

IBM Software Demos Lotus Expeditor and Lotus Forms

IBM Lotus Expeditor and IBM Lotus Forms Demo

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This demonstration shows the forms processing capabilities of IBM Lotus Forms and IBM Lotus Expeditor software. Lotus Forms provides an open electronic forms solution that supports on- or off-line processing. Lotus Expeditor can reduce the development effort needed to manage offline forms, and enables electronic forms to be components in composite applications.

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While these capabilities can be used in many industries and applications, this demonstration is based on a banking scenario.

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Mike Taylor, at JK Bank, uses an application based on IBM Lotus Forms and IBM Lotus Expeditor in his job as a teller. Using offline processing capability allows him to complete complex forms more quickly, giving him time to sell new services to his customers.

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Mike logs in to the "JKBank" application. This standard Java EE web application runs in an embedded Web container provided by the Lotus Expeditor client and eliminates the need for an Internet connection. It is a composite application in which a forms viewer is aggregated into the Expeditor workbench and displayed in a single integrated view.

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His first customer, John Doe, wants to wire \$5000 to another bank, so Mike selects the form needed to conduct the transfer.

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Electronic forms are used as the front-end of JK Bank's on demand business processes. These forms are created and completed using Lotus Forms. This software delivers an intelligent, dynamic and security-rich electronic forms solution that presents the look of traditional paper forms within a single XML document.

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As Mike enters the required information, sophisticated business rules within the form help ensure the accuracy and completeness of the data provided here and throughout the process.

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Mike now invokes a web service to retrieve the customer's account information, in order to confirm that John's account balance will cover the transaction. As he does this, an automatic message alerts him that this customer is eligible for other JK Bank services.

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To comply with bank policy, Mike shows John the Wire Transfer Disclosure Statement.

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With all steps completed, Mike submits the form.

<2:38>

Since Mike is in offline mode, Lotus Expeditor software holds an encrypted version of the submitted form in its local database until he returns online. Lotus Expeditor reduces the user's need to manage offline forms and ensures

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that forms are delivered to the server once and only once. This helps minimize the risk of error in the submission and delivery steps.

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With the initial transaction complete, Mike now has the opportunity to cross-sell other bank services. He informs John that JK Bank has a low interest rate offer for customers who refinance their mortgage and purchase life insurance at the same time.

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John is interested, so Mike opens a Mortgage Pre-Approval form.

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The intelligent form indicates the required fields and automatically checks input for acceptable values.

<TRANSITION>

<3:36>

Later, when all the information is entered, Mike and John finalize the Mortgage Pre-Approval form.

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This forms application incorporates digital signatures and Lotus Forms supports a variety of signing technologies. Users can digitally sign any portion of a form, providing a more secure, compliant and tamperproof record of the transaction.

<4:00>

With the newly submitted form stored locally, Mike continues to work with John to complete a Life Insurance application.

<4:07>

The form Mike needs is not currently on his desktop, but he knows that the electronic form – unlike a paper form -- will always be in stock and easy to locate. It will also be easy to use because it will have the look and feel similar to other forms used at the bank.

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Here, Mike browses to find the insurance form and then imports it from his local disk into his application desktop.

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When he returns to the forms page, he sees the new entry in his “New Forms” list.

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On the first page of the insurance application form, he enters information about John, including his name, address and phone number.

<TRANSITION>

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Since Mike indicated earlier that John is both the insured and the policy owner, this intelligent form automatically populates fields on the “Owner” page with values from the first page.

<5:07>

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Finally, they arrive at the completed application form, containing all information entered on the earlier pages.

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At this point, the insurance form has been successfully submitted, but is still stored locally.

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Mike now reconnects to the network, and Lotus Expeditor automatically sends this and other forms to the server with a single replication step.

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Once the forms are successfully transmitted to the server, an acknowledgement message and confirmation code are returned to the client for each form.

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Offline processing capability saves time by eliminating the need for repeated interactions with the server while forms are being completed.

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Mike also has the option to reopen Draft forms and continue to work on them, or delete them if they are no longer needed.

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This application - enabled by Lotus Expeditor and Lotus Forms software - has enabled Mike to satisfy his customer's request quickly and efficiently, and then seamlessly cross-sell additional bank services. These IBM software solutions combine to form the foundation for integrated applications that help businesses increase flexibility and responsiveness, while improving customer service.

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