IBM Social Business 2011 İstanbul
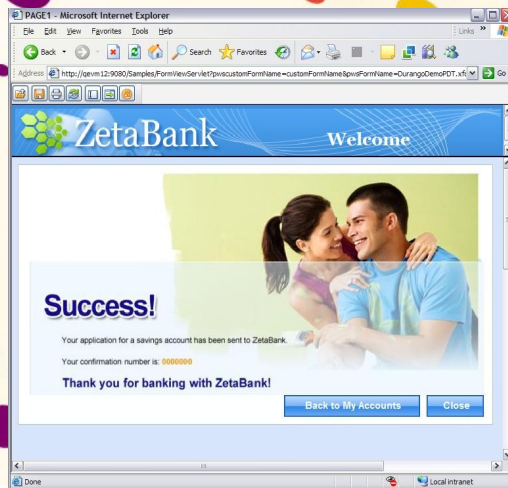## İş Dünyasının Sosyalleşme Yolculuğu Başlıyor

Dynamic electronic forms
IBM Forms 4.0

Rafał Danecki

Collaboration Solution Architect
Central and Eastern Europe

THE *Open* GROUP
Certified IT Specialist

Agenda

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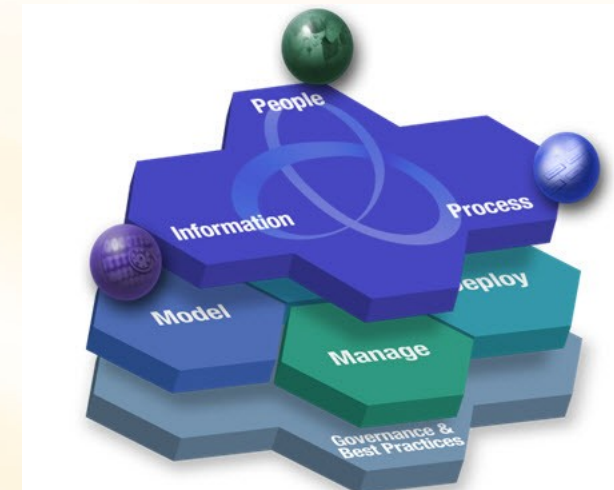 - Webform server
  - IBM Forms with Workflow

What are IBM Forms?

- ✓ A forms-based *human interface for business process automation* and SOA
- ✓ Deploys *without the expense of client software*
- ✓ Works with IBM's *industry-leading BPM technology*
- ✓ *Captures complete and accurate data* at the source

- ✓ Simplifies forms for users, *saving time and effort*
- ✓ Uses portal and forms technology to provide *a single point of contact for customers and partners*

- ✓ Helps *develop new applications quickly and easily*
- ✓ *Facilitates business-to-business commerce* using industry standard data formats
- ✓ *Eases regulatory compliance* by creating complete, auditable transaction records

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

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

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

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

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
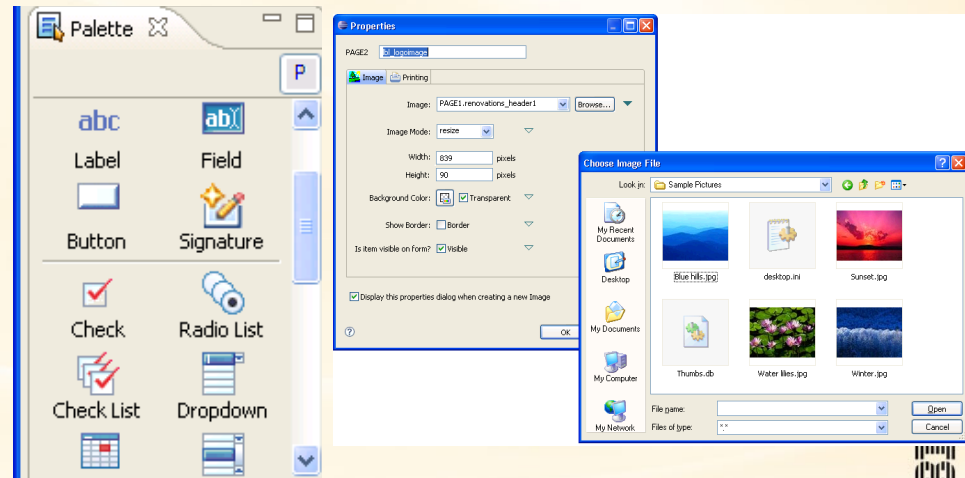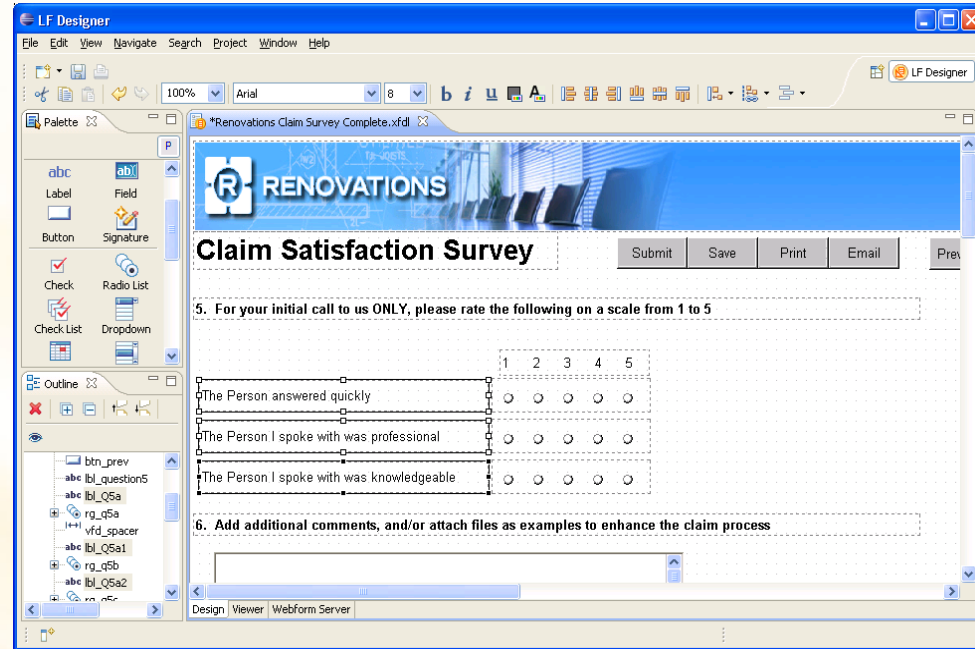
The Webform Server

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
    - Electronic signatures
    - Local form open/save
    - Accessibility compliance
    - Translated to 26 languages

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, …
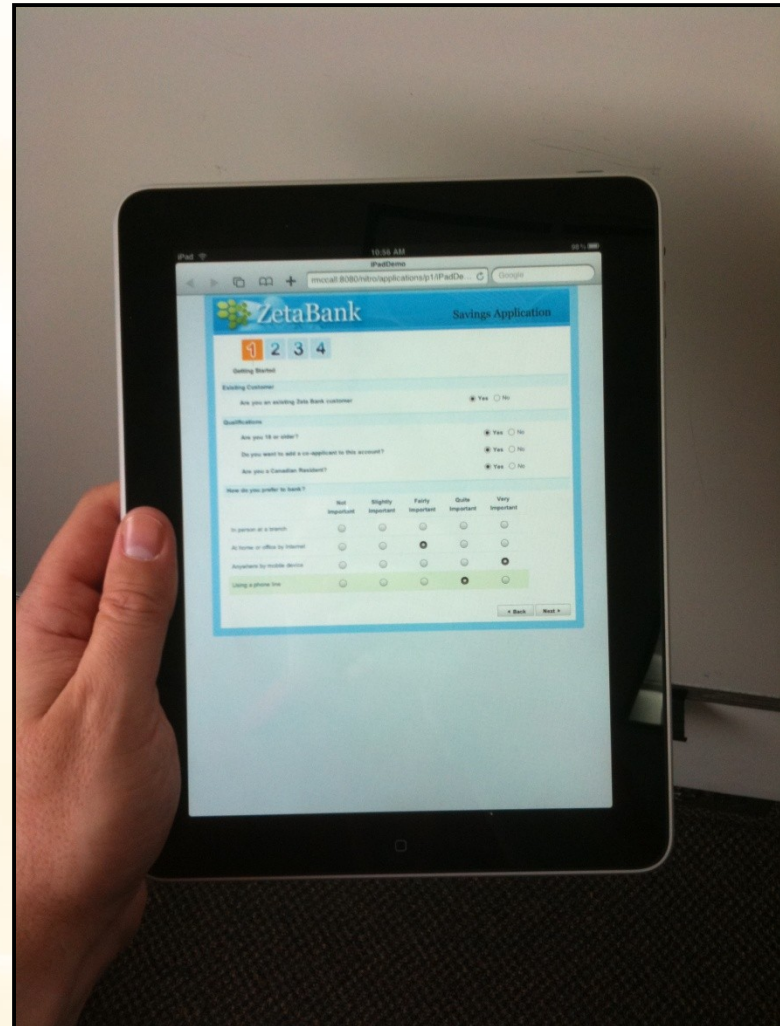
Forms Almost Always Involve Business Process

- 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

Review and approval cycle

Application Submitted → Qualified → Process as 'Accepted' → Staff Completes Enrollment → Form Placed in Repository

Process as 'Rejected' → Notice Sent to Applicant
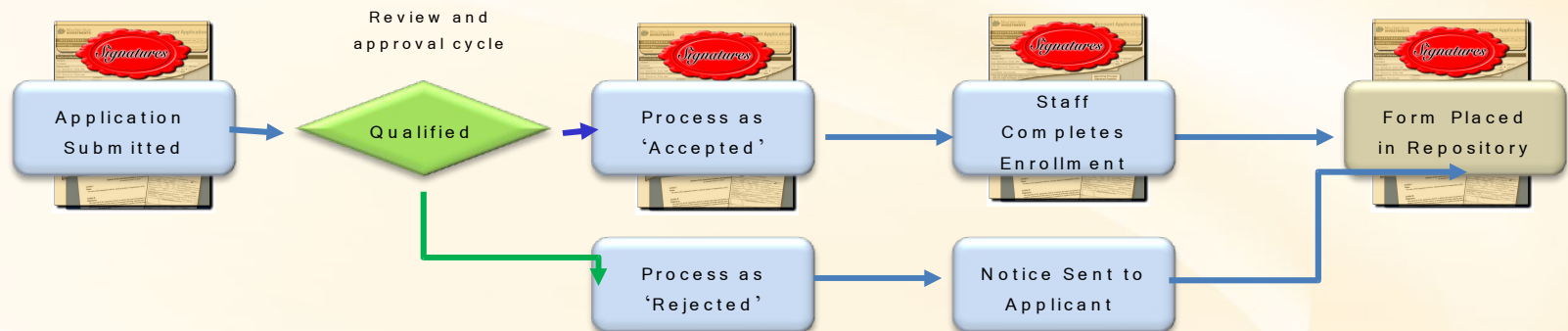
IBM Forms with Workflow

Human centric workflow for electronic forms routing

Process automation, now with "built-in" workflow.
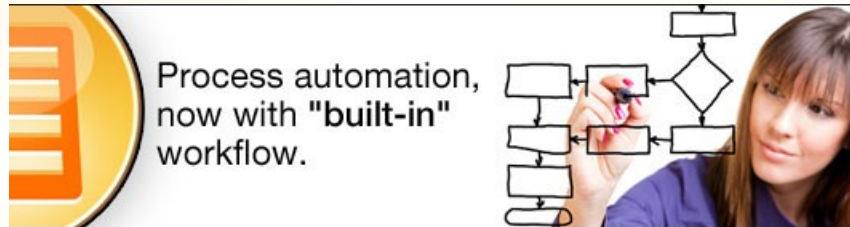
- No Coding Workflow Application Design

- 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

enterprise grade

IBM Forms
with **WebSphere Process Server**

IBM Forms
with **FileNet P8 BPM**

Time and cost to implement

lightweight & easy

IBM Forms
with **IBM Forms Enabler for Portal**

New! IBM Forms with Workflow

IBM Forms
with **database**

Process Complexity
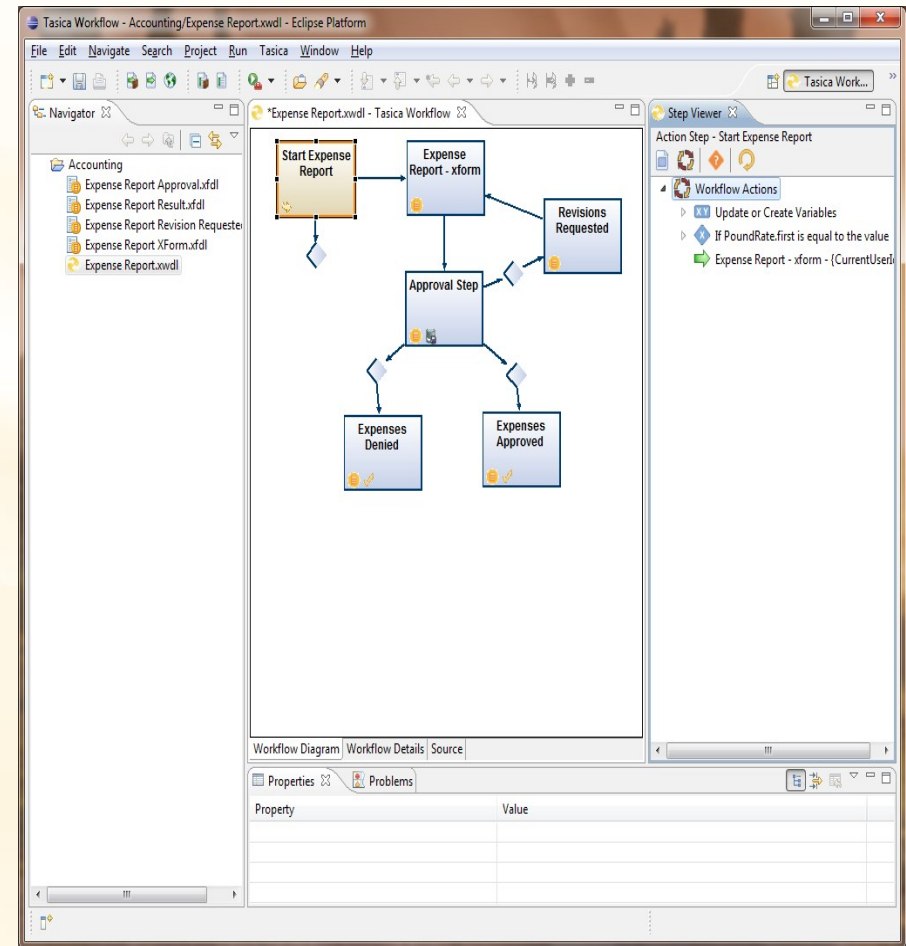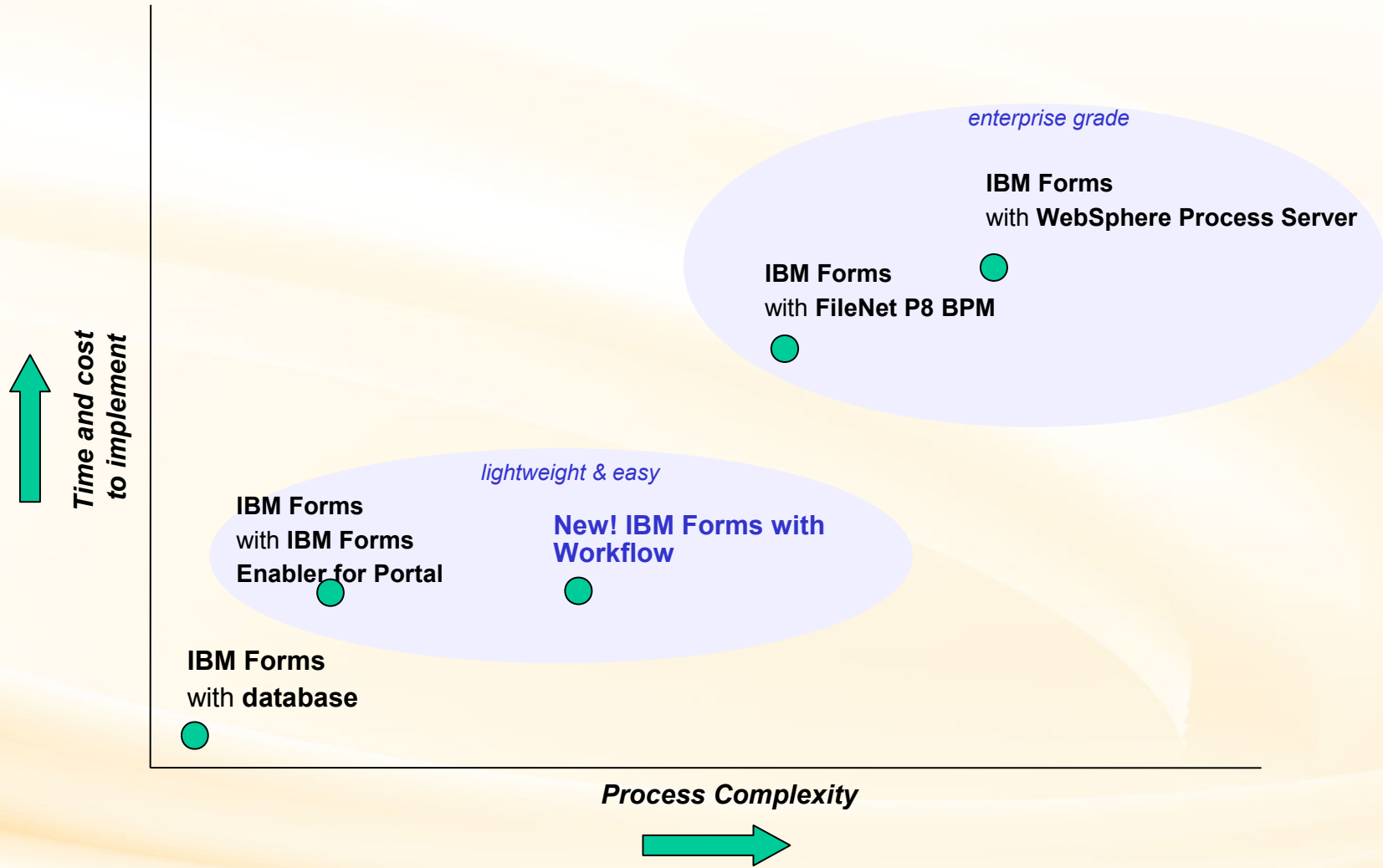
IBM Forms version 4.0

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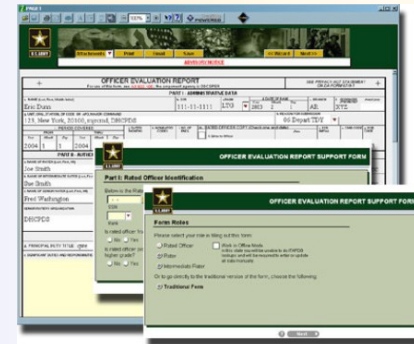
- **Challenge**
  - Modernize world's largest inventory of 100,000+ eForms used by 1.5 million users for matters such as medical, logistical, transportation and personnel
  - Automate manual form-based processes and enable units in the field to view and access the same forms as counterparts at bases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

IBM Forms 4.0 - Introduction and Agenda

17

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 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

IBM Forms 4.0 - Introduction and Agenda

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

IBM Forms 4.0 - Introduction and Agenda

Questions

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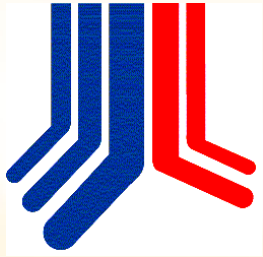**from Conference Sponsors**
please stay in this room

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

"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
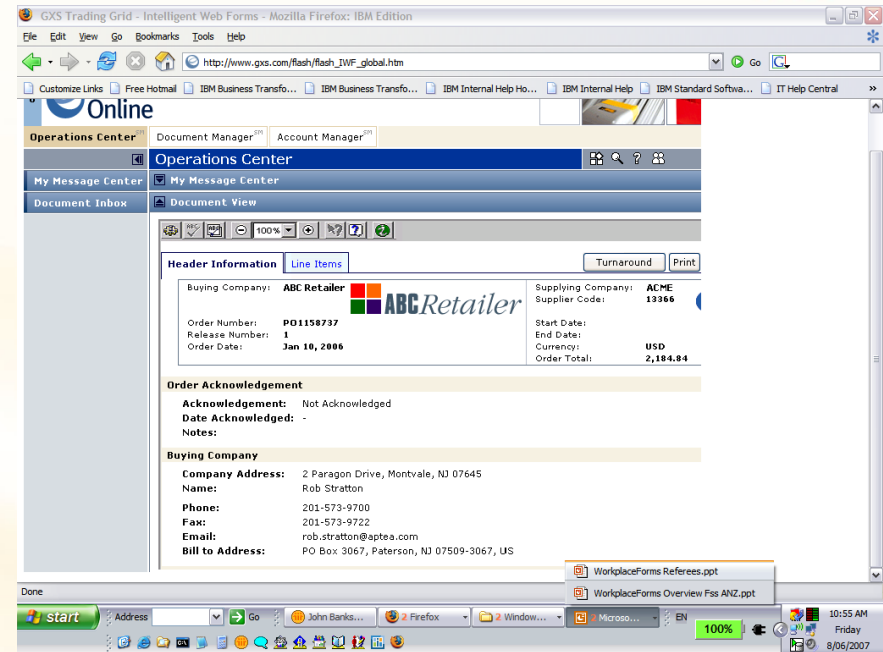
"IBM Forms helps us improve customer satisfaction and increase our competitiveness with a highly integrated solution built on open standards and Web 2.0 capabilities."
Tom Varghese, Senior Global Product Manager, GXS, *January, 2008.*