

IBM Software Demos  
Lotus Forms in FileNet P8

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The following demonstration shows the seamless integration of Lotus Forms into the FileNet P8 Workplace. Lotus Forms provides many advantages in security, rule representation and workflow integration for the form filling experience within the FileNet P8 Workplace.

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Mike Smith is a Mechanical Engineer for Renovations. He has received a turbine blade assembly which does not meet the customer's specifications. Mike uses the FileNet workplace to fill out the Equipment Deficiency Report Form.

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The Equipment Deficiency Report form is an integrated Lotus Form within FileNet workplace. It is the key initiator of this FileNet workflow.

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Mike will use the form within a FileNet workflow container, inside the browser window. The Lotus Forms - Webform server integration provides the form seamlessly to the FileNet workflow container, and provides the buttons for Mike to submit the form into the workflow.

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Lets take look at the FileNet workflow the Lotus Form will be used within.

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Mike initiates this workflow with a Lotus Form. After completing the form, it will be routed to Mike's Supervisor for review at the head office.

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The Supervisor can choose to request additional documents from Mike, choose to reject it, or to forward it on to the Inventory Supervisor.

<1:25>

The Inventory Supervisor can choose to launch the supplier sub-workflow or forward the request on to warehousing so a replacement can be issued.

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Mike returns to the Equipment Deficiency Report Form, where he enters his name and phone number. Lotus Forms provides formatting rules to protect against invalid field entries. When Mike enters the incorrect phone number

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format, a message window appears to provide him guidance to correct the invalid entry.

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Mike fills out the remaining fields.

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Lotus Forms easily represents business rules within the form. When Mike checks the Purchased Third Party Component check box, the form will enable additional fields for him to fill in.

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Lotus Forms has the ability to attach data and images directly to the form. Mike attaches a picture of the defective turbine blades from his investigation.

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Next, he enters the preliminary notes for the corrective action. He uses a productivity feature of Lotus Forms, which recognizes a star character in the date field to represent the current date. He then digitally signs the form. The signing the form places a digital 'lock' on the information that Mike has entered, providing a secure and tamper proof record of the data.

<3:00>

In his final step, Mike uses the Launch button on the FileNet toolbar to submit the form to the workflow.

<3:19>

Mike's Supervisor, Daphne signs into the FileNet workplace and finds the equipment deficiency report workflow task in her inbox.

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When she opens the task, she is presented with a different set of options on the FileNet toolbar. Daphne can review Mike's report; however, since it has been signed by Mike, she can't make any modifications.

<3:40>

She navigates to the second page of the report where she enters her information into the Case Notes field, and adds corrective actions into the table. Using a powerful feature of Lotus Forms which dynamically adds fields on the fly, Daphne simply clicks the 'plus' button on the table to add another row.

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<4:04>

Daphne chooses to send the request to the Inventory department to replace the part. She digitally signs the second page of the form, and then selects the FileNet dispatch button to send the form to the Inventory Supervisor.

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When the Inventory Supervisor checks his task list, he notices the 'Equipment Deficiency Report' item. He opens the form to review the information and then sends the Report on to Warehousing which will supply the part to Mike.

<4:45>

In the final step of the workflow, the Warehousing Manager checks his tasklist and finds the waiting task from the Inventory Supervisor. He opens the form to review the information and identifies the request for new turbine blades. He knows the part is in stock so he is able to close out the workflow by selecting 'Complete'.

<5:06>

This demonstration has illustrated the integration of Lotus Forms into the FileNet P8 Workplace. Lotus Forms provides the ease of use to increase productivity in a security rich form filling experience, all within a standard internet browser.

**END**