



Formularios Electrónicos Lotus Forms

*IBM Forum
17 de Septiembre de 2008*



ON DEMAND BUSINESS™

Lotus. software

ACCELERATING
PROCESS AUTOMATION WITH
ELECTRONIC FORMS,
WORKFLOWS AND PORTLETS



¿Qué hace Lotus Forms?

- **Automatiza** proceso/servicios “basados en formularios”.
- Recoge los datos **exactos** en origen.
- Crea registros **auditables** en las transacciones.

The image displays four overlapping screenshots of the Lotus Forms application interface, illustrating its use in processing insurance forms:

- Health Insurance Information:** A form for gathering personal and contact details, including fields for First Name, Last Name, Email, Phone, and various addresses (Street, Postal Code, State/Province).
- ADT SETUP:** A form for configuring ADT services, featuring fields for ID Number, Client Name, Product Request Type, Primary Business Contact, and Type of ADT (e.g., Regular ADT, Multi-Site ADT).
- PROPOSED INSURED:** A form for entering insured individual information, including Name (First, Middle, Last), Street Address, Mailing Address, Sex, Birth Date, Date of Birth, Age, and First Name.
- PROPERTY SECTION:** A form for detailing property information, including a table for listing items and a section for Vehicle Information with a dropdown for vehicle type and a text area for additional details.

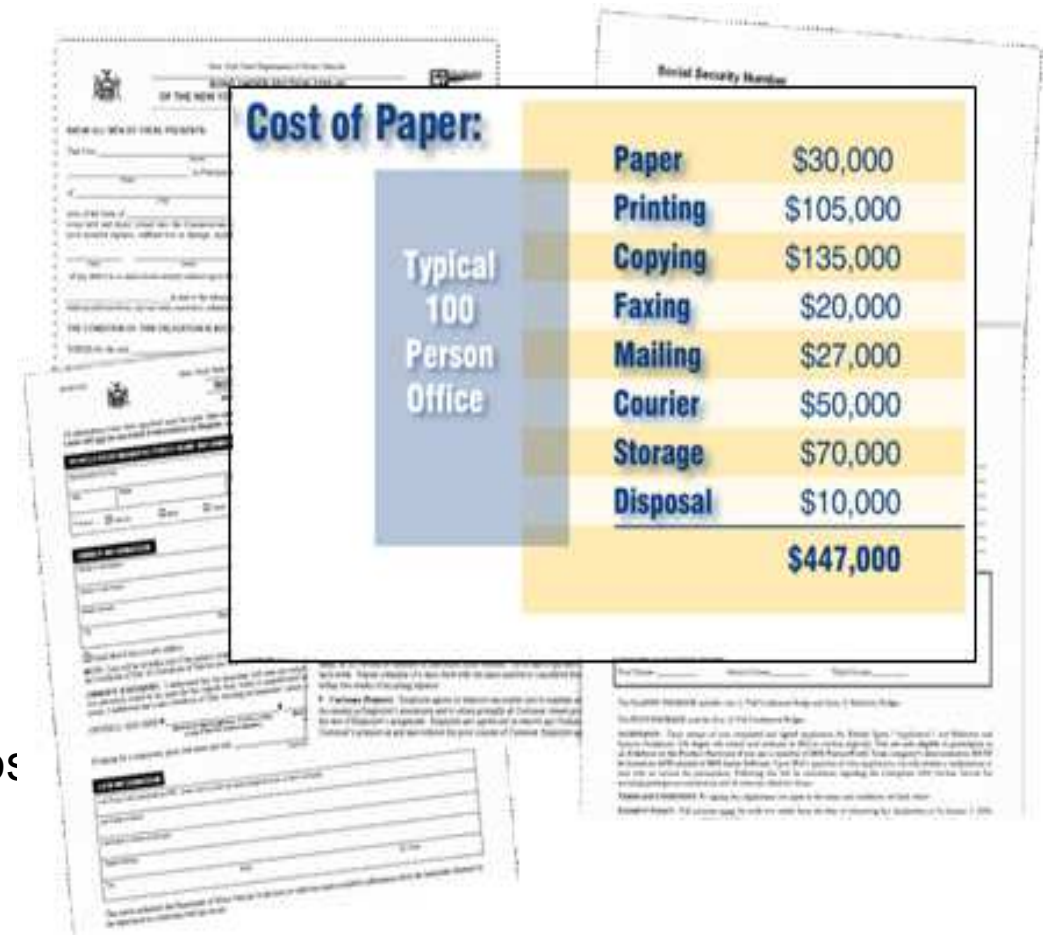
Impacto sobre los procesos en papel

Costes obvios...

- ▶ Papel, impresión, envío...
- ▶ Retirada de los formularios obsoletos
- ▶ Archivo y almacenamiento

...y los no tan obvios

- ▶ Procesos más largos
- ▶ Datos incorrectos/incompletos
- ▶ Volver a teclear datos
- ▶ Cadenas de aprobación complejas
- ▶ Datos provenientes de varios formularios
- ▶ Datos no disponibles



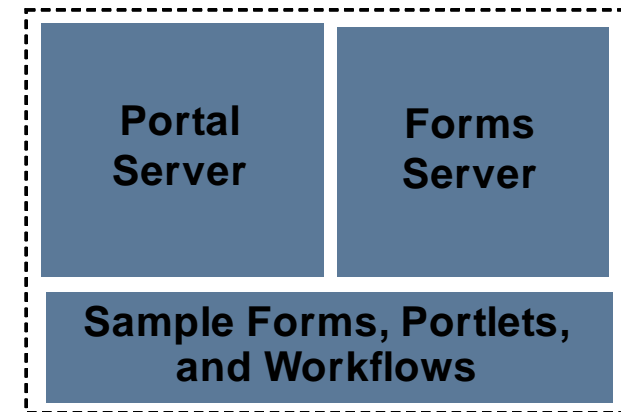
¿Cómo es Lotus Forms?

- Formularios **XML**.
- Estándar **Xforms**.
- Visualización usando **HTML**.
- Diseñador basado en **eclipse**.
- Capacidades de **diseño Web**.
- Capacidades para trabajar “**desconectado**” (offline)
- Integración sencilla con otras aplicaciones:
 - ▶ API (Java, JavaScript, C y COM)

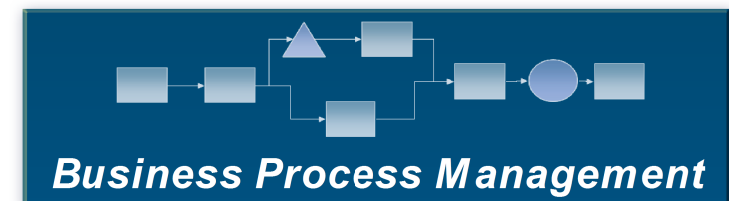


Integración con otros sistemas: “front end” del BPM

- Parte del portal
- Acelera los procesos mediante el uso de eForms
- Complementa algunas soluciones perfectamente: FileNet, WebSphere Process Server, Lotus Domino, etc.



Integración con sistemas de BPM



Partes de un formulario de IBM Lotus Forms

- Capa de presentación
 - ▶ “Pixel-perfect” para representar papel
 - ▶ Uso de asistentes y guías



Partes de un formulario de IBM Lotus Forms

Mountain-Sure INVESTMENTS Brokerage Account Application

INVESTMENTS Check/Write Account? Yes No Portfolio Account? Yes No

Account Type *check one* Individual Estate* Partnership* Custodian for a Minor Collateral *Additional Documents Required
 Joint Tenants Trust* Corporation* Charitable Organization* Investment Club

Applicant Information Required by MSRB Rule 3-67(a)(2) and NASD Rule 2210

First Name: Richard, Last Name: Smith, SSN: 999-99-9999, Date of Birth: 04-15-1964, Business Phone: () -
 Mailing Address: 123 Electric Form Ave, Springfield, MA 01111
 Legal Address (Required in addition to P.O. Box): 123 Electric Form Ave, Springfield, MA
 Employer: FaceEdge Solutions, Occupation: Doctor, City: Springfield

Are you or joint applicant employed by a member firm of a stock exchange, a municipal dealer or other securities dealer?
 Yes, Co. No

Flowchart Logic:

- Start: [Application for Estate, Partnership, Trust, Corp. or Charity] → Use Changes Account Type → Application Requires Docs (do / show attachments button, do / pop up instructions dialog) OR Application Needs No Docs (do / hide attachments button)
- Application Requires Docs → Approving Principal Signature Disabled → Unsigned → Signed → Approving Principal Signature Enabled
- Application Needs No Docs → Approving Principal Signature Enabled
- Approving Principal Signature Enabled → Unsigned → Signed → Approving Principal Signature Enabled
- Approving Principal Signature Enabled → Approving Principal Signature Disabled
- Approving Principal Signature Disabled → Approving Principal Signature Enabled

Account Type Selection:

- Individual, Joint Tenants, Corporation, Estate, Charitable Org.
- Collateral, Investment Club, Custodian for Minor, Trust, Partnership

Users may switch from any application type to any different one (and back again).

■ Lógica de negocio

- ▶ Integración con Workflows
- ▶ Proceso del formulario



Partes de un formulario de IBM Lotus Forms

```

<name>PureEdge Solutions</name>
<address>
  <city>Springfield</city>
  <state>MA</state>
</address>
<occupation>Doctor</occupation>
</applicant>
</xforms:instance>
</instances>
<bindings>
  <bind>
    <boundoption>BAA.FirstName.value</boundoption>
  </bind>
</bindings>
</ms:inst>

```

■ Capa de instancias de datos

- ▶ Xforms 1.1
- ▶ Integración XML
- ▶ Validación contra esquemas XML externos



Partes de un formulario de IBM Lotus Forms

Mountain-Sure INVESTMENTS Brokerage Account Application

INVESTMENTS Check Wishing Account? Yes No Portfolio Account? Yes No

Account Type Individual Estate Partnership Custodian for a Minor Collateral Additional Documents Required Joint Tenants Trust Corporation Charitable Organization Investment Club

Applicant Information Required by RESB Rule 3-B(X)(3) and NASD Rule 22-10

First Name: Richard Last Name: Smith SSN: 999-99-9999 Date of Birth: 04-15-1964 Business Phone: () - -

Mailing Address: 123 Electric Form Ave Springfield MA 01111

Legal Address: 123 Electric Form Ave Springfield MA 01111

Employer: PureEdge Solutions Occupation: Doctor City: Springfield

Are you or joint applicant employed by a member firm of a stock exchange, a national securities dealer or other securities organization? Yes No

Financial: [Application for Estate, Partnership, Trust, Corp. or Charity] User Changes Account Type

Application Requires Docs: do / show attachments button do / pop up instructions dialog

Application Needs No Docs

Approving Principal Signature Disabled

Approving Principal Signature Enabled

Unsigned

```

</name>PureEdge Solutions</name>
<address>
<city>Springfield</city>
</legalAddress> <state>MA</state>
</address>
<occupation>Doctor</occupat
</employer>
</applicant>

```

Bylaws of the American Institute of Organologists
as amended October 10, 2001

Article I
Name
The name of this organization shall be: American Institute of Organologists (AIO).

Article II
Objectives
The objectives of this organization shall be: to advance the science and practice of organology; to disseminate knowledge regarding pipe organ construction and repair; to establish an organized training program for organologists; to publish a journal of organology; to publish a directory of organologists; to publish a directory of degree of proficiency.

■ Anexado de ficheros

- ▶ Captura información asociada
- ▶ Formularios complementarios
- ▶ MS Office, fax, video, etc



Partes de un formulario de IBM Lotus Forms



- Firma digital
 - ▶ Múltiple firma
 - ▶ Todo el formulario o partes
 - ▶ Firmas solapadas
 - ▶ Firma predeterminada
 - ▶ Certificados digitales
 - ▶ Soporte de signing pads



Recursos

- Página de Lotus Forms

<http://www.ibm.com/software/lotus/forms/>

- Catálogo de formularios de Lotus Forms

<http://catalog.lotus.com>

- Lotus Forms Wiki

<http://www.lotus.com/ldd/lfwiki.nsf>

- Lotus Forms en developerWorks

<http://www.ibm.com/developerworks/lotus/products/forms/>

