The Easiest Way to Generate Documents from SAP
How Customer Communications Management Improves Documents, Correspondence and Productivity In Your SAP Environment
A Serious Gap in SAP Functionality

The broad SAP product line is a sound choice for organizations with complex processes and heavy data demands. But one thing none of these users can do quickly and easily is create documents for customer communications and other business information. It’s a serious omission that hampers business responsiveness and team productivity. Problems arise when document output management isn’t integrated into SAP functionality.

Companies in over 130 countries use SAP, among the world’s most widely used enterprise software platforms. The SAP Business suite alone supports 24 industries and 11 lines of business. Small, mid-size and large enterprises choose SAP for the sense of safety and security, of dealing with a longstanding, respected market leader. Hundreds of thousands of information workers around the world use SAP software every day for all kinds of applications.

Why This White Paper: The Need for Integrated SAP Document Composition

This white paper describes the difficulties SAP-based enterprises encounter when business users struggle with inadequate document composition capabilities. It then explains how companies can overcome the problem and as a result, extend the value of their SAP investment.

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The need for better document tools is more than a minor inconvenience. The lack of easy SAP document capabilities impacts many users within your organization:

- The communication manager who has to make sure the approved company style is always used
- The IT director who wants to get rid of content changes that drain time and effort
- Business communication owners who want to make content and template changes themselves.

Whether you are an IT leader or in charge of a line of business, you probably recognize the problems your employees face as they deal with these issues. You’ll learn how an customer communications management system can make correspondence fast, easy, more cost efficient and controlled by the business users who need them.

No Native Document Composition in SAP

Nearly every SAP-generated or controlled process involves document creation, modification and use. Business users of all kinds – service reps, agents and others – need to easily and quickly create and modify customer and document communications and templates. Yet, the most basic communications like modifying welcome letters for loyalty programs are beyond the capabilities of the average business user.

Even experienced SAP users struggle with routine document capabilities like billing configurations, CRM campaigns, content servers, marketing file integration, content repositories, attachment files, data sources and paths, business rules, and condition groups. As a result, your documents don’t look professional and don’t maintain your corporate style.
Why a Word Processor Won’t Work

Whatever document generation capabilities are available in SAP have limited value for the typical business user. So why not use a traditional word processor like Microsoft Word for business documents in SAP environments? For one thing, moving data from SAP sources to Word “containers” is complex to manage. While business users today are more than familiar with Word, toggling between the two applications is beyond the skill set of the average information worker. And there are other problems:

- Word doesn’t give users or administrators universal control over all the templates and macros required in a suite of corporate communications. A change at one point doesn’t automatically carry across all relevant content. Verifying changes becomes a time-consuming, uncertain process.
- Word doesn’t allow broad, consistent control to enforce corporate identity standards. Manual oversight is still required to apply corporate branding in business templates.
- Word is a low performance application not designed to scale to hundreds of simultaneous users.
- Word does not support versioning of templates, putting compliance at risk.

Questions and Query Boards: Frustration at Every Level

That’s not to say there is no document functionality within the SAP platform. SAP’s own output solution, SAP SmartForms, emphasizes reporting and standard forms, not the mainstream documents and associated correspondence that employees, customers and partners need on a daily basis. SmartForms is a very technical solution. It is designed for output that hardly ever changes, like invoices or order forms – not dynamic business documents like proposals that have to follow market conditions. Every change requires expensive ABAP programmers.

SAP and Adobe have partnered with the goal of automating and streamlining forms-based communication to support customers who create reusable forms for business processes. The result of this partnership is SAP Interactive Forms by Adobe. This has been integrated into no less than six SAP development and run-time environments, which cover both stacks of SAP NetWeaver as well as the SAP Business Suite.

Adobe for interactive forms hasn’t met the needs of most business users, since it takes the skills of a programmer to change or modify interactive forms. But the real problem is lack of functionality in another area – building and modifying document templates. This common application has not been a robust part of the SAP environment. In general, creating business documents from SAP applications such as SAP Forms is considered very complex. Even SAP itself calls it “rudimentary” in a statement on SCN (SAP’s Community Network). This typical exchange from SCN shows the level of frustration that is all too common:

Hi experts,

Quick question: is there any tool included in the newest 7.3 Portal for creating interactive forms? I did my research but end up with no satisfying results...

For Portal 7.0 we used to create such forms with WebDynpro Java, but it needs a programmer to implement an interactive form. I was wondering if there is maybe a way to go for a casual portal enduser.

What I meant was something Adobe Interactive Forms alike, but embedded in Portal, (that is) easy, accessible and more end-user friendly, especially for non-programmers. But when I read what I’ve just written I guess my expectations may be a little bit too high...

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Document Output Management: Still Too Complicated for Business Users

Document creation shouldn’t be such a struggle. Shouldn’t your employees use their time to interact with customers, not with their word processors? There’s something wrong if people spend more hours struggling with their technology than helping their customers.

Document output management and customer communications should be within the skill set of business users who don’t have programming backgrounds. Yet the current state of document and forms creation within SAP puts routine changes beyond the skills of average business users and limits the work to programmers.

Until now, In SAP environments, document composition has remained work for specialists. Even then, experienced SAP programmers and analysts are stumped by the challenge of loading and modifying communications templates. Forums like the SAP Community Network are full of their questions and requests for help. To the average business user, even the questions themselves can be incomprehensible.

SAP users wish there was an easier way, but they don’t expect it. Companies want to change the whole process of maintaining, creating and managing documents.

“We were pleasantly surprised that Kofax Customer Communications Manager could be connected to the new SAP system so smoothly.”
–Franz Schmitz, Krone GmbH

More Barriers to Easy Document Composition in SAP

Ownership of document output management in SAP environments can get confusing. IT teams are the default owner, but they aren’t familiar with how the documents are used, and they can’t respond in real time. Business users are a logical choice, but they lack the needed programming skills to create or modify templates in the SAP environment. It’s more than an organizational or operational issue. It impacts day-to-day productivity.

Barriers like these get in the way of easy document composition in SAP:

Too Technical – When a document template tool is too difficult, it must be managed by IT, not the business users who need the communication to do their jobs.

Limited Knowledge – No one department or person is responsible for an organization’s document communications. Rarely if ever does a company have a formal job description of “document expert.” IT understands the technical aspects, but can’t get to the changes quickly enough. Business users understand what changes and updates are needed, but aren’t skilled in the right areas to handle it themselves.

Poor Resource Utilization – While business users long for more control over communications, to IT the job presents an endless list of unwelcome work. Programmer time is not best spent in making changes to content blocks.

Waiting for Service – Each document template job ticket is one of hundreds waiting in the queue, so until IT can get to it, you have no choice but to send out-of-date or out-of-compliance documents.

Expensive Talent – Even a simple change in a SAP Form requires expensive and hard-to-find technical resources. This creates higher labor costs and longer times to market. Projects require highly sought after ABAP programmers, who command high price tags.
“When we talk to customers in this environment, they ask: how can we make documents easier to create and manage?”

–Otto Dijkstra, Sr. Consultant, Kofax

By Line of Business: Specific Documents and Their Issues
Consider how document composition management impacts your business. If there’s any doubt that documents are vital, this list of SAP-based business functions and their documents should provide ample evidence of the broad need for integrated communications management.

HR Management
An HR employee in SAP Human Capital Management faces the challenge to enable the creation and amendment of documents without technical know-how and according to uniform rules. It was imperative that content had an audit history (version controlled) to ensure compliance, an aspect which plays an important role in the creation of HR documents like an employment contracts.

• Contracts
• New hire letters

Leasing/Finance/Insurance Communications
In transaction-driven documents, SAP data must be merged into complex templates with no room for error. For example, an insurance firm issues a policy update, and every change in personal data generates a new document. If 500,000 accounts are involved, the number of documents affected by this single change is staggering. And that’s just one application. Here’s another example: a leasing company generates 130,000 invoices per year. That’s 800 unique documents per day just for invoices. Nested data, multibranding, conditional texts– the composition demands can overwhelm the inexperienced user. Automating content placement makes it easier for information workers and compliance personnel to do their jobs accurately.

Sometimes it’s not complex data, but something simpler that stalls document workflow. One challenge for large organizations is just making sure accurate contact information is used on correspondence or that the right executive signs a document. Updates can get locked inside functional silos, making data unavailable to all the users who need it.

• Contracts
• Proposals
• Policies

• Invoices
• Claims
• Letters
• New accounts
• Loan records

Sales Documents
Sales documents can drive deals representing huge sums of revenue. Creating complex documents like proposals is a time-consuming process when there is no automated communications management. These high-value sales-related communications require a balance of consistency and flexibility. Standard copy blocks define products and services, while each quote and proposal combines them in a unique way. Efficient companies can pull a lot of proposal content from pre-approved text repositories. Then it’s just a matter of fitting together the content best suited to the customer’s need and inquiry. Merging data from SAP CRM is a common practice. Certain areas must be editable, with the ability to include graphics and images. When it is difficult for sales teams to assemble strong proposals and quotes, revenue goals suffer.

• Proposals
• Quotes

• Contracts
• Non-disclosure agreements

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Purchasing Information
Purchasing activities require specific performance and quality statements from vendors, which should be automatically included in document templates and copy modules. Purchase orders and contracts are mostly based on pre-defined text blocks. This makes it easier to pull data through a SAP system and use it consistently in business communications. The composition system should allow flexibility for editing specific areas.

- Purchase orders
- Contracts
- Service agreements

Manufacturing and Technical Documentation
Manufacturing documents include registration documents, certificates and reports. Auto manufacturers might need certificates to prove a vehicle’s structural stability. Food producers require special labels and permits for refrigerated trucks. Documents may be needed as multilingual communications in the customer’s language. Across national boundaries and increasingly within them, the need for documents in several languages is part of doing business. If you have trouble getting documents prepared in one language in your SAP environment, imagine the difficulty of pushing out communications in multiple languages.

- Certificates
- Test documents
- Instruction manuals
- Shipping records
- Packing and fulfillment paperwork

A Switch to SAP Leasing to Replace Legacy Systems
When various legacy systems were due for replacement, and the need for more flexibility grew critical, ABN Amro Lease switched to SAP leasing for invoicing. SAP Leasing streamlines business processes at all stages of the leasing life cycle. Its extensive features support strategic goals and let the company better manage the life cycle of contracts. Users can identify financing options for lease contracts or loans, make mid-lease changes, and deal with end-of-lease options and remarketing.

Kofax Customer Communications Manager fits in seamlessly with SAP Leasing
The switch to SAP Leasing meant ABN Amro Lease had to look for another solution to generate invoices automatically from this data source. One solution they looked at was the Kofax Customer Communications Manager Document Platform. A preliminary investigation quickly showed that Kofax Customer Communications Manager can be integrated with SAP Leasing and it provides the flexibility ABN Amro Lease was looking for.

“...We have been satisfied with Kofax Customer Communications Manager Document Platform for years now. The use of Kofax Customer Communications Manager has ensured that our applications work together completely with one single document solution. In practice, this has led to lower management costs and more flexibility. On top of this, Kofax Customer Communications Manager provides us with a method of putting together all of our key business documents quickly and correctly, meaning we can achieve optimum control over the whole process.”

–Information Management & Automation manager

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Why You Need a Different Approach

A different approach to SAP document generation is critical. Otherwise, changes take too long, time to market is delayed and companies miss opportunities. A short time to market for customer communications is essential. Consider a recent example from real life. A disastrous “monster” storm was tracking for coastal landfall. An insurance firm quickly sent a mailing to their customers about how to get assistance with storm damage claims. For urgency of this nature, you want communications in place fast. In fact, all customer communications can go out as quickly and accurately as possible.

How Your Company Benefits From Communications Management

Customer Communications Management (CCM) provides the easiest document generation solution for SAP, benefiting business users and information workers, as well as their colleagues in IT.

Control at user level where it belongs—Business users across all lines of business can manage their own departmental documents. Users closest to customers benefit most. IT can do what it does best: managing and safeguarding the technology investment.

No impact on existing systems—IT focuses on maintaining the status quo because that is what they are accountable for. They don’t want changes that threaten existing systems. CCM complements your SAP platform without requiring a modification or creating a barrier to data.

More mileage from legacy systems—It is important to note that the document data stream can be from a legacy system. The CCM software takes the data and creates documents out of that without any intrusion into the legacy application – or the SAP application.

CCM: “Software used to compose, format, personalize and distribute content to support physical and electronic customer communications and improve the customer experience.”
—Forrester

One system for print and digital documents—Today, CCM not only streamlines template design for printed communications, but also for interactive documents. It works by post or by email.

CCM: A Better Way to Handle SAP Data

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No More Cut and Paste

With SAP applications alone, it could take hours to get basic data into just one document. Cutting and pasting results in errors like incorrect names, information or graphics appearing in proposals, contracts, account statements and other important communications. Sometimes, the outcome is simply embarrassment in front of customers who might question your professionalism. CCM tools make it easier to extract and insert data from SAP business systems, without...
additional manual steps. Each business user can access data from within the application without having to copy and paste it into another place and without requiring technical knowledge. A user selects appropriate text blocks to incorporate into a document and can use business data without having to copy and paste it—avoidable steps that are time consuming and error prone.

**Current Data From a Central Source**

CCM promotes data integration so all documents can use the same data, once you set up the path to get it. A universal document template platform allows one-time set up of a common data path for all relevant documents. Users don’t have to leave their working environment and interrupt the workflow every time they need to work with a routine document template. With the right processes in place, users can pull extra data from the SAP system in a fraction of the time. Every authorized user who creates documents has controlled access to the database. Everyone gets the same current information without going through siloes of unmatched data. Users can also combine data from SAP and another system and deliver it in one single document.

**CRM Value of Communications**

When someone creates a document, it should also be available as a record within SAP, because that is the primary information source for CRM information. It doesn’t make sense to have the source disconnected from the communications delivery vehicle. When someone prints a letter to a customer, it would be a good practice to store it within the customer’s SAP record. For compliance and for customer service benchmarks, it can be shown as a document sent to a customer. CCM software handles this automatically.

"Business processes in Insurance, Leasing, Public sector and many other industries require the production of documents. Organizations enable themselves to produce these documents and manage templates and documents content themselves."

—Christoffel Klimbie, Key Account Manager, Kofax

**Dynamic Document Archives**

automatically, along with all their metadata, properties, and elements like tables with specifications, product data in documents. The system carries instructions for design considerations and placement of graphical material and images like signatures or logos. CCM does this automatically, and users don’t have to make any effort. Authorized content editors can update or modify the stored information as needed to accommodate things like new logos or regulatory statements. For example, invoicing users don’t get access to HR templates. All changes are made once and universally to all affected content material.

**A Resource for Compliance and Audits**

When business users can’t make their own updates and additions to routine document templates, productivity suffers. This also prevents you from maximizing your SAP investment as an integrated enterprise platform. No matter how good the data analysis, the business processes, and the collaborative operations, it all comes apart at the point of use with an inaccurate or delayed document. The worse case scenario is a compliance failure that results in fines or other penalties. The financial sector is especially under regulatory pressure. Poor financial practices have resulted in more stringent standards for governance and compliance.
CCM offers several ways to ensure compliance across document processes.

- Designated parts of the document are editable; other sections are read-only.
- Ability to keep track of template and content changes
- Only authorized users have access to restricted templates
- Maintains professional document quality
- PDF and Word formats supported

The content publication mechanism can be tuned to accommodate compliance regulations. In some cases, users can change certain sections of the document in Word, while other sections are protected from editing. This brings a new level of control and flexibility.

Versioning for Audits and Compliance
Versioning of business documents is difficult under any circumstance. When compliance is involved, versioning must be precise. If a document comes under scrutiny, the organization must prove which version of the text block was used in the document. If the problem relates to mistakes in content, you must be able to go back at least one or two versions to identify when and how the error occurred. CCM stores these records automatically and makes them available whenever needed.

Enforce the Corporate Brand
Company style and brand are not guaranteed if communication templates are managed by employees removed from the point where the communications are needed. IT is not necessarily going to know the most current approved style, layout or content for customer communications. By the time they work through the backlog of change requests, the guidelines themselves may have changed. CCM allows approved users to apply brand guidelines at the template and content block levels for other users to have for their communications.

Multi-branding on the Fly
It’s common for companies to present a different brand “face” to customers, depending on the market, region or subsidiary. Sometimes communications wear a different brand when they represent third party trade partners. Multi-branding your SAP documents for these situations is not an easy task. Logos, content and style must be current and applied on the fly. Intelligent CCM systems can apply business rules automatically to generate documents with the accurate brand, no matter how many different ones you need to accommodate.
Streamlined and Flexible Approval Set Up
At some point in their life cycle, most templates and content blocks require modifications and approval. Manual approval processes aren’t the answer. The risk of compliance error or customer service slip up is too critical to not have a formal process to check communications content.

Consider a company that has to modify a suite of communications because of a name and logo change. With CCM, that can be done in about two hours for all affected documents. Changes can be reviewed and approved one time by the department responsible for company standards.

One CCM system divides an entire suite of documents into groups of folders organized by who is allowed to change, view and create new content, and who is allowed to approve. Business users and reviewers only see what they have to see, removing as much complexity as possible. If the legal department just needs to review specific boilerplate copy, the system makes certain those reviewers only deal with text blocks assigned to legal.

Usually the CCM software vendor will help set up roles at the beginning of implementation and appoint someone to each approval role or set of roles. Defining the permission set is an easy task for software that is designed to do this. Appointing permission is also something the enterprise can set and change.

The most flexible CCM systems allow approvals to be handled at the either total or partial level, and approval for templates can be assigned differently than the process for text blocks. Comprehensive CCM offerings integrate all these capabilities into one package.

Dealing with Attachments
Dealing with document attachments can be unexpectedly complicated in SAP applications, but CCM can make it an easy and automatic step. Consider an insurance company that does business with end customers through agents. If documents must be sent to the customer, the agent may want to get them first and distribute. If communications are sent directly to a customer, the agent wants to be informed and copied on the attachments.

The requests are simple and reasonable, yet sometimes quite impossible using traditional SAP document functionality. In legacy systems, business rules for attachments are hard to standardize and implement. In integrated communications management systems, inclusion is flexible, controlled and automated. When an insurer sends a letter or email, the system also sends data about the agent and how the document should be routed. It will automatically add attachments like general terms and conditions, or a relevant flyer, and combine documents doing to the same address.

“Our staff can then produce completely correct documents, practically at the click of a button.”
—Information Management & Automation Manager, ABN Amro Lease

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SAP HCM and Sharepoint and Easier HR Document Creation

The situation faced by itelligence GmbH is common for organizations that use the Human Resources Management System SAP HCM (Human Capital Management). The company had the challenge of creating and amending HR documents without technical know-how and according to certain rules. For example, it was imperative that content had a version-controlled audit history to ensure compliance. This is an important requirement in the creation of employment contracts.

Sometimes it was necessary to pass on documents to other applications and processes. It was important to seamlessly integrate application data from the SAP system into document templates. The aim was the creation of a consistent working environment for users.

When a company like itelligence needs to create HR documents and all the required data is available in SAP HCM, it makes sense that the starting point is SAP HCM itself. However, SAP HCM may not be the most familiar environment for your users or the most efficient way to create HR documents, even when integrated with a document composition tool like ITP. You can avoid complexity by leveraging the familiar Microsoft Office and Microsoft SharePoint environments in combination with ITP.

Consider this solution for composing an employment contract in a SharePoint environment with ITP. Data that is already available in SAP can be retrieved by ITP from SAP HCM. The user is then presented with a Wizard in the familiar SharePoint user interface to compose the contract and capture additional data. The contract can then go through a SharePoint workflow, and when finished, ITP can push the final document to SAP HCM, including any additional data captured in the Wizard.

The Kofax Customer Communications Manager Software Platform: The Proven Approach to CCM

CCM is the easiest way to integrate the document creation process in your SAP applications and processes. It not only increases the productivity of business users and IT staff, it enhances customer communication. Kofax Customer Communications Manager stands out as a proven solution for integrated communications management in SAP environments.

Integrated Kofax Customer Communications Manager Document Composer Leverages Your SAP Data

Many organizations use SAP architecture as the platform for their enterprise business applications. If your business relies heavily on SAP, your document composition processes must be integrated with it. Document composition must work with core business applications to maximize efficiency and information access. Kofax Customer Communications Manager works with SAP applications as a fully integrated solution for business correspondence composition.

The ITP Document Platform has received “Powered by SAP NetWeaver” certification. This means users can produce documents and correspondence from their SAP applications. Users experience production of critical documents such as letters, proposals and contracts as a seamless part of the SAP application. Your SAP business data can be re-purposed directly for use in your documents and correspondence, making it easier to leverage this valuable corporate asset.
Kofax Customer Communications Manager can feed result documents with metadata into a DMS system, regardless if it is SAP DMS or others like FileNet, Documentum, Open Text or SharePoint. This is an automated process; documents will no longer get lost and are available for reference immediately. The solution can also insert pictures, diagrams and collateral from CMS systems or shared drives into the document or as attachments.

Used by Nearly Two Hundred Customers for SAP Integration

Nearly two hundred Kofax customers use Customer Communication Manager/OnLine Server by way of the SAP NetWeaver integration platform. This is particularly important when SAP applications are deployed by administration oriented organizations with significant demand for high volumes of complex documents.

Kofax Customer Communications Manager supports output from SAP applications at all locations where customer communications and business documents are needed. It can also be used to control the overall company document style. Kofax Customer Communications Manager document processes communicate with your SAP applications through a standardized XML Web Services exchange infrastructure. You avoid proprietary high-maintenance workarounds and confusing connections. It’s simple and seamless, and can help your business run more efficiently and ultimately more successfully. Without Kofax Customer Communications Manager, results are not predictable. Document creation remains work for specialists, when it could be something less experienced staff can handle.

For more information visit kofax.com.