

IBM Social Business 2011 İstanbul

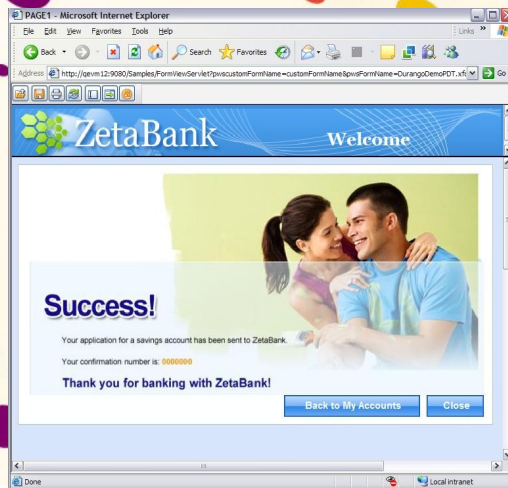
İş Dünyasının Sosyalleşme Yolculuğu Başlıyor

Dynamic electronic forms

IBM Forms 4.0

Rafał Danecki

Collaboration Solution Architect
Central and Eastern Europe





Agenda

- Market trends
 - IBM Forms position
 - Anatomy of an intelligent document
- Component overview
 - Viewer
 - Designer
 - Webform server
 - IBM Forms with Workflow



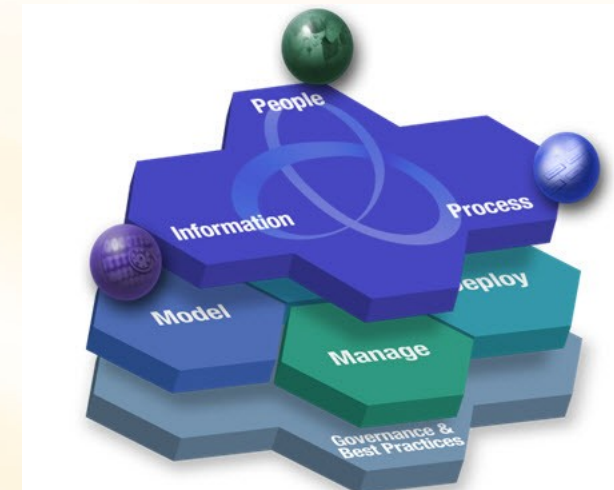
The IBM Forms Solution: Agility

“Future proof” your company’s documents with open standards

- IBM Forms is built on the World Wide Web Consortium’s (W3C) XForms standard

Lower time-to-value by leveraging industry-standard data formats

- IBM Forms facilitates business-to-business data interchange by encapsulating industry standard data formats
- Reduces system integration overhead
 - Insurance: ACORD
 - Financial Services: SWIFT, XBRL, FIXML etc.
 - HealthCare: HL7
 - Banking: ISO
 - Manufacturing: RosettaNet





The Anatomy of IBM Forms

Mountain-Sure INVESTMENTS Brokerage Account Application

INVESTMENTS Check Writng 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 MSRB Rule 3-21(a)(5) and NASD Rule 2210

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

Mailing Address: 123 Electric Form Ave Springfield MA 01111 City: Springfield State: MA ZIP Code: 01111

Legal Address (Required in addition to P.O. Box #): 123 Electric Form Ave Springfield MA 01111 City: Springfield State: MA ZIP Code: 01111

Employer: PureEdge Solutions Occupation: Doctor City: Springfield

PureEdge Solutions Doctor Springfield

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

Financial Information

Application flow diagram:

- Start: Application for Estate, Partnership, Trust, Corp. or Charity
- Decision: Use Changes Account Type
- Path 1: Application Requires Docs (do / show attachments button do / pop up instructions dialog)
- Path 2: Application Needs No Docs
- Path 3: Unsigned
- Path 4: Approving Principal Signature Enabled
- Path 5: Approving Principal Signature Disabled

XML Data:

```

<name>PureEdge Solutions</name>
<address>
  <zip>011111234</zip>
  <city>Springfield</city>
  </legalAddress>
  <state>MA</state>
</address>
<employer>
  </address>
</employer>
<name>PureEdge Solutions</name>
<occupation>Doctor</occupation>
</address>
</employer>
</applicant>

```

Attachments:

- Bylaws of the American Institute of Organbuilders as amended October 10, 2001
- Certificate of Live Birth

Presentation Layer

- Multipage precision layout
- Wizard driven interaction (Guided-interview)
- Localized Data Formatting, Accessibility

Dynamic Behaviors/Process Logic

- Capture interactional rules in the form
- Hybrid event-driven script/declarative model
- Based on standard W3C XForms specification

Data Instances

- Multiple XML payloads for integration
- Validate against external XML Schemas
- SOA Enrichment via Web Services

File Attachments

- Attachment folder system within form
- Office documents, images, videos, etc.

Digital Signatures

- Protect the complete transaction
- Multiple, overlapping sections or whole form



The Anatomy of IBM Forms

The image shows a screenshot of a 'Brokerage Account Application' form from Mountain-Sure Investments. A large red stamp with the word 'Signatures' is overlaid on the form. Below the form, a flowchart illustrates the process logic, including states like 'Application Requires Docs', 'Application Needs No Docs', 'Approving Principal Signature Disabled', and 'Approving Principal Signature Enabled'. The flowchart also shows XML data instances for the form fields, such as:

```

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

```

At the bottom, there are images of physical documents, including 'Bylaws of the American Institute of Organohalle' and a 'Certificate of Live Birth'.

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IBM Forms component - Viewer

IBM Forms Viewer

Standalone or browser-based plug-in application to present, manage, interact with, integrate, digitally sign and submit IBM Forms XML e-form and process-wizard front-ends

The screenshot displays two overlapping browser windows. The background window is titled 'Page1' and shows the IBM logo and a navigation bar with 'Welcome', 'Willkommen', 'Benvenuto', and 'Recepción' buttons. The foreground window is titled '運転免許試験申請書' (Driving License Exam Application Form) and contains the following fields:

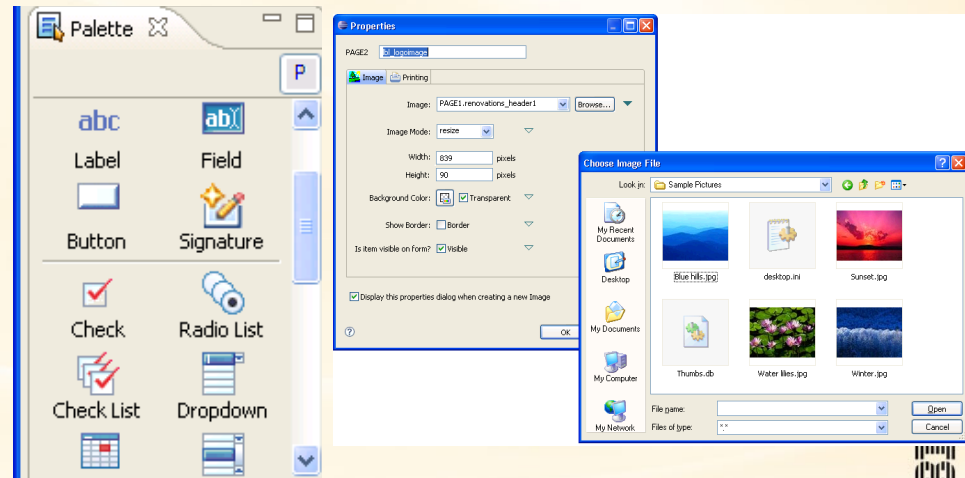
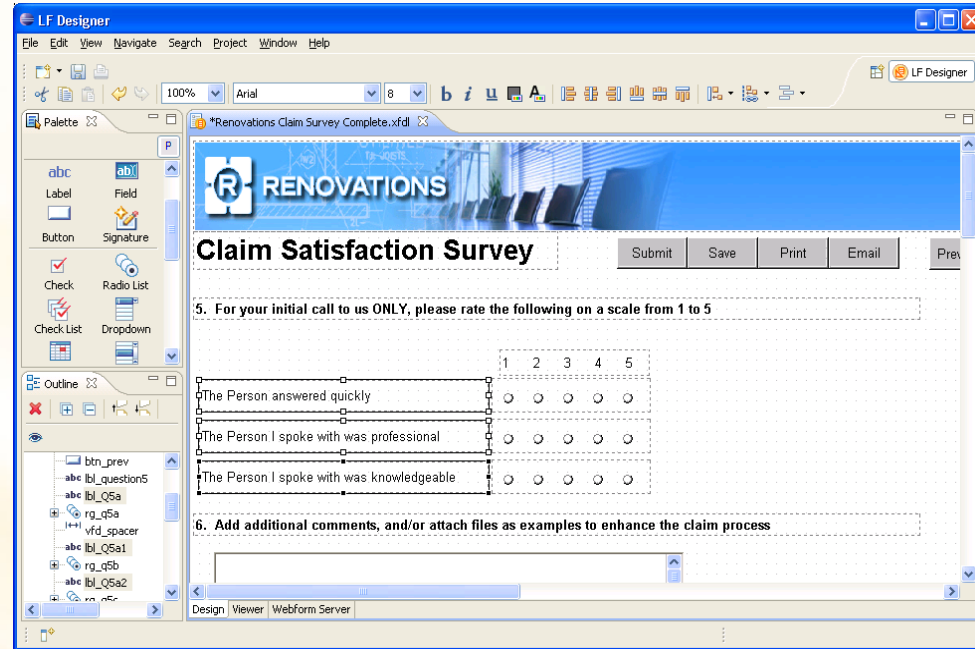
- Header: 運転免許試験申請書
- Radio buttons: 学科試験 (selected), 技能試験
- Section: 必要な項目 申請者本人について入力してください
- Form fields:
 - 名前: わたしの 名前 で引
 - 生年月日: 昭和 元 年 1 月 1 日 性別: 男 女
 - 住所: 都道府県 愛知県
 - 外国で有効な免許
 - 切り替え 外国免許証番号: 西暦 年 月 日
- Section: 署名 申請者本人が署名してください
- Form fields:
 - 署名する、クリックして下さい
 - 日付: 平成 元 年 1 月 1 日

The left sidebar of the foreground window contains a form for 'Bauantrag' (Building Application) with fields for 'Vorhaben, für das d. (§ 68 Abs. 1 Satz 1 u', 'Bauherrin / Bauherr / Antr', 'Name, Vorname, Firma', 'Straße, Hausnummer', 'PLZ, Ort', and 'vertreten durch: Name, Vorne'.



IBM Forms Eclipse Designer even easier to use

- Support for Basic & Advanced user modes
- A simple drag-and-drop/point-and-click design experience
 - Quick start wizards
 - Simplified Palette
 - Easier Access to Property Settings
 - Easier Button Creation
 - Easier Image Addition
 - Automatic data model creation/update
- Dramatically lowers TCO
 - Business analysts can develop forms without having to involve IT





The Webform Server

Webform Server is a Web 2.0 forms experience

- Forms are rendered as HTML/JavaScript
- Eliminates the expense of deploying and managing desktop software
- Enables complex, interactive customer-facing forms applications
 - Customers don't have to install software to do business with you

Webform Server is a cross platform solution

- Windows (IE and Firefox),
- Mac OS X (Firefox and Safari)

Webform Server provides an interactive fill experience

- AJAX is used to update forms dynamically
- Includes support for:
 - Document attachments
 - Accessibility compliance
 - Electronic signatures
 - Translated to 26 languages
 - Local form open/save

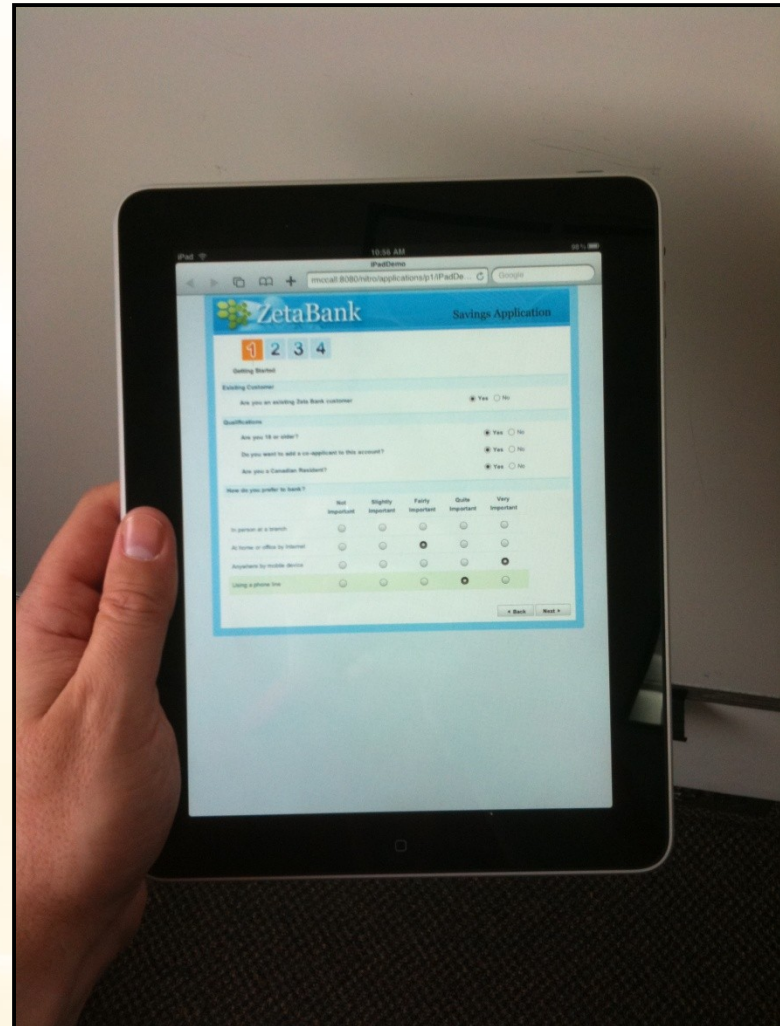
The screenshot displays a web browser window with the title 'PAGE1 - Windows Internet Explorer'. The address bar shows 'http://localhost:8085/Samples/FormView/Servlet?pvwAction=open'. The page content features a header with the word 'Renovations' in large blue letters, followed by 'Mutual Funds Account Application' and a 'Wizard View' button. Below the header is a form titled 'Mutual Funds Account Application' with several sections: 'Owner Information' (Last Name, MI, First Name, Gender, Date of Birth, Social Security Number), 'Account Type' (Individual, Joint Account, Uniform Gifts or Transfers to Minor), 'Residential Street Address' (State, City, Zip Code), 'Mailing Address (if different than residential street address)' (State, City, Zip Code), 'Evening Phone Number', 'Daytime Phone Number', 'Citizenship', and 'Email Address'. At the bottom, there is a section for 'ICGMA/UTMA Account Information'.



The Webform Server

Simplifying Deployment, Expanding the availability of Forms to all

- Eliminates need for client side SW install when Online
- Web 2.0 / Ajax functionality – dynamic, modern UI
- Strong support for WebServices, REST, ATOM based services
- Supports highly fidelity, signatures, dynamic behaviours, and all other forms functionality
- Compatible with Viewer deployed forms
- Renders to a broad array of platforms, Mac/Safari, iPad, FireFox, IE, ...

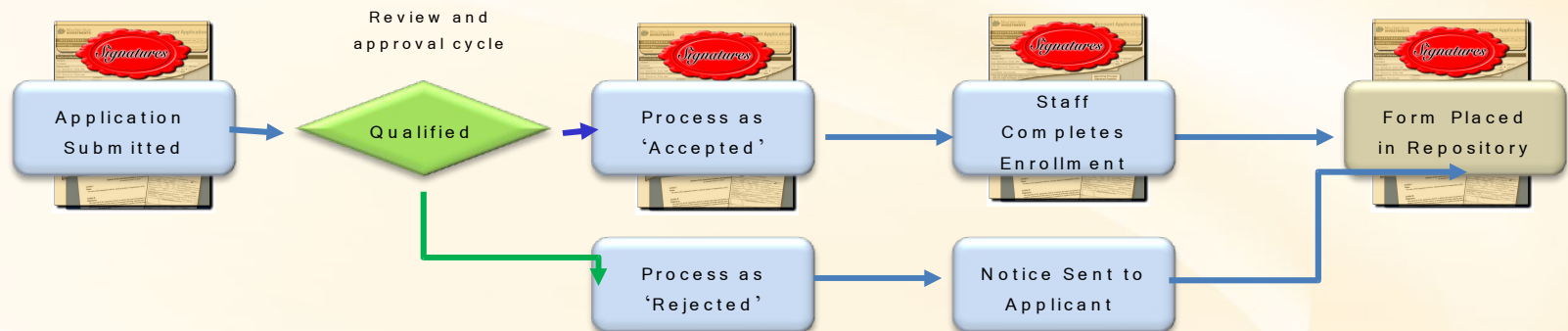




Forms Almost Always Involve Business Process

- Forms are the Human Interface to Process Automation
- Opportunity for significant efficiency gains and savings
- There are various options to route forms – from simple to complex
- IBM Forms fits into a spectrum of process automation scenarios

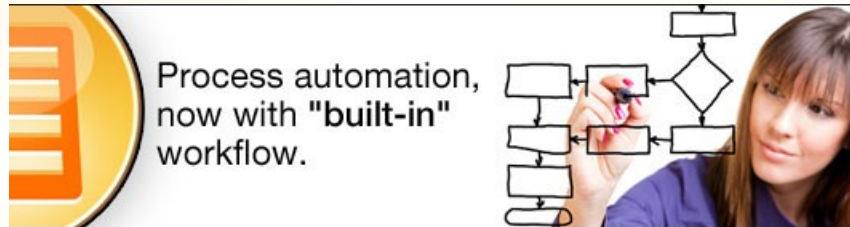
Typical Forms Workflow



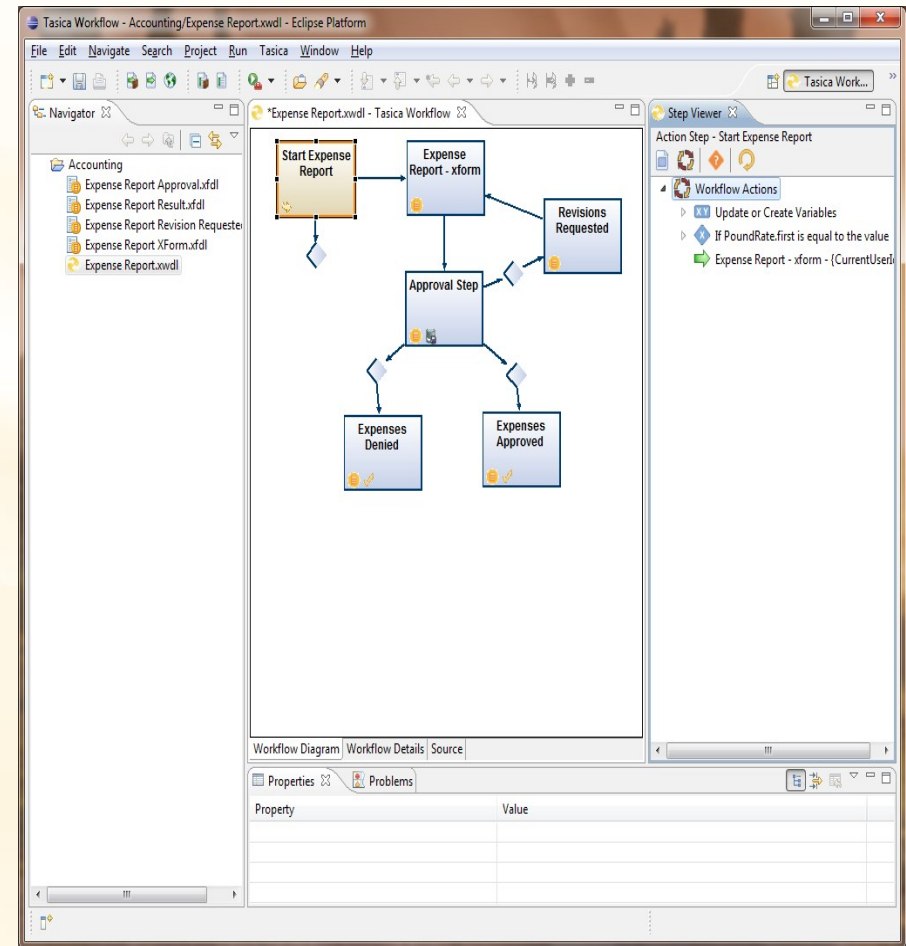


IBM Forms with Workflow

Human centric workflow for electronic forms routing

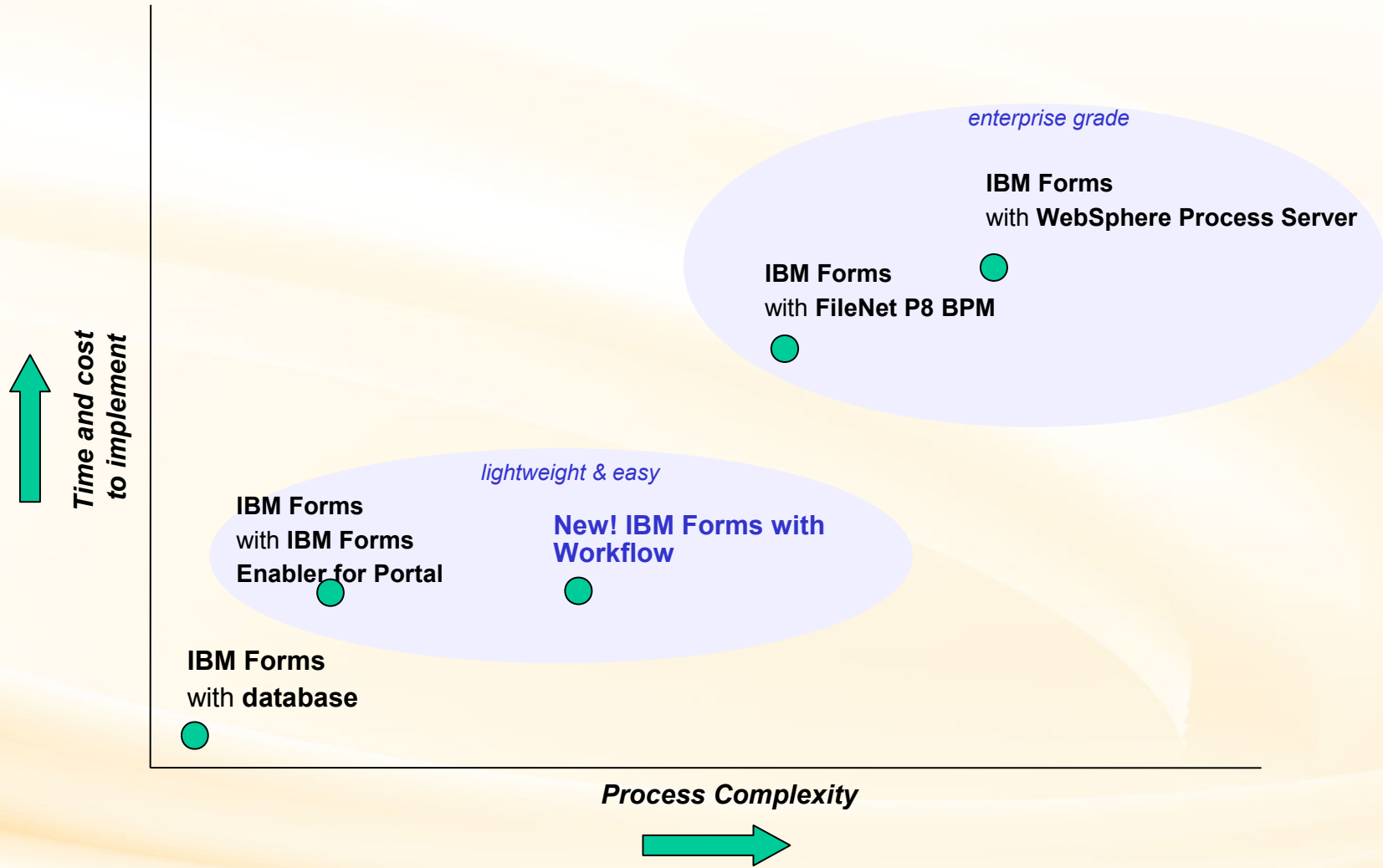


- No Coding Workflow Application Design
- Route IBM Forms and eform data through business logic
- Send IBM Forms and eform data to and from databases, directories and document repositories
- Workflow statistics and monitoring
- Real-time data centric reporting
- IBM WebSphere Portal portlets with Web 2.0 Capabilities





Forms Almost Always Involve Business Process





IBM Forms version 4.0

Create cool looking interactive web experiences that take the users from start to finish





At a Glance: Why IBM Forms?

IBM Forms Sparklers

- ✓ The **largest** eForms installation in the **world** runs on Lotus Forms (1.5m users)
- ✓ Over **5 million** users across **300,000** end user organizations
- ✓ IBM is an eForms technology and thought-leader: co-chair of the W3C XForms board and co-author of the original XForms standard
- ✓ Mature product over 15 years of eForms and data-entry experience
- ✓ *“IBM is a Leader in the e-forms software market”* -Forrester
- ✓ *“An advanced XML based user Interface that happens to do forms exceptionally well”*
USAF AFDPO Chief Architect

US Army

Paper reduction. Quicker processing. Saved lives.



Challenge

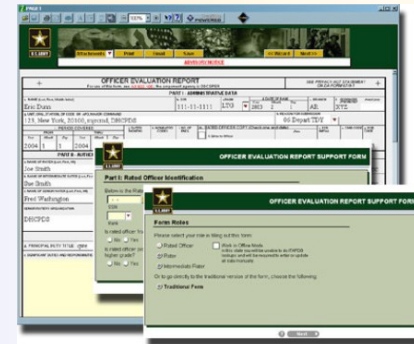
- Modernize world's largest inventory of 100,000+ eForms used by 1.5 million users for matters such as medical, logistical, transportation and personnel
- Automate manual form-based processes and enable units in the field to view and access the same forms as counterparts at bases around the world
- Capture and transfer confidential data securely

Solution

- WebSphere Portal + IBM Forms based solution to automate processes & streamline paper transactions
- Forms can be filled online or offline
- Portlets provide access to views such as in-basket, a list of commonly used forms, or forms awaiting completion
- Secure digital signatures can be added to each form

Benefits

- Estimated cost avoidance ~ \$1.3 billion
- 1/3rd savings in time. Total of 60 hours saved annually per form.
- Improvement of Army efficiency in the field, as well as reduced exposure to enemy fire in transporting paper forms
- Reduced redundancy and data errors through auto-population of forms
- Auditable records
- Addresses regulatory compliance concerns (GPEA)





ACORD

Improved efficiency through standardization on IBM Forms

Challenge

- The Association for Cooperative Operations Research and Development (ACORD), a standards body for the insurance industry had 1,000 member companies, each with separate forms and no interoperability
- Desire to improve industry efficiency by standardizing on standards based forms
- Federal mandate

Solution

- IBM Forms based eForms that ACORD made available to all its members, with the ability to populate forms online, save, print, and submit by mail, fax or email
- IBM and ACORD enhanced the library of ACORD forms to be XML-based forms called eForms+ (powered by IBM Forms)

Benefits

- Improved efficiency through standardization on IBM Forms
- Straight-through processing of forms for core insurance workflows
- Helps reduce errors, costs and risks associated with paper-based forms
- Improves operational efficiencies
- Provides support for electronic, or digital signatures to lock down forms data when transmitted

The screenshot shows the ACORD website interface. At the top, there is a navigation bar with links for 'About', 'Standards', 'Advocacy', 'Publications', 'News', 'Events', 'Global Markets', and 'Contact'. Below this is a 'Press Releases' section with a sub-header 'ACORD Leverages IBM Workplace Forms Technology in New ACORD eForms+'. The main content area contains a press release dated November 14, 2006, announcing the latest enhancements of ACORD Forms. To the right, there is a 'What's New' sidebar with a banner for the 'ACORD Standards Forum' held in Ft. Lauderdale, Florida, from November 12-15, 2006. Below the press release is a table listing various forms.

		Placement		
60	NJ	New Jersey Personal Property Insurance Supplement - Flood Exclusion	2001/10	A
61	MA	Massachusetts Property Insurance Underwriting Association - Inspection Notice, Credit Reporting Notice and Instructions for Completing Homeowners Application ACORD EQ MA	2003/04	A
62	CO	Colorado Personal Property Supplement	2/97	A
62	IL	Illinois Property Supplement - Notice of Availability of Earthquake Insurance	2006/04	A
62	LA	Louisiana Commercial Property Supplement Loss Settlement	4/98	A
62	MO	Missouri Property Supplement - Notice of Availability of Earthquake Insurance	2006/04	A

MassMutual

Quicker processing. Improved accuracy. Paper reduction

▪ Challenge

- 10,000 agents in field use over 1500 proprietary paper forms to conduct business
- Many of those paper applications are 20, 30, or even 40 pages in length
- a) Lengthy processing times b) inaccurate and incomplete data c) difficult to complete the very first time

▪ Solution

- IBM Forms based solution to streamline data entry and processing for Life, Disability, and Annuities. Key features include:
 - Wizards, Hi-fidelity forms, Dynamic form assembly, Integration via ACORD XML to underwriting system, Offline/mobile capabilities using Expeditor

▪ Benefits

- Dramatic reduction in processing times of applications
- Improved accuracy
- Improved customer service



Golden State Foods

Streamlined retail ordering + internal business processes

- Challenge
 - GSF is the primary supplier to McDonald's and Starbucks. It needed retail supply portal to help customers place orders and check inventories
 - It also needed departmental portals to enable departments to execute business processes faster and route results to dashboards for mgmt

- Solution
 - IBM Forms + Portal + Dashboards + Alphalogix Tassica Director based solution
 - Departmental portals automate processes and provide employees with action items, electronic forms and approval steps. Real-time results flow in to dashboards
 - Retail supply portal enables retail outlets to check inventory, order products, check backordered products and status of current products

- Benefits
 - Faster execution of business processes
 - Streamlined retail ordering
 - Eliminated manual errors during order entry process

gsf golden state foods



Questions

After this presentation
Closing comments and gifts
from Conference Sponsors
please stay in this room





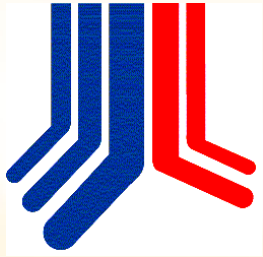
Thank You

We appreciate your feedback.





New Business Capture: Woodmen of the World



- **Profile:**
 - ▶ One of the largest fraternal benefit societies 825,000+ members
 - ▶ Write \$1 billion annual premium, \$32 billion+ in-force business
- **Challenge:**
 - ▶ Modernize and automate Field Rep activity
 - ▶ Need easy-to-use process to improve efficiencies of core customer-facing activities (policy applications, form updates, quotes)
 - ▶ Significant data entry errors and excessive application processing times
 - ▶ Solution and forms must comply with industry regulations
 - ▶ Maintain accurate audit logs of all transactions and track performance data
- **Solution:**
 - ▶ Integrates with Notes database
 - ▶ Enables laptops with on/offline capabilities
 - ▶ Time-saving, intuitive XML e-forms wizards
 - ▶ ePad integration reduces application process time
 - ▶ Table-based signing enables mobile applications
- **Benefits:**
 - ▶ Application process efficiencies improvement and reduced data entry errors drives cost savings and improved cycle times
 - ▶ Enhanced agency connectivity
 - ▶ Streamlined workflow of field representatives enables improved productivity
 - ▶ Increased productivity, Clean skins from **two weeks to two days**
 - ▶ Reduced cycle times and minimized errors -> Revenue impact
 - Less abandoned, rejected and delayed applications
 - Competitive advantage – move underwriting closer to the customer



Nova Scotia – Land Registry

Challenge

- Poor service and delays to citizens
- Many “resubmits” increasing load in all agencies

Solution

- Legal, Accounting, Citizen and Govt joint working group
- Integration of Forms to submission process
- Electronic bill payment as a component
- Online screen videos to assist adoption

Benefits

- Reduced registration time from 1 week to 1 day
- Rejection rate **reduced from 15% to 3%**
- No manual handling of Funds
- 2007. **97% of registration paperwork is now electronic**
- Planning “mandatory” in future

NOVA SCOTIA CANADA Service Nova Scotia and Municipal Relations

Government Home > Service NS Home > Service Nova Scotia and Municipal Relations Banner

GO | or try How Do I Find...

Service NS Home **E-Submission**

[Land Registration](#)
[Act and Regulations](#)
[Brochures](#)
[Contact Registry 2009](#)
[Directives and Policies](#)
[Errors and Omissions](#)
[E-Submission](#)
[Fees](#)
[Forms and Guidelines](#)
[Newsletters](#)
[Project Overview](#)
[Property Online Tutorial](#)
[User Group Resources](#)

The Nova Scotia government continues to move forward into the electronic world! In conjunction with the rollout of the new land registration system in Nova Scotia, the Province has implemented the innovative electronic submission of deeds, mortgages and releases of mortgages in order to expand our clients' electronic access to land transactions and create even more efficiencies in real estate closings. This system provides for simple and efficient submission of highly secure, tamper-proof forms to the Land Registration Offices using an electronic forms software package from PureEdge Solutions. Nova Scotia is once again on the leading edge of technology.

An e-submission working group assisted the project team in the design of the new system and participated as pilot users beginning in early June 2005. Representatives from the project team, Nova Scotia Barristers' Society, Department of Justice, and lawyers and accounting staff from several law firms participated. [Feedback from the pilot users](#) enhanced and improved the system.

A system for electronic funds transfer, e-payment, has been developed to facilitate the payment of document filing fees for e-submission and monthly Property Online usage charges. With the completion of a pre-authorized debit (PAD) agreement, the Provincial government is authorized to debit funds directly from users' accounts by providing client banking information directly to the Department of Finance. E-payment is a prerequisite for electronic submission of documents. E-submission of deeds, mortgages and releases of mortgage is now available to authorized lawyers province-wide. Initially, e-submission is not mandatory, however, when more users are familiar with the e-submission process and more forms are available for electronic submission, the process will become mandatory. At that time, training will be available for new users before they begin using e-submission.

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[Printer Version](#) [PAD Agreement](#)
[PAD Agreement Completion Instructions](#)

“The level of commitment to the ongoing improvement of the system on the part of the land registration staff and lawyers alike acts as a daily reminder as to why we embarked on this worthwhile journey – to create a modern land registration system that will serve the public of Nova Scotia well into the next millennium.

As we initiate the next new phase of the system, electronic document submission, we look forward to the challenges that await us, and we are confident in the successes that will result. Progress after 250 years is long overdue – and is definitely under way.”

Catherine S. Walker, Q.C.
Walker's Law Office Inc.





GXS Global Challenge

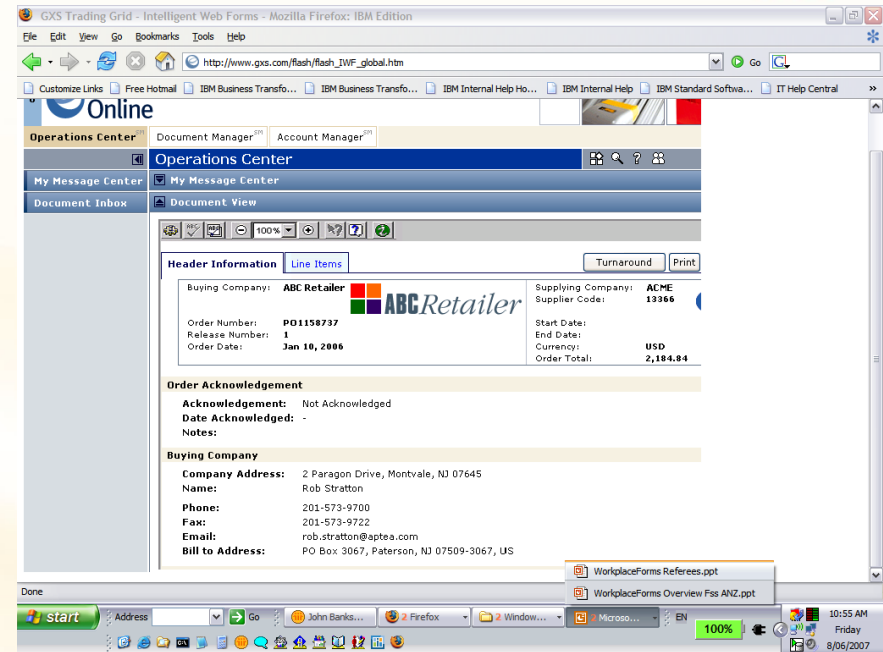
- Operate a a global trading grid
- Need to exchange trade documents
- Many partners do not have EDI solutions
- International languages must be supported
- Up to 4 billion “documents” processed annually

Solution

- IBM Forms within GXS service
- Deployed as a platform to be used by partners
- Browser based access.
- IBM licensing is matched to GXS business model
- In context help and other inline functions combined with the GXS portal

Results Achieved

- “Intelligent WebForms” now in use
- Cost and IT appropriate on ramp available
- Pre populate invoices, ship notes etc maximizing accuracy



"IBM Forms helps us improve customer satisfaction and increase our competitiveness with a highly integrated solution built on open standards and Web 2.0 capabilities."

Tom Varghese, Senior Global Product Manager, GXS, *January, 2008.*

