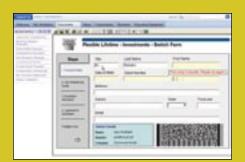**Workplace Forms and WebSphere Portal solutions**
**To support your business objectives**

**Lotus**® software

IBM

**Better together: Add IBM® Workplace™ Forms™ software to your portal and simplify business processes, application development and complex forms.**

**Some solutions work very well together. And when they do, everyone benefits—IT, the business and end users. Take IBM WebSphere Portal and IBM Workplace Forms software, for example.**

IBM WebSphere® Portal software integrates applications, content, tools and people, and puts a common user interface on disparate resources. This makes them easier to use and helps employees, partners and customers share information and collaborate. And by combining enterprise resources that work together in a process, and "wiring" them together within the WebSphere Portal framework, you help to achieve process automation. As a result, you can conduct business transactions more quickly and easily, to help your business grow.

So how can you get even more from a solution that's already considered the marketplace leader in portal software? By integrating the forms that drive the processes managed by a portal—using IBM® Workplace™ Forms™ software.

IBM Workplace Forms software works seamlessly with WebSphere Portal software. Workplace Forms software is an electronic forms solution that enables you to quickly build powerful portal applications so you can render electronic versions of paper forms and simplify complex forms—more quickly than with traditional electronic forms solutions. For users, it provides instant access to forms and the information they contain. And for organizations, it helps to streamline and reduce inefficiencies in processes. In the end, everyone benefits: simplified process management, faster application development, improved data integrity and easier-to-use forms.

**Help simplify business processes**

Many organizations—and their employees—struggle with complex, cumbersome business processes. The processes can be rigid, need to access multiple back-end systems, or can involve paper-based forms and manual data entry to move them along. These types of processes don't focus on the user and aren't easy to initiate or complete. If an organization seeks to improve worker productivity and operational efficiency, that needs to change.

*Whether you've already deployed WebSphere Portal software or are thinking of doing so, you can extend the value of your portal deployment with IBM Workplace Forms software.*

Companies that want to simplify processes for their end users need to create an elegant end-user experience. One that is intuitive, easy and practical, when the user touches the process. This can be achieved through a portal: a consistent, user interface that surfaces business processes, delivers forms and streamlines the entire workflow, making everything easier for the user and more efficient for the business.

For many companies, forms initiate a business process or transaction, such as an insurance claim or bank loan. When forms are integrated within a portal, the portal helps drive those processes or transactions. It's an ideal combination. The form captures the data, and the portal drives the process, integrating all of the back-end systems that are required by that process.

The benefit of portal-driven forms can be summarized in one word: simplification. Managing a process that uses multiple systems with multiple interfaces can be difficult. By contrast, a portal creates a single interface from all the different systems, platforms and applications that participate in a process, making it easier to manage the processes. Moreover, a portal allows

the elements of the user interface, or portlets, to be "wired" together, so information can be easily transferred from one portlet to another. This reduces the burden on the end user to transfer the data and helps to automate and streamline processes. And, as processes are automated, the inefficiencies associated with ad hoc process execution methods can be minimized, saving IT time, money and headaches.

The business realizes benefits, too. Portal-driven forms can make it easier to conduct business transactions. Without a portal, users often need to access multiple back-end systems, with different interfaces, to obtain the information they need. This can be time consuming and inefficient. But WebSphere Portal software delivers a single interface, making different systems—such as mainframes, customer databases or PC-based applications—look the same. This makes it easier and faster for users to work with different systems and to find and access the needed information.

WebSphere Portal software also acts as the conduit for delivering forms to your users. This can be especially beneficial for businesses, such as financial, healthcare and insurance organizations, that rely on complex input, forms and processes. By connecting Workplace Forms software with your WebSphere Portal implementation, you can make it easier to drive form-based processes through your portal—ultimately helping to shorten end-user completion time. And for many businesses, every processed form adds revenue.

*Process-based portals combine the business processes, activities and tools people use every day into a single interface.*

# The portal as the front end for service-oriented architectures

There is widespread and growing recognition that a service-oriented architecture (SOA) helps organizations become more agile, adapt to change more quickly and implement new services and solutions more easily to take advantage of competitive threats or marketplace opportunities.

But an SOA is not a single technology or a single project or initiative. Instead, it's a business strategy, one that must be implemented in phases and that requires certain levels of success at each step along the way. When done right, an SOA helps streamline access to and use of applications and information. And this streamlining means people can be more productive, efficient, collaborative and innovative. But the one question many business and technology leaders ask is, "Where do we start?"

A front-end approach is often the easiest and fastest way to realize immediate benefits from an SOA. The front end represents a key integration point, and it's where people—employees, partners and customers—experience an SOA in a very practical way.

That's where a portal comes in. A portal is, by definition, a composite application—one that is assembled at the front end from many different application elements. It is an aggregation point for services, delivered through portlets, and it helps drive SOA-based business processes. IBM Workplace Forms software is well-suited to an SOA, because it's based on open standards and contains within itself the process rules and data to drive and adapt to the services in an SOA.

Now consider that IBM Workplace Forms and WebSphere Portal software are very user centric. End users—internal and external, technical and nontechnical, as well as business-line executives—are likely to touch and interact with the software every day. Together these software products provide users with a visual example—a first-person experience—of the benefits of SOA. What's this mean for IT? Workplace Forms and WebSphere Portal software showcase your SOA efforts more than a traditional back-to-front approach. By using IBM Workplace Forms and WebSphere Portal software for your SOA, you can better demonstrate IT's flexibility, technical leadership and concern for the user-facing experience.

## How else can electronic forms in general and IBM WebSphere Portal and Workplace Forms software together help drive your SOA-based processes?

- Electronic forms are often the first step in a business process, and they help standardize industry processes and transactions. This can help drive down costs and create efficiencies.

- Workplace Forms software is an ideal entry point application for getting started with an SOA. Combined with WebSphere Portal software, the solutions help simplify business processes.

- Electronic forms are commonly used to collect and share information within a process. Workplace Forms software can contain all data and business rules relevant to a process in one document of record, thereby helping to boost people productivity and efficiency.

- Electronic forms are SOA services acting as gateways between people and the information and systems that automate a business process.

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**Create the portal applications you need—and write less code**

Forms are inherent to many business processes. Forms are also the medium through which users interact with a business process, collect data and share information. And the way users experience all of this, simply and easily, is through their portal. With the framework provided by Workplace Forms software, developers can render forms that ultimately become part of the user experience.

Workplace Forms software delivers a forms development environment that allows you to create powerful portal applications and build forms without writing a lot of code. Writing less code means projects can be completed more quickly, which can lead to lower maintenance and growth costs, while helping succeeding projects come to market more quickly.

With Workplace Forms software, you can re-create your current forms pixel by pixel. The solution encapsulates the data that users enter into a form, and then delivers that data into the appropriate systems, where it can be reused. Plus, Workplace Forms software is based on the Eclipse open source framework, as are many of your other portal tools, such as IBM Lotus® Component Designer software. Which means artifacts you create with your Eclipse technology-based development tools can be shared between tools, making it easier to further automate processes.

Workplace Forms software adapts to the familiar interfaces and existing, disparate resources and applications that your portals bring together—making the software easy to use for both IT and end users. This also means that important forms applications get to end users more quickly, helping to speed business processes and transactions.

## Simplify complex forms for end users and be a hero

What good is rendering an electronic version of a complicated paper form? Not much good. Complex forms can be stressful for users and, as a result of their complexity, can take more time to complete, be more error prone, require more technical support and error checking by your staff and reduce the quality of your enterprise data. What's more, some forms are part of a process that is executed by different roles, such as managers and customer service personnel, within the organization. This could mean that only certain parts of a form are to be completed by certain employees. For any of these reasons, it can be in a developer's best interest to make forms that are simple, elegant, graphical—and adaptable to the user.

You could simplify your forms in-house, but that might mean your developers have to spend a lot of time writing code that doesn't deliver high value to the organization. Do you want to take on that extra time, expense and risk?

What's more, because the code may be specific to only one form, the solution may not be scalable. And there may be multiple forms. In the end, costs can go up, productivity can go down, and your IT staff can be prevented from focusing on more high-level business initiatives.

Workplace Forms software offers a different solution, one that provides the tools you need to simplify complex paper forms and adapt them to specific users. New programming capabilities allow you to build wizards, prepopulated fields, and help and data completion functions right into your forms. Plus, role-based intelligence allows you to create forms that assume a specific format based on the user's role or responsibility. For instance, a sales manager would see only those parts of a form for which he or she is respon-sible, while a customer service agent would see a different part of the same form. These capabilities ultimately assist

users and make it easier and faster to complete forms and initiate processes. And you don't have to write code. Data is validated at the point of entry as well, saving valuable server processing and reducing the staff time needed to validate forms that are supposed to be self-validating. These features also can help improve back-end data integrity by reducing errors and enabling users to validate data more quickly.

How do Workplace Forms and WebSphere Portal software work together to help the user? The portal delivers forms to the user. By doing so, it helps simplify the business process experience and helps make process execution more elegant for the user. At the same time, Workplace Forms software simplifies the forms. And once a form is completed, the portal helps initiate the associated business pro-cess—which simplifies workflow. As a result, it helps improve the produc-tivity of your people and the efficiency of your business.

**Help relieve compliance pressures**

Some data is proprietary and therefore requires a higher level of confidentiality. Moreover, higher inspection levels and compliance issues require organizations to capture and report data from across the organizations' processes. Collecting all the information related to a process can be difficult, even with custom applications in a portal. Workplace Forms software helps address presentation compliance, as well as industry-specific data standards, by encapsulating everything related to a transaction (forms data, attachments, the user interface, business rules and so on) in a single document. And by creating electronic audit trails, you can more easily address regulations.

For instance, Workplace Forms software can capture the signatures of sales representatives to verify that information was discussed with or shown to customers. To help address consumer protection regulations, Workplace Forms software can provide the document of record that proves disclosure statements were presented to customers. Likewise, Workplace Forms software can help strengthen compliance efforts with government and global regulatory mandates and standards such as the following:

- International Convergence of Capital Measurement and Capital Standards: A Revised Framework (Basel II)
- The Sarbanes-Oxley Act of 2002
- The Health Insurance Portability and Accountability Act of 1996 (HIPAA)
- Anti-money laundering (AML) provisions
- The Health Level Seven (HL7) protocol
- The Association for Cooperative Operations Research and Development (ACORD) standards

**IBM**®

## Rely on proven solutions from a trusted, marketplace-leading provider

As a recognized leader in the enterprise portal marketplace, WebSphere Portal software can help you improve IT and business efficiency by integrating people, processes, applications and information. Workplace Forms software can help you speed the development of forms applications and simplify forms for users. Whether you want to integrate Workplace Forms software with your current or your future WebSphere Portal solution, you can count on IBM for industry-leading technology; worldwide expertise; knowledgeable technical staff; robust, scalable and security-rich solutions; and the flexibility to fit your unique needs and processes.

## For more information

To learn more about IBM Workplace Forms software and IBM WebSphere Portal software solutions, contact your IBM representative or IBM Business Partner, or visit:

**ibm.com**/software/forms

**ibm.com**/websphere/portal

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