

# IBM Software Demos

## IBM Workplace Forms

### IBM Workplace Forms Demo Narration

#### 1a <00:05>

IBM Workplace Forms is a powerful electronic forms solution that provides an intelligent, dynamic, and security-rich front end to an organization's on demand processes.

#### 1b <00:17>

Alice Sheen is a customer of Open Financial Network. She is looking to obtain a home improvement loan and is at a bank kiosk discussing options with a financial advisor by video phone.

#### 1c <00:31>

Alice logs in to Open Financial Network's internet portal where she and her advisor view her account information and apply for a home improvement loan.

#### 2a <00:42> Branch Information screen

Open Financial Network used the drag and drop WYSIWIG (pronounced WIZ-ee-wig) features of IBM Workplace Forms Designer to easily create the loan application form. The IBM Workplace Forms Viewer is used to display the electronic form and manage the interaction with the customer.

#### 2b <01:01> Applicant Information screen

Using web services integration, the Workplace Form is pre-populated with Alice's contact information from her client file. Alice is able to edit and add new information by following the wizard-based interface that guides her through the application process.

#### 2c <01:18>

Sophisticated business rules ensure the accuracy and completeness of the data entered throughout the process, and enable a dynamic user experience. Since these rules are contained within the Workplace Forms document, a user can enter data and access the form application online or offline.

#### 2d <01:40> Guarantor screen

Based on the amount of her loan, the business rules inside the form require Alice to provide a guarantor. In addition to the one on file, she adds a new guarantor. The intelligent form automatically identifies required data and checks user input for correct data types. The presence of business rules and automatic data validation vastly reduces the occurrence of common data entry errors and incorrect form submissions.

#### 2e <02:11> Loan Information screen

IBM Workplace Forms present the look of traditional paper forms within a single XML document, populated automatically with correct customer data. Workplace Forms also enable the easy attachment of supporting documents, to provide a single comprehensive file for efficient processing and storage.

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<<TRANSITION>>

3a <02:34>

Once all required information has been entered, Alice is able to view and digitally sign the loan agreement form.

3b <02:44>

Workplace Forms support a variety of signing technologies. Users can digitally sign any portion of a form, creating a secure, compliant and tamperproof record of the transaction. The form can also include multiple role-based overlapping signatures to fit a variety of workflow and approval processes.

3c <03:06>

Alice signs the form with the digital signing pad at the bank kiosk, and submits the application.

3d <03:16>

When the IBM Workplace Forms Server receives and processes the form, Alice receives a confirmation message and logs out of the portal.

3e <03:26>

IBM Workplace Forms is the perfect solution for moving from paper-based to intelligent electronic processes. By automating forms-based processes, organizations in many industries can streamline workflow, enhance productivity, and implement security-rich forms applications that address compliance issues.