

Lotus. software

IBM®

# 【IBM SOA講堂】

## Lotus動員協作： Introducing IBM Lotus Forms V3.5

*Zero to eForm –  
In 15 minutes*

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ACCELERATING  
PROCESS AUTOMATION WITH  
ELECTRONIC FORMS,  
WORKFLOWS AND PORTLETS



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# Agenda 1 – Lotus Forms V3.5



Overview



Exceptional ease of use



Streamlined business processes



Industrial strength security and scalability



References



Summary



# How Lotus Forms Provides Profound Value

- **Automates** business processes that are “forms-based”
- Collects data accurately and completely, with **straight through integration** to one or more back end systems.
- Creates an **auditable, compliant record** of a complete business transaction
- eForm solutions for both **LOB and Enterprise** (Simplest to most complex forms)

The image displays four overlapping screenshots of Lotus Forms web applications:

- Top Left:** "Health Insurance Information" form with fields for "First Name", "Last Name", "Street Address", "City", "State", and "Postal Code".
- Bottom Left:** "ADT SETUP" form with sections for "LEGAL ADDRESS" and "Primary Business Contact", including fields for "Client Name", "Client ID", "Product Request Type", and "Type of ADT".
- Center:** "PROPOSED INSURED" form with fields for "Name" (First, Middle, Last), "Street Address", "Phone", "Daytime", "Evening", "Mailing Address if Different from Residence", "Sex", "Birth State", "Date of Birth", "Month", "Day", "Year", "Age Now", and "Rating Age".
- Right Side:** "PROPERTY SECTION" and "VEHICLE INFORMATION" forms. The "VEHICLE INFORMATION" form includes a dropdown for "Year" and a "Make" field, with a small image of a blue van.

“More than 80% of the processes in public and private businesses depend on forms.” - IDC

## Typical Form-Driven Processes

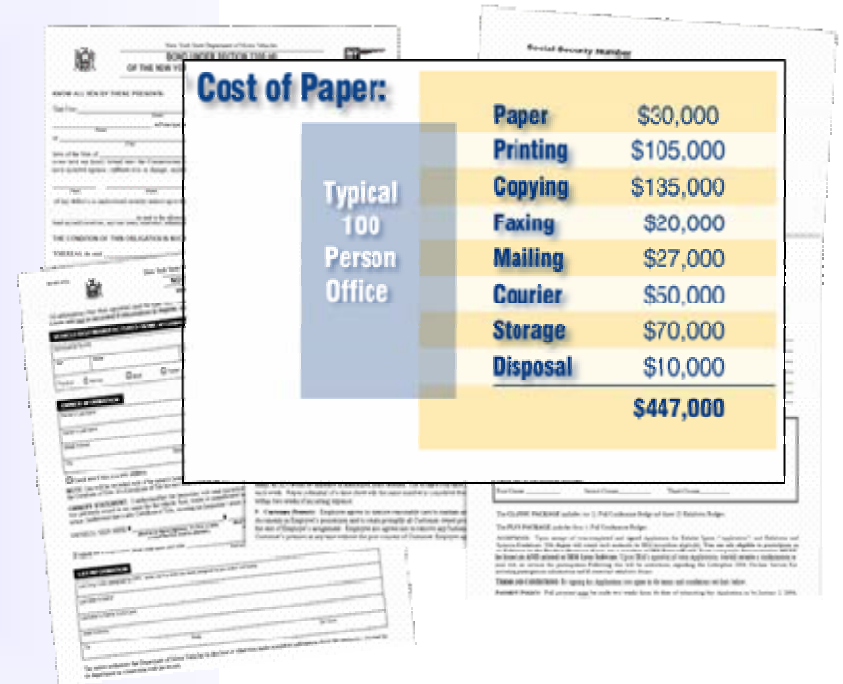
- New Business Acquisition
- Loan Application & Approval
- Customer Self Service
- Health & Safety compliance processes
- Threat and Risk Assessment
- Supplier Management
- Dealer Management
- Leave Request and Approval
- Travel Request and Approval
- Procurement Approval
- Timesheet Recording & Approval
- Performance Management
- Personnel Profile and Updating
- Records Management
- Contract Management
- Forms Management
- Compliant Document Generation
- Many, many others



eForm applications can be  
**Horizontal**  
**Vertical**  
**External**

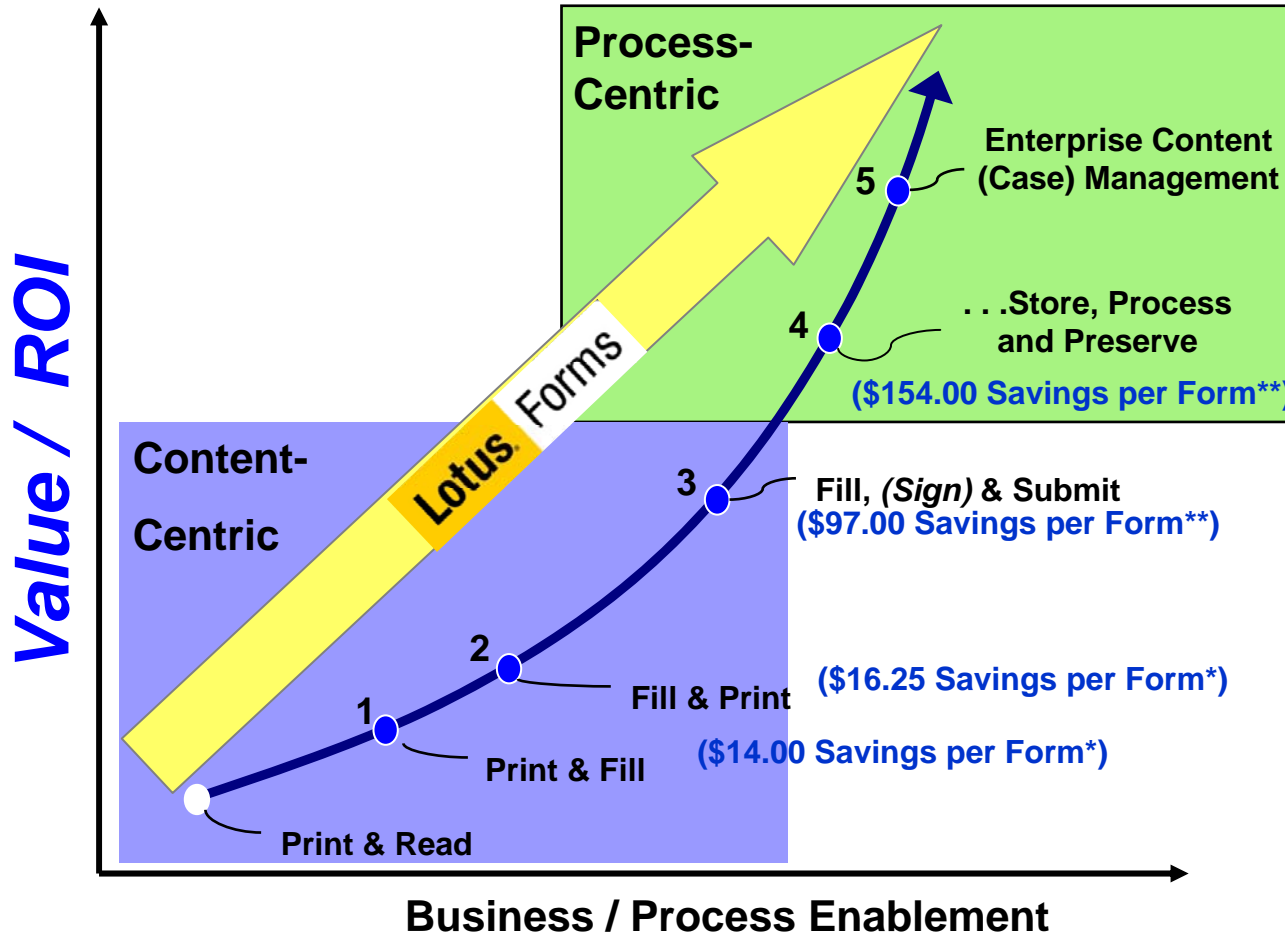
# The Impact of eForms on paper-based Processes

- **Obvious costs...**
  - Paper and printing, transmission
  - Unused form disposal
  - Archival and storage costs
- **...hidden inefficiencies that can paralyze organisations**
  - Lengthy process cycles
  - Incorrect and incomplete data
  - Data re-keying
  - Physical routing time
  - Complex approval chains
  - Data aggregation across forms
  - Inaccessible data
  - Stove-pipe solutions for each process



# Why are eForms so hot?

*Solid, quantifiable benefits for customers – through process automation as well as paper savings*



Sources: \* Bill Gates, Business @ the Speed of Thought, \*\*Gartner Group

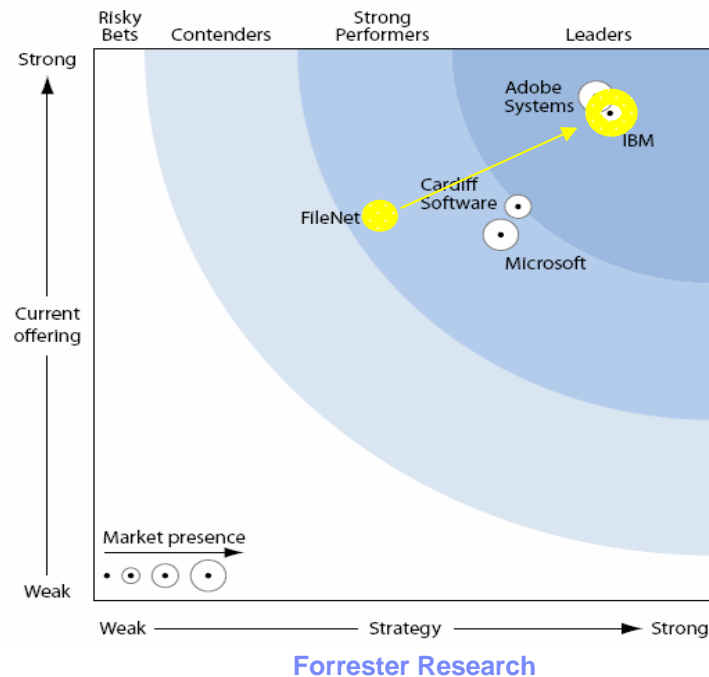


# Some Lotus Forms ROI Proof Points

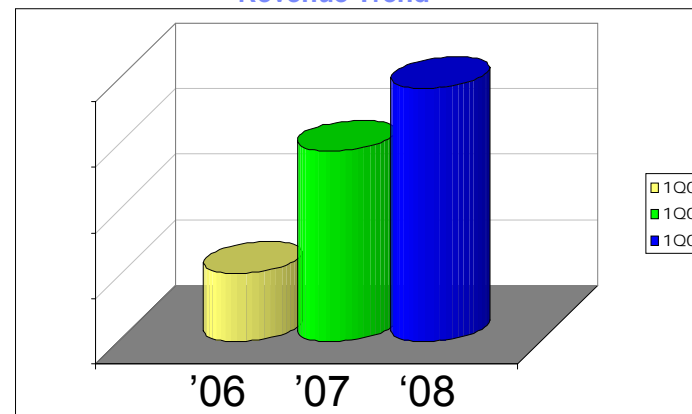
	Customer	ROI
1	US Army	100,000 forms, used by 1.4 million Army personnel around the world – ROI estimated to be <b>\$1.3B / year</b>
2	USAF	18,000 forms, serving 700,000 employees globally – ROI: <b>\$50 Million annually</b>
3	IBM Express Managed Services	Boosts productivity by 25%, Improves data accuracy and completeness from 75% to 100%, cycle times down by 25%, <b>reduced form localization times by 80%</b>
4	Major League Baseball	Reduced staffing requirements as well as development, printing, travel and telephone costs. MLB estimates <b>annual savings of more than US\$350,000</b>
5	AMP	IFA users estimate an admin saving of 1h a day in completing application forms and following up errors etc. <b>70% reduction in manual effort</b>
6	Global Apparel Manufacturer	<b>Reduced process time by 75%</b> . Estimated <b>cost savings per year \$787,500</b>
7	Woodmen Insurance	Accelerated new business application process <b>from weeks to hours</b>
8	Nova Scotia Land Registry	<b>Reduced transaction time from 7 days to just 1 day</b> . Reduce <b>rejection rate from 15% to 3%</b> .
9	SEC	27,000+ publicly traded firms. Estimated annual to taxpayers of \$1.8 million. Estimated <b>savings of 750,000 lines of code</b> based on custom vs. COTS Solution
10	U.S. Directorate of Defense Trade Controls	Shortens the <b>application process from up to 66 days to as little as 9 days</b>

# Lotus Forms Business Traction

- ✓ **Significant Successes in '08, including...**
  - ✓ *Strong 33% YtY 1H growth*
  - ✓ *136% YtY growth in 3Q!!!*
  - ✓ *81 of the top 100 transactions were to "new" customers (market is in growth mode)*
  
- ✓ **Customers / references in all GEOs, in over 20 countries, across 12 major industries including:**
  - ✓ *Public Sector (Fed, State & Local), Banking, Insurance, Manufacturing, Healthcare, Automotive, Education, Hospitality, Supply Chain, Transportation, others...*
  
- ✓ **Hundreds of Business Partners around the world are now trained on Lotus Forms**
  
- ✓ ***Forrester Names IBM Leader in eForms!***



**Revenue Trend**



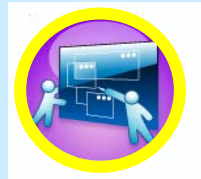


# Lotus Forms 3.5 Offers...

*...the Broadest set of eForms capabilities available for all skill levels!*

**“Skill-Based”  
Design  
Environments**

**Solutions for every  
Requirement:**



**Business Process  
Accelerator**

Business Process  
Focus  
and Bundles  
WebSphere Portal

*Developers*



**Lotus Forms**\*

Document Focus, Pixel Perfect,  
Secure, Industrial Strength

*Business Analysts*



**Lotus Forms Turbo**

Zero-footprint, turnkey form  
creation tool end users developing  
simple forms

*Business Users*



\* Includes Turbo module



# Lotus Forms 3.5 Extends IBM's Leadership in eForms

## ▪ Exceptional Ease of Use

- Browser-based, out of the box forms: without IT involvement – EASY & FAST
- Simplified Eclipse Designer for beginners as well as advanced developers
- Sample eForms & demos speed implementations
- No desktop software installation

## ▪ Optimized Business Processes – Within the Firewall and Beyond

- Even tighter integration with market leading BPMs, WebSphere Process Server and Filenet
- Security rich, easy-to-use front-end for business process automation

## ▪ Industrial-Strength Security and Scalability

- Advanced, zero footprint digital signing and authentication with standards such as XML Dsig
- World's largest eForms implementation @ US Army with 1.5M users

The image displays three overlapping screenshots of Lotus Forms 3.5 web applications. The top screenshot is a 'Household Census Survey' form from the Federal Government Statistical Agency, featuring a 'Filter Contact Information' section with fields for 'Today's Date' (2008-05-12), 'Name of Filler', 'Family', and 'Phone Number'. The middle screenshot is a 'renovations mobile device survey' form, including a 'Contact Information' section with fields for 'First Name', 'Last Name', 'Email', and 'Re-type Email', and a 'With a prize!' section. The bottom screenshot is an 'Application for Employment' form for 'Zeta', with sections for 'Position', 'General Information' (including fields for 'Last Name', 'Middle Initial', 'First Name', 'Street Address', 'City', 'State/Province', 'ZIP/Postal Code', 'Country', and 'Email'), and a section for 'Have you ever worked for this company before?' with radio buttons for 'Yes' and 'No'.

# Agenda



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# Lotus Forms Turbo

*Out of the box. Easy & fast. No IT involvement.*

**Design**

Compose eForms right from your Web Browser!  
No desktop software required.

**Fill**

Fill eForms directly from the Web

Store

**Store**

Store submitted forms data simply

**Route**

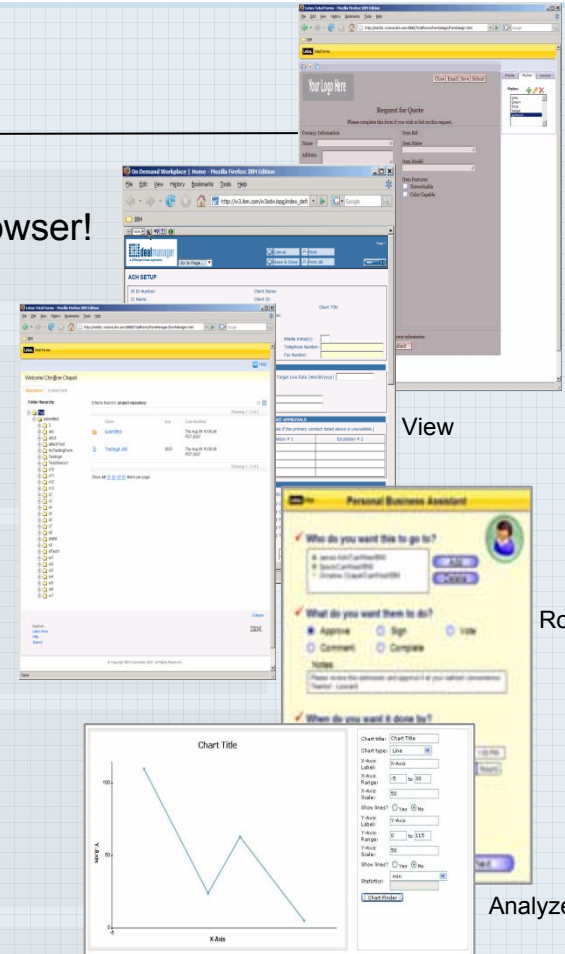
Email a simple web link to your form for employees, customers and partners to fill

Route

**Analyze**

Open submitted data into your favorite spreadsheet.  
Perform basic graphing & analysis directly from the Web.

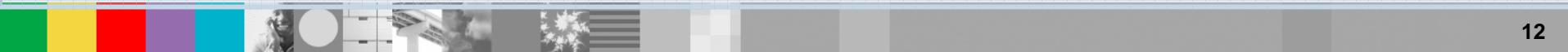
Analyze



Design

View

Analyze



# Use cases

## Seven simple, broadly applicable eForms use case patterns were identified:



**1. Request for Submission** – An invitation to submit a proposal on a specific opportunity:

- . Request for proposal
- . Request for quote
- . Request for information

**2. Approval** – A document is routed through one or more decision makers in an approval/rejection process:

- . Vacation request
- . Expense report
- . Purchase request
- . Change request
- . Request for transfer
- . Request for promotion

**3. Survey** - Collecting structured information from a group of respondents:

- . Market survey
- . Employee satisfaction survey
- . Census
- . Site visitor survey
- . Service quality audit survey
- . Instructor assessment

**4. Application** - A set of documents are submitted and one or more selections are made from amongst them:

- . Employment application
- . Grant application
- . Bid or proposal

**5. Notification/Report/Filing** - A means of delivering notification and recording information when a business event occurs or information changes:

- . Court filing
- . Change of address
- . Notice of separation
- . Performance appraisal

**6. Transaction Records** – A record of an agreement between parties usually involving the exchange of value:

- . Receipt of payment
- . Purchase Agreement
- . Land title
- . Employment contract
- . Non-disclosure
- . Record of employment

**7. Feedback/Review** - A process of disseminating and collaborating on information, observations or opinions:

- . Policy and procedure development
- . Status report
- . Trip report
- . Clinical study
- . Technical note
- . Meeting minutes

# Quick & Easy Form Creation: Start creating a form with one-click...

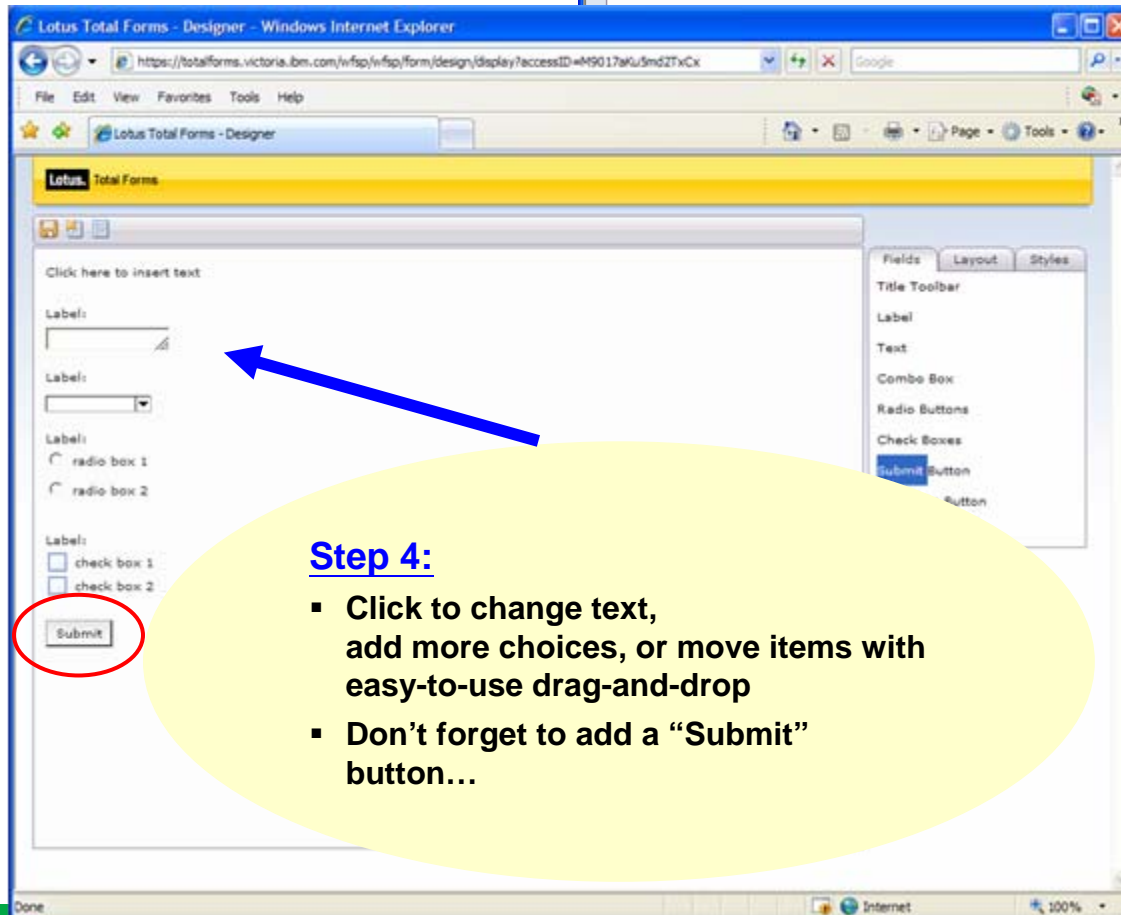
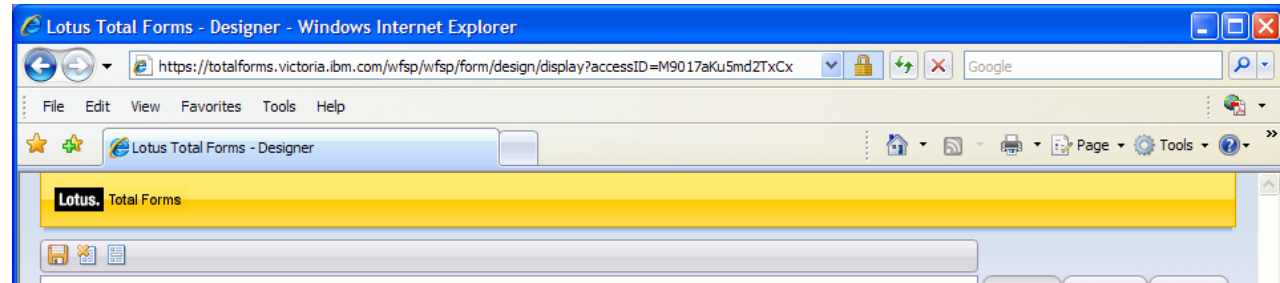
**Step 1:**

- Enter user name and password to login

**Step 2:**

- Click "Create Form" to start your the form creation process

# Quickly add fields and choose layouts to customize your form...



## Step 4:

- Click to change text, add more choices, or move items with easy-to-use drag-and-drop
- Don't forget to add a "Submit" button...

## Step 3:

- Customize your form by adding fields and selecting layout and style options

# Simply save your form, adding name, descriptions and tags...

The screenshot shows the Lotus Total Forms Designer interface. The main form is titled "Pet Store Co. Survey -- Please Tell Us What You Think". It contains several fields: a text input for "Name:", a dropdown for "Favorite Pet", radio buttons for "I am" (tall, short), and checkboxes for "I like" (red, blue). A "Submit" button is at the bottom. An "Attributes" dialog box is open on the right, showing a table of properties for the selected field.

Property	Value
Field Type	Label
Label	Pet Store Co. :
Text size	small

## Step 5:

- Save the form
- Select name, description, tags and author

The screenshot shows the "Form Information" dialog box, which is used to save the form with metadata. The dialog has the following fields:

- Name: Pet Survey
- Description: First Customer Survey
- Tags: Survey, Pets
- Author: Jim Fields

Buttons for "Save" and "Cancel" are at the bottom of the dialog. The background shows the same form design as the previous screenshot, but the "Form Information" dialog is the primary focus.

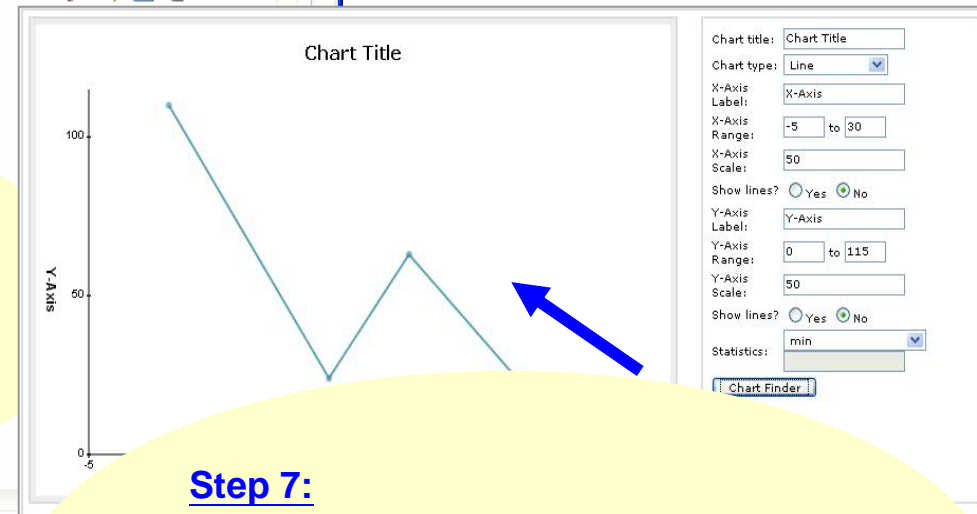


# Send your form via email or web, and easily gather data...

Name	Type	Author	Date
FAB_Feature_Poll_1	Form		4/30/08 4:55 PM
Pet_Survey	Form		5/2/08 4:21 PM

## Step 6:

- Send a quick link in an email to your form to colleagues, partners or customers
- Receive completed forms back from customers who have entered and saved their data



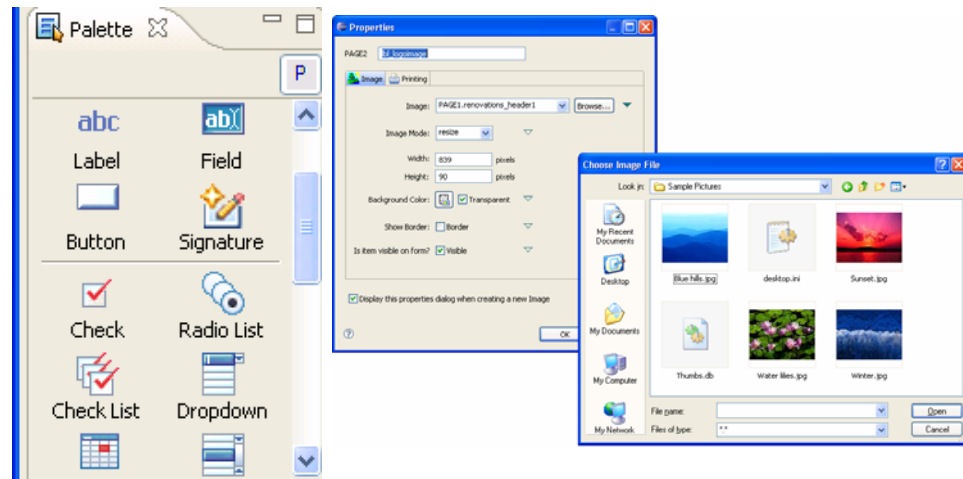
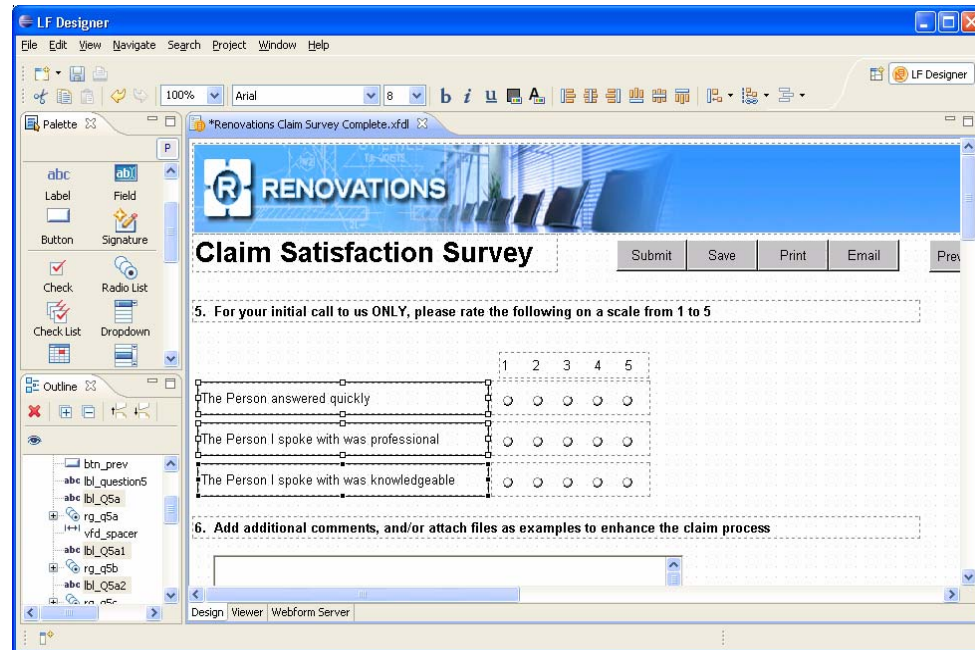
## Step 7:

- Perform basic analysis of the data you receive in your completed forms, or deposit it right into your favourite spreadsheet software

# Lotus Forms 3.5 Eclipse Designer even easier to use

*For beginners as well as advanced users*

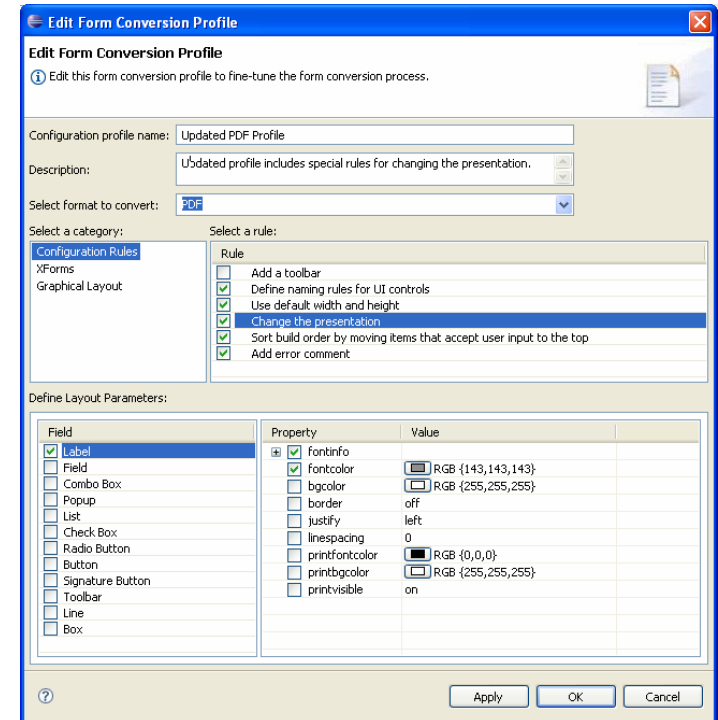
- **Support for Basic & Advanced user modes**
- **A simple drag-and-drop/point-and-click design experience**
  - Quick start wizards
  - Simplified Palette
  - Easier Access to Property Settings
  - Easier Button Creation
  - Easier Image Addition
  - Automatic data model creation/update
- **Dramatically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



# Improved Form Conversion Tooling

*Import legacy documents even more easily*

- Directly imports content from .pdf and FileNet eForms
- Saves development time and expense
- Supports conversions in 20 languages.
- Performs batch form version updates
- Open framework allows conversion of multiple form format.
  - Enables Independent Software Vendors (ISV) and System Integrators (SI) to create parser extensions.



# Lotus Forms Sample Catalog

*Easy starting point. Quick ROI demonstration*

- **Ready-to-use samples and demos** for common business/industry scenarios like:
  - Request for submission
  - Approvals
  - Surveys
  - Job applications
  - Notifications/filings
  - Transaction records/orders
  - Feedback/reviews
  - ... and more!
- Quickly demonstrate Forms ROI to management
- Easy starting point for developers

The image displays three overlapping screenshots of the IBM Lotus Forms Viewer application, demonstrating various form types:

- Top Screenshot:** A "Household Census Survey" form from the Federal Government Statistical Agency. It includes a "Survey Sections" sidebar, a "Filler Contact Information" section with fields for "Today's Date" (0000-00-00), "Name of Filler", "Family", and "Phone Number".
- Middle Screenshot:** A "renovations mobile device survey" form. It features a "Contact Information" section with fields for "First Name", "Last Name", "Email", and "Retype Email". It also includes a "Who is a prize?" section with a text box and a "1. What is your main motivation for using a mobile device?" section with radio button options: "Work", "Contact Friends & Family", "Fun (music, movies, games)", and "Safety".
- Bottom Screenshot:** An "Application for Employment" form for Zeta. It includes a "Position" section with fields for "Post Title" and "Reference Number". The "General Information" section contains fields for "Last Name", "Middle Initial", "First Name", "Street Address", "City", "State/Province", "ZIP/Postal Code", "Country", "Email", and "Primary Phone". It also has a "Have you ever worked for this company before?" section with "Yes/No" radio buttons and a "Type of employment desired?" section with radio button options: "Part-time Position", "Full-time Position", and "Temporary Position".

# Agenda



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**Streamlined business processes**



Industrial strength security and scalability



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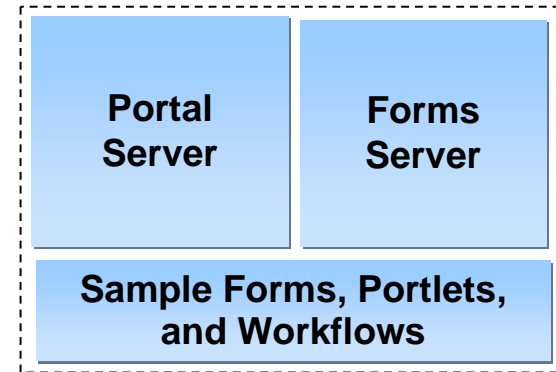


Summary



# Business Process Accelerator: Front end for BPM

- Snaps on to Portal
- Accelerates processes by delivering the appropriate eForms to knowledge workers where and when they need them
- Responds to the leading capability that Portal customers deem critical in next 24 months
- Enhances and complements standalone IBM offerings such as Lotus Forms, FileNet Business Process Manager and WebSphere Process Server
- Based on open standards to increase reusability and leverage your existing investment



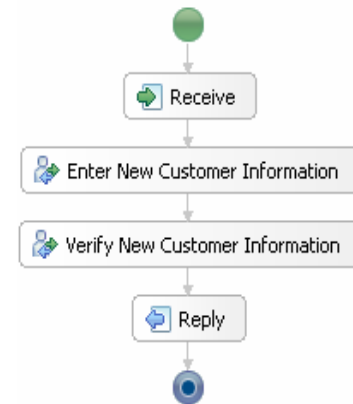
**Integrations with:**

**FileNet**  
**WebSphere Process Server**  
**3rd Party BPM systems**



# Lotus Forms + Process Server: End to end solution for human and system centric processes

- Modelling, simulation and orchestration of processes
  - Import forms into / create forms in WID or Modeler
  - Create human tasks
  - Associate forms w/ Human Tasks
  
- Process Server offers a development license of Forms



File Links Google Go Bookmarks 2 blocked APP Check AutoLink AutoFill Send to

Setting

Canada [change] English - Français Terms of use

Acme Insurance Inc. [Website](#)

My ToDo's > Open > NewCustomer\$NewCustomerTask3

Enter the values for the output data of your task.

Release Save Complete

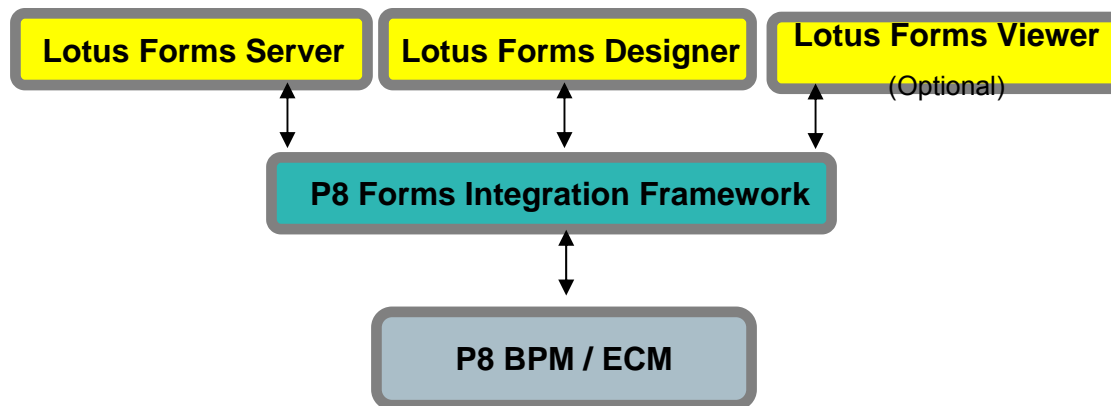
Acme Insurance Inc.

**Customer Information**

ID:	33
Name:	Paul Pacholski
Address:	50 Barolo Lane
City:	Markham
State:	ON
Country:	Canada
Postal Code:	E34 1N2
Tax ID:	UXS346

# Lotus Forms + Filenet P8 repository & workflow: End-to-end solution for automating content/document centric processes

- Integrates with P8 as tightly as P8 eForms – through P8 Forms Integration Framework
- Offers advanced eForms capabilities to P8 customers
  - True 0-footprint Web 2.0 rich eForms, Dynamic forms user interface, offline forms access and processing, Section 508 compliance, XML schema support for XForms and Industry specific forms and integration with more than 40 enterprise information systems





# Alphalogix Tasica Forms Director + Lotus Forms + WebSphere Portal: End to end human centric business process automation

- Tasica Forms Director is a business process automation tool that routes electronic forms through logical decisions and workflows with no coding
- Adds value to Lotus Forms by applying simple or complex workflow rules to create interactive forms routing and approval systems
- Fully integrates with JSR 168 compliant Enterprise Portals



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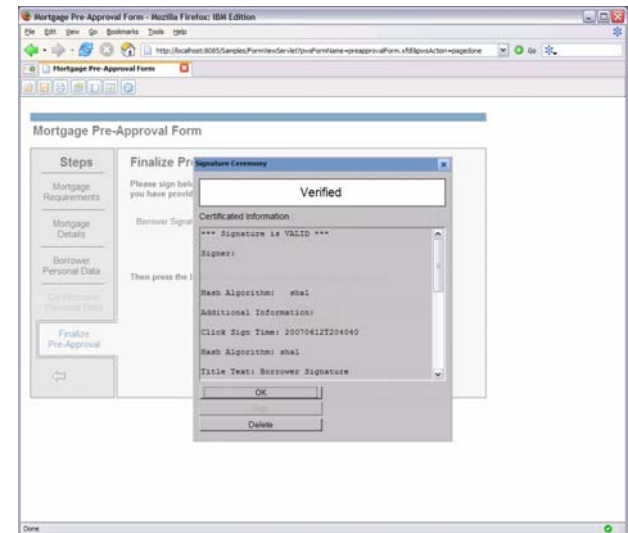
Summary



# Improved digital signature support

*Automate security rich business processes*

- Signature supports both data and presentation
- 2 kinds of electronic signatures:
  - Public Key Cryptography (PKI) based
    - Forms are signed with local, standards-based certificates
    - Ideal for high value, high security transactions
  - Authenticated click-wrap
    - Authentication using shared secret (account information, personal information, etc.)
    - Ideal for medium value business
- More flexibility – Nested/Paralled/Overlapping/Staged
- XML DSig (rfc3075) support for regulatory compliance for European customers
- Digital signing with Firefox browser and on iSeries



# US Army

## Automating world's largest eForms implementation

### Challenge

- Modernize inventory of approximately 80,000 eForms used by 1.5 million
- Automate manual form-based processes
- Single, centralized format for electronic documents based upon open standards to ensure scalability
- Units in the field must be able to view and access the same forms as counterparts at bases around the world
- Confidential and critical data must be captured and transferred securely

### Solution

- Lotus Forms based solution to automate processes & streamline paper transactions (eg: supply requests, personnel evaluations, medal recommendations)
- Also implemented DB2 Content Manager, Portal, DB2 and Tivoli

### Benefits

- Estimated cost avoidance = over \$1 billion
- Significant time savings: cut time on many processes by 2/3
- Auto-population of eForms reduces redundancies and data errors
- Improved security of information and provision of auditable records
- Interoperability with existing infrastructures & system extensibility
- Helped address regulatory compliance concerns (GPEA)
- Field & Base units able to capture all required data in a single XML format for fast, secure transmission via email



**Lotus** Forms

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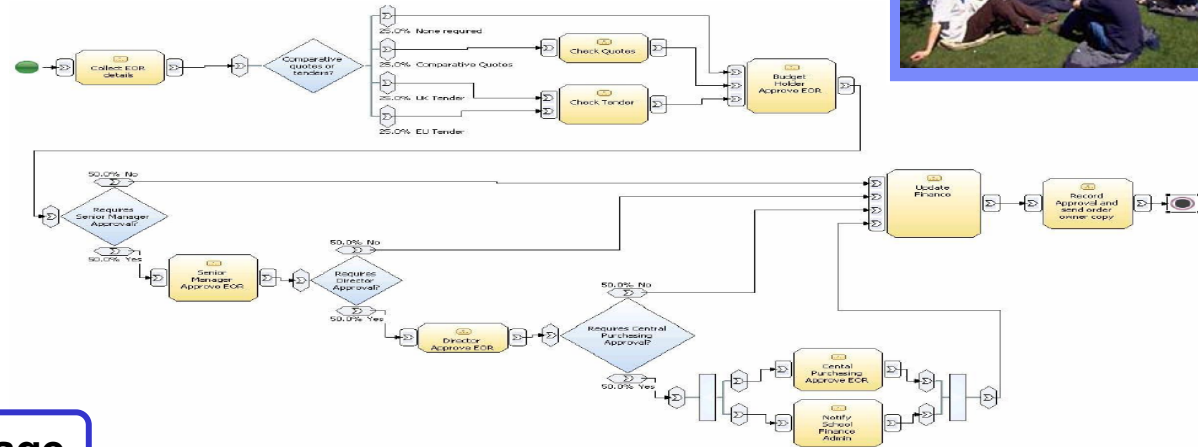


# Business Process Automation at Cardiff University!

## Process Server+ Portal + Lotus Forms

### Sample Applications

- Telecoms Change Requests
- External Order Requests
- Sickness Absence
- Leave Requests
- Library Requisitions
- Inter-library loans
- Timesheets
- Staff Training Requests
- Transfer Funds
- Expenses



**Manage**

**Initiate**

**Submit**

**Check Status**

# U.S. Securities and Exchange Commission (Government)

## ▪ Challenge

- ▶ Public companies disclose information to SEC via EDGAR, which receives between 12 -16 million pages of documents annually, from more than 28,000 different entities, totaling over 350,000 filings each year
- ▶ System was stretched to the limit and the agency had trouble managing the 350 different types of forms being submitted by the public

## ▪ Solution

- ▶ U.S. federal regulatory agency increases user satisfaction and saves taxpayers money by implementing a simplified, automated filing process based on IBM Lotus Workplace Forms software

## ▪ Benefits

- ▶ Streamlines electronic filing process
- ▶ Saves corporations more than \$234,000 per year, and tax payers \$150,000 per month due to lower maintenance costs
- ▶ Allows the SEC to adhere to GPEA (Government Paper Elimination Act) requirements

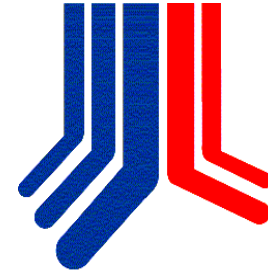


*"Public company financial documents used to be submitted in hard-copy format using couriers, overnight mail and regular postal services. Now the information is disseminated worldwide within minutes of receipt."*

*– Rick Heroux, EDGAR Program Manager, U.S. Securities and Exchange Commission*

# Woodmen of the World (Insurance)

- Challenge
  - Modernize and automate insurance business processes for field representatives to help them be more productive and competitive while complying with regulations
  
- Solution
  - IBM Lotus ® Forms solution provides the correct forms for compliance and automates the forms-handling process—from quotes to policy issuance
  
- Benefits
  - Reduced time required for policy application completion and issuance from weeks to hours
  - Streamlines workflows of field representatives
  - Improves productivity resulting in increased competitiveness



*“The Lotus Forms solution allows for accurate and complete information, the first time. This saves money, but also increases potential revenues significantly.”*



# AMP (Banking and Finance)



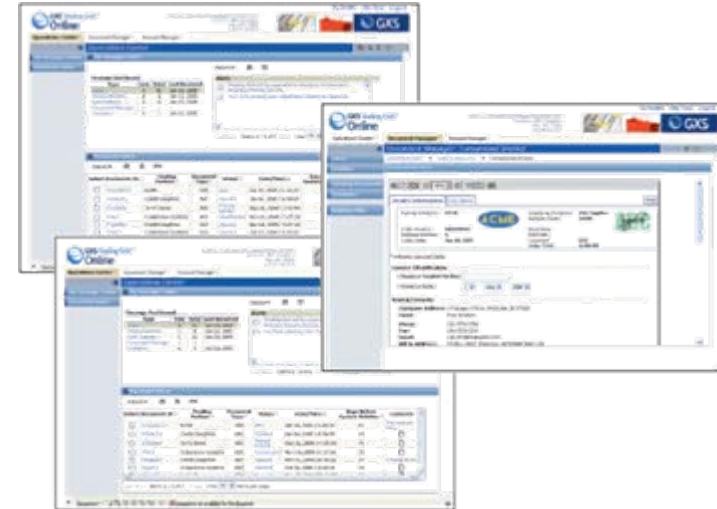
- Challenge
  - Over 3000 agents using completely manual processes for new business applications. Great deal of rework, due to inaccurate, incomplete data
  
- Solution
  - IBM Lotus Forms solution provides every Advisor the ability to create, pre-fill and submit new business application forms straight through to back end systems like Siebel, with both on-line and off-line capabilities, as well as signature pads
  
- Benefits
  - Significantly reduced the cost and time to acquire new business.
  - Dramatic improvement in the way advisers work with AMP
  - Increased revenue due to being able to close more business in a shorter amount of time

*“Using IBM Workplace Forms made it much simpler and more cost effective for financial planners to work with us. Many of the financial planners we deal with do not sell AMP products exclusively, so being easy to deal with is one of our key competitive advantages.”*



# GXS (Manufacturing And Retail)

- Challenge
  - GXS is the world's largest provider of B2B solutions to an extensive list of fortune 500 customers
  - Was using HTML and paper to drive transactions in their Trading Grid
  - Required global trading partners to have customization capabilities for form look and functionality
  - Required core B2B trading forms to be customized from one partner to many partners and customers
- Solution
  - Used Lotus Forms to front-end their global B2B Trading Hub
  - WebForm Server used for Web 2.0 based forms
- Benefits
  - Company uses these forms to drive and quickly complete electronic transactions between trading partners
  - Pre-populated forms increase speed and accuracy of document turnaround while built-in templates minimize data entry errors



# Province of Nova Scotia (Local Government)

## Challenge

- Automation of land registry processes
- 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
- 97% of registration paperwork is now electronic
- Planning “mandatory” in future



*“With the IBM solution in place, we can provide better and more secure document submission services to our clients, and we can receive and process land transactions faster and with more error checking up front than ever before.”*

*— Nancy Saunders, Acting Director,  
Registry 2000 Project, Corporate  
Registries of Service Nova Scotia*

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# Lotus Forms 3.5

- ✓ ***Easier than ever***
- ✓ ***Optimized for Business***
- ✓ ***Process Automation***
- ✓ ***Industrial Strength Security***
- ✓ ***Most Scalable Solution***
- ✓ ***TURBO Fast***

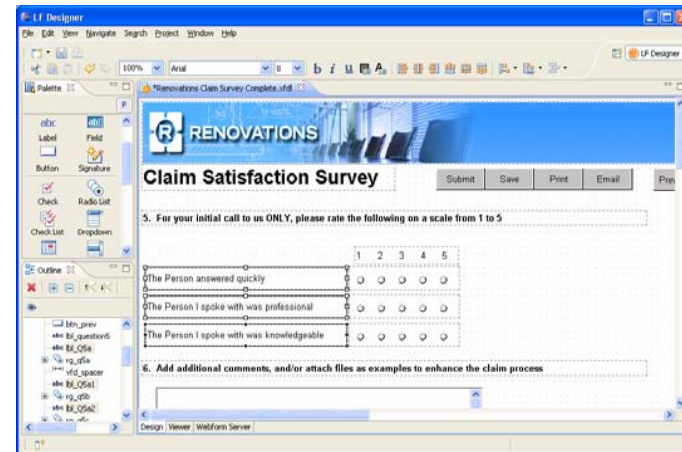
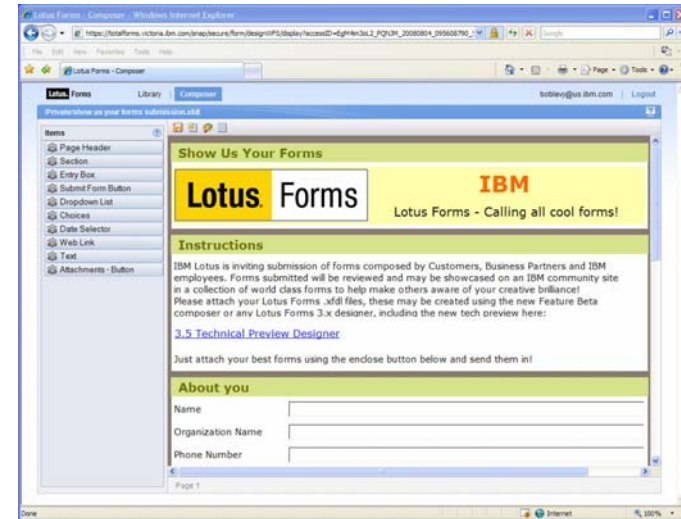
The image displays three examples of web forms created using Lotus Forms 3.5:

- Household Census Survey:** A form from the Federal Government Statistical Agency. It includes a 'Filter Contact Information' section with fields for 'Today's Date' (2008-05-12), 'Name of Filler' (Family, Given, Suffix), and 'Phone Number'. A sidebar lists 'Survey Sections' like 'Filter Contact Info', 'Address of Household', 'Residents', 'Housing General', and 'Utilities'.
- renovations mobile device survey:** A survey form with a 'Contact Information' section (First Name, Last Name, Email, Retype Email) and a 'Win a prize!' section. It includes a question: '1. What is your main motivation for using a mobile device?' with radio button options: 'Work', 'Contact Friends & Family', 'Fun (music, movies, games)', and 'Safety'.
- Application for Employment:** A form for 'Zeta' (an Equal Opportunity Employer). It includes a 'Position' section (Post Title, Reference Number) and a 'General Information' section with fields for Last Name, Middle Initial, First Name, Street Address, City, State/Province, ZIP/Postal Code, Country, Email, and Primary Phone. It also has a 'Have you ever worked for this company before?' section and a 'Type of employment desired?' section with radio button options: 'Part-time Position', 'Full-time Position', and 'Temporary Position'.



# Resources and next steps...

- Check out the Website  
<http://www-01.ibm.com/software/lotus/forms/>
- Read the Datasheet  
<ftp://ftp.software.ibm.com/software/lotus/lotusweb/forms/LotusForms3.5DATA-SHEET.pdf>
- Try sample eForms in the Solutions Catalog  
[https://www14.software.ibm.com/webapp/iwm/web/preLogin.do?source=portlets&S\\_PKG=1WP1001PB](https://www14.software.ibm.com/webapp/iwm/web/preLogin.do?source=portlets&S_PKG=1WP1001PB)
- Download the Trial version  
<http://www-01.ibm.com/software/lotus/forms/trials.html/>
- Try Lotus Forms Turbo live on Lotus Greenhouse  
<https://greenhouse.lotus.com/home/login.jsp>
- Enter the “Show us your Forms” Challenge  
<https://greenhouse.lotus.com/featurebeta/secure/route/view/start?formName=/route/KPsNtoHPTopOB2-M1217275064185.xfdl>
- Need product Support?  
<http://www-306.ibm.com/software/lotus/products/forms/support/>



# Lotus Forms 3.5 with Lotus Forms Turbo



## Agenda 2 – Lotus Forms Turbo



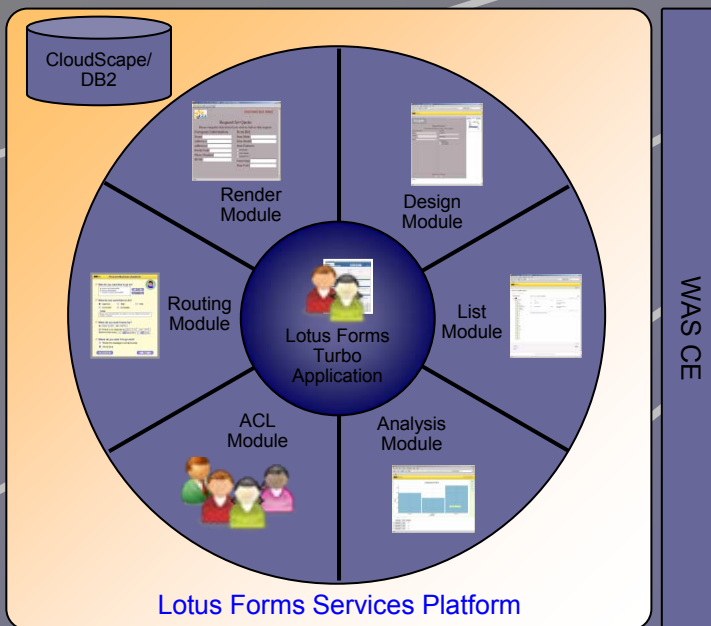
- ✦ The Concept
- The Lotus Forms Turbo Solution
- Sample Use Case





## Lotus Forms Turbo

- An intuitive, Web 2.0-based form design experience
- A simple repository with a Web interface
- A zero-footprint viewing experience
- A simple, form routing mechanism
- Reporting and graphing
- Aggregated data export (CSV)
- E-mail-based forms distribution
- Forms can be used with full Lotus Forms implementations



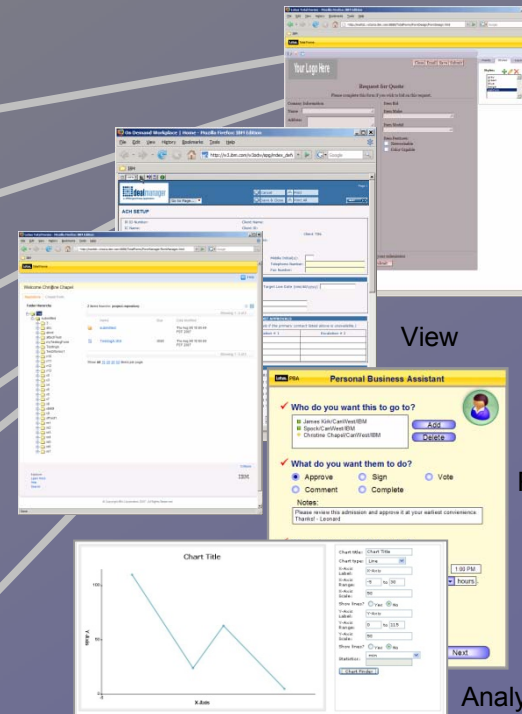
Store

Design

View

Route

Analyze

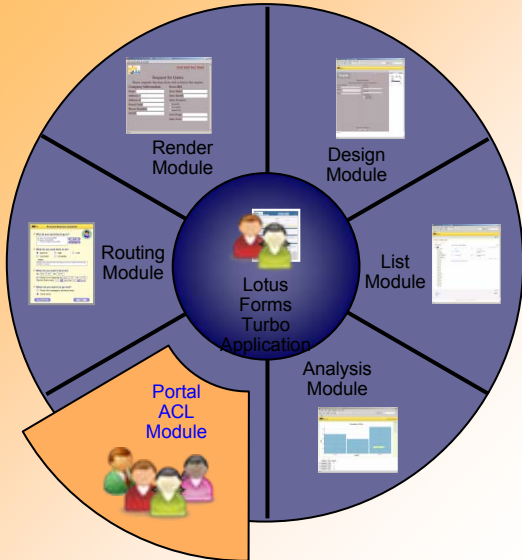


## Lotus Forms Turbo vs. Enterprise Forms

- Forms are limited to 1 page/50 items
- Only supports simple template-based layout
- No ability to extend or integrate processing
- Only full-form/non-PKI signing supported
- Forms will only support simple pre-defined calculations

***Lotus Forms Turbo is a complete forms solution that drives immediate value for SMB/Departmental users while providing significant up-sell opportunity.***

## Websphere Portal

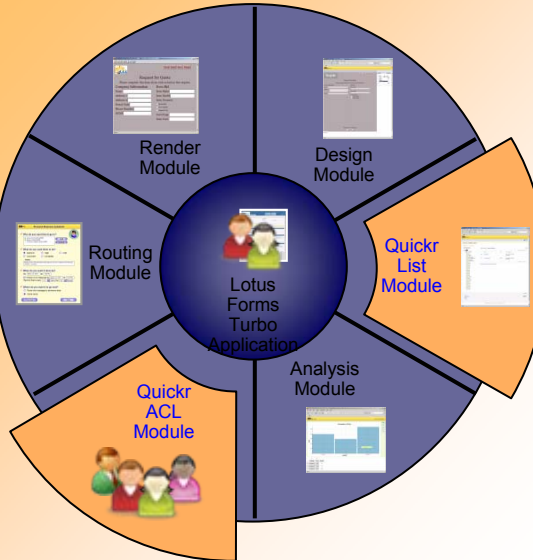


Lotus Forms Services Platform

Allows line-of-business users to collect information through portlets

- Lotus Forms Turbo runs as a series of portlets
- ACL module is replaced with an implementation that integrates with portal login mechanism

## Quicr

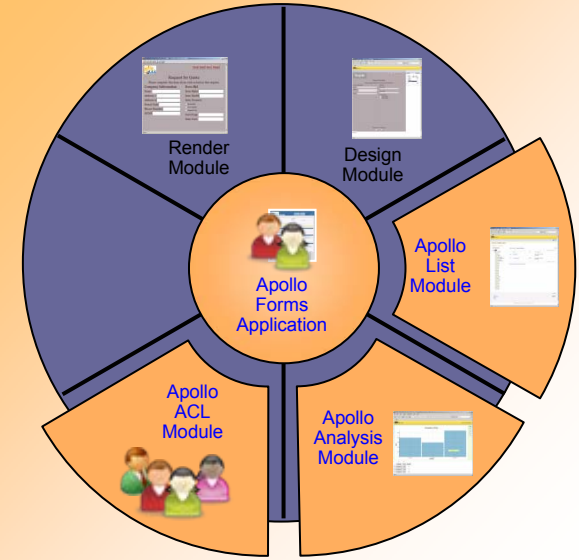


Lotus Forms Services Platform

Improves Quicr's competitive positioning

- Lotus Forms Turbo uses the Quicr repository for form storage
- ACL module is replaced with an implementation that integrates with Quicr login
- List module is replaced with extensions coded into Quicr repository interface

## Apollo



Lotus Forms Services Platform

Extends Apollo with forms use cases

- Lotus Forms Turbo provides forms services in Apollo framework
- ACL module is replaced with an implementation that integrates with Apollo login
- List module is replaced with extensions coded into Apollo repository interface



# Agenda



- The Concept
- ✦ The Lotus Forms Turbo Solution
- Sample Use Case



# The Lotus Forms Turbo Solution - Design

## Lotus Forms Turbo Design

- A pure Web 2.0 designer
  - No desktop software required
- Supports a simplified set of forms widgets
- Can be used with no training
- Publishes directly to Lotus Forms Turbo Repository
- Produces limited XForms/XFDL documents`
  - Pre-defined layout models
  - Single page only
  - Signatures cover whole document
  - Limited calculation/validation support



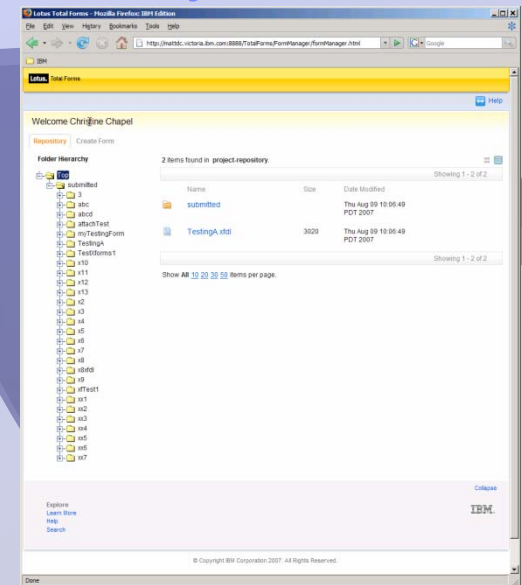
Lotus Forms Turbo is composed of modules that can be used together or independently to forms enable product offerings.

Design Module

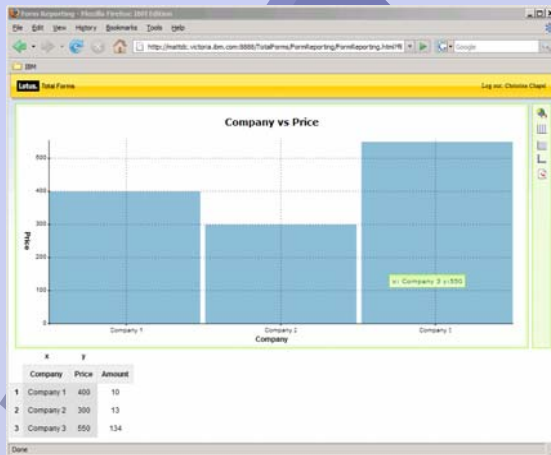
# The Lotus Forms Turbo Solution – Store and Analyze

## Lotus Forms Turbo List

- Allows forms to be saved
  - Submitted forms are collected in sub-directories
- Provides interface to:
  - Create forms (through Lotus Forms Turbo Designer)
  - Delete forms
  - Preview forms (through Webform Server)
  - Graph submitted forms (through Lotus Forms Turbo Reporting)
- Form URLs can be directly exported to email
- Form submissions can be tracked using ATOM protocol



List Module



Analysis Module

## Lotus Forms Turbo Analysis

- Graphs aggregated data from a directory of submitted forms
  - Provides a variety of graph types:
    - Line, Area, Bar, Scatter, Bubble, etc.
  - Leverages Dojo graph widget
- Provides simple data aggregation
- Allows any two form fields to be used as X and Y axis
- Graph data can be exported to spreadsheet for further analysis

# The Lotus Forms Turbo Solution – Render and Route

## Lotus Forms Turbo Routing

- Processes are created using a simple “Routing Slip” metaphor
  - Processes can be created by any user with no training
  - Process can be created ad-hoc or prescribed by an administrator
  - Processes can be saved, reused and shared
  - Slips can be cascaded to form multi-stage processes
- Email/Sametime and Web 2.0 used as delivery vehicle
  - Any user with Web access and MIME/HTML enabled email or SameTime can participate in a process
  - Active Sametime users can receive priority task notification

Request for Quote

Please complete this form if you wish to bid on this request.

Company Information	Item Bid
Name	Item Make
Address-1	Item Model
Address-2	Item Features
Postal Code	<input type="checkbox"/> Networkable
Phone Number	<input type="checkbox"/> Color Capable
DUNS	<input type="checkbox"/> Integrated Fax
	Cost/Copy
	Item Cost

Render Module

Personal Business Assistant

Who do you want this to go to?

- James Kirk/CanWest/IBM
- Spock/CanWest/IBM
- Christine Chapel/CanWest/IBM

What do you want them to do?

Approve Sign Vote  
Comment Complete

Notes:  
Please review this admission and approve it at your earliest convenience.  
Thanksl - Leonard

When do you want it done by?

By March 12, 2007 at 3:00 PM  
If there is no response by March 10, 2007 at 1:00 PM  
Remind them every 10 hours for 10 hours

Where do you want it to go next?

Route this message to someone else.  
We're done.

Previous Next

Routing Module

## Lotus Forms Turbo Render

- Based on WebForm Server
  - A Web 2.0 form view environment
  - Supported on Windows (IE/FireFox) and Macintosh (FireFox)
    - Safari supported in V1.1 release
  - Supports real-time (no-refresh) calculations and formatting
  - Supports authenticated click-wrap signatures
    - PKI signatures can be supported with upgrade

# Agenda



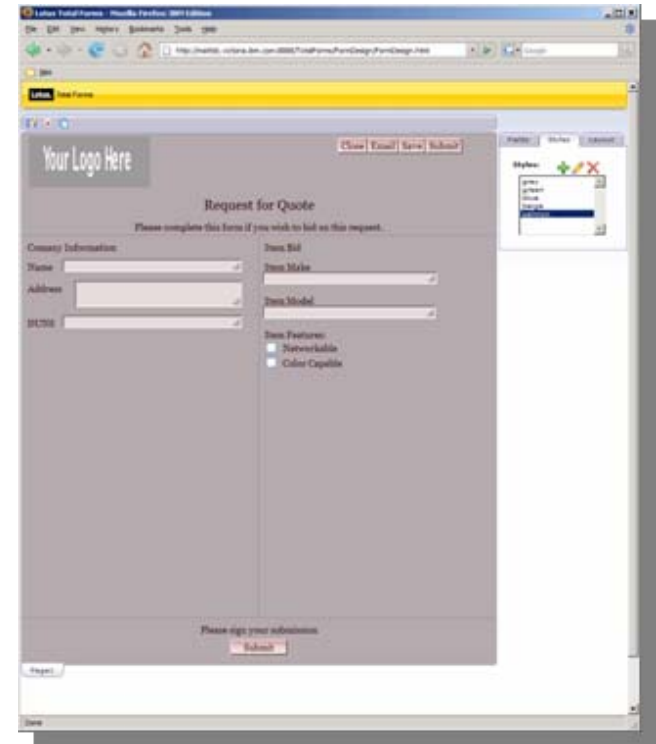
- The Concept
- The Lotus Forms Turbo Solution
- ✦ Sample Use Case



# Sample Use Case

## 1 The Purchasing Agent for a 200 person distribution company orders a new copier

- The Lotus Forms Turbo designer is used to create an RFQ to solicit bids on the purchase
  - A description of the item being sought
  - Basic information (company name, address, etc.)
  - Key features on the copier being proposed
  - The cost of the copier
  - An “enclose” button to allow product information to be attached
  - A button for the vendor to sign the form



The screenshot shows a web browser window with a 'Request for Quote' form. The form is titled 'Request for Quote' and includes a sub-header 'Please complete this form if you wish to bid on this request.' The form is divided into several sections: 'Company Information' with fields for Name, Address, and City/State; 'Item Bill' with fields for Item Make and Item Model; and 'Item Features' with checkboxes for Networkable and Color Capable. A 'Submit' button is located at the bottom of the form. The browser's address bar shows a URL starting with 'http://localhost:8080/lotus/forms/PortGroup/FormDesign.html'.



- The RFQ form is saved into a new folder in the Lotus Forms Turbo repository
  - The purchasing agent copies the URL to the form into an email message
  - The email message is sent to a list of potential suppliers



# Sample Use Case

1

## A supplier responds to the RFQ

- The supplier receives an email containing a link to an RFQ
- The supplier clicks the link and retrieves the form in a browser (zero-footprint)
- The supplier completes the RFQ form with the necessary information

A screenshot of a web browser window showing a "Request for Quote" form. The browser's address bar shows "http://watt1dc.victoria.ibm.com:8080". The form has a header with the IBM logo and the text "Request for Quote". Below the header, there are buttons for "Close", "Email", "Save", and "Submit". The form is divided into two columns: "Company Information" and "Item Bid". The "Company Information" column includes fields for Name, Address-1, Address-2, Postal Code, Phone Number, and DUNS. The "Item Bid" column includes fields for Item Make, Item Model, Item Features (with checkboxes for Networkable, Color Capable, and Integrated Fax), Cost/Copy, and Item Code. A large red '@' symbol is overlaid on the form, indicating an email attachment.

- A product brochure (in PDF format) is attached to the form
- The supplier digitally signs the form

- The RFQ response is submitted
- A thank-you page is returned acknowledging the submission

# Sample Use Case

## The Purchasing Agent purchases the copier

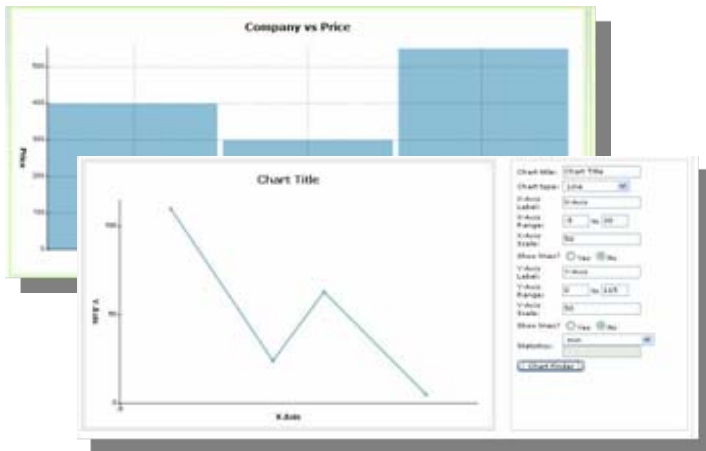


- The Purchasing Agent has been monitoring the RFQ responses using an ATOM feed
- Once all the responses are in, the agent navigates to the repository of submitted responses
- Once in the repository, the Agent chooses to graph the suppliers by the submitted price
- A decision is made and the copier is purchased



## Later, a computer is purchased...

- The Purchasing Agent now needs to purchase a computer
- The copier RFQ is duplicated and re-named appropriately
- After a few minor modifications, the new RFQ is sent out to a list of computer suppliers
- The purchasing process completes as above





# Questions?





# Backup Slides



## Potential Future Directions:

## Future Direction

## Data connectivity

- Drive form creation from data sources
  - Spreadsheets
  - Simple RDBMS
  - Web service definitions (WSDL)

## Support for common e-commerce services

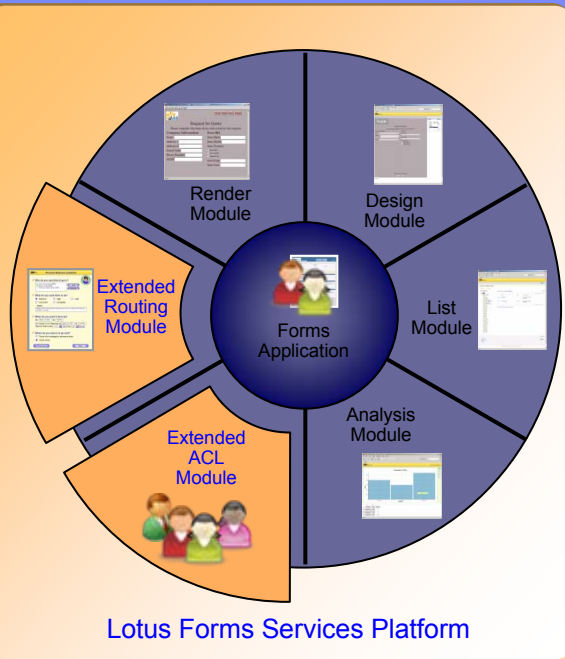
- Credit card payment Service
- Electronic funds transfer
- Shipping and tracking service
- Email validation

Integrate workflow/routing engine to provide complete user-driven process definition

User UI personalization (skins)



## Extended Ad-Hoc Workflow



### Lotus Forms Turbo with extended workflow/routing capability

- ACL module is integrated with workflow's access control system
- Routing module creates ad-hoc processes in workflow engine

## Lotus Workflow and Lotus Forms Turbo:

- Lotus Forms Turbo routing can be extended to provide complete ad-hoc routing
  - Provide integration to formal BPM initiatives
  - Support extensible automated tasks
  - Allow processes to be shared within a community
  - Underlying workflow could be implemented with Lotus Workflow, Process Server or FileNet P8 Workflow
- Concept has been proven using Lotus Workflow in CDSL
  - Would require some investment in Lotus Workflow
    - to ACL mechanism to allow non-notes users to participate ("beyond the firewall")
    - Some improvements in LF API may also be required to support ad-hoc model
- Other Workflow engines should also be considered.

*Once released, Lotus Forms Turbo would benefit from more complete extended ad-hoc workflow functionality.*



# Questions

