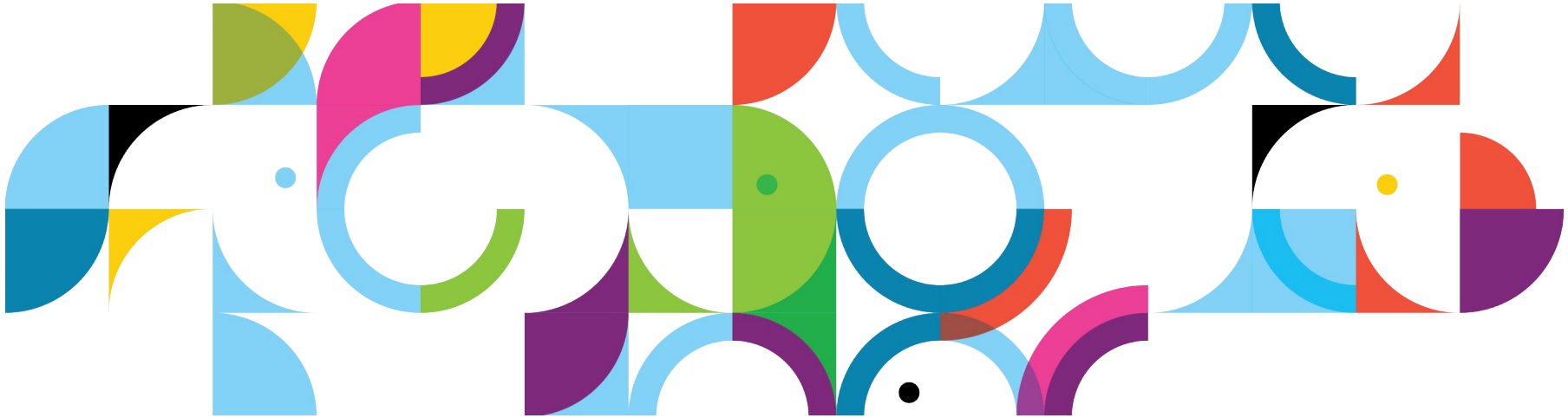
IBM Forms Experience Builder

Bernd Beilke

Digital Experience Solutions Architect



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Introduction

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Web forms are part of an engaging experience

Natural part of the page – no plug-ins required

Highly dynamic and fit with site's navigation approach

Able to communicate with other elements on the page

Takes on the web site look through CSS

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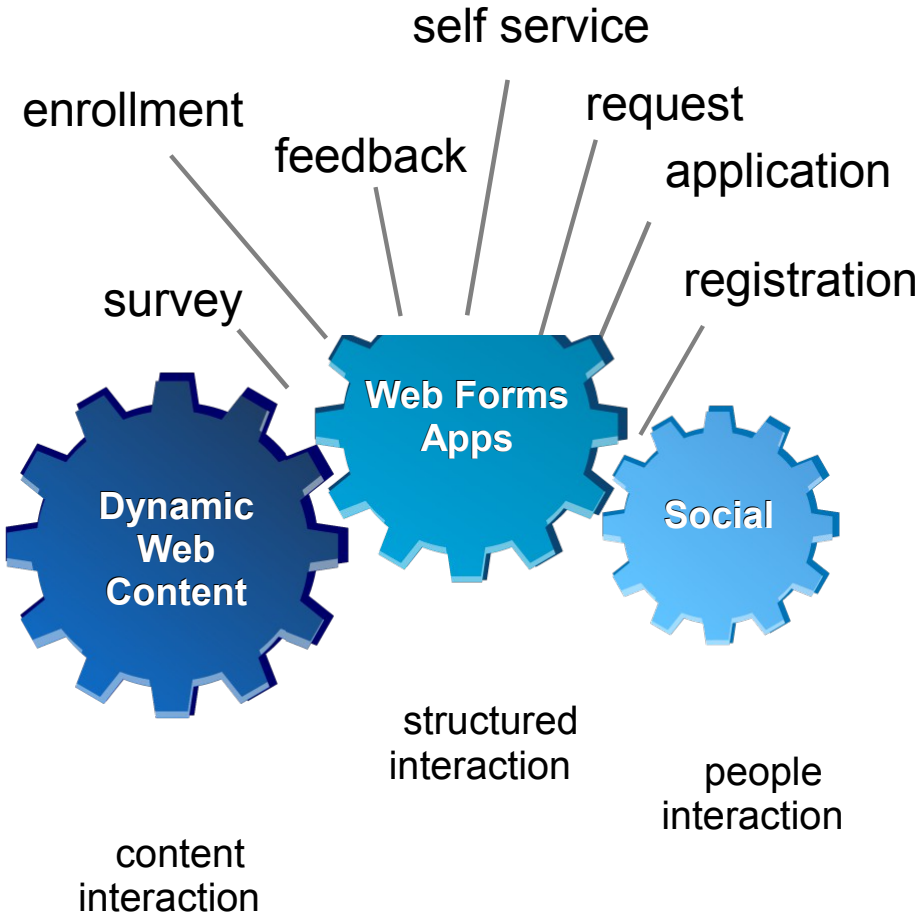
Web forms are one of the interaction patterns

Web Forms are one of the interaction patterns ...

… along with dynamic **Web Content** and **Social**



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Forms technology has evolved...

Paper Forms

Soft Copy
(fill and print)

e-Forms

Phase 1

- Reader/Viewer
- Rules & validation

Phase 2

- Dynamic experience
- Wizards/guides
- Web forms
- Integration

Web Form Solutions

- Easy access to everything you need
- Easy to design
- Easy to deploy
- Automatic database
- Simple access control, workflow
- Fast reporting

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IBM Forms Experience Builder

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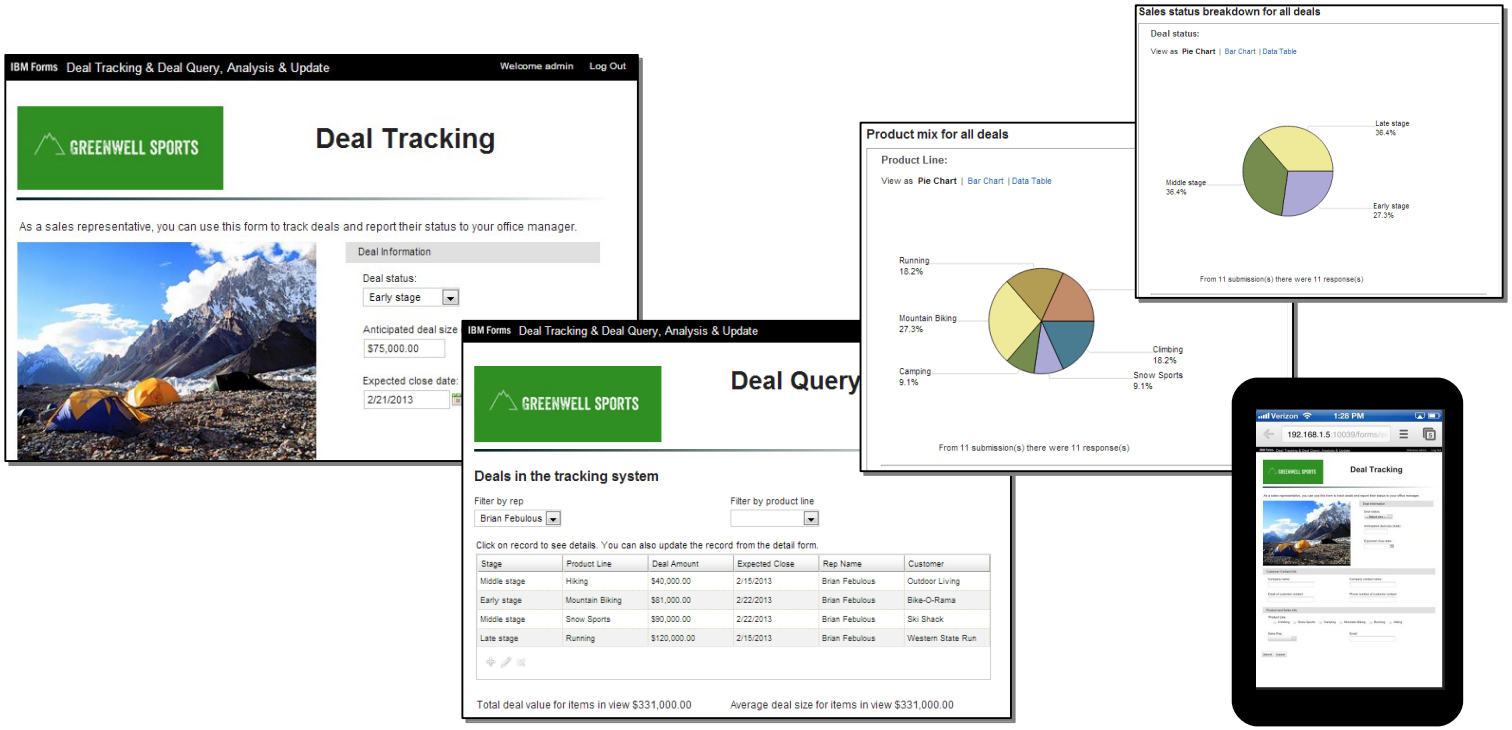
IBM Forms Experience Builder

Lets non-technical users create sophisticated web form applications

- Build complete solutions with database, reports, charting, workflow, notifications, access control and more
- Easily integrate with existing systems and information through a comprehensive service architecture



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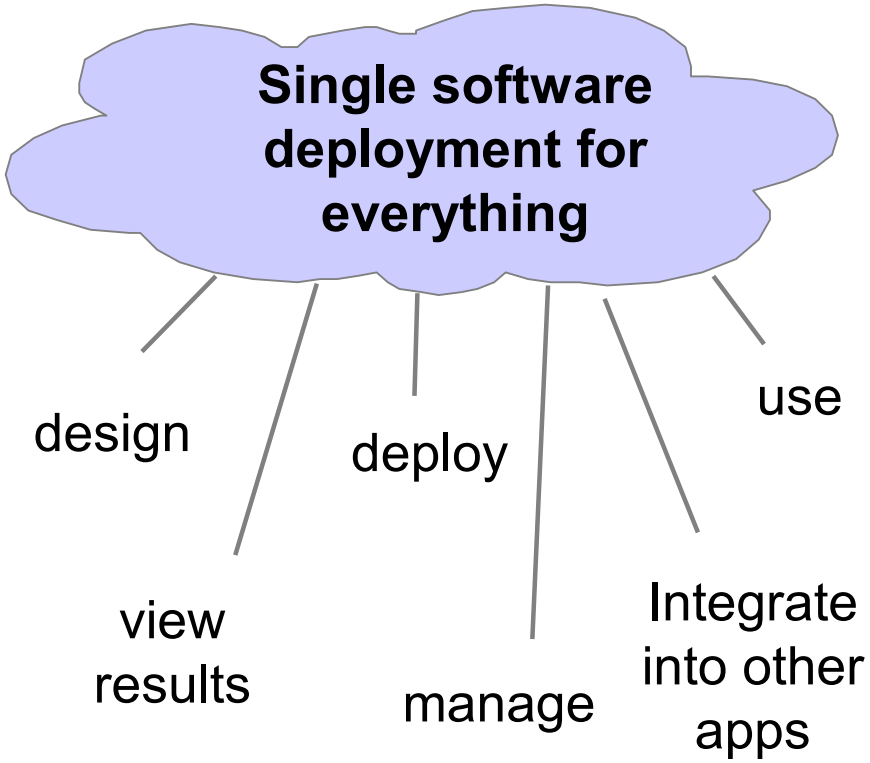
IBM Forms Experience Builder

Based on a Modern Web Architecture



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Business User Creation of Self Service Applications

Easy-to-use web based design tooling

Browser based design

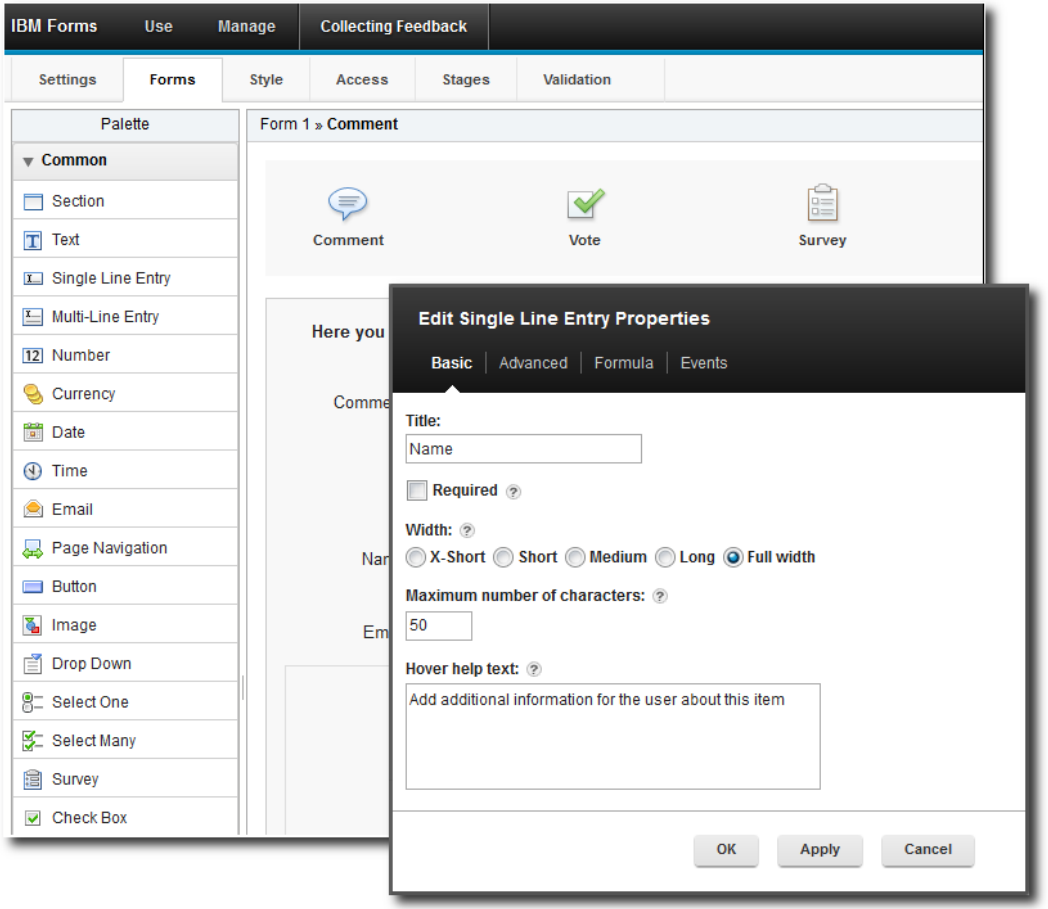
- Full palette of widgets
- Flexible layout using grids & sections
- Graphical rules & formula editor

Rapid development

- Preassembled items with default values
- Automatic binding to data records
- Apply advance features quickly

Familiar techniques

- Drag & drop design experience
- Easy discovery of item properties



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Built in data management, “lists” and visualization

Built in data management and access control

Easy and fast access to results

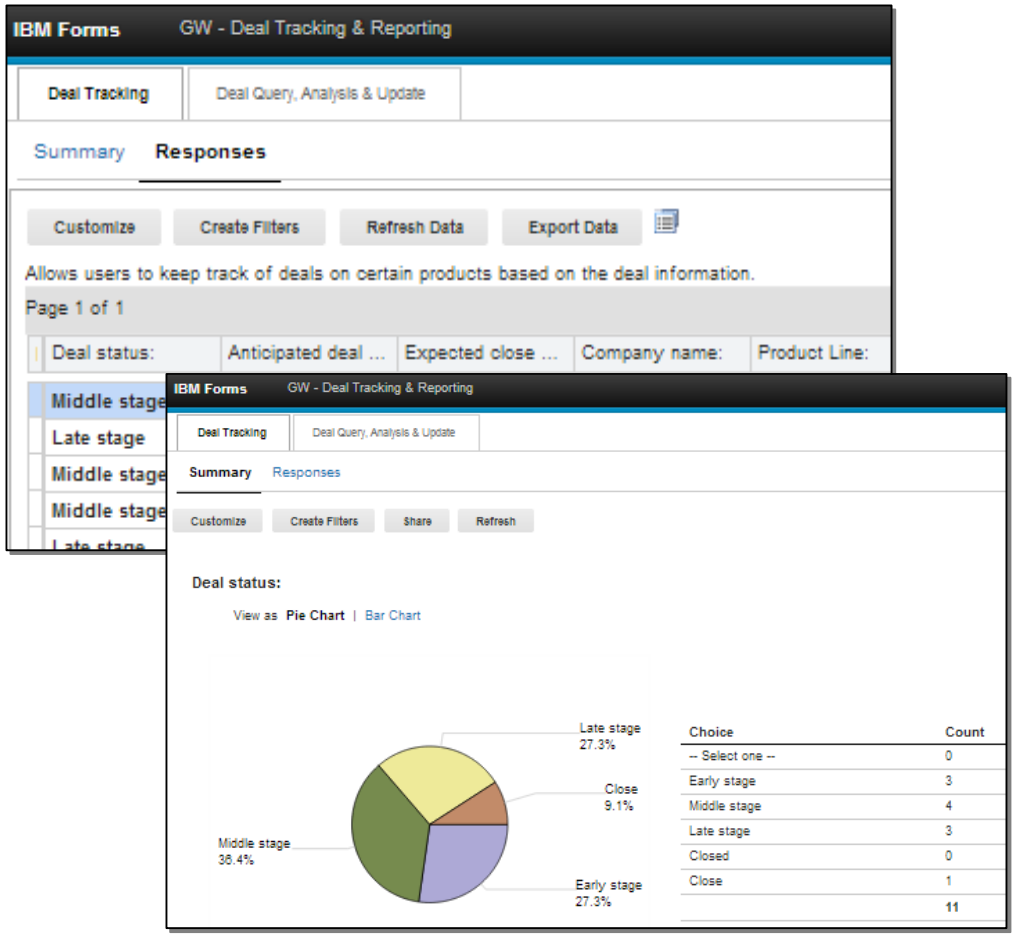
- Lists of captured data
- Search and filter records
- View captured data by form
- See workflow activity as it happens
- Print individual records

Automatic summarization

- Charts
- Summary Tables

Permission based

- Only see records allowed to see
- Roles and privileges
- Generate detailed reports
- Compete assigned tasks



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Dynamic Experiences

Comprehensive set of data capture items, formulas and rules work seamlessly to increase productivity

Rich user interface

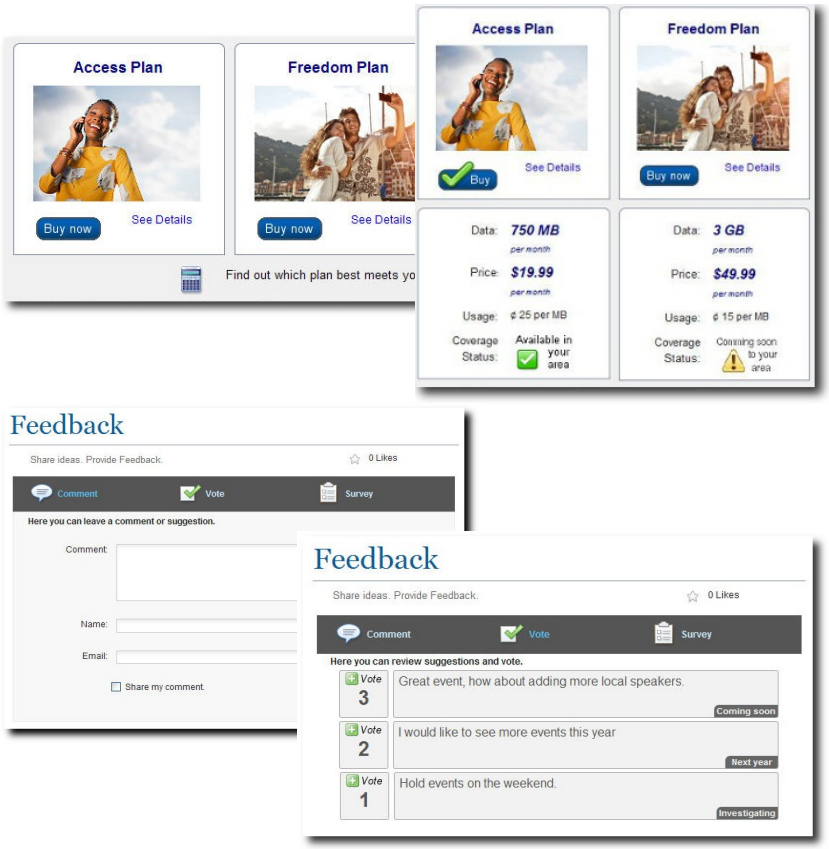
- Create engaging & personalized layouts
- Deepen relationships with dynamic content
- Smart interactions using formulas
- Customization with JavaScript & CSS

Improve customer engagements

- Increase forms completion %
- Improve click through %

Intuitive self-service experience

- Guided interactions with show & hide logic
- Role-based views and actions
- Responsive content using rules



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Workflow and Access Control

Role-based access control and adaptable business processes automate user notifications and approvals

Customized interactions

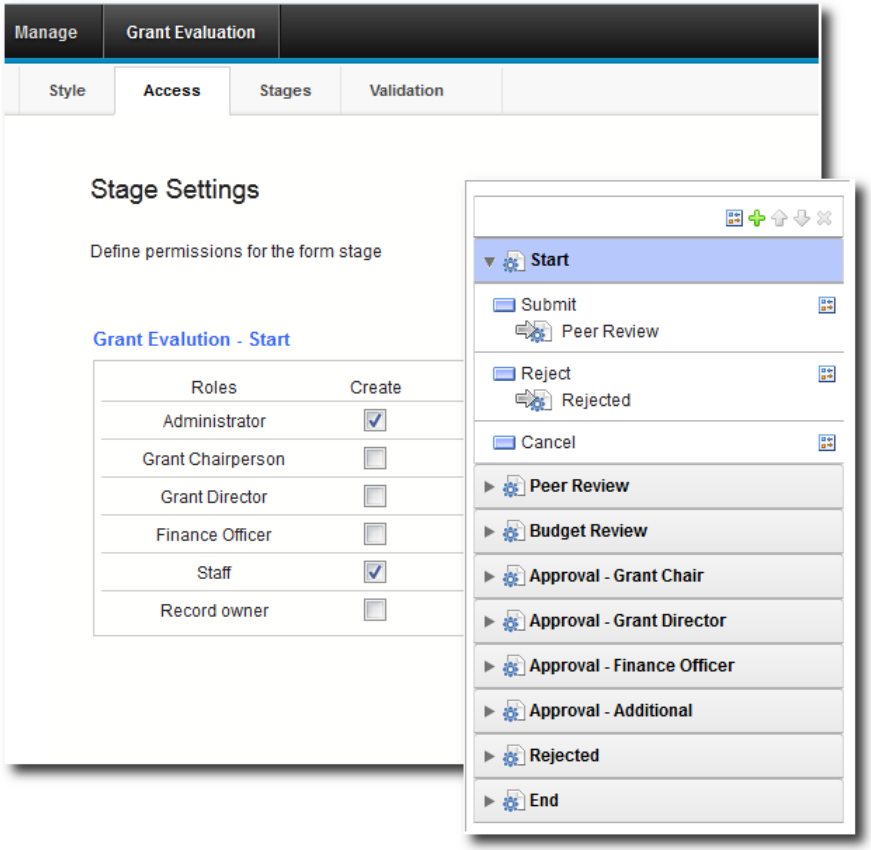
- Guided data capture experience
- User-specific access to form items
- Personalized submission actions

Dynamic experience

- Content show & hide based on role
- Automatic generation of email notifications
- Invoke services at routing steps
- Flexible routing using rules

Quick setup

- Easy to automate routing process
- Simple role & user security assignments



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Demo

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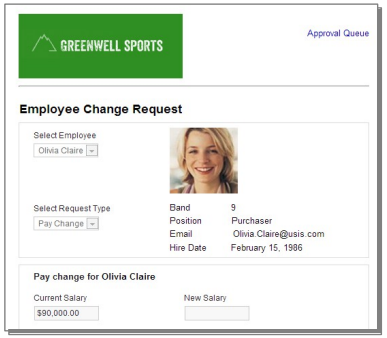
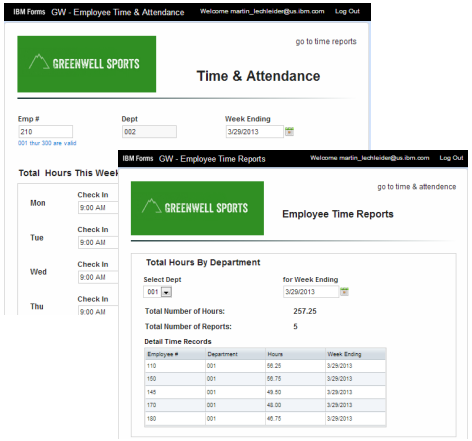
Example Applications

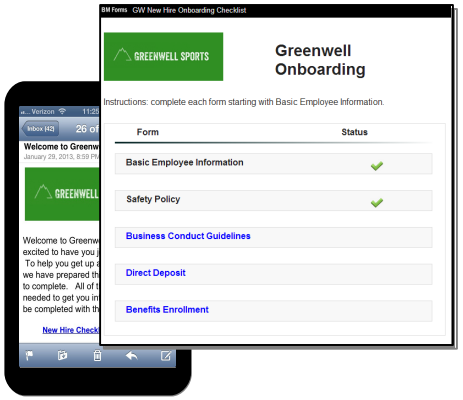
HR Self Service



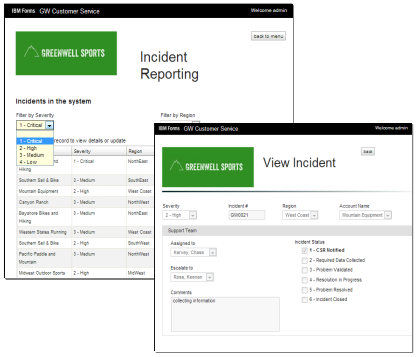
Time & Attendance



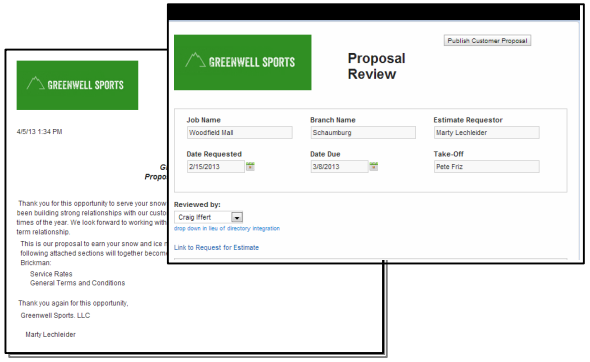
Employee Onboarding



Customer Service



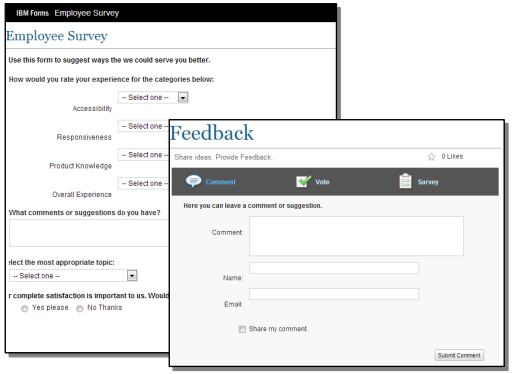
Bid Preparation and Proposal Review



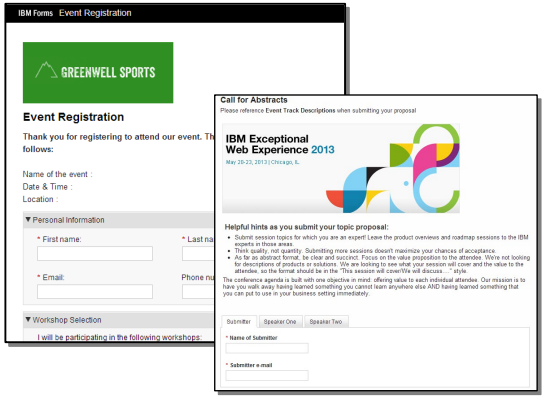
Opportunity Tracking

Example Applications

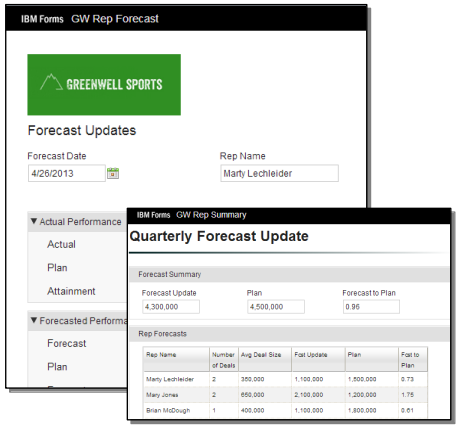
Surveys, Polls & Feedback



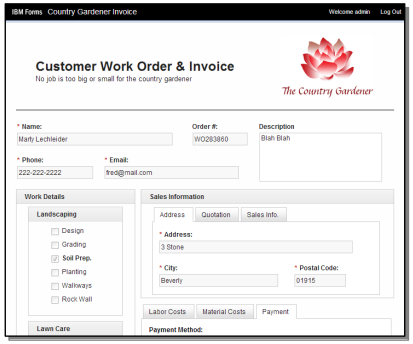
Program & Event Registration



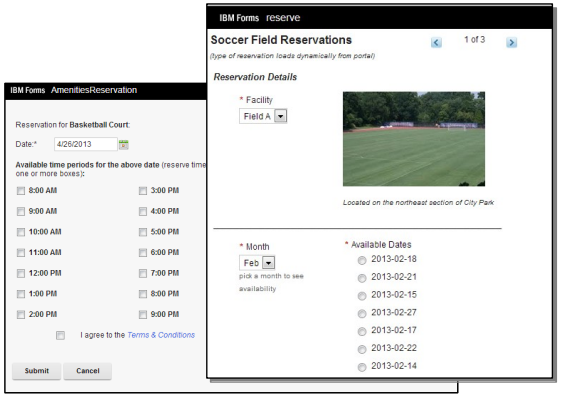
Business Forecasting and Project Tracking



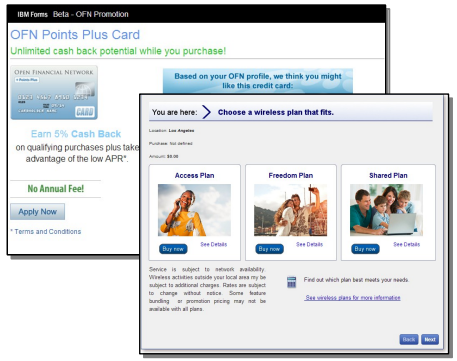
Financial Applications & Transactions



Reservations & Scheduling



Promotional Offers and Campaigns



Add value by integrating FEB into your Web Experience

Capture feedback

- Use surveys and polls to capture customer sentiment

Personalized self service

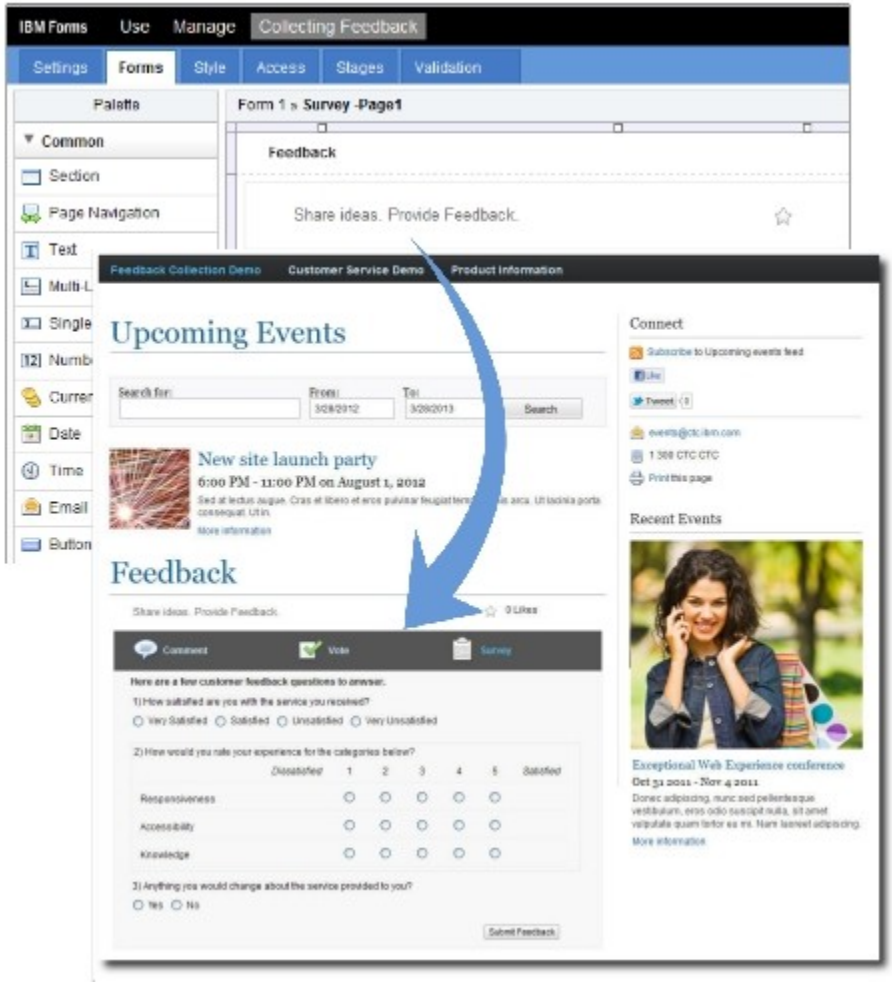
- Integrate with profile information to provide a custom experience
- Integrate with existing systems to provide exceptional self-service

Add offers and campaigns

- Capture new leads
- Engage customers in marketing programs

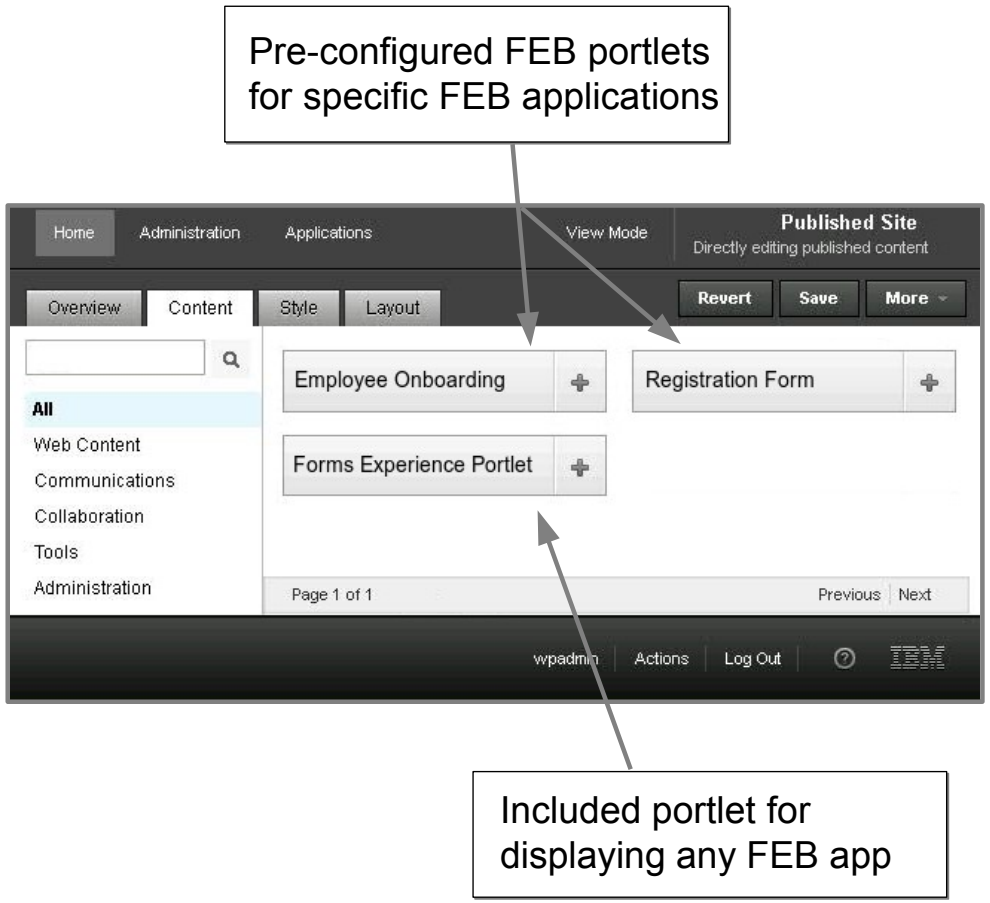
Monitor and track results

- Easy access to results with IT involvement



Integration with WebSphere Portal

- Add one or more FEB application to a WebSphere Portal page
- Pre-configure instances of specific FEB applications for Portal Page Builder
- FEB appps and Charts can also be embedded in the Web Clipping, Web Application Bridge, Rich Text or any iFrame portlets
- FEB web forms and summary charts can be embedded in other web applications with iFrames
  - In HTML pages
  - In Notes Open Social via an iFrame Gadget



New - FEB 8.5 enables community survey experience in IBM Connections 4.5

Survey widgets

- Show list of active surveys
- Display featured surveys
- View featured results

✔

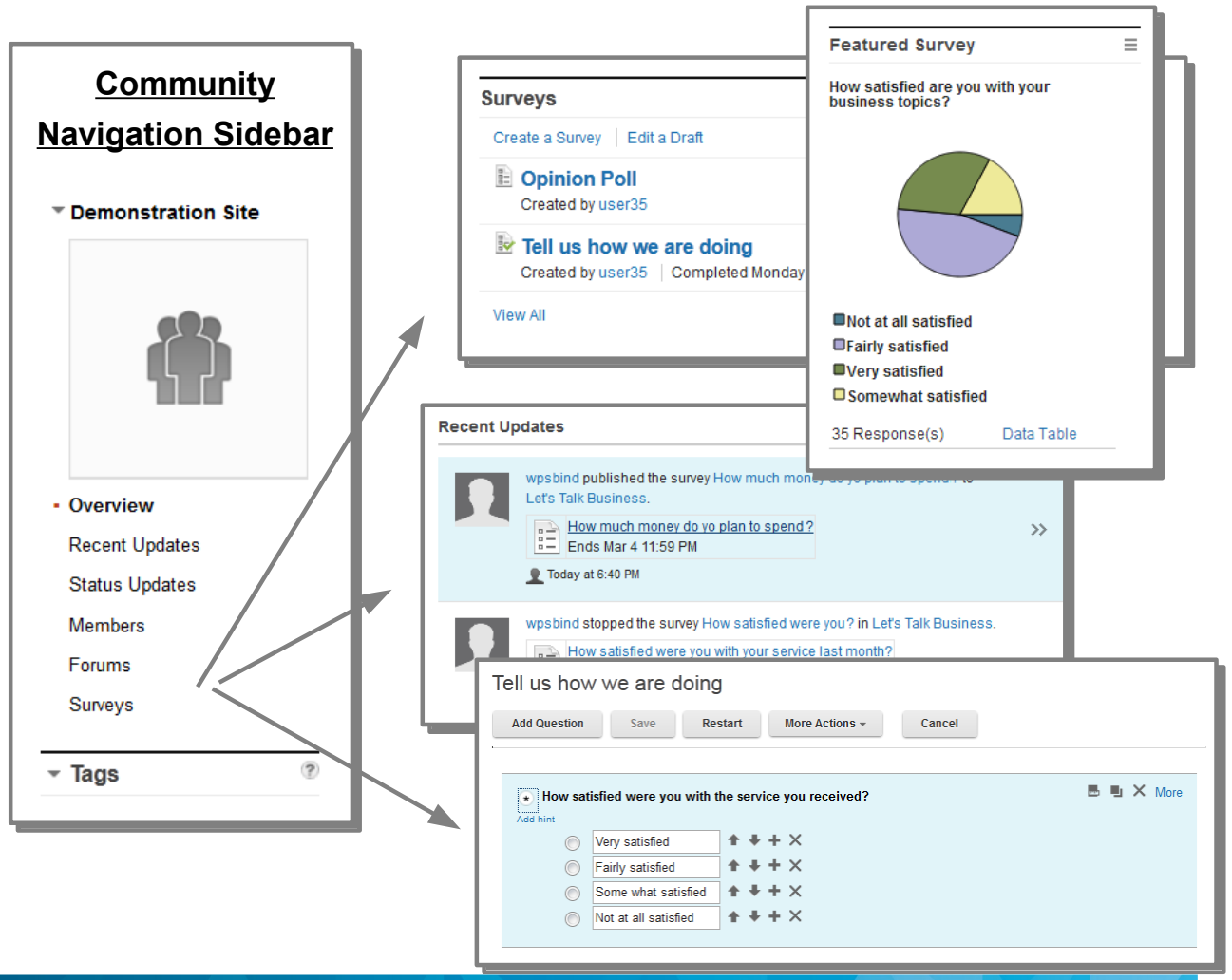
Survey events

- Receive updates
- Participate or view results

✔

Survey designer

- Create polls and surveys
- Manage surveys



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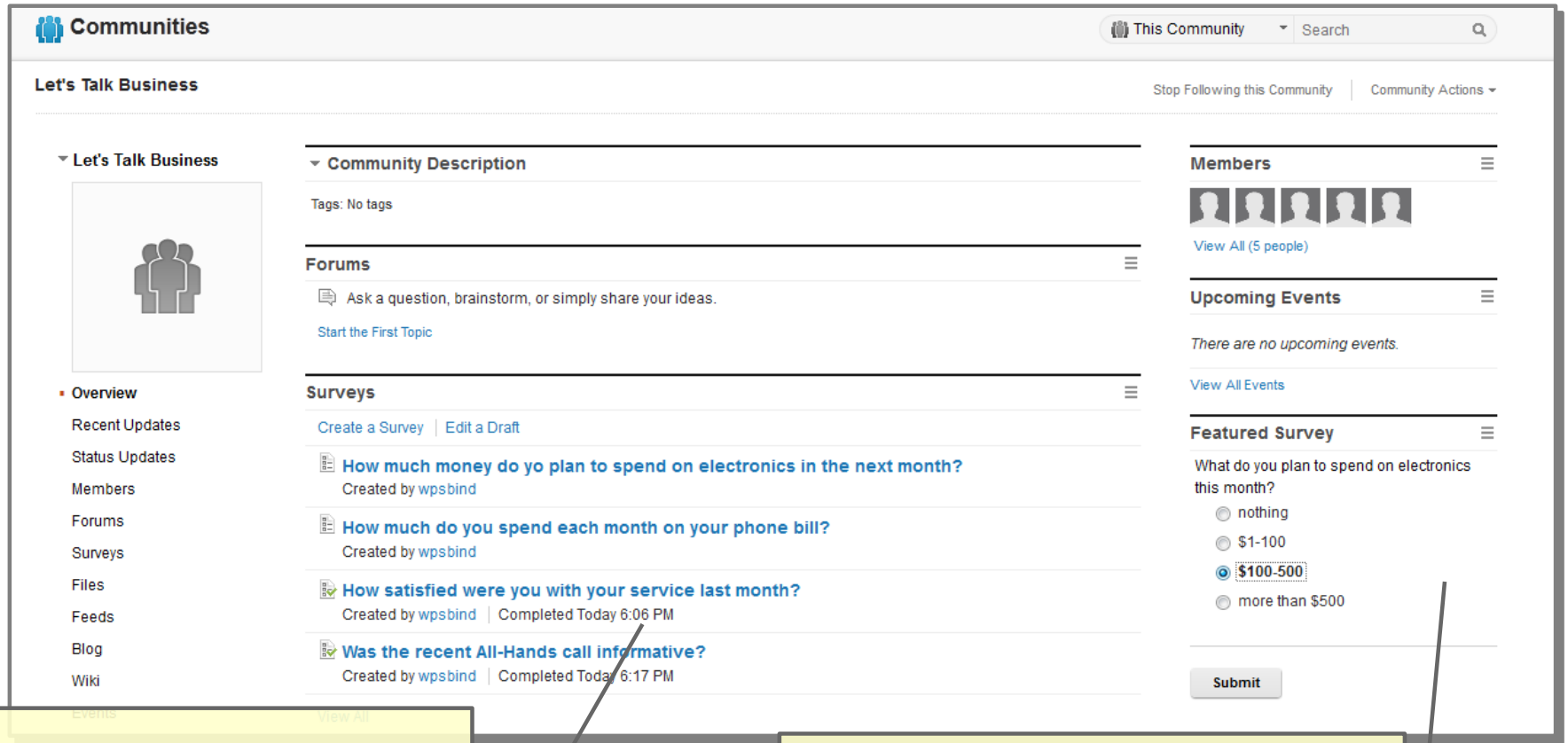
Two survey widgets available for community pages



Surveys Widget lists active surveys in a community

Featured Survey Widget displays a single survey or survey results

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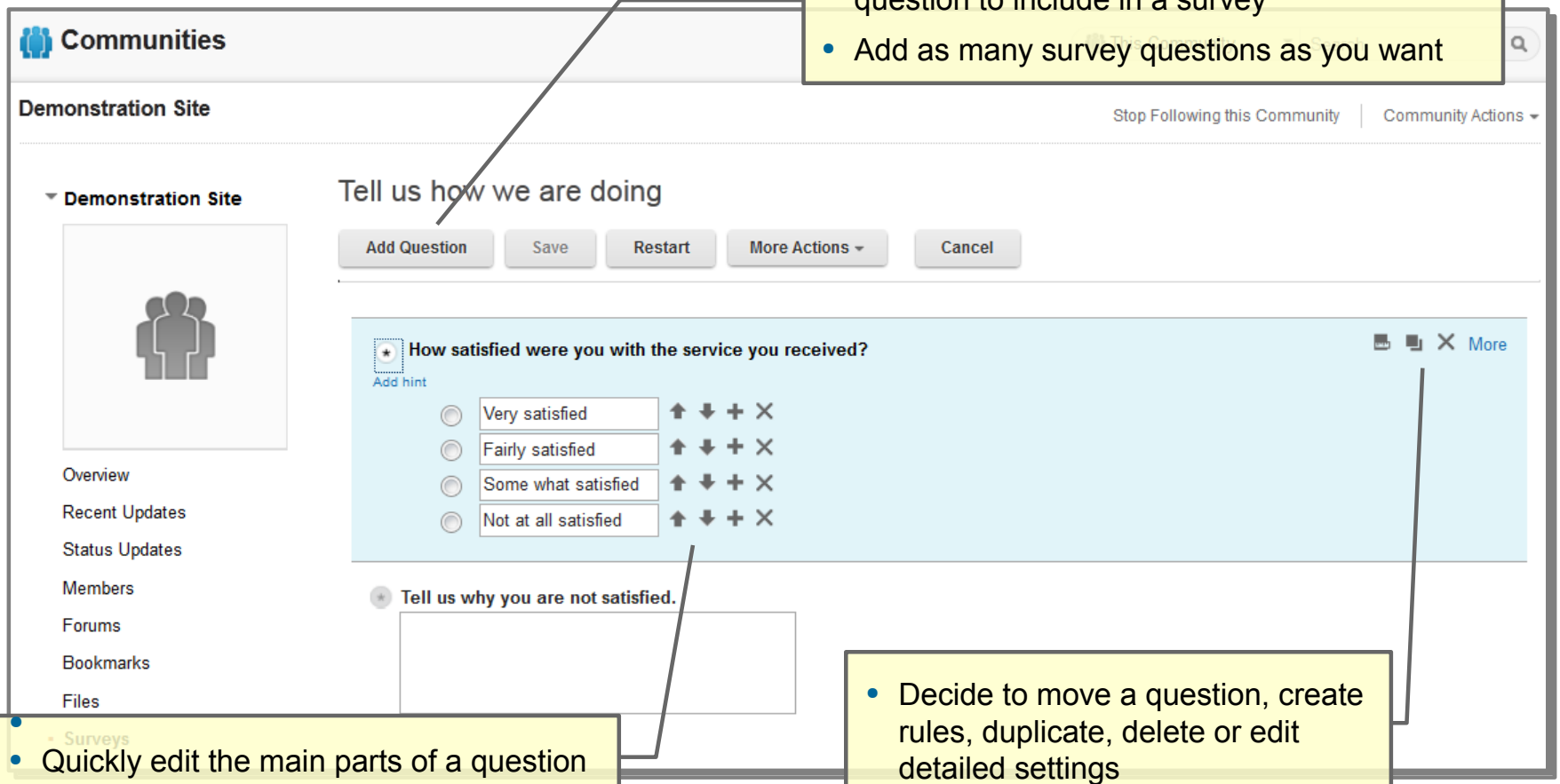
Design surveys one question at a time

- Add question lets you choose the type of question to include in a survey
- Add as many survey questions as you want



- Quickly edit the main parts of a question

- Decide to move a question, create rules, duplicate, delete or edit detailed settings

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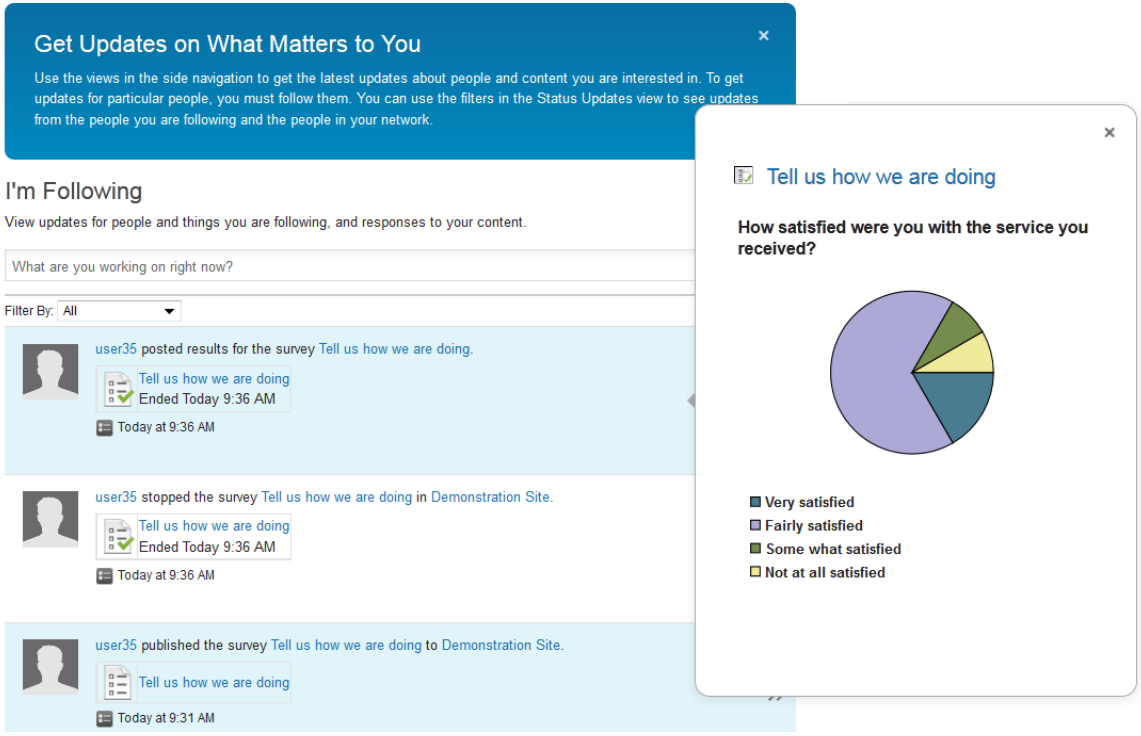
Stay connected with survey events in activity streams

–

– Survey events will appear in activity stream listings
  - Community updates
  - Homepage views
– Survey events:
  - Publish the survey
  - Stop the survey
  - Publish the survey results
– Embedded experiences enables users to view activities and take action quickly
  - Complete active surveys
  - View survey results

–



People can interact directly with survey events through embedded experiences

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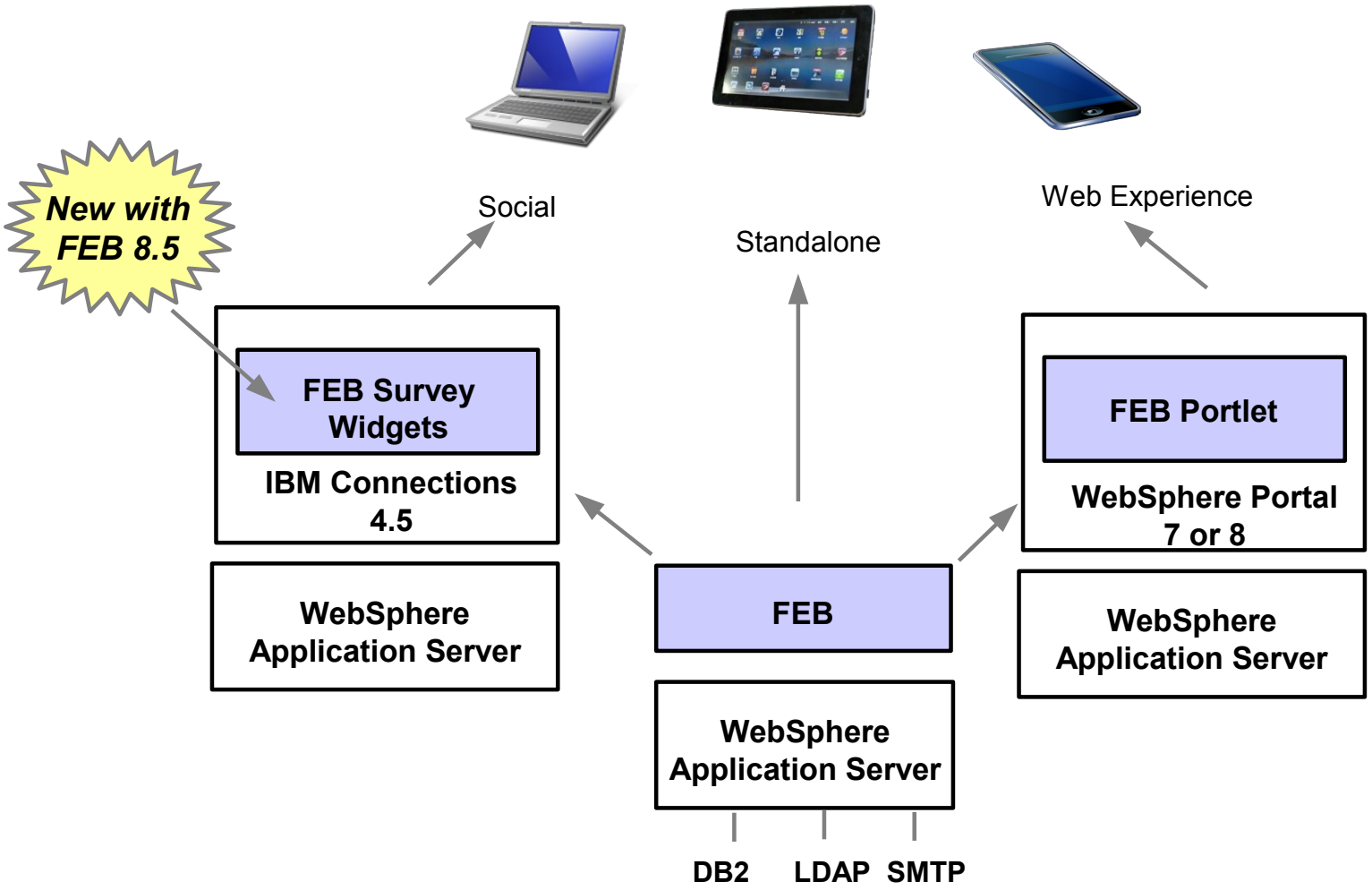
IBM Forms Experience Builder

Architecture



FEB includes entitlements to WebSphere Application Server and IBM DB2

IBM Forms Experience Builder – how is it sold?

IBM Forms Experience Builder

- Now available as its own product!
- PVU based licensing
- Pricing and part numbers were announced on May 14, 2013

New

http://www-01.ibm.com/common/ssi/cgi-bin/ssialias?infotype=AN&subtype=CA&htmlfid=897/ENUS213-175&appname=USN

FEB entitlements in other products

	Forms 8.0	Forms Classic 8.0.1	WebSphere Portal Extend 8.0	Cust Exp Suite & Emp Exp Suite 8.0	IBM Connections 4.5.1 (Sep 2013)
FEB 8.0	2012 added to product		2012 via Forms 8.0	2012 via Forms 8.0	
FEB 8.5		July 2013 – does not include FEB	Sep 2013 will update Portal Extend 8.0.0.1 IFR1 to FEB 8.5	Sep 2013 will update CES & EES 8.0.0.1 IFR1 to FEB 8.5	
FEB 8.5 Community Surveys					Sep 2013 will add entitlement limited to Community Surveys

Why Customers Love Forms Experience Builder

Speed

- Non-technical users can build sophisticated web applications

Agility

- Make changes and fine tune web form experiences in minutes

Integration

- Excellent fit with IBM Web Experience and Social software

Cloud Economics

- A single shared deployment for all your needs

Easily Extended

- IT can collaborate with business users to extend applications using readily available web development skills

IBM's CIO Lab deployment of FEB

What

- Delivered FEB as a “self-service” tool to IBM business users

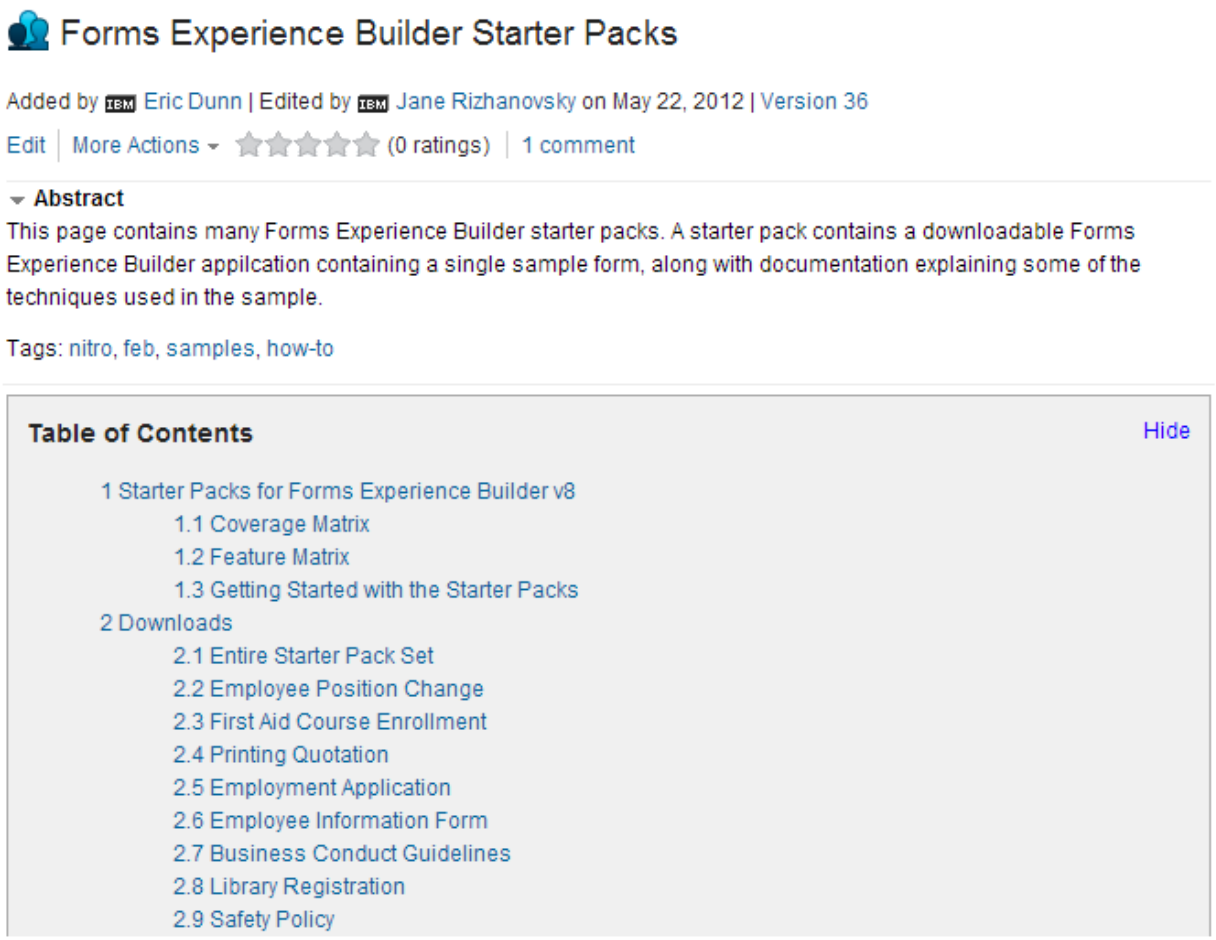
Savings

- 2011/2012 estimated cost avoidance over $6.4M
  - Reduced development & hosting costs
  - Increased transactional efficiency

Statistics

- 189 registered apps
- Over 135,000 forms submitted
- Over 51,000 IBMers have interacted with FEB on SSAe
- Over 400 community members

Sample Apps to Help you Get Started



Forms Experience Builder Starter Packs

Added by Eric Dunn | Edited by Jane Rizhanovsky on May 22, 2012 | Version 36

Edit | More Actions (0 ratings) | 1 comment

Abstract

This page contains many Forms Experience Builder starter packs. A starter pack contains a downloadable Forms Experience Builder appilcation containing a single sample form, along with documentation explaining some of the techniques used in the sample.

Tags: nitro, feb, samples, how-to

Table of Contents Hide

1 Starter Packs for Forms Experience Builder v8
- 1.1 Coverage Matrix
- 1.2 Feature Matrix
- 1.3 Getting Started with the Starter Packs

2 Downloads
- 2.1 Entire Starter Pack Set
- 2.2 Employee Position Change
- 2.3 First Aid Course Enrollment
- 2.4 Printing Quotation
- 2.5 Employment Application
- 2.6 Employee Information Form
- 2.7 Business Conduct Guidelines
- 2.8 Library Registration
- 2.9 Safety Policy

http://www-10.lotus.com/ldd/lfwiki.nsf/dx/Forms_Experience_Builder_Starter_Packs#Starter+Packs+for+Forms+Experience+Builder+v8

Videos to Help you Learn

IBM Forms Experience Builder Video Demonstrations

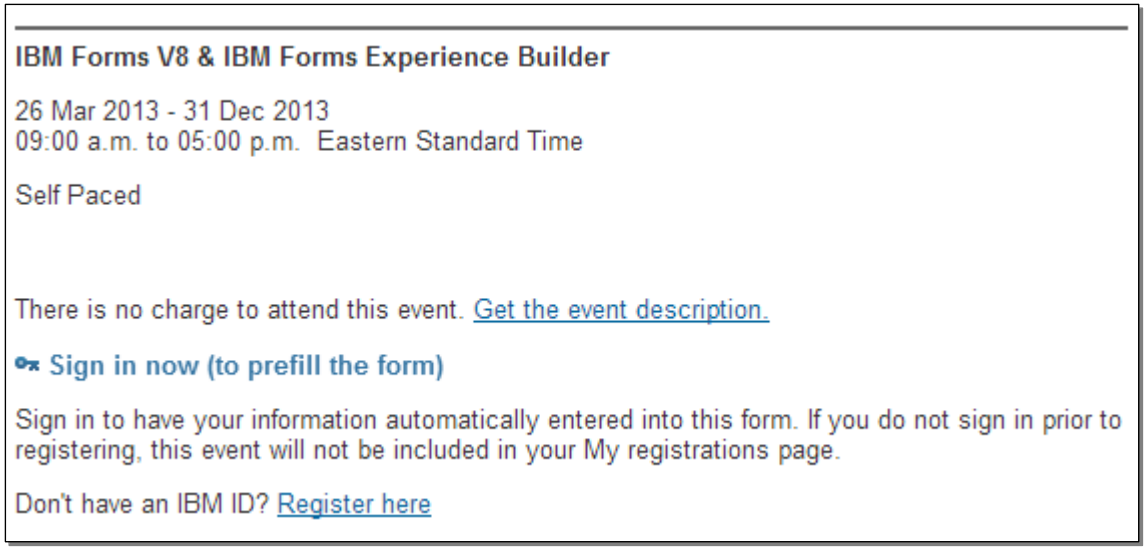
This video series demonstrates many of the new features available with IBM Forms 8.0. The videos walk you though various use cases in how applications built with the IBM Forms Experience Builder can enhance your customers web experience.

Video of IBM Forms Experience Builder - Feedback Collection Application Demonstration
Video of IBM Forms Experience Builder - Customer Support Application Demonstration
Video of IBM Forms Experience Builder - Wireless Service Plan Purchase Demonstration
Video of IBM Forms Experience Builder - Customer Satisfaction Survey Demonstration
Video of IBM Forms Experience Builder - Grant Evaluation Application Demonstration

http://www-10.lotus.com/ldd/lfwiki.nsf/dx/Forms_Experience_Builder_Demonstrations_and_Videos

http://www-10.lotus.com/ldd/lfwiki.nsf/dx/Forms_Experience_Builder_Starter_Packs#Starter+Packs+for+Forms+Experience+Builder+v8

Education to help you develop your skills

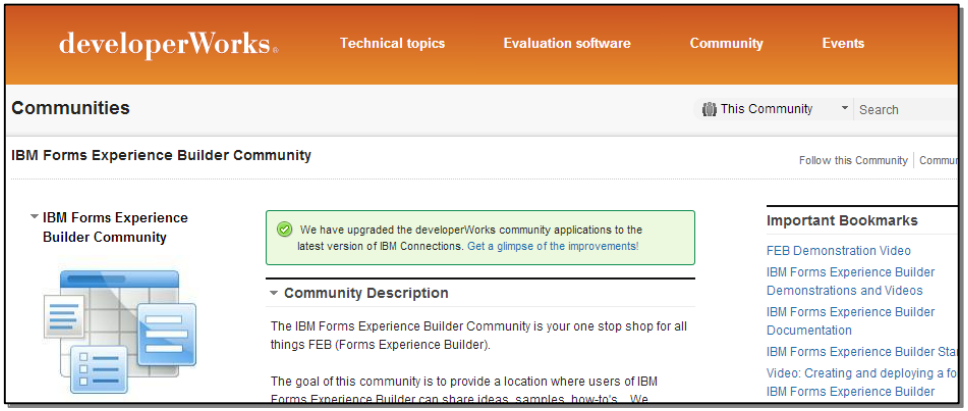


"Using the IBM Forms Experience Builder you will learn to use the simple web-based user interface to develop interactive form driven applications, integrate role based security, implement the integrated lightweight routing for approvals and notifications, explore personalized integration with WebSphere Portal, and leverage open standards utilizing REST API services."

http://www-304.ibm.com/events/idr/idrevents/detail.action?meid=10361&ieid=4513

Resources to help build applications

https://greenhouse.lotus.com/wpsgh/wcm/connect/ghcontent/lotus+greenhouse+next+site/home/products/ibm+forms+turbo



https://www.ibm.com/developerworks/community/groups/service/html/communityview?communityUuid=05651788-f17f-4309-a5c6-698e67acd9c1

What's else is new with FEB 8.5?

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Discover important comments or trends in collected responses

View submitted responses for a single question or create filters for cross tabulation.

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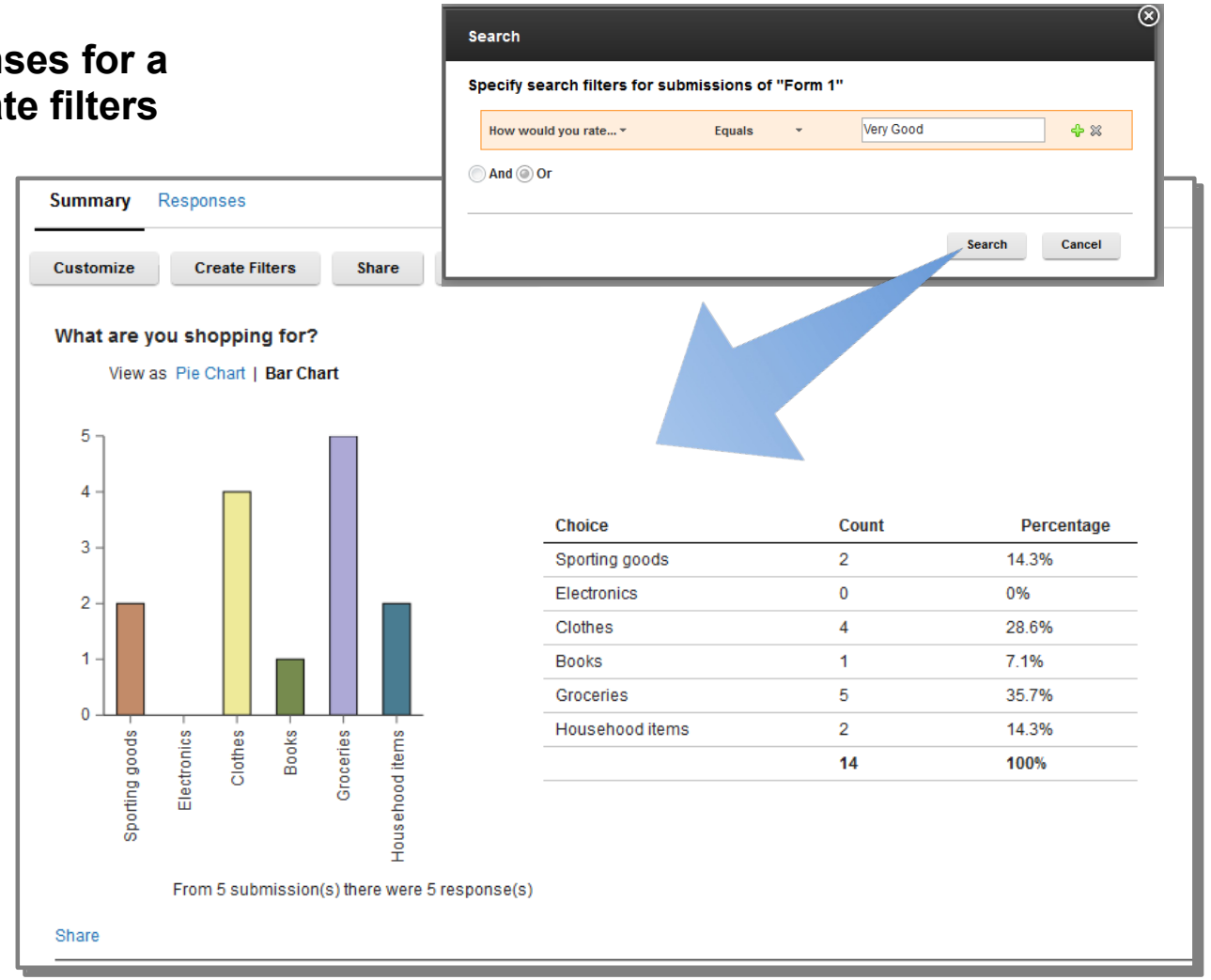
– Create customizable filters to discover patterns

– Define simple or multiple condition filters using an easy to use search dialog

– Decide to share specific views with others

–



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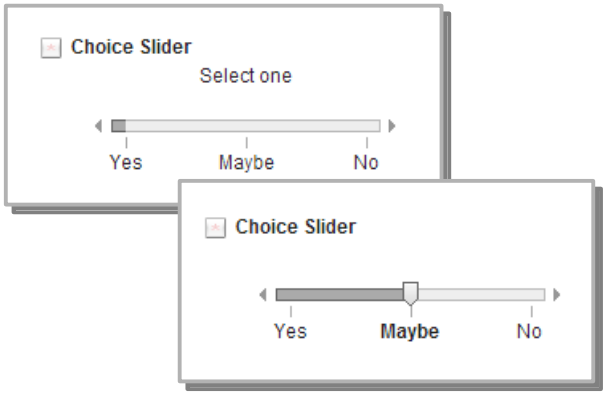
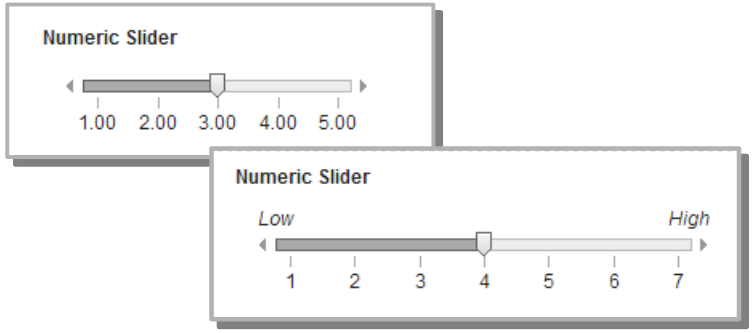
New form items and item behaviors

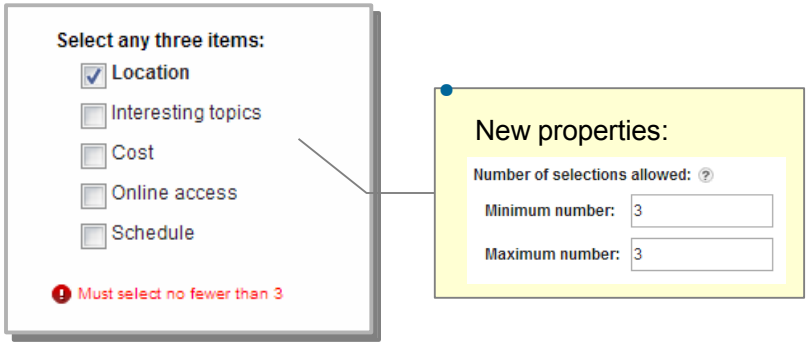
- Choice slider item for making choices, complete with a required option.



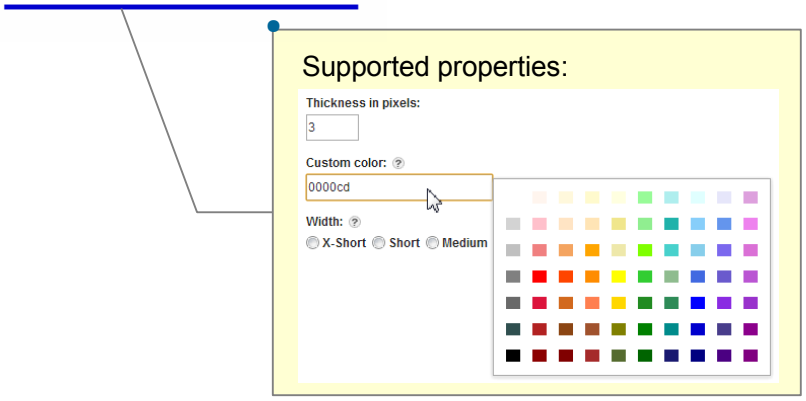
- Numeric slider item for selecting numbers, with automatic scale generation.



- Select many item now has a option for defining minimum-maximum number of choices.



- Line or divider display item.



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Specific product enhancements and entitlements

- Layout and usability improvements
  - Layout enhancements now allow form items to self adjust their content in response to size changes on the web page
  - Field widths for numeric widgets have been adjusted to better align with common usage
  - New simplified theme now available for viewing web forms and results
  - Widget property UX improved to make it easier to specify range values
- Adopted IBM Collaboration Solutions (ICS) UI 3.0.3 to achieve stronger visual alignment when delivering social business solutions
- Expanded globalization group 1 & 2 supported to now include Catalan, Kazakh, and Thai languages
- Update entitlements for prerequisite software
  - WebSphere Application Server Network Deployment 8.5
  - DB2 10.1
  -
  -
-

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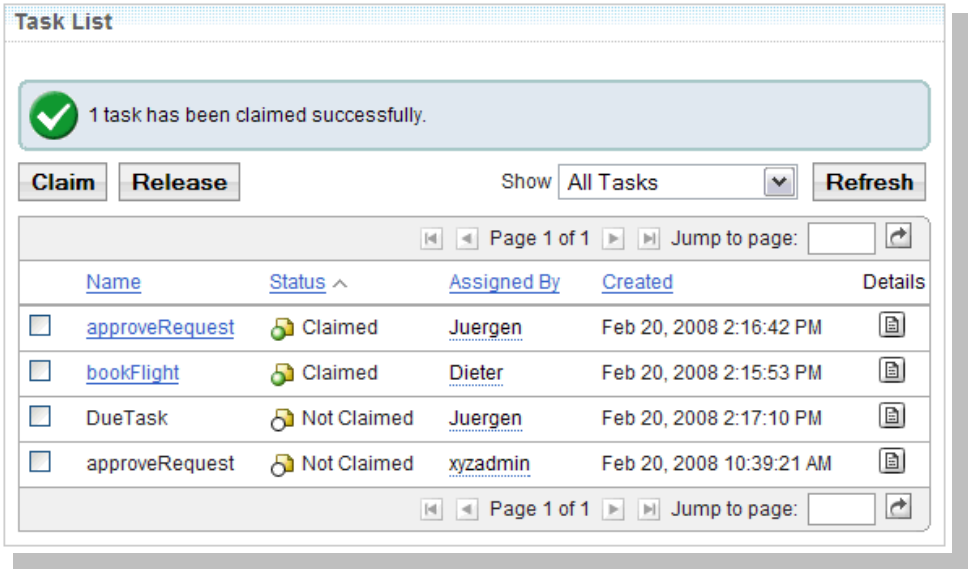
New - FEB 8.5 integration with Unified Task List

- FEB forms can appear as part of Portal Unified Task List (UTL) solution for enterprise processes
  - Portal UTL will support a FEB adaptor
  - FEB portet supports UTL wires to display forms
- This makes it easy to deliver web form applications for human tasks in business workflows
-



Available with the next Websphere Portal UTL update

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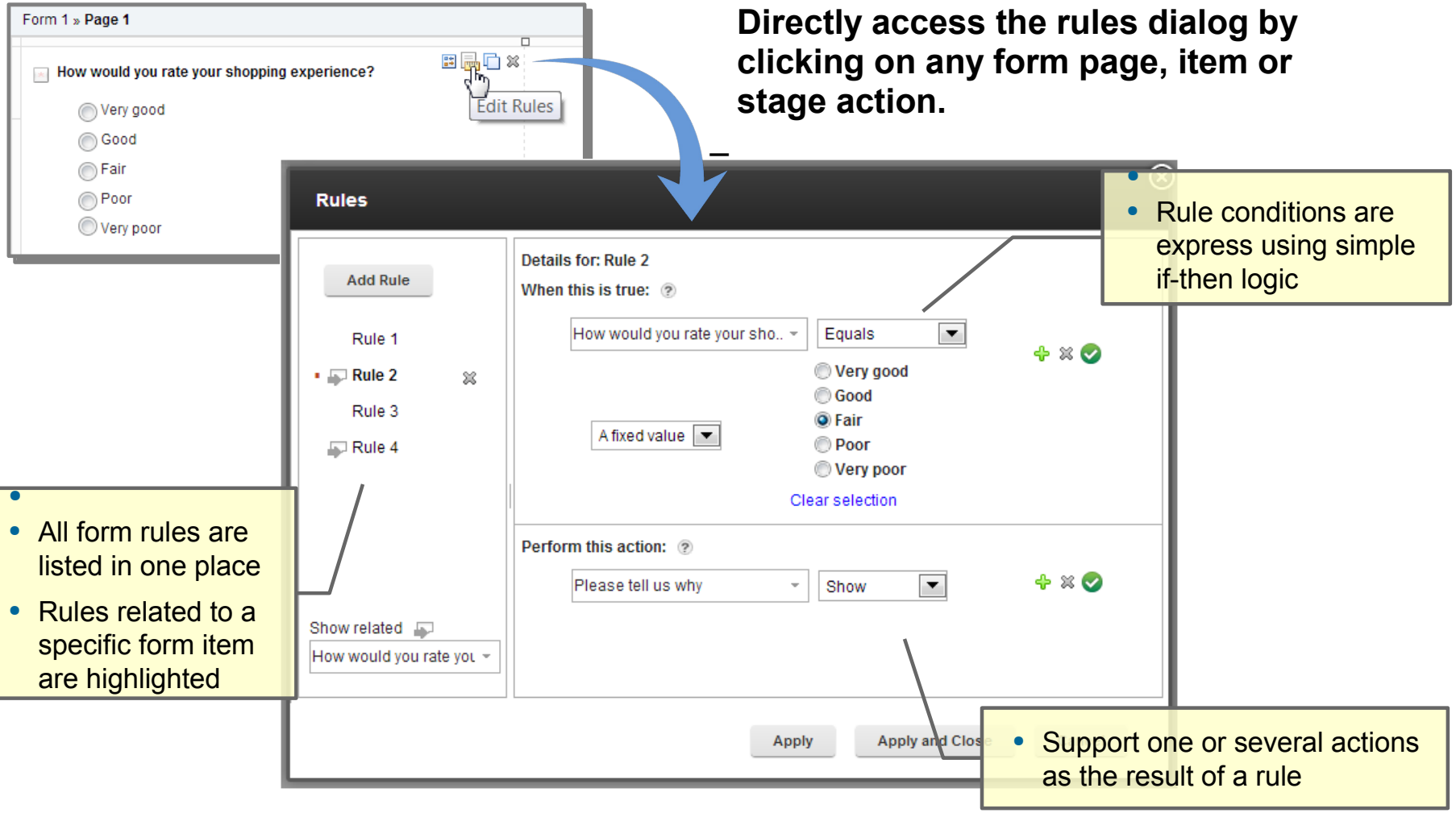
Improved rules experience and capabilities

Directly access the rules dialog by clicking on any form page, item or stage action.



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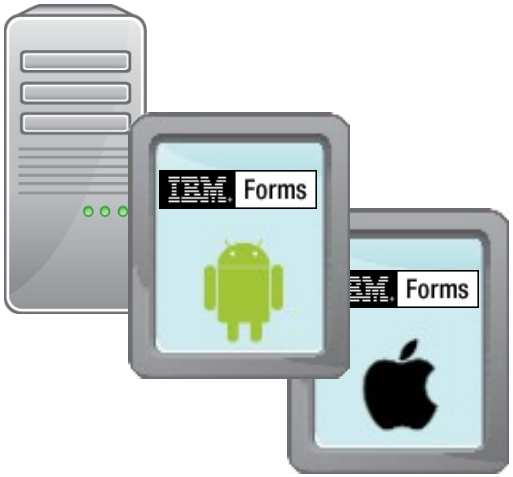
Continued support for new operating systems and web browsers

- Updated server OSs to include
  - Windows Server 2012
- Updated tablet support to include
  - iPad with iOS 6.1
  - Tablets with Android 4.1
- Updated mobile device support to include
  - iPhone running iOS 6.1
  - Phones running Android v4.0
- Updated browser support to include
  - Chrome v25
  - FireFox v20
  - Internet Explorer v10
  - Safari v6.0



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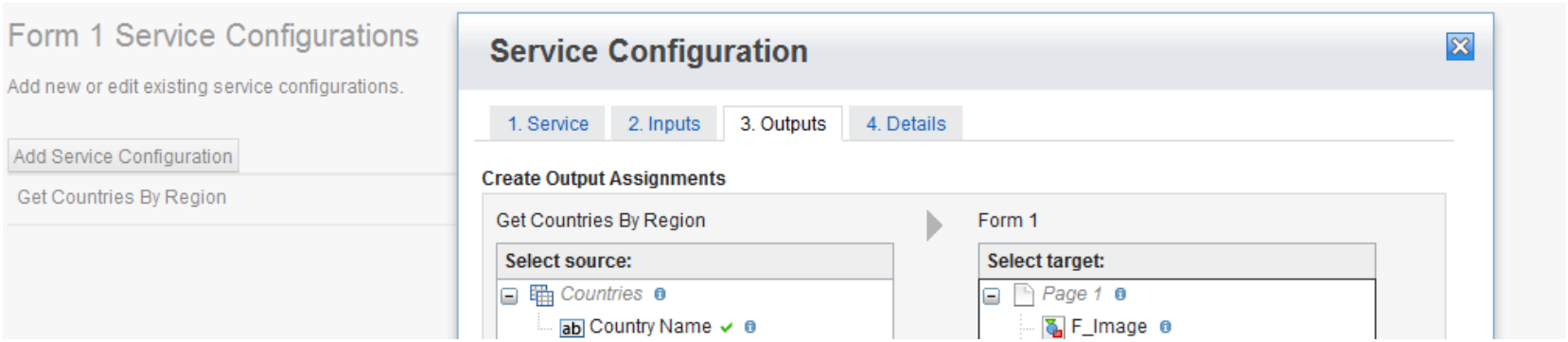
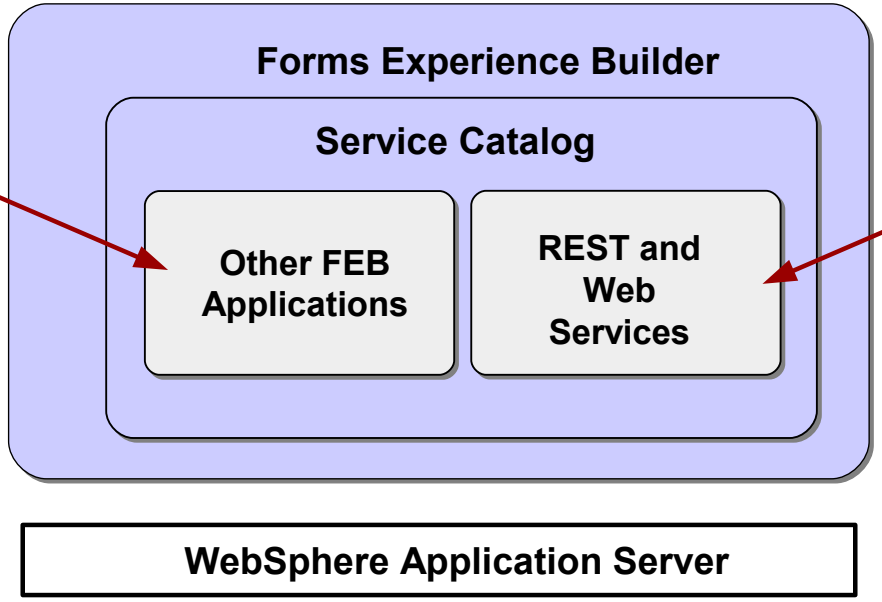
FEB Service Catalog and Discovery



Every FEB application is exposed as services



Definitions can be created for any REST or Web Service including:

- SAP
- Oracle
- IBM BPM
- many others

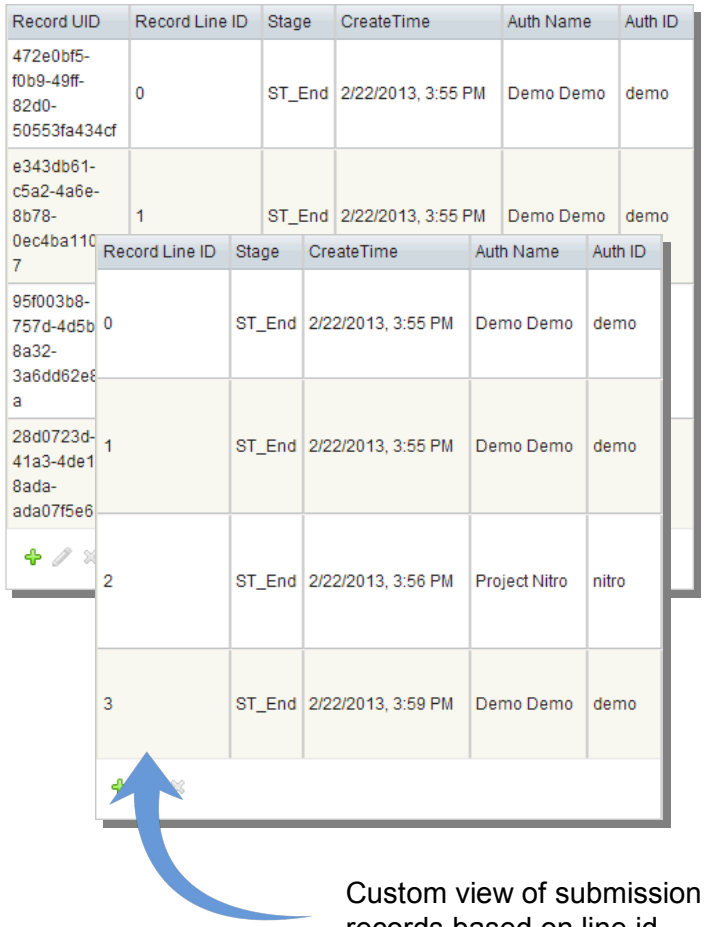
Services enhancements included in FEB 8.5

FEB services can now return detailed information about submission records which enables custom data views to be created or allows records for a particular person to be located.

- Search and retrieve record metadata
  - Author & last updater (name, login, email)
  - Stage & line id information
  - Creation time & update time
- Filter metadata results

Other enhancements:

- One can now search results using a page approach by setting a page size (how many entries to return) and a page (which page of entries to return) parameter
- JSON in the service transport layer is now supported in addition to HTML type transport



Custom view of submission records based on line id example

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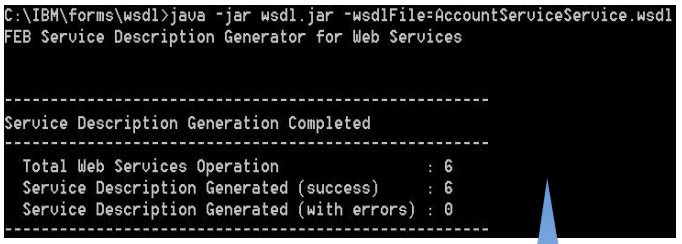
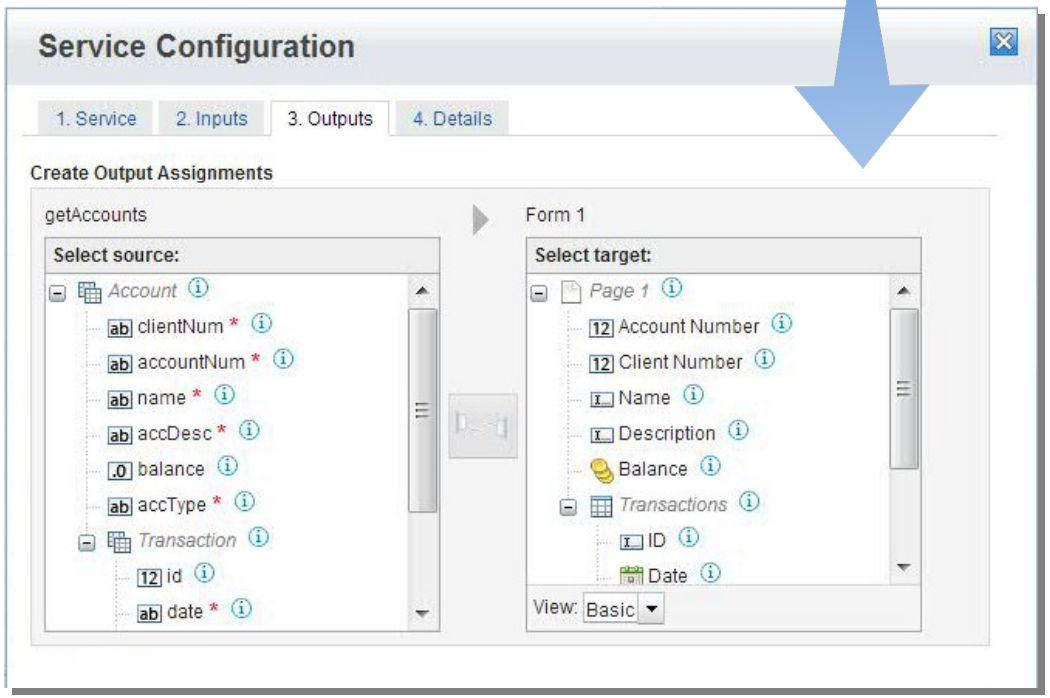
Connecting to external enterprise systems is now easier

New in v8.5 is a generator tool that can transform the contents of a WSDL to a FEB service description represented as an XML document.

- Generation tool works with WDSL 2.0
- Command line tool automatically generates FEB service description files
- New service descriptions are ready for use in any FEB application
- Generated graphical interface allows knowledge users to manage service call details within a form





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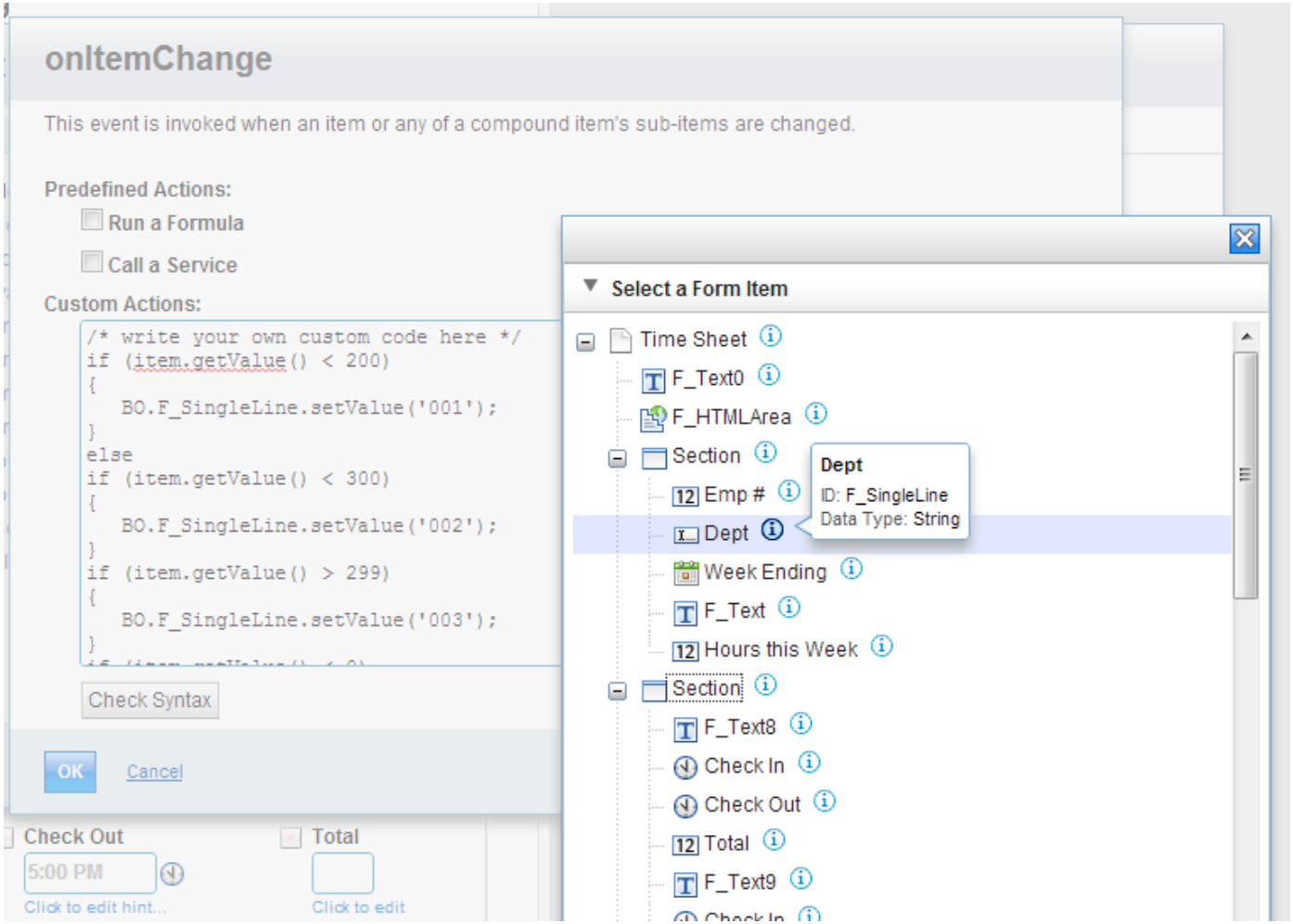
JavaScript API

Easy sandbox approach to extending functions with JavaScript



New JavaScript APIs and libraries supported in v8.5

- Allow content to be displayed as the user types it (before tabbing out)
  - item.getDisplayValue()
  - item.setDisplayValue(pValue)
- Control whether or not a pop up message is displayed when navigating away
  - app.setSuppressWarning(pSuppress).
  - app.getSuppressWarning();
- Programmatically get links to all imbedded application files (image, CSS, pdf, etc.)
  - app.getImageBaseURL();
  - app.getStyleBaseURL();
  - app.getFileBaseURL();
- Get unique IDs of the application and the form to build up URLs for rest calls
  - app.getUID();
  - form.getUID();
- Now available are Dojo 1.8 libraries to extend FEB form capabilities
  -
-

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Rest API enhancements and additions in v8.5

Methods are now available that help automate the deployment of web form solutions from a development system to a staging or production system.

–

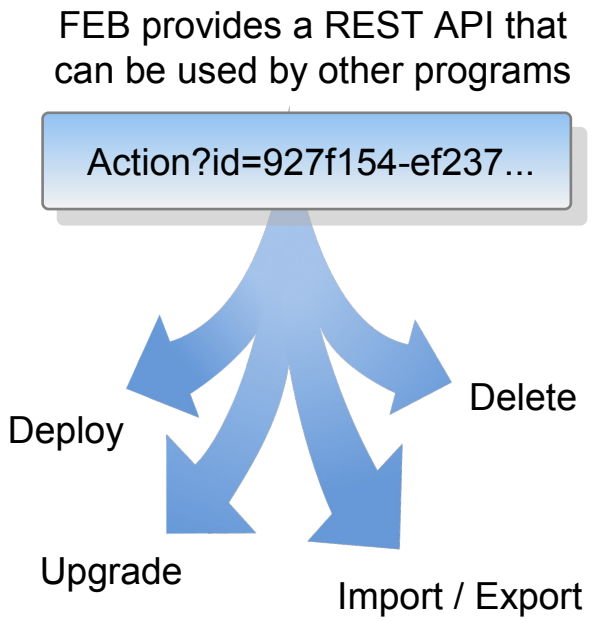
– Deploy activates a draft version of a form and makes it available for use

– Upgrade replaces a deployed form with a new version of the source file

– Import uploads a form source file to the FEB server

– Export downloads a form source file to be saved locally

– Delete removes a form source file and related data records from the FEB server



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What's new with ...

–

– FEB form upgrade process has been improved
  - Upgrade service runs as a background thread with on demand processing
  - FEB v8.5 is backward compatible with v8.0 forms.
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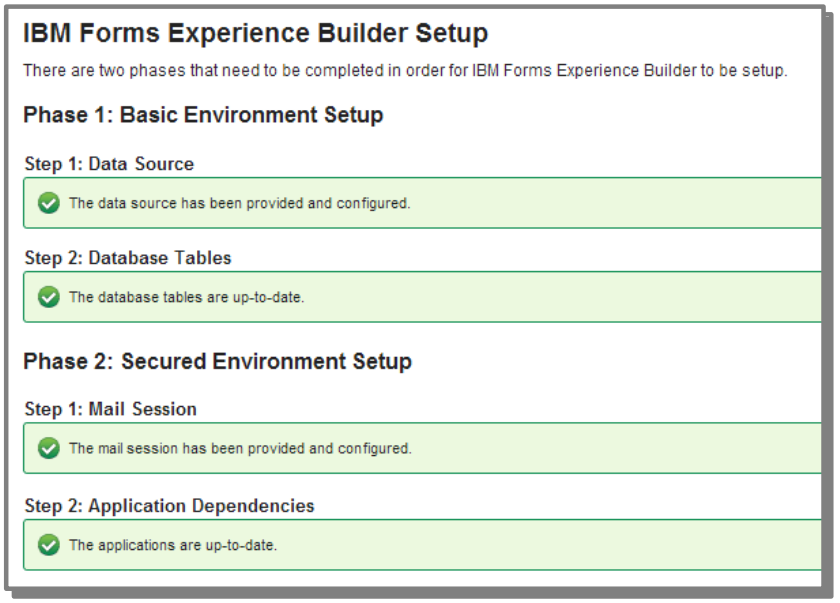

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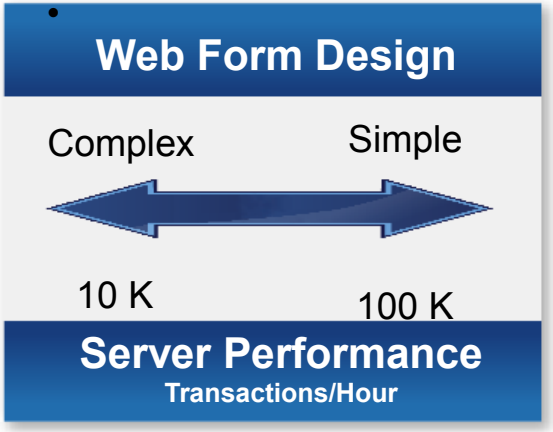

– General solution performance has been improved
  - Revised database configuration settings to increase server performance
  - Database tuning to optimize size and I/O activity

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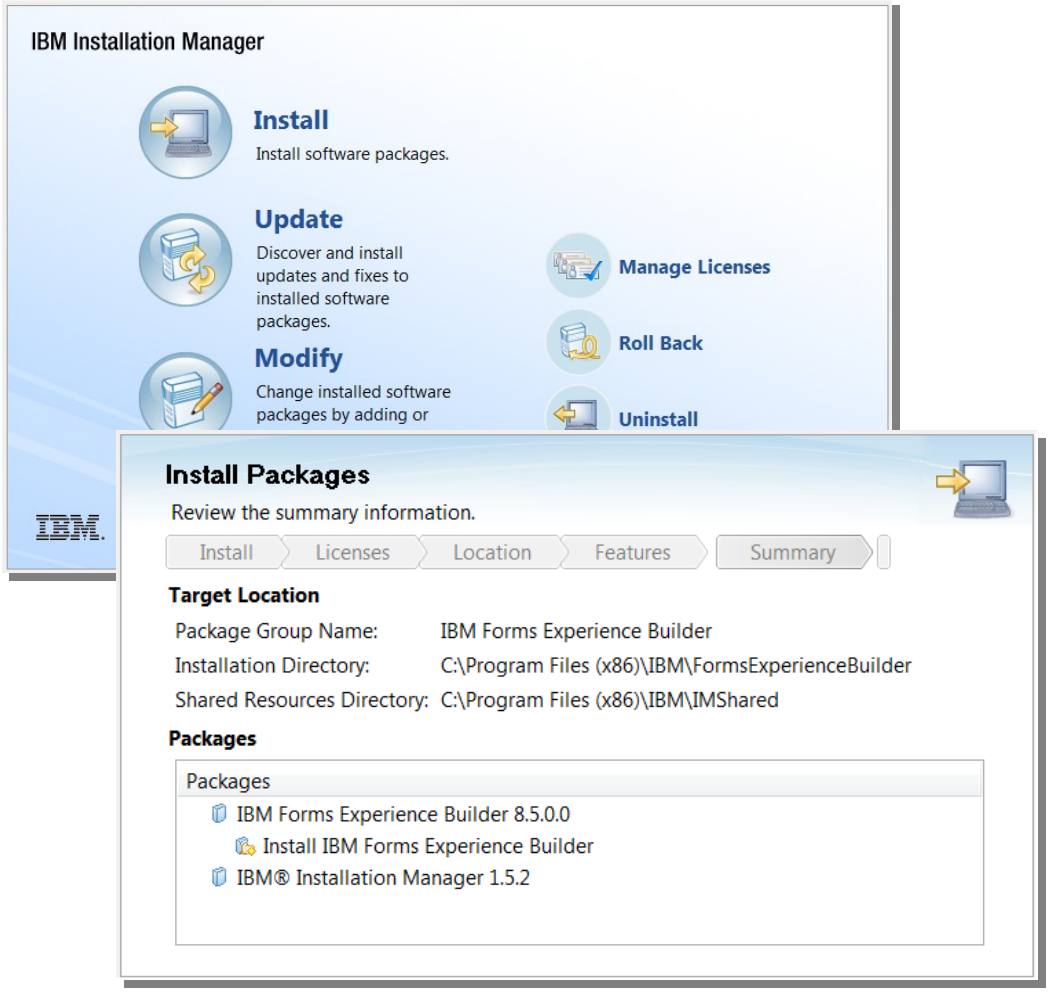
Faster and simpler product installation approach for FEB v8.5



- Easy to use and highly automated installation using IBM Installation Manager and Launchpad
- Installer can install a FEB server:
  - With existing WebSphere Application Server
  - With existing WebSphere Portal Server
- Installer can also:
  - Install FEB Connections Integrator for community survey enablement
  - Install out-of-the-box package of FEB with WeSphere Application Server Community Edition
  -
-

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Forms Experience Builder Architecture

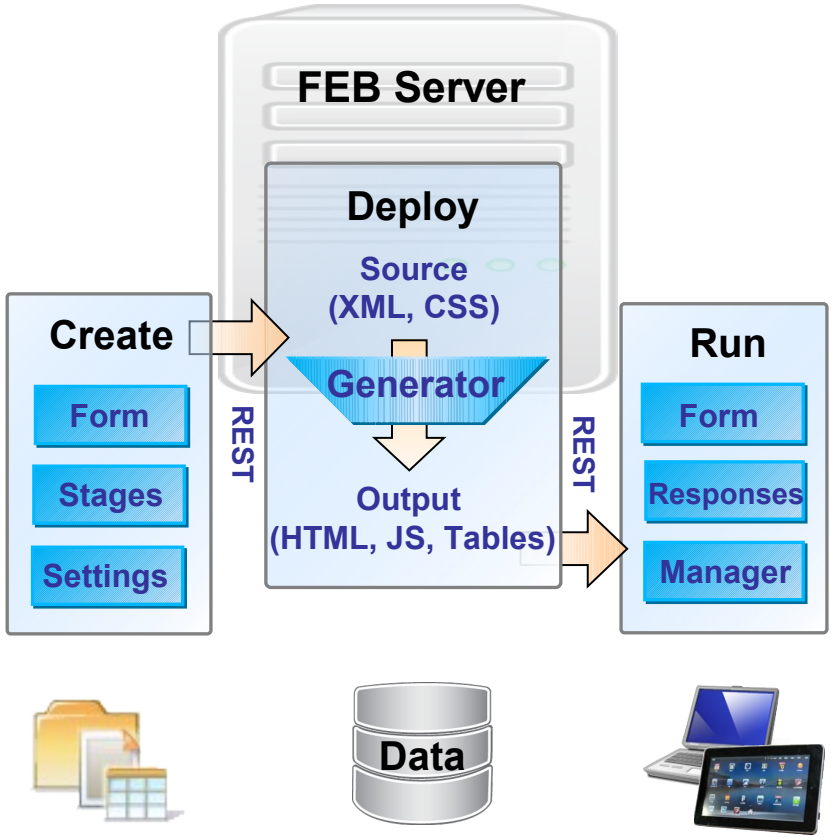
Product framework reduces the gap between end-user development and IT administration enabling rapid deployment of web form solutions.

Collaborative framework
- LOB User: WYSIWYG-like tooling
- IT staff: ACL, SOA services & plugins
- Others: CSS, JavaScript API
- Export/Import forms

Proven methods
- Packaged as an EAR
- Security provided by J2EE container
- Datasoure connection to DB2

Extensible
- REST interfaces
- Services interface
- Data API for captured data

Scalable
- Client-side web processing
- 100% stateless server-side



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