



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. The forms shown include:

- Health Insurance Information:** A form for gathering personal and contact details, including fields for First Name, Last Name, and Address.
- ADT SETUP:** A form for setting up Authorized Driver Transactions (ADT), featuring fields for ID Number, Client Name, and Product Request Type.
- PROPOSED INSURED:** A form for entering insured information, including Name (First, Middle, Last), Street Address, and Birth Date.
- VEHICLE INFORMATION:** A form for recording vehicle details, including Make, Model, Year, and Expected Mileage.

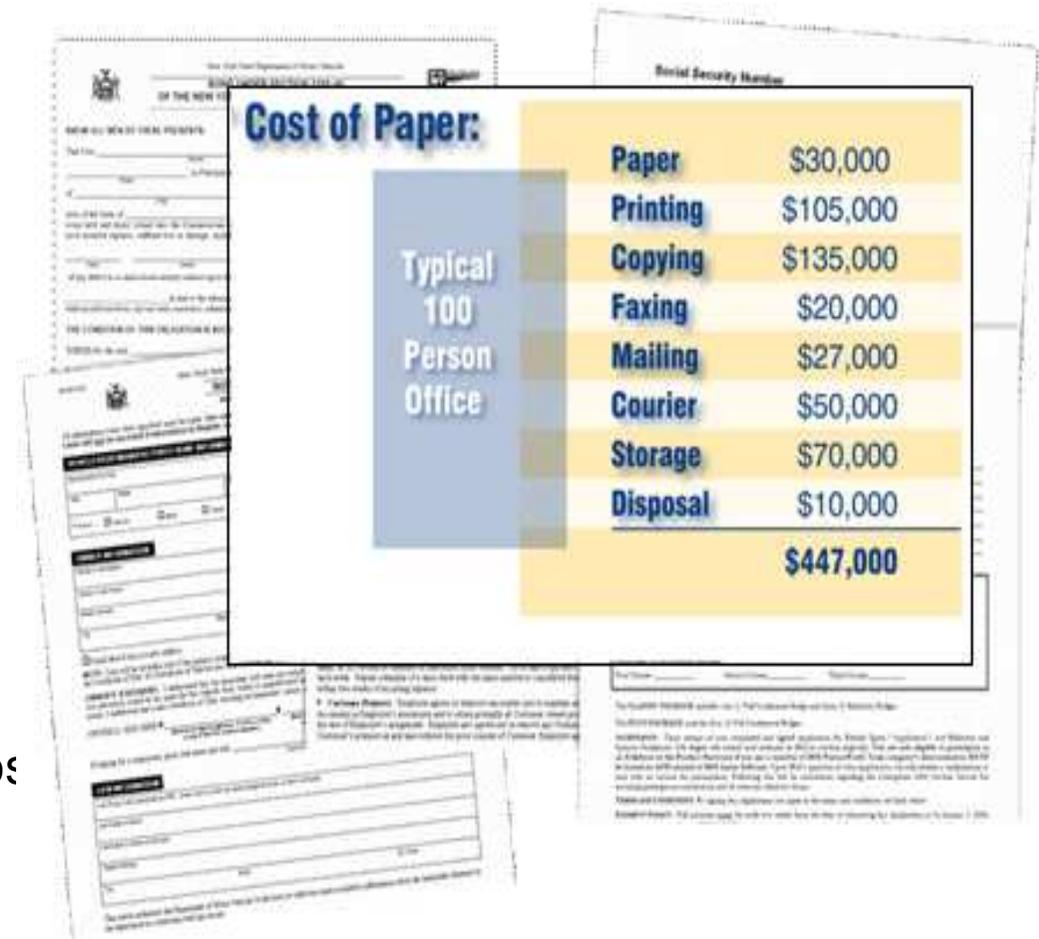
Impacto sobre los procesos en papel

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



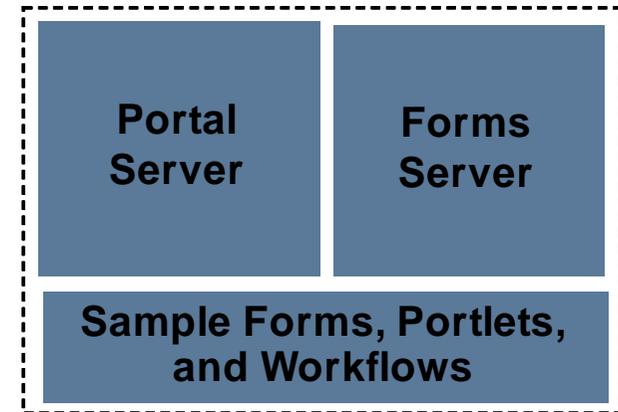
¿Cómo es Lotus Forms?

- 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)

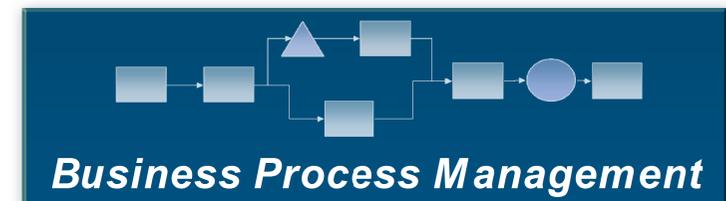


Integración con otros sistemas: “front end” del BPM

- 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

The screenshot shows a multi-page form application. The main window is titled "Account Application" and contains several sub-windows and sections:

- Header:** "Type of Application" with a logo for "INNOVATIVE INSURANCE" and the tagline "thinking outside the box".
- Application Type:** "Proposed Insured 1".
- Owner Information:** Fields for First Name (JAMES), Middle Initial (M), and Last Name (THOR).
- Residential Information:** Fields for Mailing Address (25 BE), City (NORT), State (Illinois), and Zip Code (60164).
- Area Code and Phone Number:** Fields for "Please enter your area code and phone number."
- Marital Status:** A dropdown menu for "Please select your current marital status."
- Driver's License Information:** Fields for "Driver's License Number" and "State".
- Social Security or Tax Identification Number:** A field for "Social Security or Tax Identification Number".
- Page 2 of 3:** The form is currently on the second page.

- 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: 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 | 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 Address (Required in addition to P.O. Box): 123 Electric Form Ave | Springfield | MA | 01111
 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

Financial:

Workflow Diagram:

- Decision: [Application for Estate, Partnership, Trust, Corp. or Charity]
 - Yes: Application Requires Docs (do / show attachments button, do / pop up instructions dialog)
 - No: Application Needs No Docs (do / hide attachments button)
- Decision: Use Changes Account Type
 - Yes: Application Requires Docs
 - No: Application Needs No Docs
- Decision: Approving Principal Signature Disabled
 - Yes: Approving Principal Signature Enabled
 - Unsigned
 - Signed
 - No: Approving Principal Signature Disabled
- Central Hub: Individual, Joint Tenants, Corporation, Estate, Charitable Org., Collateral, Investment Club, Custodian for Minor, Trust, Partnership.
 - Note: 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

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 MSRB Rule G-9(a)(2) and NASD Rule 2210

First Name: Richard Initial: R Last Name: Smith SSN: 999-99-9999 Date of Birth: 04-15-1964 Business Phone: () -
 Mailing Address: 123 Electric Form Ave Springfield MA 01114 City State ZIP Code
 Legal (Street) Address (Required to address P.O. Boxes): 123 Electric Form Ave Springfield City State ZIP Code
 Employee: 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, Co. No

Flowchart:

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

XML Snippet:

```

<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, Co

Financial: Yes, Co

Flowchart:

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

```

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

Scanned Documents:

- Bylaws of the American Institute of Organologists (ADO) as amended October 10, 2001. Article I: Name. The name of this organization shall be: American Institute of Organologists (ADO). 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.
- STATE DEPARTMENT OF HEALTH CERTIFICATE OF LIVE BIRTH 854-458

■ 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/>

