

IBM Software Demos Lotus Forms and Lotus Notes and Domino

IBM Lotus Forms and Lotus Notes and Domino Demo

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IBM Lotus Forms helps businesses improve customer satisfaction and reduce costs by enhancing and extending IBM Lotus Domino applications. Lotus Forms streamlines business processes while improving access to accurate and timely data through Lotus Notes views and Domino applications.

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In this demonstration, we will see how a bank uses Lotus Forms with Lotus Notes and Domino to manage their mortgages. First, a loan officer uses the Notes client to access a customer list and view the information for customer Mary Black. This information, including Mary's e-mail address, is currently stored in a Domino database.

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Lotus Forms extends Domino's collaborative, workflow-driven environment beyond the enterprise with intelligent open standards-based electronic forms that integrate Domino information with customers, suppliers, partners and employees.

<TRANSITION TO BROWSER VIEW>

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Here, Mary Black applies for a mortgage. After authenticating with the bank's Domino-hosted web site, she is presented with a mortgage application form. This form is rendered in the Lotus Forms Viewer.

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Integration with Lotus Forms enables Lotus Domino to deliver intelligent forms that encapsulate business rules and data, providing users online and offline access to pixel-precise forms.

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Mary's mortgage application form is pre-populated with her personal information from the bank's Domino server. She corrects her e-mail address, which in turn is updated on the server. Domino will also propagate this information to other core banking systems as needed.

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Lotus Forms provides a personalized experience using data-driven wizards based on business rules and user input. The “Mortgage Pre-Approval” form is one such example. These wizards increase user productivity and reduce overall costs by streamlining business processes, reducing data errors, and eliminating manual reentry of data. And by extending Domino with Lotus Forms, companies can render pixel-precise representations of paper-based forms for compliance, and also maintain and store transaction records in a Domino database as a system of record.

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Lotus Forms present the look of traditional paper forms in a single document. The open standards-based technology powering the Lotus Form accelerates the integration of Domino-based form data with other enterprise data repositories, content and document management systems, and workflow environments. Also supported is the easy attachment of supporting documents, to provide a single comprehensive file for efficient processing and storage.

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Lotus Forms supports a variety of signing technologies, and allows users to digitally sign any portion of a form at the field, section, page, or document level. It creates a secure, compliant, and tamperproof record of the transaction, to satisfy audit requirements. A form can also include multiple role-based overlapping signatures to fit a variety of workflow and approval processes.

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Mary completes the signature and submits the mortgage application form to the bank.

<TRANSITION BACK TO NOTES VIEW>

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Once again using Lotus Notes, the bank’s loan officer examines Mary’s customer record and sees that the address change made in the mortgage form is now reflected in the Domino database.

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Mary’s mortgage application form is also saved in a document on the Domino server, where it can be used in views, workflow processes, search tools, and more.

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Here we see the mortgage information in the document and the attached application form, ready to be processed by the bank.

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The integration of IBM Lotus Forms with Lotus Notes & Domino enables organizations to easily make electronic forms available to employees, customers, partners and suppliers, and incorporates forms based data into business processes supported by Domino applications. This integration helps businesses increase efficiency and maximize return on investment.

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