

## IBM Workplace Forms Viewer

### Highlights

- **Dynamic, data-driven forms viewer provides a customized user interface based on defined business rules and real-time user input**
- **Wizard-based user interface easily guides users through complex forms, helping to improve user adoption while coexisting with legacy forms systems**
- **Role-based forms integrate with workflows by maintaining persistent data, business rules and information within the form with minimal need for any server connectivity**
- **Digital signature capabilities enable multiperson workflows and address security, while facilitating audits and compliance**
- **High-performance forms with offline capabilities help improve productivity and can produce significantly smaller file size than many other forms programs**
- **Open-standards-based forms ease integration of information and help reduce total cost of ownership**

John Cook - PAGE 1

PE Insurance  
Personal Life Insurance

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PureAssure Life Insurance APPLICATION FOR LIFE INSURANCE AND MEMBERSHIP PART I

1 PROPOSED INSURED GTF NO. [ ]

First	Middle	Last	Soc. Sec. #
John		Cook	513-87-8348

Street Address (Residence of Proposed Insured)  
345. Basem Road

City	State	Zip	Country
Seattle	WA	98433	United States

Mailing Address if Different from Residence (If Rural Route give Box #)

Sex	Date of Birth	Age Now	Rating Age	Birth State	Phone#	Day	Eve
M	Mo: 2 Day: 20 Yr: 1998	7	C	WA	(360) 867-2348		(360) 868-8989

2 ADULT APPLICANT

First	Middle	Last	Soc. Sec. #
Peter	S	Cook	513-84-6348

Street Address (Residence of Adult Applicant)  
345. Basem Road

City	State	Zip	Occupation and Duties
Seattle	WA	98433	Manager

Date of Birth	Age	Relationship to person in #1: Partner	Phone#	Day	Eve
Mo: 3 Day: 19 Yr: 1998	39	If legal guardian, forward copies of guardianship papers	(360) 867-2348		(360) 868-8989

3 LIFE INSURANCE

BASIC BENEFITS Grandparent Gifting  Yes  No

### E-forms address challenges faced by organizations

Organizations today are faced with increasing pressure to improve efficiencies, reduce costs and operate within strict industry and government regulations. To be successful, organizations must enhance

and extend their operational capabilities, while simplifying and unifying information management processes. Organizations need to sharpen their focus and improve access to information to equip them for faster and better decision making.

The automation of forms-based processes has been recognized as a high priority for organizations across all industries including government, insurance and banking. IBM Workplace Forms™ products help organizations to address security and compliance issues, while helping improve efficiencies and reduce operational costs.

**Workplace Forms Viewer helps improve productivity and streamline workflows**

IBM Workplace Forms Viewer is a feature-rich desktop application used to view, fill, sign, submit and route e-forms from the desktop or within a browser. Enabling disconnected as well as fully connected offline usage, Workplace Forms Viewer enables real-time integration using Web services. The open-standards framework of IBM Workplace Forms enables Workplace Forms Viewer to operate in portal or stand-alone environments and as a plug-in for thin or rich-client browsers.

**Key features**

*Helps streamline workflows and improve efficiencies*

Workplace Forms Viewer automates multiperson workflows by providing role-based signing authority and access to specific form sections. Role-based wizards enable users to efficiently move through the form filling process, helping increase accuracy and improve efficiency. Forms can be routed via any document transport mechanism, such as e-mail, or forms can be routed by existing workflow systems. Data is validated on the client side instead of requiring roundtrips to the server—making forms easy to use and faster to complete.

*Helps improve user productivity with advanced usability features*

IBM Workplace Forms Viewer includes advanced features such as drag-and-drop functionality, spell checking and “smart-fill” capabilities that help reduce duplication of data entry, increase the usability of a form, minimize errors and form completion time, and improve user adoption. A dynamic user interface makes form completion easy and ensures a customized but consistent user experience.

*Helps improve performance with smaller file sizes*

IBM Workplace Forms Viewer helps increase performance speed by producing file sizes that can be dramatically smaller than those provided by proprietary formats. Smaller file sizes contribute to faster download of forms from Web sites and quick loading, navigation and submission of forms.

*Helps organizations to address compliance and security concerns*

With support for multiple signature technologies (including public key infrastructure [PKI] and non-PKI based solutions) and signature pads, IBM Workplace Forms Viewer creates robust, security-rich, auditable records of an entire form or sections within a form. End users can attach multiple files directly to a form to create one complete, security-rich file for a transaction. Workplace Forms Viewer addresses regulatory compliance issues with pixel precision presentation that ensures that a form is an exact replica of existing paper forms. Forms are accessible to a wide range of users in accordance with government accessibility regulations.

## **About IBM Workplace Forms**

IBM Workplace Forms provides a security-rich, dynamic and intelligent front end to On Demand Business processes. The IBM Workplace Forms product family consists of IBM Workplace Forms Server, IBM Workplace Forms Designer and IBM Workplace Forms Viewer, that enable the creation, deployment and streamlining of XML forms-based processes. By leveraging open standards to integrate an intelligent user interface with high value, back-end systems, IBM Workplace Forms provides public and private sector organizations with compliant, security-rich forms that leverage existing sources and systems to better serve customers and increase operational efficiency.

By automating the accurate capture and processing of information, IBM Workplace Forms reduces manual intervention, speeds up transactions and increases operational efficiency. Workplace Forms enables organizations to achieve a “once and done” process by eliminating costly exception handling and enabling

straight-through processing of transactions using open standards for data integration.

Built on open-standards-based component architecture, IBM Workplace Forms provides the forms front end to service-oriented architecture (SOA)-based component applications. In addition, Workplace Forms enables integration and deployment with IBM middleware and other standards-based products by supporting JSR-168, JSR-170, Java™ 2 Platform, Enterprise Edition (J2EE), as well as Web services.

### **How IBM Workplace Forms integrates with IBM products**

IBM Workplace Forms adds value to the IBM® Workplace™ family of products, while providing opportunity to extend e-forms across IBM's broader portfolio of software solutions for On Demand Business through tight alignment with IBM Workplace, IBM WebSphere® and IBM DB2® offerings. IBM Workplace Forms provides a security-rich, dynamic front end to business processes, enabling process automation that leverages the major

components of a complete On Demand Operating Environment, including portals, content management repositories, workflow, records management and Java application servers.

IBM Workplace Forms adds value to IBM Workplace, WebSphere, IBM WebSphere Portal, IBM Lotus® Notes® and Lotus Domino®, and IBM DB2 Content Management software by automating forms-based processes through new capabilities such as offline processing, digital signing of multipart forms, attachment handling and inclusion of easy-to-use, wizard-based forms. IBM Workplace Forms revolutionizes IBM's support for open-standards, forms-based processing using XML. In addition, IBM Workplace Forms complements industry solutions by offering industry aligned, forms-based solutions to address business problems faced by a variety of industries including government, insurance, banking, healthcare and manufacturing.

### **For more information**

To learn more about IBM Workplace Forms, visit:

**[ibm.com/software/workplace/forms](http://ibm.com/software/workplace/forms)**



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