00 8	08:00 17:00 0	08:00 17:00 0	Mo Di Mi Do Fr Sa So
Fehler bei Eingabe des Übernachtungskennzeichens						1 1
Übernachtungskennzeichen 1, 2, 3, 4 oder 5 eingeben!						Hotel Astoria
						1 1
						Hotel Astoria
						9

Client side validations can also be performed to ensure that the data is entered in the expected format. For e.g time is expected in HH:MM or the number of overnight stays per week can only be between 1 to 5.


## Offline Scenario: 3 Steps of the Upload Process



**Upload**

Zurück zur Vorauswahl Eingaben prüfen Eingaben speichern Ausblenden Dateihochladen

**Lokale PDF Datei hochladen**


 Datei (.pdf): C:\Documents and Settings\ Browse... **Datei hochladen** Übernehme PDF Prüfe PDF-Übernahme

**Datei Eigenschaften**


Dateiname:  
 Dateieindung:  
 Dateigröße:

Datei LW5301060101KW28\_final.pdf erfolgreich hochgeladen

**Transfer**

Zurück zur Vorauswahl Eingaben prüfen Eingaben speichern Ausblenden Dateihochladen

**Lokale PDF Datei hochladen**


 Datei (.pdf): Browse... Datei hochladen **Übernehme PDF** Übernehme PDF-Übernahme


**Datei Eigenschaften**

Dateiname: LW5301060101KW28\_final.pdf  
 Dateieindung: pdf  
 Dateigröße: 449.26 KB

**Consistency check**

Zurück zur Vorauswahl Eingaben prüfen Eingaben speichern Ausblenden Dateihochladen

**Lokale PDF Datei hochladen**


 Datei (.pdf): Browse... Datei hochladen Übernehme PDF **Prüfe PDF-Übernahme**

**Datei Eigenschaften**

Dateiname: LW5301060101KW28\_final.pdf  
 Dateieindung: pdf  
 Dateigröße: 449.26 KB

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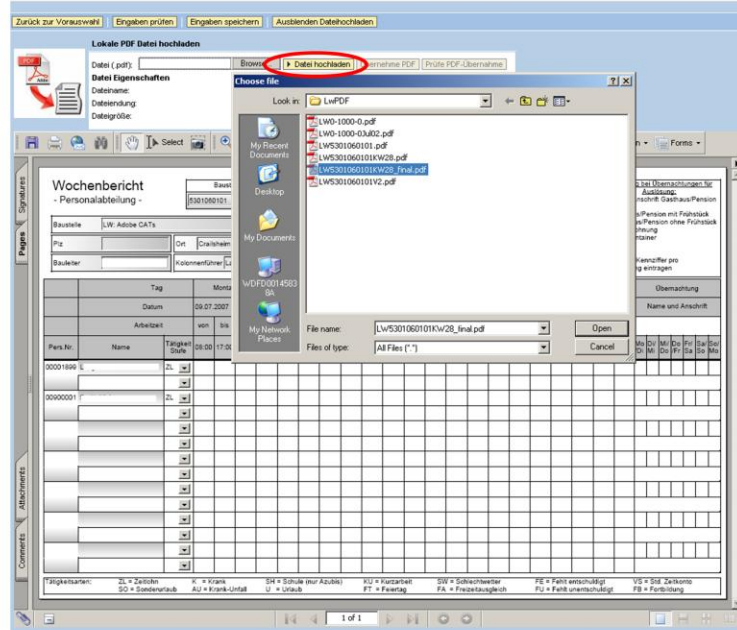
Once the form is completed the foreman logs on to the system when he is back in the office updates the system in three steps. This is how the solution was implemented at the customers place.

We will have a look at each of these steps in detail.

## Offline Scenario: Upload



Local PDF form can be uploaded after it's filled in



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On uploading the form from his laptop he can view the form online where he can make last minute changes on the form.



## Offline Scenario: Upload Feedback



### Feedback after a successful upload of the PDF form

Success!

■ Datei LW5301060101KW28\_final.pdf erfolgreich hochgeladen

Zurück zur Vorauswahl Eingaben prüfen Eingaben speichern Ausblenden Dateihochladen

**Lokale PDF Datei hochladen**

Datei (.pdf):  Browse... Datei hochladen Übernehme PDF Prüfe PDF-Übernahme

**Datei Eigenschaften**

Dateiname: LW5301060101KW28\_final.pdf  
Dateiendung: pdf  
Dateigröße: 449.26 KB

Wochenbericht  
- Personalabteilung -

Baustellen-Kst Nr.  
5301060101

Baustelle: LW: Adoha CATe Woche vom: 09.07.2007 bis: 15.07.2007

He can apply his last minute changes to complete the upload.

# Offline Scenario: Consistency Check



Start consistency check

Zurück zur Vorauswahl Erstellen prüfen Eingaben speichern **Überprüfen** Ausblenden Dateihochladen

**Lokale PDF Datei hochladen**

Datei (pdf):  Browse...

**Datei Eigenschaften**

Dateiname: LMS0010601010K028\_final.pdf  
 Dateierstellung: pdf  
 Dateigröße: 449.26 KB

**Wochenbericht**  
 - Personalabteilung -

Einzelnen-Kat.Nr.

Baustelle: LW Adobe CATs Woche vom 09.07.2007 bis 16.07.2007  
 Plz:  Ort: Crailsheim Straße:   
 Bauleiter:  Entfernungskilometer: 0000

**Legende zur Überwachungs-Liste:**  
 Name und Anschrift BaustellenausPerson  
 1 = BaustellenausPerson mit Frühstück  
 2 = BaustellenausPerson ohne Frühstück  
 3 = Ferienanmeldung  
 4 = Wohncontainer  
 5 = Privat  
 Beifolgende Kennziffer pro Überwachung eintragen

Pers.Nr.	Name	Tageszeit	Montag		Dienstag		Mittwoch		Donnerstag		Freitag		Samstag		Sonntag		Überwachung
			von	bis	von	bis	von	bis	von	bis	von	bis	von	bis			
00001890	Heinrich	2L	08:00	17:00	08:00	17:00	08:00	17:00	08:00	17:00	08:00	17:00	08:00	17:00	08:00	17:00	1
00000001	Umbau	2L	08:00	17:00	07:00	17:00	08:00	18:00									1
000001		2L			4												
		K							8		8						
		2L															
		2L															
		2L															
		2L															
		2L															
		2L															

**Legende:**  
 2L = Zeitfenster  
 2D = Sonderurlaub  
 K = Krank  
 AU = Krank-Urlaub  
 S4 = Schicht (vor Arbeit)  
 U = Urlaub  
 K2 = Krankheit  
 FT = Feiertag  
 S2 = Schichtwechsel  
 FA = Freizeitangelegenheit  
 PE = Fehlentschuldigung  
 FU = Fehlentschuldigung  
 US = Stl. Zerkunft  
 FB = Fortbildung

To finish the process he runs server side validations or consistency checks to ensure that the data confirms to backend business logic.

PSP-Element 0-1000-U gehört nicht zum Kostenrechnungskreis M320

Zurück zur Vorauswahl   Eingaben prüfen   Eingaben speichern   Einblenden

Select

Wochenbericht  
- Personalabteilung -

Baustelle	Baustellen-Kst Nr.
New administration building	0-1000-0

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## Vendor Account Creation @ SAP Initial Situation



### Initial situation

- Manual data entry of information found on letters or other sources
- Multiple screens for data entry
- Manual scan of source necessary
- Issues
  - Forms not completely filled in or missing data
    - Informal way for getting missing data: bank details, tax information, etc
  - Inconsistent data (bank, IBAN for example)
  - Not a standardized way to get the data (form, letters and fax, document needed)
  - 12,000 request to create new vendor accounts in 2008
  - 14,000 request to update existing vendor accounts in 2008

## Vendor Account Creation @ SAP Requirements



### Requirements for a modern solution

- Minimal system requirements for a vendor to participate
  - Adobe Reader + E-Mail client
- Replacing manual, error prone process with an electronic forms based process
- Avoiding: rekeying, contacting vendors multiple times, duplicate accounts
- Shifting responsibility for getting a complete master data record from SAP to the vendor
- Providing a standardized way to get vendor information + providing additional information like purchasing policy (to be accepted before form is sent back)
- Enhancing auditability of the process (SOX compliance): contacts (at SAP and at the vendor), email addresses, document of record etc

### Future

- Validation and consolidation of all vendor accounts

**The custom implementation of an offline scenario using SAP Interactive Forms by Adobe is the solution meeting all requirements**

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# Starting the Creation of a New Vendor Account



Vendor Master Data Request - Windows Internet Explorer

https://

Vendor Master Data Request

## VENDOR MASTER DATA

Select Processing Type

Vendor Data

Address Data    Payment    Taxes

Company Code

Company Code: 0001    SAP AG

Purchasing Org:   

Name

Name:   

Address

Street:   

District:   

Postal Code:   

City:   

Country:   

Region:   

Post Office Box

PO Box:   

PO Box Code:   

Communication

Language:   

E-Mail:   

Telephone:   

Fax Number:   

Finance E-Mail:   

Select Process Type

Please select the Process Type

New Vendor

Change Vendor

Copy Vendor Account

OK

### Enter Missing Fields

#### Missing Fields

Company Code: \*    0002    (Press 'Enter' to determine commodities)

Country of the Vendor: \*    DE

Vendor needed for (commodity): \*    Accounting Department

OK

#### SOX

In order to comply with SAP's internal SOX documentation and controls only documents which are directly received from the supplier will be accepted. For example, invoices, pro forma invoices and offers will generally be accepted as vendor documents. Documents which are created by SAP need to be unequivocally accepted with signature and supplier stamp.

In all cases the following information should be included on the documents:

- Name of Vendor
- Physical Address
- Bank Details (Name of the Bank, IBAN (EMEA only), SWIFT and Bank Account Number)

Please be aware of country specific regulations. In many countries a Vendor Master Form is mandatory, which might specify further requirements.

# Entering Data through Multiple Screens

## 5 Data Entry Screens/Dialogs



The image displays five overlapping SAP Vendor Master Data Request screens, illustrating the sequence of data entry steps:

- Vendor Data:** The initial screen with tabs for Address Data, Company Code, Payment Conditions, Bank Data, and Communication. Fields include Name, Address, and Post Office Box.
- Enter Bank details:** A dialog box for selecting a bank country and entering bank details.
- IBAN Data:** A screen for entering IBAN details, including IBAN, IBAN valid, and Registration Numbers.
- Bank Data:** A screen for entering bank key, bank account, control key, and reference.
- Responsible Purchaser:** A screen for entering responsible purchaser information, including Estimated Business Volume, Responsible Purchaser, and checkboxes for vendor selection and PO creation.

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## Entering Data through Multiple Screens Provide a Scan of the Source of Data



### Additional manual step

- Scanning the source of information and manually attaching it to the vendor account record

**VENDOR MASTER DATA REQUEST**  
THE BEST-RUN BUSINESSES RUN SAP

Select Processing Type Save Request

Vendor Data

Address Data Payment Taxes Additional Information Workflow Data

**Archived Images**

In order to comply with SAP's internal SOX documentation and controls only documents which are directly received from the supplier will be accepted. For example, invoices, pro forma invoices and offers will generally be accepted as vendor documents. Documents which are created by SAP need to be unequivocally accepted with signature and supplier stamp.

In all cases the following information should be included on the documents:

- Name of Vendor
- Physical Address
- Bank Details (Name of the Bank, IBAN (EMEA only), SWIFT and Bank Account Number)

Please be aware of country specific regulations. In many countries a Vendor Master Form is mandatory, which might specify further requirements.

attach a current W9 for all US Vendors or a current W8 BEN for all International Vendors - must include a US Tax ID#

File name	Doc. class
TF1	TF

**Upload Document**

Only TF, FAX and PDF documents must be uploaded:

Browse...

Upload

**Delete Document**

Delete Attachment

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## Streamlining Vendor Account Creation Starting the process



### Enhanced Vendor Account Maintenance application

- Two new options: "Send Request Form to Vendor" and "Upload Request Form"

**Enter Missing Fields**

**Missing Fields**

Buchungskreis: \*  (Press 'Enter' to determine commodities)

Country of the Vendor: \*

Vendor needed for (commodity): \*

OK

**Receive vendor master data by e-mail**

Send Request Form to Vendor Upload Request Form

**SOX**

In order to comply with SAP's internal SOX documentation and controls only documents which are directly received from the supplier will be accepted. For example, invoices, pro forma invoices and offers will generally be accepted as vendor documents. Documents which are created by SAP need to be unequivocally accepted with signature and supplier stamp.

In all cases the following information should be included on the documents:

- Name of Vendor
- Physical Address
- Bank Details (Name of the Bank, IBAN (EMEA only), SWIFT and Bank Account Number)

Please be aware of country specific regulations. In many countries a Vendor Master Form is mandatory, which might specify further requirements.

## Sending an Interactive Form to a Vendor



### Dialog to send an Vendor Data Request form to a vendor

- E-mail address of a contact has to be known
- E-mail subject and some text can be provided

**Send/Receive Vendor Request Form**

**Send PDF Vendor Data Request Form via E-Mail**

**Enter E-Mail Data**

E-Mail Address:

E-Mail Title:

Addition Email Text:

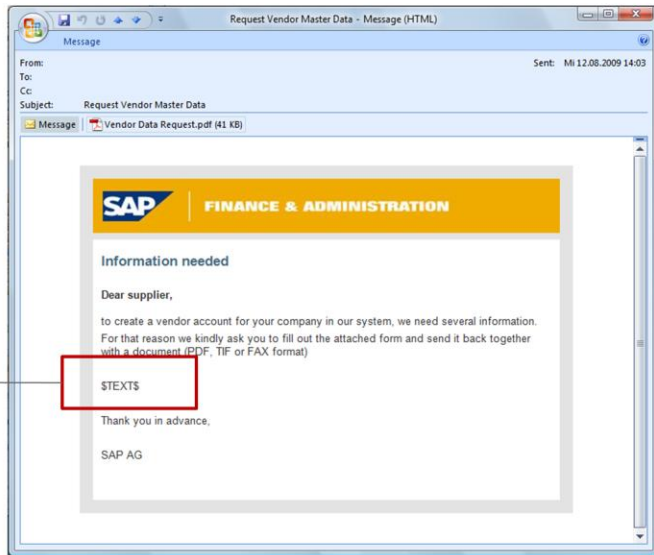
## Vendor's View of Received E-mail



### Vendor needs an e-mail client and Adobe Reader to participate

- Receives and HTML e-mail with PDF form as attachment

Variable that will be  
replaced with text



## Filling in the Interactive PDF Form I/II



### Form contains logic to determine

- Visibility of form fields
- Mandatory form fields
- State of form fields

Vendor Data Request (6).pdf - Adobe Reader

Please fill out the following form. You can save data typed into this form.

### Vendor Master Data Request Form

**Address Data**

Name\*

Name 2

Street\*

District

Region

Pst Code/City\*

Country\*

PO Box

PO B Postal Cn

Telephone\*

Fax Number

E-Mail

**Payment Information**

Bank Country

Bank Key

Bank Account

Control Key

Acct holder

SWIFT code

Name of bank

Bank branch

City

E-Mail for Remittance Advice

**Tax and Identification Numbers**

VAT ID

Tax Number

DUNS Number

**Additional Information**

**Processor Information**

Name

Position in company

Date

☒ We accept the SAP purchasing terms and conditions

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## Filling in the Interactive PDF Form II/II



A second example providing more mandatory fields (due to a bank in the European Union)

Vendor Data Request (6).pdf - Adobe Reader

File Edit View Document Tools Window Help

1 / 1 65.9% Sign Find Object Data Tool

Please fill out the following form. You can save data typed into this form. Highlight Fields

### Vendor Master Data Request Form

Address Data	Payment Details	Tax and Identification Numbers
Name* <b>TechED IT supplier LTD</b>	Bank Country <b>Germany</b>	VAT ID <b>DE143454214</b>
Name 2	Bank BIC <b>67230000</b>	Tax Number
Street* <b>Mainstreet 1-3</b>	Bank Account <b>4049583495</b>	
District	Control key	
Region	Account	DUNS Number
Post Code/City <b>69190 Walsdorf</b>	ISAN <b>de53872300004049583495</b>	
Country* <b>Germany</b>	SWIFT code <b>ABCDBE1XXX</b>	Additional Information
PO Box	Name of bank <b>ABC Stad Bank</b>	<b>Please execute all payments in Euro ASAP!</b>
PO B-Postal Code	Bank Branch	
Telephone* <b>1234578-0</b>	City <b>Frankfurt</b>	
Fax Number <b>1234578-10</b>	E-Mail	
E-Mail <b>support@tech-it.com</b>	Remittance Address	

Processor information

Name **Dr. J. H.**

Position in company **Chief Accountant**

Date **Aug 12, 2009**

\* This field is marked as mandatory.  
According to the status of some fields can be set as mandatory dynamically.  
All mandatory fields which are not filled so far will be highlighted when the e-mail button is pushed.

☒ We accept the SAP purchasing terms and conditions

**Send Request to SAP**

THE BEST-RUN BUSINESSES RUN SAP™

SAP

## Before Submitting the Form Back Acceptance of Purchasing terms & Conditions



### Confirmation of the “purchasing terms and conditions”

- Enables “Send Request to SAP” button

to ☐ We accept the SAP purchasing terms and conditions

will

L

Send Request to SAP

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SAP

☒ We accept the SAP purchasing terms and conditions

Send Request to SAP

RUN BUSINESSES RUN SAP™

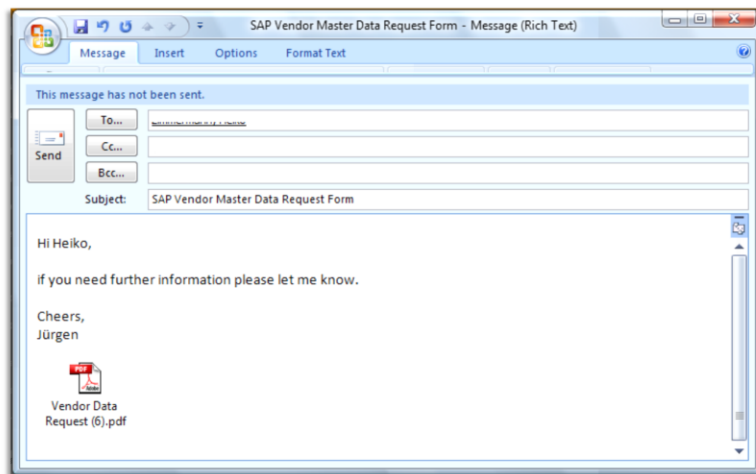
SAP

## Submitting Vendor Account Data Back



### Data submission with local e-mail client

- Explicitly confirmed by clicking "send"





## Uploading PDF Form Submitted by Vendor



Enter Missing Fields

Missing Fields

Buchungskreis: \*  (Press 'Enter' to determine commodities)

Country of the Vendor: \*

Vendor needed for (commodity): \*

OK

Receive vendor master data by e-mail

Send Request Form to Vendor Upload Request Form

SOX

In order to comply with SAP's internal SOX documentation and controls only documents from the supplier will be accepted. For example, invoices, pro forma invoices etc. will be accepted as vendor documents. Documents which are created by SAP need to be accepted with signature and supplier stamp.

In all cases the following information should be included on the documents:

- Name of Vendor
- Physical Address
- Bank Details (Name of the Bank, IBAN (EMEA only), SWIFT and Bank Account)

Please be aware of country specific regulations. In many countries a Vendor has to provide a PDF form which might specify further requirements.

Send/Receive Vendor Request Form

Enter sender's Email address

Sender's Email Address: \*

Select PDF File

C:\Users\... Desktop\Vendor Data Request (6).pdf Browse...

Upload PDF Form

## Uploading the PDF



Uploading the PDF forms is pre-filling multi screen applications

Vendor Master Data Request - Windows Internet Explorer

Vendor Master Data Request

**VENDOR MASTER DATA REQUEST**

THE BEST-RUN BUSINESSES RUN SAP

Select Processing Type [Save Request]

Vendor Data

Address Data | Payment | Taxes | Additional Information | Workflow Data

Company Code

Company Code: 0001 SAP AG

Purchasing Org.: 0001

Name

Name: TechED IF supplier LTD.

Address

Street: Mainstreet 1-3

District:

Postal Code: 69190 City: Walldorf

Country: DE Region:

Post Office Box

PO Box:

PO Box PCode:

Communication

Language: German

E-Mail: twuppon@tech-ed.com

Telephone: +49 1234578-0

Fax Number: +49 1234578-10

Finance E-Mail:

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## Review of prefilled screens



### All screens are prefilled except one screen

- Information cannot be provided by vendor
  - E.g. Estimated business volume

## Automatic Attachment of Form to Vendor Account



### Documentation of source of information

- PDF form is automatically attached to vendor account record

Here's the PDF form

File name	Doc. class
Vendor Data Request (6)	PDF

## Vendor Account Creation Effort for Custom Implementation



### Form design

- 5 days

### Distributing forms and integration in existing screen flow

- 2 days (1 new Web Dynpro) + 1 modification of existing screen (buttons added)

### Processing incoming forms

- 2 days (1 new Web Dynpro + processing code)

### Special attention to SOX compliance

- Additional validations like email addresses (no SAP internal), auditing information (like user id, dates)
- Read Only after submit
- Storage of uploaded form

## Agenda



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- 1.1. Technology Basics
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- 2.2. Vendor Account Creation – Offline Scenario

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- 3.1. Adobe LiveCycle Designer
- 3.2. Form Design Demo
- 3.3. Enhancements with Adobe LiveCycle Designer 8.2

### 4. Outlook

- 4.1. Interactive Forms & SAP Business Process Management
- 4.2. New Developments From Selected Areas
- 4.3. Strategy & Roadmap



# DEMO



I'll use the standalone Designer for this demo. For the implementation the Adobe LiveCycle Designer is integrated into the SAP GUI or the SAP NetWeaver Developer Studio. This is no disadvantage. It even lets me show and explain some background things that go on automatically. I'll leave the presentation and switch to the Designer next.

## Designer Demo Script

Start showing Designer – Palettes, Object Inspector, Library, Menus and Designer Help

Create a new Form

Create a new data connection (have sample XML file prepared)

Set form properties (point out Performance settings, set default data file)

Show PDF preview (empty one page PDF, embedded Reader)

Add a Text Field by dragging from the data view on the body page

Add a Data Field from the library, specify data binding by dragging from the data view on the field on the form

Add a Dropdown-List to the form

Enable dynamic properties (Menu Tools-Options-Data binding)

Specify items for DDL

Show PDF preview and demo DDL

Add a standard button

Make this button a submit button

Enter email address and change the submit format to "XML Data"

Preview the PDF and click on the submit button – The email client comes up and has an XML file as attachment – Open XML file

Add another button.

Add a script to the click event – Change language to JavaScript and add the following script "xfa.host.messageBox("Button clicked!");"

Add a signature field – Preview PDF and sign the PDF

Show Data view and hierarchy view

Add a table by dragging and dropping the table section of the data structure on the form.

Preview PDF and talk about the table.

Optional: Show XML source of the template. XFA Standard

Show "drawing aids" (Windows – Drawing Aids) – Talk about the grid (e.g. useful when designing accessible forms)

Demo subforms – explain that subforms add structure to documents

Discuss positional and flowed layout.

XML File

```
<data>
<orderDescription>Gear Unit Repair</orderDescription>
<date></date>
<ServiceParts>
  <item>
    <partNo>10301-36N</partNo>
    <description>Gear Mechanism Unit</description>
  </item>
  <item>
    <partNo>10032-43m</partNo>
    <description>Ball Bearing</description>
  </item>
</ServiceParts>
</data>
```

## Live Demo: Adobe LC Designer 8.1 Summary



### Use of Adobe LiveCycle Designer 8.1 to design a simple form

- Designer UI
- Data connections and data view
- Drag & Drop to design forms
- Adding form fields
- Data binding of form fields
- Simple scripting
- Signatures and barcodes
- Tables



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Last part of our presentation is an outlook where we want to look at what's coming next. It helps you understand what will be available in short term but also what the long term strategy for Interactive Forms is. I will cover the short term part and hand back to Nikhil for the strategy.

## **SAP NetWeaver next release – Designer 8.2 New Features – Overview**



### **Layout**

- Hyphenation
- Page break control for text objects
- Typographic enhancements

### **Authoring**

- Tab order authoring enhancements
- Updated import for MS Word 2007 (no slide)

### **Implementation**

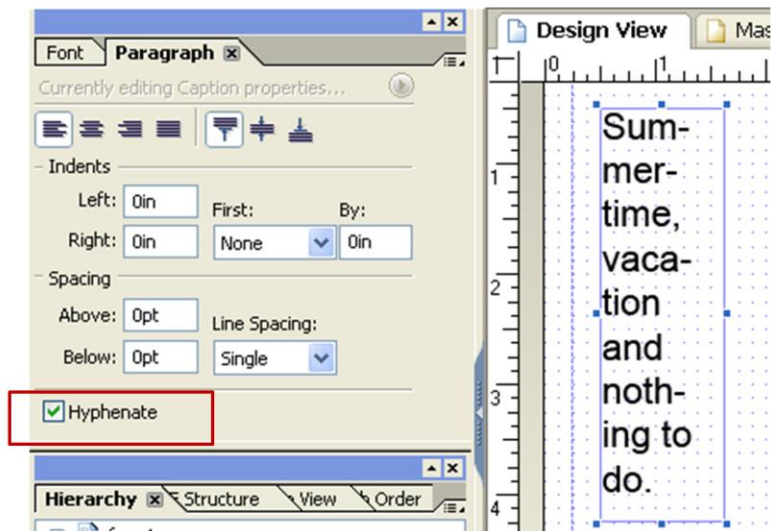
- Hyperlinks
- Web service authentication

## Hyphenation



### Hyphenation

- New options dialog to control text hyphenation
- Option to enable hyphenation for text objects



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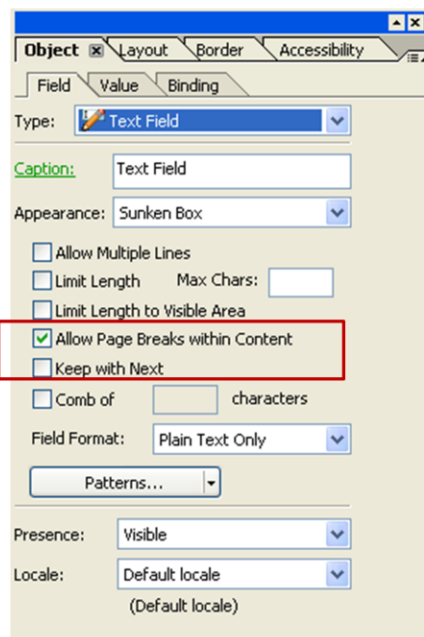
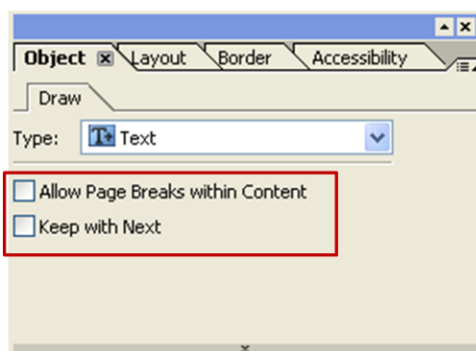
## Page Break Control for Text Objects



### Page Break Control for Text Objects

#### ■ New options

- Allow Page breaks within Content
- Keep with Next

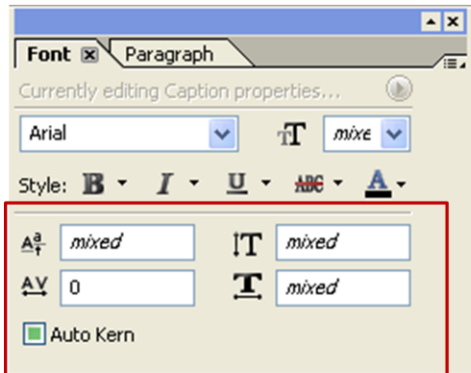


## Typographic Enhancements



### Typographic Enhancements

- Auto Kerning, letter spacing, horizontal and vertical scaling



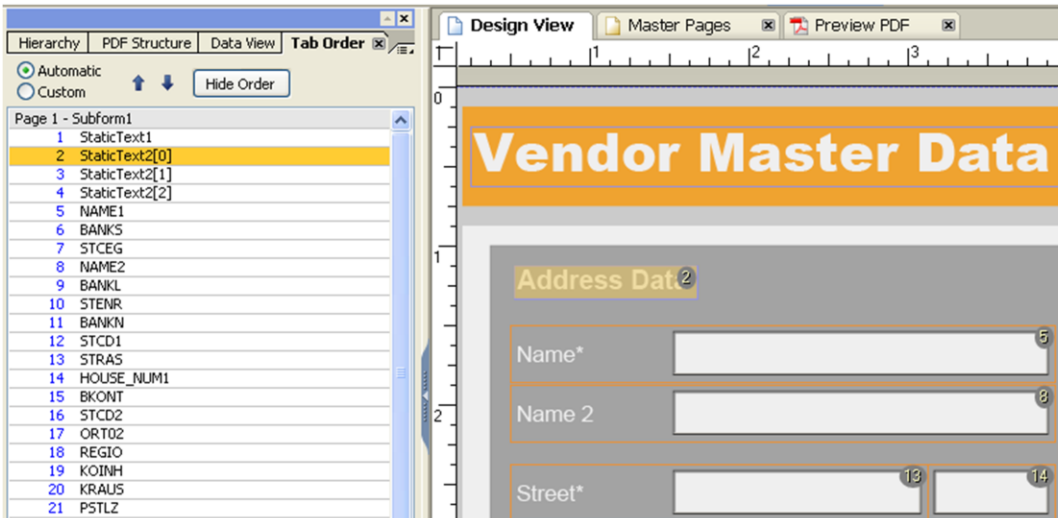
AW, Te (auto kern)  
AW, Te (no kerning)  
some words are scaled  
s t r e t c h  
baseline shift

## Tab Order Authoring Enhancements



### Tab Order Authoring Enhancements

- Improved visualization and simplified modification of tabbing order



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## Hyperlinks in Text Objects



### Hyperlinks

- Support for native hyperlinks
- Not suited for Web Dynpro
  - Opening a link in a secondary window not supported

A text with a [link](#).

**Edit Hyperlink**

☒ URL  
http://www.adobe.com

☐ Email  
Email address:   
Subject:

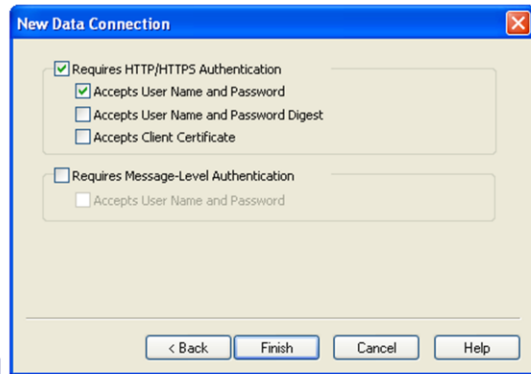
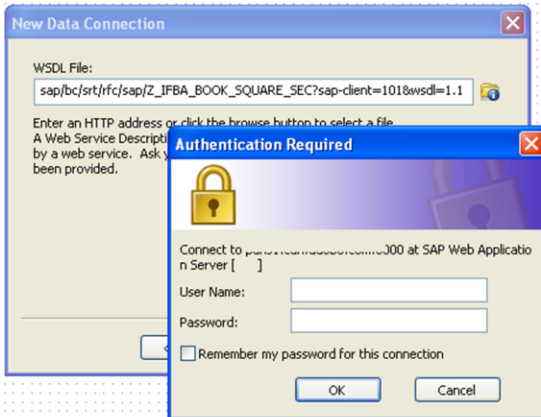
OK Cancel

## Web Service Authentication



### Web Service Authentication

- Various authentication modes supported
- Adobe Reader 9 is lowest supported version





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Last part of our presentation is an outlook where we want to look at what's coming next. It helps you understand what will be available in short term but also what the long term strategy for Interactive Forms is. I will cover the short term part and hand back to Nikhil for the strategy.

## Interactive Forms & SAP NetWeaver Business Process Management



### SAP NetWeaver Composition Environment 7.2

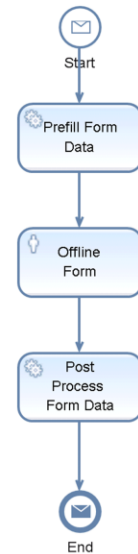
- Integrate Interactive Forms into business processes using the SAP Business Process Composer
- Share data between an Interactive Form and a business process
- Take the process offline through the use of offline Interactive Forms inside a process

### Forms-based Processes in Business Process Management

- Supports a disconnected working mode within a workflow process step
- Extend business processes to external parties
- Tracking of forms processes (process transparency)

### Planned for future releases

- Forms translation
- Transport of forms
- Initiating a new business process with a form



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## SAP Interactive Forms by Adobe

### New developments



#### Forms Processing based improvements

##### ■ Performance, Interoperability, Lowered cost of development

- Interoperability between Adobe Document Services versions and SAP Business Suite releases with ADS Hub ([SDN Blog](#))
- Offline forms data processing infrastructure in ABAP ([More](#))
- Performance improvements in Print forms
- Job Profiles administration UI – SAP NW CE 7.11 ([SDN Blog](#))

#### Web Dynpro based improvements

##### ■ Usability, Performance & Robustness

- Improved validation error message handling in online scenarios with Interactive forms and Web Dynpro
- Performance optimization in online scenarios

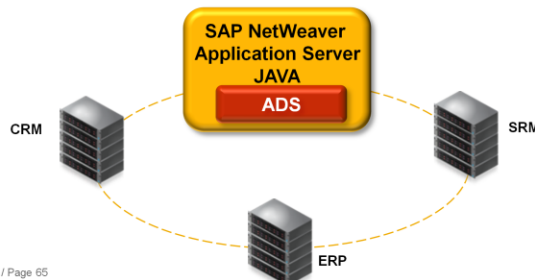
The screenshot shows a web form interface. At the top, a red error message states: "30.02.2009 is an invalid date". Below this, a purple banner reads: "Please fill out the following form. You can save data typed into this". The form contains a "Submit" button and three input fields: "STRING" with the value "Web Dynpro", "DATE" with the value "30.02.2009" (highlighted in pink), and "INTEGER" with the value "0". A vertical sidebar on the left contains icons for help, documents, and users.

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## Adobe Document Services Hub Sharing an ADS



- Most SAP IT landscapes consist of multiple SAP systems requiring forms processing capabilities
- Many of these SAP systems are at different releases
- Upgrade cycles for these systems are often different
- Sharing an ADS between these systems could lead to compatibility problems
- Maintaining multiple servers with ADS serving these systems considerably increases customer TCO
- Sharing an ADS in an IT landscape brings obvious benefits



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In case an ERP system is newer than the ADS it may rely on features that are not available.

This leads to an unpredictable behavior: depending on the feature an old ADS may throw an exception or (sometimes even worse) ignore what the application requires.

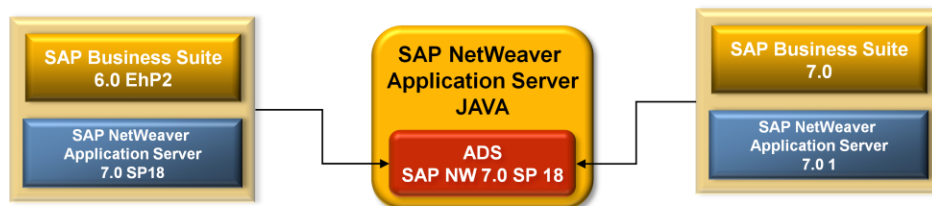
It cannot be decided in general what should happen in such a case, sometimes the application scenario can live without a feature, could provide an alternative solution or needs to stop the processing and inform the user.

## Adobe Document Services Hub The Solution



- The ADS hub is a concept defining rules to share a central ADS instance between multiple SAP systems
- The ADS hub „interoperability“ ensures compatibility of a single ADS instance with multiple SAP systems on different releases
- For the ADS Hub an API allows an application to check if a particular feature is supported by the ADS before using it
- If this feature is not supported the application is notified and has to take the necessary action
- It is the responsibility of the application to verify if a feature is supported

***Interoperability is ensured beginning with SAP NetWeaver 7.0 SP13***



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Interoperability is a property referring to the ability of diverse systems to work together (inter-operate). It is the ability of two or more systems or components to exchange information and to use the information that has been exchanged. According to ISO/IEC 2382-01, Information Technology Vocabulary, Fundamental Terms, interoperability is defined as follows: "The capability to communicate, execute programs, or transfer data among various functional units in a manner that requires the user to have little or no knowledge of the unique characteristics of those units".

A new API allows an application to check whether a certain feature is supported by the current ADS installation.

In case a feature is not supported the application can decide to

- continue without using this feature. The corresponding parameters must be removed from the following call to the forms processing run-time environment.
- inform the user who can decide whether to continue without this feature or to cancel the task.
- provide a fallback scenario that does not require this feature.
- cancel the output and inform the user that an ADS upgrade is required to run this scenario.

This allows each application to make the right decision in case a feature is not supported.

An ADS on SAP NetWeaver 7.0 SP13 or higher can be used by several ABAP stacks on different releases and SP levels (SAP NetWeaver 7.0 SP13 or higher)

## **Adobe Document Services Hub Benefits of the ADS Hub**



- Leverage existing infrastructure to make use of new features from the ADS
- Lower administration effort through reduced complexity of landscape
- Be independent of the innovation cycles of other SAP systems
- Mitigate impact of platform availability of ADS

## Offline Forms Data Processing Infrastructure



The new offline forms data processing infrastructure offers out of the box support for processing of Interactive form data sent back via emails by:

- Handling PDFs through inbound mail handlers
  - Retrieving the form template information
  - Extraction of XML based form data from the PDF Form
  - Conversion of extracted form data to SAP data dictionary based structures
- 

■ ***Considerably reduces the implementation time for offline forms***

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Offline inbound form processing is not difficult to implement but could be often time consuming.

The new Offline Forms Data processing reduces development effort for processing the data from PDF forms.

An inbound application Handler is the defined application specific code for evaluation of the retrieved data and further application specific processing and update



## Offline Forms Data Processing Infrastructure

### Design Time: Inbound Handler definition in TXN: SFP



**Form Builder: Display Form FP\_TEST\_IA\_01**

Form:  Active

Properties | Context | Layout

Description:

Layout Translation:

Layout Technology:

Layout Type:

Interface:

**Inbound Handler:**

Created By:  Date:  Time:

Changed By:  Date:  Time:

Package:

Original Language:

- The inbound handler for a form should be defined in the transaction SFP on the properties tab.

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The form inbound processing of the backend system forwards the mail to the configured generic handler

The generic handler provided by the forms-processing runtime environment:

- Extracts the attached PDF from the mail
- Extracts the form data from the PDF using the Adobe Document Services
- Reads the form-template name from the form data
- Passes PDF, form name and form data to the application module associated with the form template

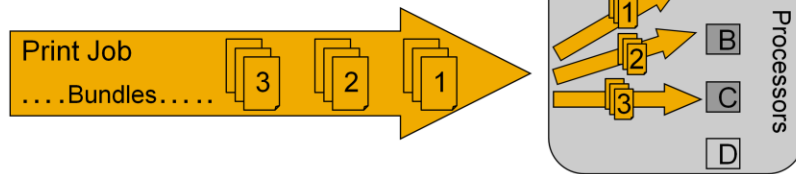
The extracted data of the completed form is always in XML form. Applications working with a dictionary-based data model have to convert this XML data into dictionary structures.

- The application module can call a helper function module for this task.

## Printing Performance Improvement for Large Print Jobs

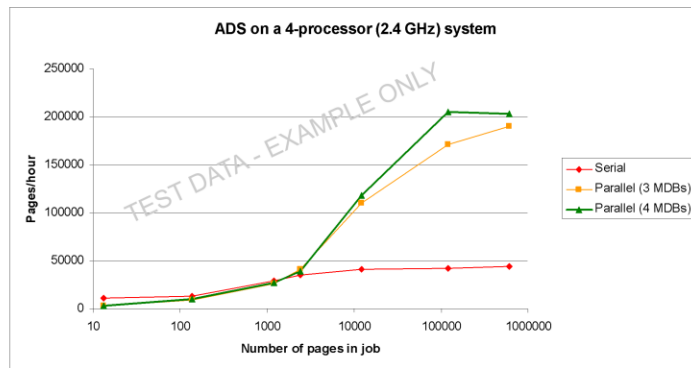


New parameter PARALLEL in  
function module FP\_JOB\_OPEN



Requires:

- SAP NetWeaver 7.02 (ABAP)
- ADS on the next SAP NetWeaver Application Server (Java) release



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### Print Performance:

Large print jobs can take several hours or even days to process

Some large print jobs must be completed in a shorter time – for example, more than a million invoices in less than 8 hours

There is a bottleneck on the Java stack

Synchronous forms processing of a single job on the Java stack uses only one process even if there are more processors available

There is no scalability on multi-processor systems for single print jobs

- This is in contrast to multiple print jobs, which will be distributed over multiple processors

### Print Performance – Release Requirements for Parallelization

ADS on SAP NetWeaver 7.2 (Java) is currently required

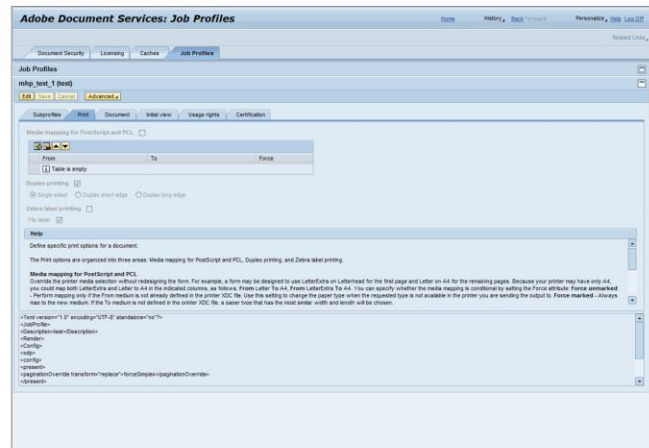
Currently supported combinations for parallelization:

- SAP NetWeaver 7.02 (ABAP) and the next SAP NetWeaver Application Server (Java) release
- SAP NetWeaver next release (ABAP) and the next SAP NetWeaver Application Server (Java) release

## Administration: Job Profile Editor



- When an application calls the ADS, it can specify a job profile to modify the way ADS processes the job (for example, `OUTPUTPARAMS-JOB_PROFILE = 'Adobe/Print/DuplexLongEdge'.`)
- A UI for editing job profiles is part of the SAP NetWeaver Administrator in SAP NetWeaver 7.11.



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#### **4.3. Strategy & Roadmap**

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Last part of our presentation is an outlook where we want to look at what's coming next. It helps you understand what will be available in short term but also what the long term strategy for Interactive Forms is. I will cover the short term part and hand back to Nikhil for the strategy.

## SAP Forms Strategy



*"The SAP forms strategy is based on SAP Interactive Forms by Adobe (IFbA). This applies to both print and interactive forms. In this context, most Business Suite solutions have already been converted to the IFbA technology (more than 2300 forms), and new standard SAP forms will be created using IFbA instead of Smart Forms or SAPscript."*

*SAPscript and Smart Forms shall continue to be supported inline with SAP's maintenance strategy, thereby ensuring the ability to protect existing customer investment."*

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- The strategy for SAP when it comes to forms development is Interactive Forms by Adobe.
- SAP doesn't force customers to migrate/move to IFbA.
- SAP provided equivalent forms which existed in SapScript and Smart forms in IFbA.
- There is no end of life (EOL) for maintenance for SAPScript or Smart forms as of today, these products will be further supported in line with the 5-1-2 maintenance strategy of SAP.
- The customer investment is supported
- Each customer has to decide for himself depending on his scenario if he wants to move to the new solution.
  - Use of easy to design forms using Adobe LiveCycle designer
  - Use of Interactive Scenarios
  - SapScript and Smart forms can only support print forms and no interactive scenarios

## Roadmap Future Direction SAP Interactive Forms by Adobe



### FOCUS AREAS

#### User Productivity

Enhanced development efficiency through improved developer productivity

#### Performance

Continuously improve interactive forms And high volume printing performance

#### Installation and Configuration

Simplify Installation and Configuration cross checks

#### Globalization

Widen support for printers and Improve support for local product Requirements e.g. RTL

#### Accessibility

Enable mobility impaired form developers for Adobe LiveCycle Designer

#### Miscellaneous

Extended Browser Support, new print features, Security etc

### RELEASE PLAN

2009				2010			
Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
◆	SAP NetWeaver 7.01						
◆	SAP NetWeaver CE 7.11						
				◆	SAP NetWeaver 7.02		
				◆	SAP NetWeaver CE 7.2		

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- User Productivity
- The design of forms will be made easier through usability improvements in the LiveCycle Designer, the use of form fragments and with corporate style sheets.
- The development and deployment of offline form scenarios will be accelerated.

#### Performance

- The performance of IFbA for printing will be continuously improved. For very high-volume scenarios, it is intended to enable several processors in parallel to handle a single print job.

#### Installation & Configuration

- The administration and configuration of the ADS will be made easier through automatically computed default values (for example Pool Max) and input help and checks on the properties.
- Administration of digital signatures and key storage will be improved.

#### Globalization

- Solutions for local product requirements such as right-to-left languages (phase wise).
- Support for printers will be widened beyond the current PCL, PS, & ZPL compatible printers.

#### Accessibility

- Enable mobility & visually impaired users access for use of interactive and print forms

#### Miscellaneous Features

- Improvements will be made to the generated page layout, such as formatting of numbered lists.
- It will be possible to 'Watermark' PDF print forms.

## Roadmap Key Takeaways



SAP and Adobe continue to invest significantly in SAP Interactive Forms by Adobe



User experience, productivity and product performance are high priority



SAP and Adobe remain committed to support product standards such as accessibility and Globalization



The SAP forms strategy is based on SAP Interactive Forms by Adobe.

## Summary



### **SAP Interactive Forms by Adobe provide substantial benefits, because they ...**

- Automate and streamline forms-based business processes
- Are fully integrated into SAP NetWeaver
- Are available to any application based on SAP NetWeaver
- Combine the benefits of the open technology standards XML and PDF
- Can be deployed in online and offline scenarios
- Cover high-volume print requirements

What do I want you to take away from this presentation?  
See above!



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## Further Information



### → SAP Public Web:

SAP Developer Network (SDN): [www.sdn.sap.com](http://www.sdn.sap.com)

SAP Interactive Forms by Adobe: [www.sdn.sap.com/irj/sdn/adobe](http://www.sdn.sap.com/irj/sdn/adobe)

SDN Forum: SAP Interactive Forms by Adobe

<https://forums.sdn.sap.com/forum.jspa?forumID=155>

SAP EcoHub:

<https://ecohub.sdn.sap.com/irj/ecohub/solutions/interactiveforms>

### → Related SAP Education and Certification Opportunities

<http://www.sap.com/education/>

BC480: Creating PDF-Based Print Forms

BC481: SAP Interactive Forms by Adobe in the ABAP environment

HR280: HCM Processes & Forms technology

## Further Information (continued)



### → Related Workshops/Lectures at SAP TechEd 2009

CD107, Best Practices for Designing Forms with SAP Interactive Forms by Adobe, Lecture (1 Hour)

BPM263, Using Adobe Forms in SAP NetWeaver BPM, Hands-On (2 hours)

ALM275, Creating PDF-Based Print Forms, Hands-on (2 hours)

UP264, Creating Online and Offline Form Processing Scenarios with Adobe Forms and Web Dynpro for ABAP, Hands-on (2 hours)

ALM210, Overview of Printing from SAP Systems, Lecture (1 hour)



## Feedback

**Please complete your session evaluation.**

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