



Lotus.



# Workplace Form

电子表格解决方案及演示

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Lotus. software



@business on demand

# 议程

1) 电子表单以及IBM的电子表单策略

2) Workplace Forms 简介

3) 演示 (Workplace Form + Domino)

4) 行业解决方案

Q & A



# 传统表单处理

- 传统的表单(表格)处理
  - ▶ 表单印制、表单分发、表单填写、表单流转、表单回收、数据录入、表单归档
- 传统表单(表格)处理的问题
  - ▶ 印刷费用高、适应业务变化能力弱、仓储和管理成本高
  - ▶ 传输和流转效率低、数据填写质量不高
  - ▶ 传输过程中的安全难以保证、数据访问权限无法控制



# 电子表单—以电子的方式进行表单处理

- 以电子的方式提供
  - ▶ 表单部署、管理、授权、流转、归档、数据入库等功能
  - ▶ 有效解决传统表单处理方式的缺陷

“2004年， 电子表单的市场为4,000,000,000美元。”

- Gartner Group, 2005年2月

“ 2006年， 作为一个标准企业文档格式， XML实现的电子表单的应用将增加一倍。”

- Gartner Group , 2005年2月



# IBM在电子表单领域

- **eForms是IBM重点投资的市场领域**
  - ▶ 收购 eForm领域的技术领导者--PureEdge
  - ▶ 建立实验室专门从事eForm产品的研发
  - ▶ 发布了新的产品 - Workplace Forms 2.6
  - ▶ 建立电子表单开发者社区
  - ▶ 推动 XForm标准
- **Workplace Forms 是业界互操作性最好的Form环境**
  - ▶ 利用XForms, XML,和SOA标准, 适应客户的异构环境
  - ▶ Workplace Forms 2.6中包含基于Eclipse的表单设计环境
  - ▶ 将通过alphaWorks 提供免费的 XForms 设计工具
  - ▶ 是IBM复合应用编程模型的一部分
- **全球化支持, 同时也适合于GMB客户**
  - ▶ Workplace Forms 2.6 支持26种语言
  - ▶ 通过与Workplace Services Express的集成, 向中、低端市场延伸



# Workplace Forms 2.6

- **Workplace Forms 2.6:** 于2006第二季度发布
- 国际化
  - ▶ Forms Viewer 和Forms Server: 支持包括中文在内的26种语言
  - ▶ Forms Designer :支持包括中文在内的26种语言
- 平台支持
  - ▶ Forms Server 将支持 IBM AIX , 支持Portal, Solaris, FireFox and WAS
- **XForms**
  - ▶ Forms Viewer和Forms Server能支持对于包含XForm 1.0内容表单的查看、编辑、签署和提交
- 基于**Eclipse**的**Workplace Forms** 设计工具
  - ▶ 新的基于Eclipse的XForm表单设计工具
- **Workplace Forms** 支持与 **Portal**和**WSE**集成
  - ▶ Workplace Forms 2.5 Integration with Portal 5.1 1Q
  - ▶ Workplace Forms 2.5 Integration with WSE 2.5 2Q

## 集成目标: 涵盖各种应用

- 内容库, 如 Content Manager, JCR, Domino
  - ▶ archival, change management
- workflow, 如 Portal Document Manager, Process Server, Notes
  - ▶ form submission, routing, approval, email agents/processing
- 用户UI, 如 WS Portal, Notes, Workplace Managed Client
  - ▶ template publishing, summary reporting, viewer distribution
- 消息中间件
  - ▶ SOA
- 应用开发, 如 Notes Designer, Workplace Designer, RAD
  - ▶ including forms in applications developed
- Hybrids, 如. Notes/Domino, ERP, CRM systems like SAP & Siebel
  - ▶ forms in full packaged application contexts e.g. HR functions, order entry

*Clients leverage Forms in concert with their evolving, mixed infrastructure*



# 发展趋势

- 网络连接越来越普及: 随时随地可用的网络连接 WLAN/2.5G/3G/ WiMAX
- 越来越丰富的基于**Web**的用户界面,如 Web 2.0技术, AJAX
  - Web Forms Server 符合该趋势
  - 减少对于私有的客户端阅读器的依赖
- **XForms**的成熟: XForms兼容DSig等标准, 已经足够成熟, 能够满足表单处理的需求, 并能给用户带来更多的价值

*Sustainable Competitive Advantage: ease of assembling open components & middleware as business solutions*





# XForms – 商业优势和客户价值

1

## 实现应用程序交互

任何设备上的表单... 使用任何语言... 任何人... 商业流程中的任何角色

2

## 支持行业标准

Xforms支持各种行业schema以及事务处理规则/UI

3

## 降低应用程序开发成本

XForms 提供可重复使用的表单组件和多个客户机部署选项

4

## 增强和完善 SOA

XForms 提供一个表单数据处理模式, 同时使用规则声明和Web服务支持活动的内容

实现可互操作的  
**B2B**流程和交易

集成客户、供应商和渠道

更快的上市时间/价值

降低部署和维护应用程序的成本

# 议程

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分组讨论



# Workplace Forms: 电子表单文件格式

- 演示层
- 精确到点的表格设计可以完全兼容纸质表单

## Brokerage Account Application

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INVESTMENTS

Check/Writing Account? Yes  No  Portfolio Account? Yes  No

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**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 G-5(a)(ii) and NASD Rule 2310  
 First Name  Middle Initial  Last Name  SSN  Date of Birth  Business Phone   
 Mailing Address  City  State  ZIP Code   
 Legal (Street) Address (Required in addresses P.O. Box #)  City  State  ZIP Code   
 Employer  Occupation  City  State  Citizenship

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

Are you or joint applicant a director, 10% or greater shareholder or policy making executive officer of a publicly traded company?  
 Yes, CUSIP:  No

I want my name, address, and securities positions disclosed to companies in which I own securities that are registered in nominee or street name.  
 Yes  No

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**Financial Information**  
 Years of Experience  Tax Bracket  % Beneficial Account Owner   
 I have the following investment objectives:  
 Preservation of Capital (Investment Grade Bonds)  Speculation (Options & Futures)  
 Capital Appreciation  Tax-Advantaged Income  
 Income (Bonds, Mortgage, Mutuals & Fixed Annuities)  Banked Securities  
 Annual Income (in \$1,000s)  Liquid Assets (in \$1,000s)  Net Worth with Residence (in \$1,000s)   
 Risk Tolerance  Time Horizon

---

**Instructions for Payments & Safekeeping**  
 Securities Settlement Instructions  Money Settlement Instructions (pick one option only)  
 Money Market Fund Sweep  Regular taxable MEF

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**Banking/Brokerage Reference**  
 Bank or Brokerage Firm  City  State  Account #

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**T.I.N./Backup Withholding Certification** Please READ the following before entering into any transaction or signing this agreement.  
(Cross out item (2) if subject to backup withholding.)  
(Under penalty of perjury, I certify:  
 (1) that the number shown on this form is the correct taxpayer identification number (T.I.N.) and  
 (2) that I am not subject to backup withholding either because I have not been notified that I am subject to backup withholding as a result of failure to report all interest or dividends, or the Internal Revenue Service has notified that I am no longer subject to backup withholding.  
I acknowledge that the attached form of application contains a substitute form W-9 as well as the terms and conditions under which my account will be managed. I further acknowledge that the Internal Revenue Service does not require my consent to any provisions of the attached application other than the certifications required to avoid backup withholding.

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**To: Mountain-Sure Investments**  
 In consideration of your accepting this brokerage account, I (we) hereby acknowledge that:  
 (1) I (we) have received, read, understand and agree to the terms set forth above and in the Customer Agreement printed on the reverse of this application, including the predispute arbitration clause as found in paragraph 16.  
 (2) I (we) authorize the mutual or electronic transfer of funds between accounts on this application. All persons must sign if this is a joint account.  
 (3) Mountain-Sure Investments (MSI) is a member of the NASD & SIPC.  
 (4) Mutual funds, annuities and other investment products are "not FDIC insured," not deposits or obligations of or guaranteed by any bank, and "may involve investment risk, including possible loss of the principal amount invested."  
 (5) Brokerage services and products are offered through Mountain-Sure Investments.

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Applicant  Date  Joint Applicant  Date   
 Brokerage Accounts Representative  Date  Approving Principal  Date

---

Account are carried by MSI, Member NYSE/NASD/SIPC



# Workplace Forms: 电子表单文件格式

## 演示层

- 通过向导引导用户表单的填写

## 用户界面灵活性

- 关于同一数据的多个“视图”
- 数据/规则驱动的“视图”

## 动态特性

- 采用基于声明的规则，而不是采用脚本编程
- 实现更复杂的行为而无需深入编程

# Workplace Forms: 电子表单文件格式

**Mountain-Sure INVESTMENTS**  
**Brokerage Account Application**

INVESTMENTS  Check Writing 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 MERB Rule 5-5(a)(3) 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  
Legal Street Address (Required in addition to P.O. Box #): 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 municipal dealer or other securities dealer or other securities dealer or other securities dealer?  
 Yes, Co.  No

Financial...

**Flowchart:**

- Start: [Application for Estate, Partnership, Trust, Corp. or Charity]
- Decision: User Changes Account Type
  - Yes: Application Requires Docs (do / show attachments button, do / pop up instructions dialog)
  - No: Application Needs No Docs (do / hide attachments button)
- Decision: Approving Principal Signature Disabled
  - Yes: Approving Principal Signature Enabled (Unsigned)
  - No: Approving Principal Signature Enabled (Signed)
- Decision: Users may switch from any application type to any different one (and back again).
  - Individual, Joint Tenants, Corporation, Estate, Charitable Org.
  - Collateral, Investment Club, Custodian for Minor, Trust, Partnership

## 演示层

## 商业逻辑

- 在表单中包含表单填写流程
- 集成商业流程工作流

## 商业规则灵活性

- 位于客户端和服务器的表单逻辑能够满足各种业务需求

# Workplace Forms: 电子表单文件格式

**Mountain-Sure INVESTMENTS** Brokerage Account Application

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

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

Applicant Information Required by MSRB Rule 0-9(a)(ii) and NASD Rule 2310

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

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

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

Employer: PureEdge 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

Financial...

Flowchart Logic:

- 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

```

<accountType>PureEdge Solutions</name>
<address>
<city>Springfield</city>
</legalAddress> <state>MA</state>
<employer>
</address>
<name>PureE<occupation>Doctor</occupation>
<address>
</employer>
</applicant>
</xforms:instance>
</instances>
<bindings>
<oc<bind>on>Doctor</occupation>
</employ><boundoption>BAA.FirstName.value</bound
pplicant <ref xmlns:xforms="http://www.w3.org/20
ms:ins</ref>
  
```

## 演示层

### 商业逻辑

### 数据实例

- 基于W3C XForms 规范
- 承载多种XML, 有效实现集成
- 根据外部XML schema在客户端进行验证

### 支持多种schema和标准

- 客户机端或服务端验证
- 唯一在表单中支持多项schema的产品
- 唯一可用于生产的准备好支持 W3C XForms 标准的产品

# Workplace Forms: 电子表单文件格式

**Mountain-Sure INVESTMENTS**  
**Brokerage Account Application**

INVESTMENTS  Check Withdrawing 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 2-21(a)(1) and NASD Rule 2210)

First Name: Richard, Middle Initial: , 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 (Street) Address (Required in addition to P.O. Box #): 123 Electric Form Ave, Springfield, MA

Employer: PureEdge Solutions, Occupation: Doctor, City: Springfield

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

Financial...

Flowchart Logic:  
 - 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

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

Documents:  
 - Bylaws of the American Institute of Organbuilders  
 - Certificate of Age Birth

■ 演示层

商业逻辑

数据实例

文件附件

- 捕获完整的事务
- 补充或与电子表单相关的文件
- MS Office、录像、传真等

# Workplace Forms: 电子表单文件格式

Mountain-Sure INVESTMENTS Brokerage Account Application

INVESTMENTS

Account Type:  Individual  Joint Tenants

Applicant Information

First Name: Richard

Mailing Address: 123 Electric Form Ave

Legal Street Address (Required): 123 Electric Form Ave

Employer: PureEdge Solutions

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

Approving Principal Signature Disabled

■ 演示层

商业逻辑

安全的“电子信封”中的数字签名

- 签署多个、重叠的部分或完整的表单
- 使用内置的签名、数字证书或签名小键盘
- 与专用的二进制文件相比显著减少的文件规模

数字实例

文件附件

Bylaws of the American Institute of Organizational Development as amended October 10, 2001

Article I  
Name  
The name of this organization shall be: American Institute of Organizational Development (AIOD).

Article II  
Objectives  
The objectives of this organization shall be to advance the science and practice of research, experiment and other means, to disseminate knowledge regarding principles, publications and exchange of information; to establish an organized training program; and to manufacture of degree of proficiency.



# Workplace Forms 2.6产品包



- 产品包内容与上一个版本(2.5)相同:
  
- Workplace Forms Viewer 2.6
- Workplace Forms Designer 2.6
- Workplace Forms Server 2.6
  - ▶ Internet Deployment Server
  - ▶ Webform Server
  - ▶ API
  
- 产品界面

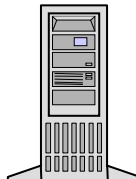
# 常用系统架构

客户端



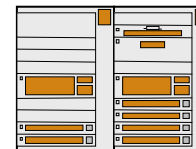
浏览器/安装了客户端的PC

应用层

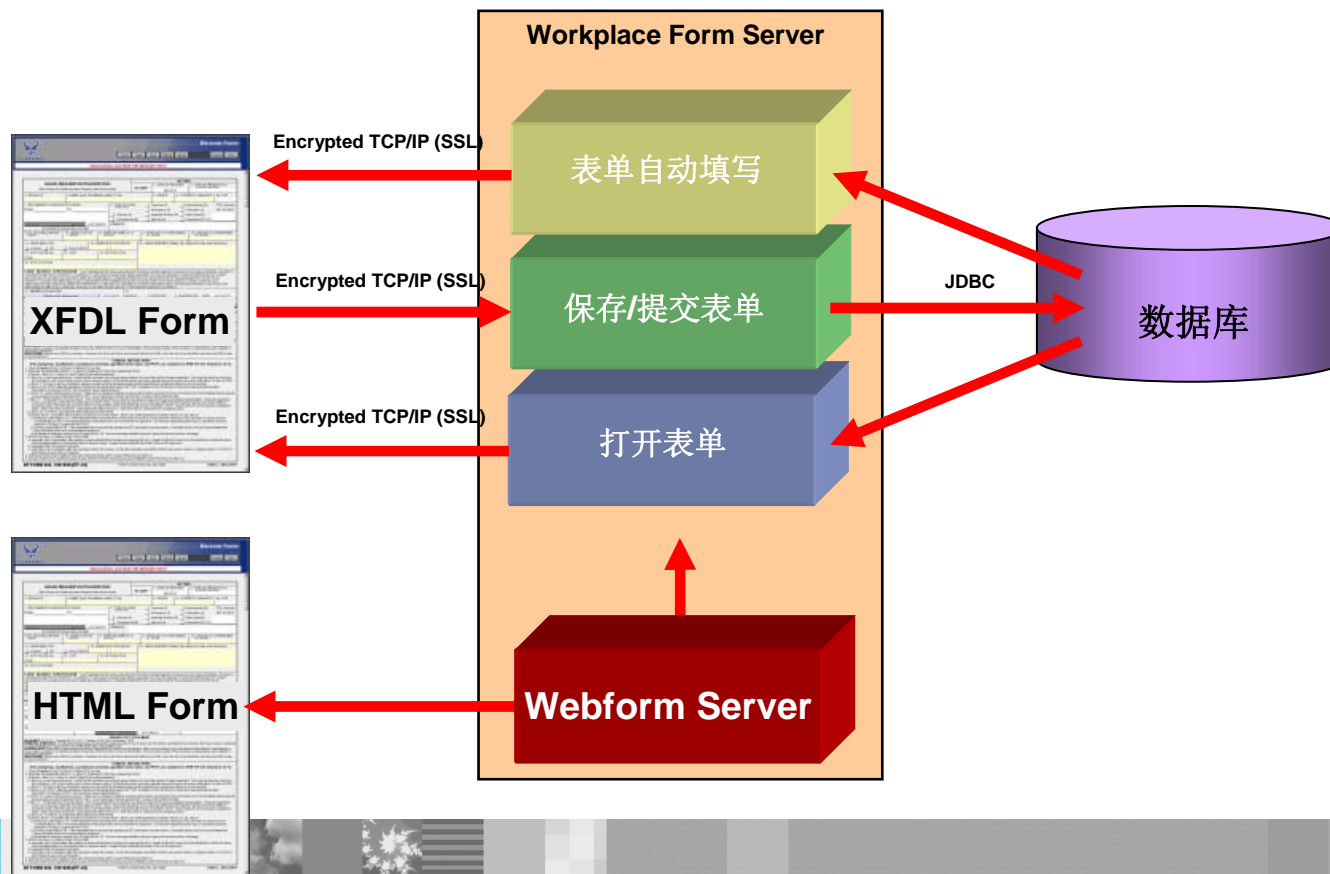


Web/应用服务器

数据层



数据库服务器



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1) 电子表单以及IBM的电子表单策略

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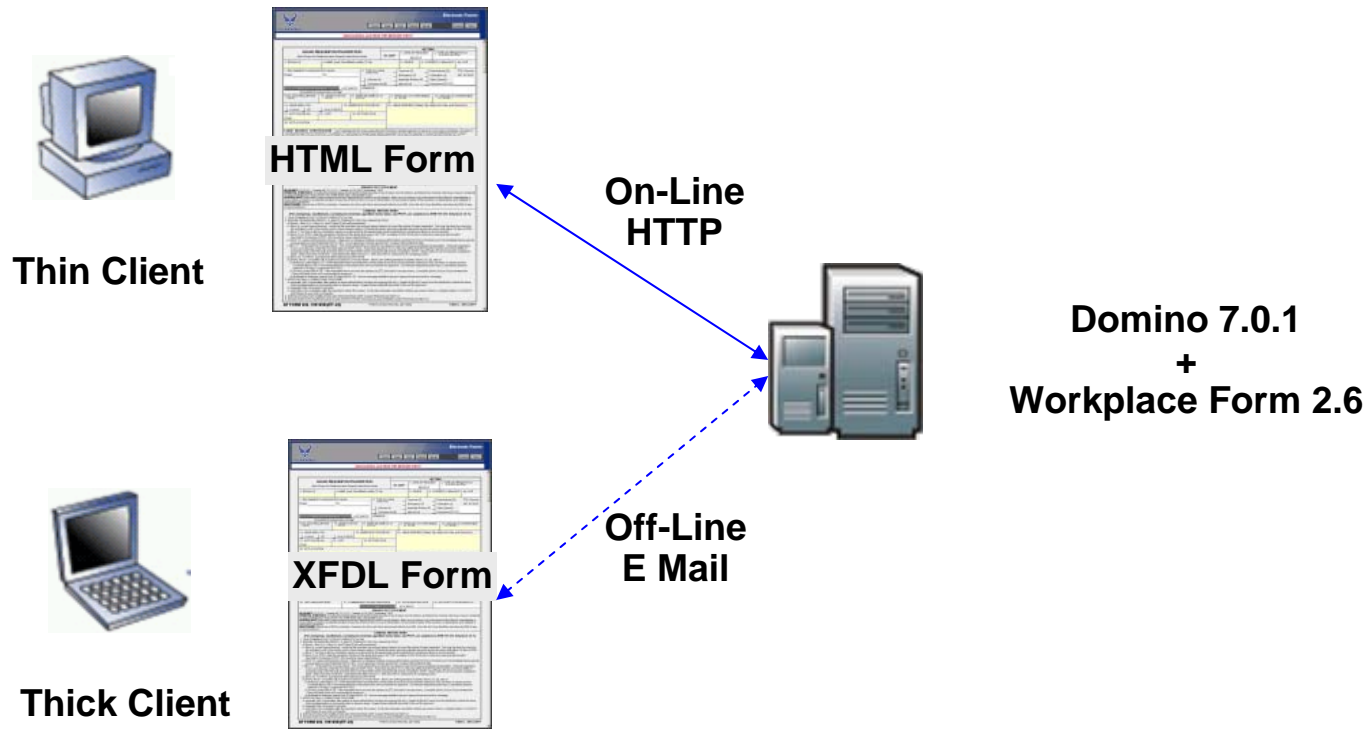
3) 演示 (Workplace Form + Domino)

4) 行业解决方案

分组讨论



# 演示环境



# 议程

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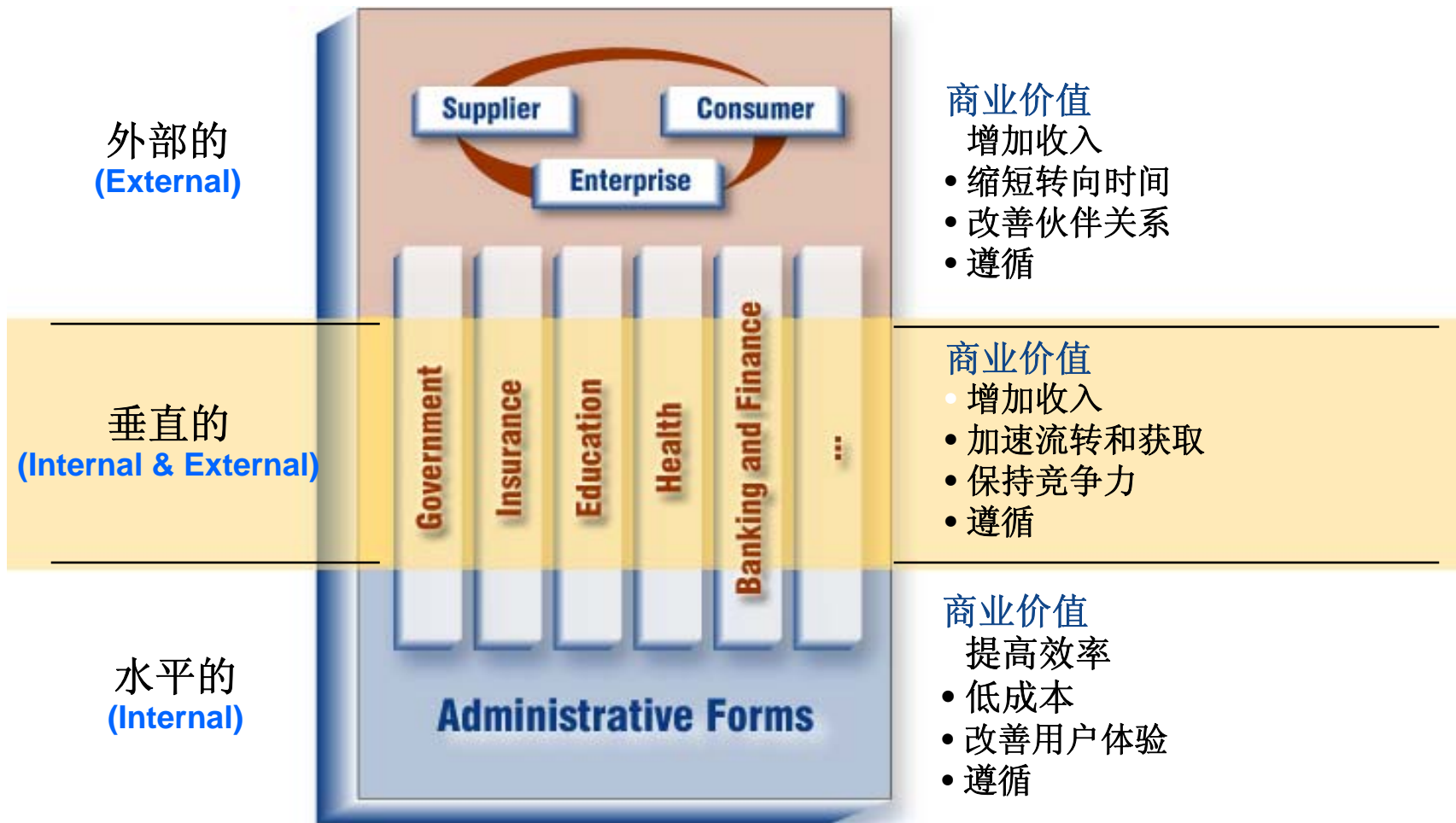
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分组讨论



# E-forms 无处不在



- 商业价值**  
增加收入
- 缩短转向时间
  - 改善伙伴关系
  - 遵循

- 商业价值**
- 增加收入
  - 加速流转和获取
  - 保持竞争力
  - 遵循

- 商业价值**  
提高效率
- 低成本
  - 改善用户体验
  - 遵循

