



Get social. Do business.

IBM Forms Experience Builder and IBM Operational Decision Manager

A pattern based approach integrating process orientated forms

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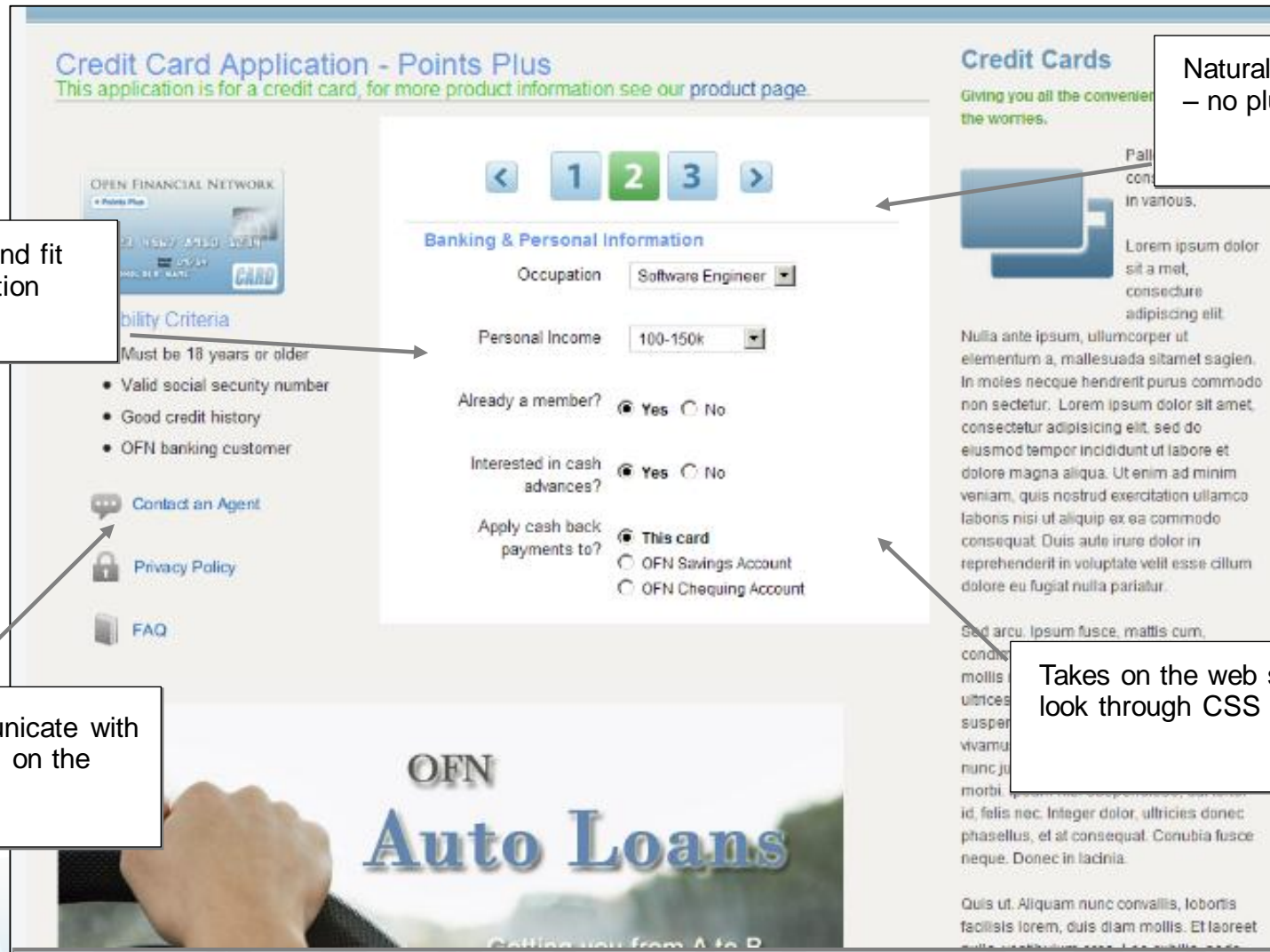
Claudio Tag | WebSphere
Technical Sales and Solutions



Agenda

- What is Forms Experience Builder?
- What is Operational Decision Manager?
- Why use ODM for Forms Logic?
- Demonstration
- How it works
- Q&A

Web forms apps are part of an engaging experience



Highly dynamic and fit with site's navigation approach

Natural part of the page – no plug-ins required

Able to communicate with other elements on the page

Takes on the web site look through CSS



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

Deal Tracking

As a sales representative, you can use this form to track deals and report their status to your office manager.

Deal Information

Deal status: Early stage

Anticipated deal size: \$75,000.00

Expected close date: 2/21/2013

Deal Query

Deals in the tracking system

Filter by rep: Brian Febulous

Filter by product line:

| Stage | Product Line | Deal Amount | Expected Close | Rep Name | Customer |
|--------------|-----------------|--------------|----------------|----------------|-------------------|
| Middle stage | Hiking | \$40,000.00 | 2/15/2013 | Brian Febulous | Outdoor Living |
| Early stage | Mountain Biking | \$61,000.00 | 2/22/2013 | Brian Febulous | Bike-O-Rama |
| Middle stage | Snow Sports | \$80,000.00 | 2/22/2013 | Brian Febulous | Ski Shack |
| Late stage | Running | \$120,000.00 | 2/15/2013 | Brian Febulous | Western State Run |

Total deal value for items in view \$331,000.00 Average deal size for items in view \$331,000.00

Product mix for all deals

Running: 18.2%

Mountain Biking: 27.3%

Camping: 9.1%

Climbing: 18.2%

Snow Sports: 9.1%

Sales status breakdown for all deals

Deal status:

Middle stage: 36.4%

Late stage: 36.4%

Early stage: 27.3%

From 11 submission(s) there were 11 response(s)

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 Digital Experience and Social software

Cloud Economics

- A single shared deployment for all your needs

Easily Extended

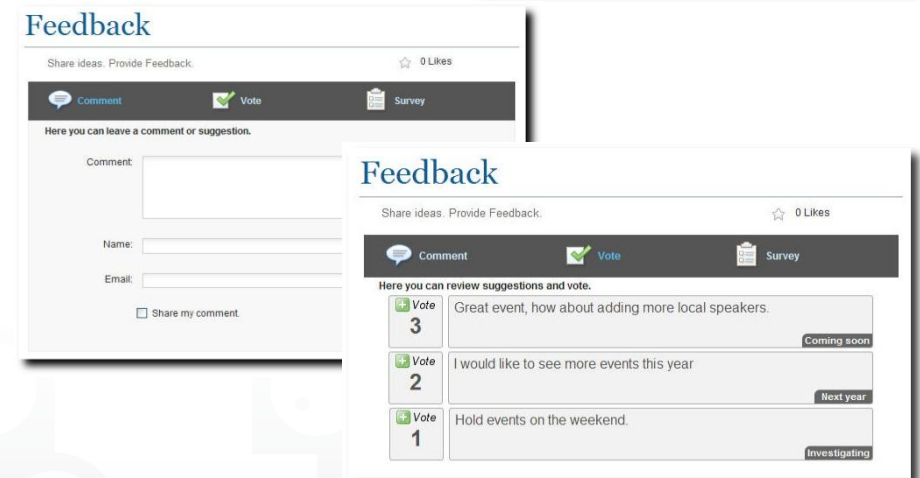
- IT can collaborate with business users to extend applications using readily available web development skills



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



Built in data management, “lists” and visualization

Built in data management and access control

Easy and fast access to results

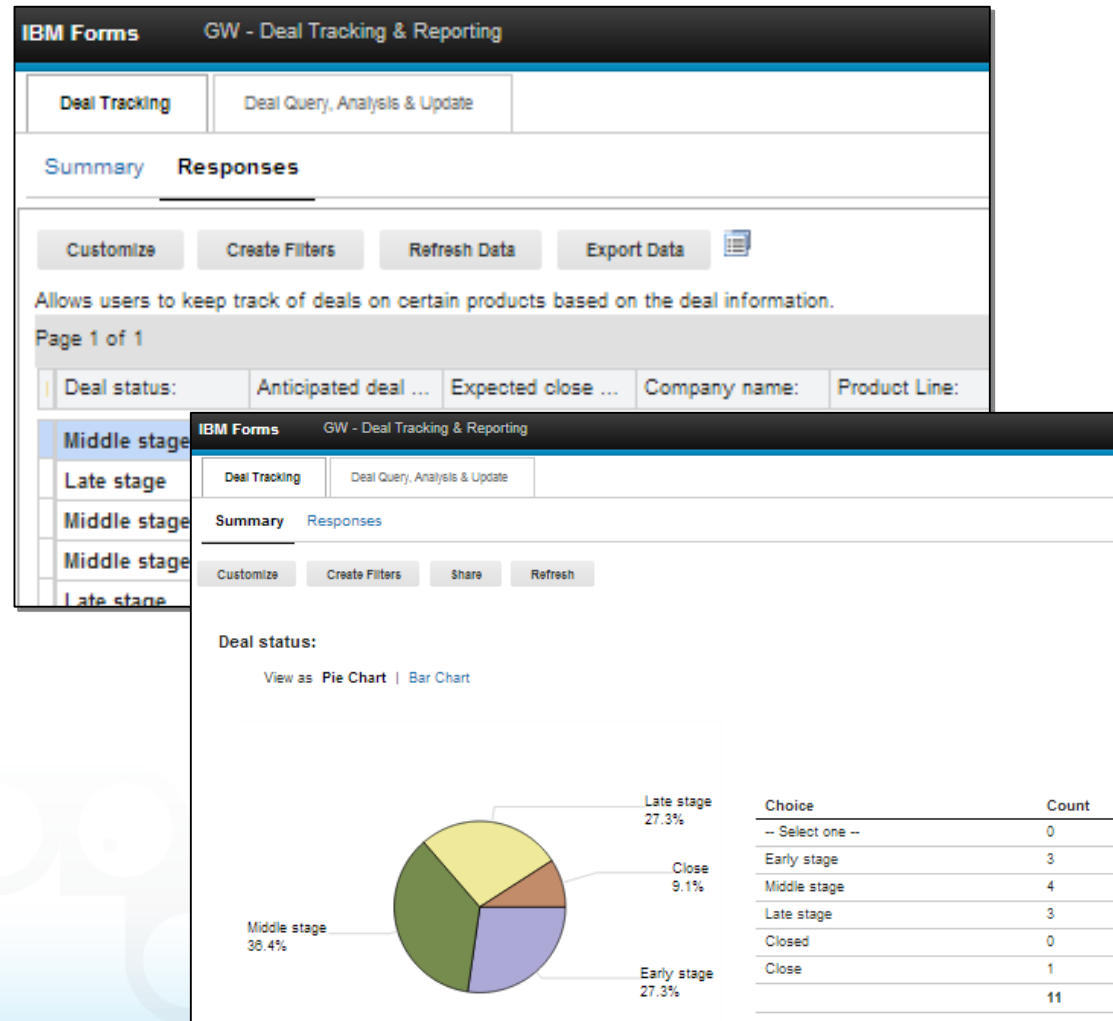
- Lists of captured data
- Search and filter records
- View captured data by form
- See workflow activity as it happens
- Print individual records

Automatic summarization

- Charts
- Summary Tables

Permission based

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



Business User Creation of Self Service Applications

Easy-to-use web based design tooling

Browser based design

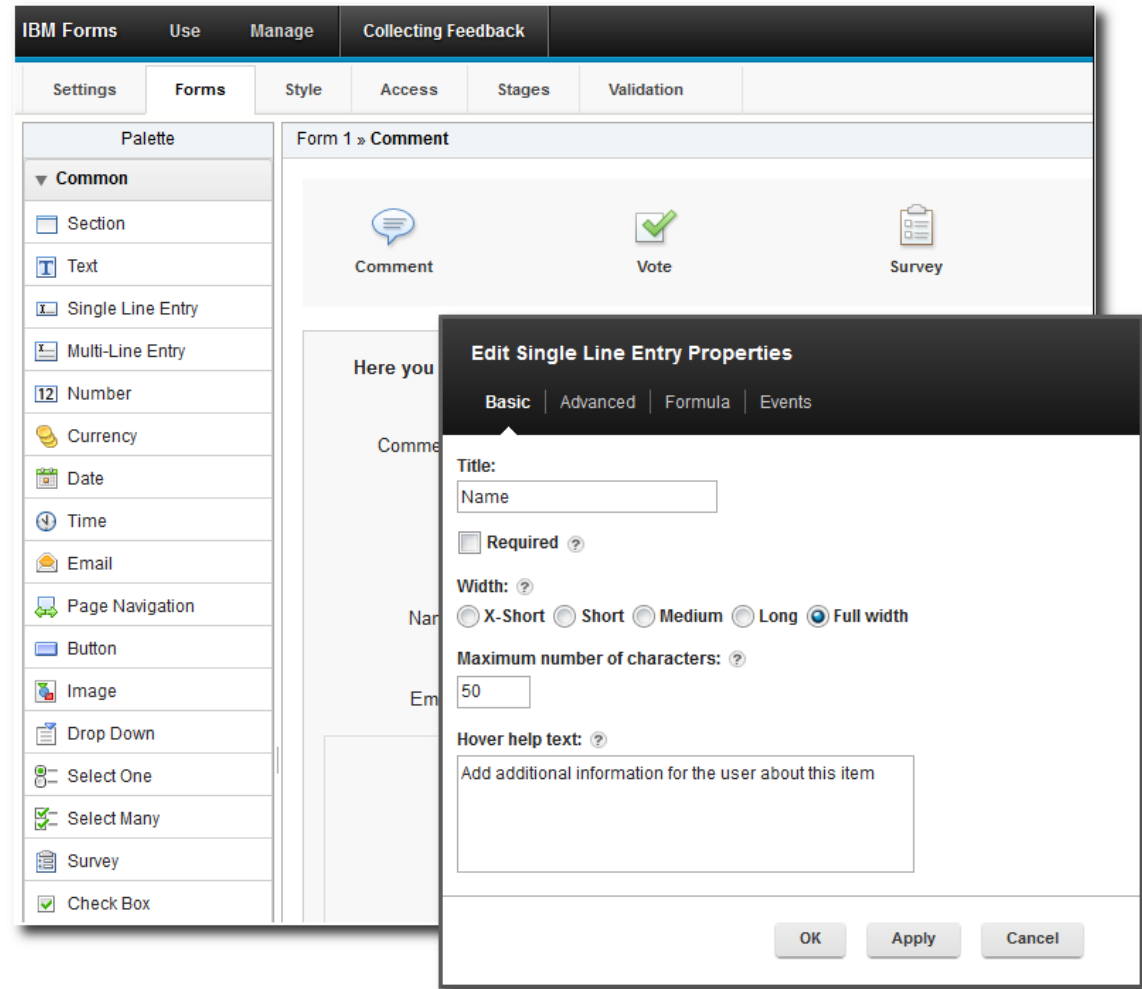
- Full palette of widgets
- Flexible layout using grids & sections
- Graphical rules & formula editor

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



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

Manage Grant Evaluation

Style Access Stages Validation

Stage Settings

Define permissions for the form stage

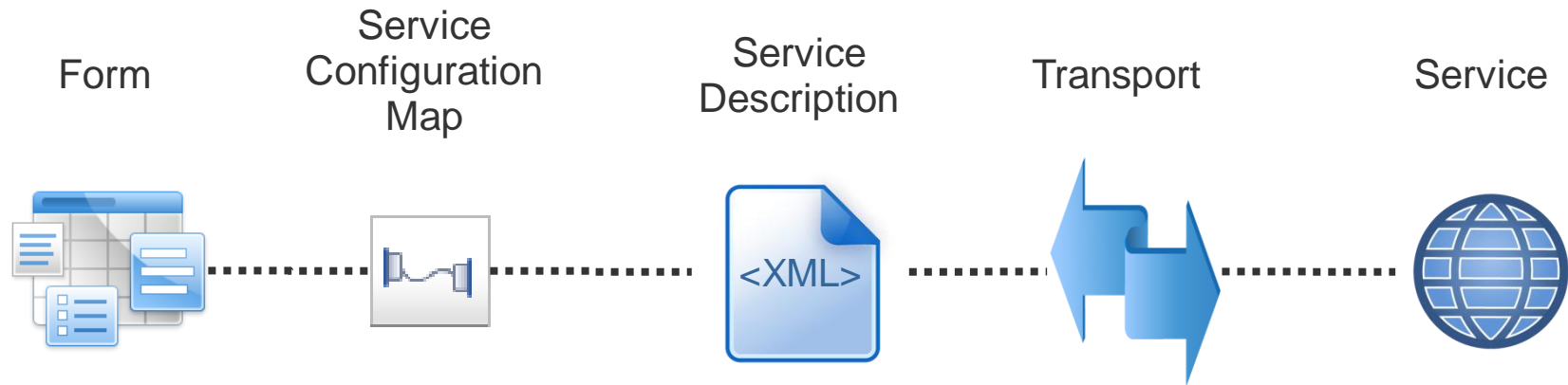
Grant Evaluation - Start

| Roles | Create |
|-------------------|-------------------------------------|
| Administrator | <input checked="" type="checkbox"/> |
| Grant Chairperson | <input type="checkbox"/> |
| Grant Director | <input type="checkbox"/> |
| Finance Officer | <input type="checkbox"/> |
| Staff | <input checked="" type="checkbox"/> |
| Record owner | <input type="checkbox"/> |

- Start
 - Submit
 - Peer Review
 - Reject
 - Rejected
 - Cancel
- Peer Review
- Budget Review
- Approval - Grant Chair
- Approval - Grant Director
- Approval - Finance Officer
- Approval - Additional
- Rejected
- End

Web Services

- Service configuration



- FEB application services

FEB Logic

Form 1 » Page 1

Forms Rules and Logic Demonstration

We require complex business logic

Yes
 No

Complex Logic

What is your gender?

Male
 Female

Gender Options - Male

Gender Options - Female

Rules

Add Rule

- Rule 1
- Rule 2** ✕
- Rule 3

Show related ➔

Gender Options - Male ▾

Details for: Rule 2

When this is true: ?

What is your gender? ▾ Equals ▾ + ✕ ✓

A fixed value ▾ Male
 Female
[Clear selection](#)

Perform this action: ?

Gender Options - Male ▾ Show ▾ + ✕ ✓

Gender Options - Female ▾ Hide ▾ + ✕ ✓

Apply **Apply and Close** **Cancel**

**What if we need to make a complex
set of decisions?**

What does Business Agility mean?

- **Agile processes** to optimize decision making
- **Unbounded applications** that enable business change and maximize investments
- **Rapid, adaptable integration** to thrive in an interconnected world
- **Flexible & intelligent Infrastructure** for performance, productivity and scale
- Take advantage of **new delivery models** – mobile, cloud, appliances

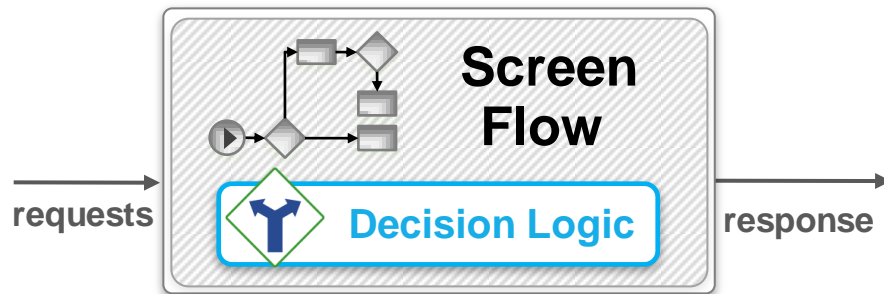


In order to execute across a broad and increasingly dynamic network

The benefits of decision externalisation

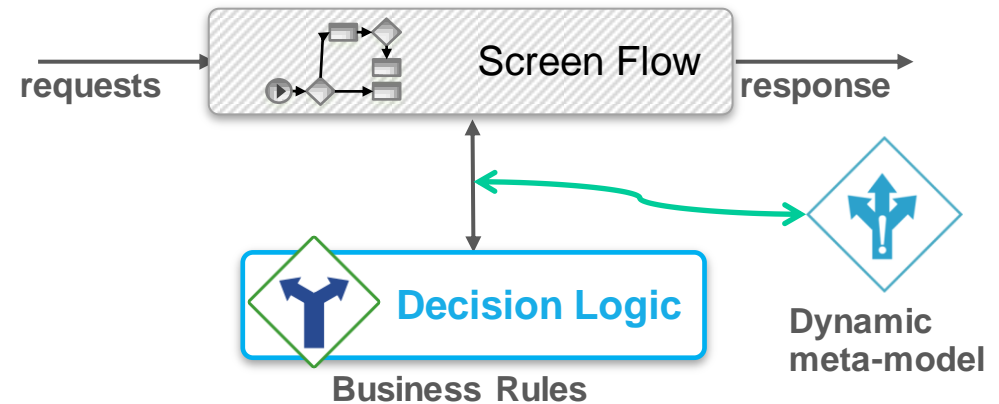


Before



Decision logic embedded in screen flow

After



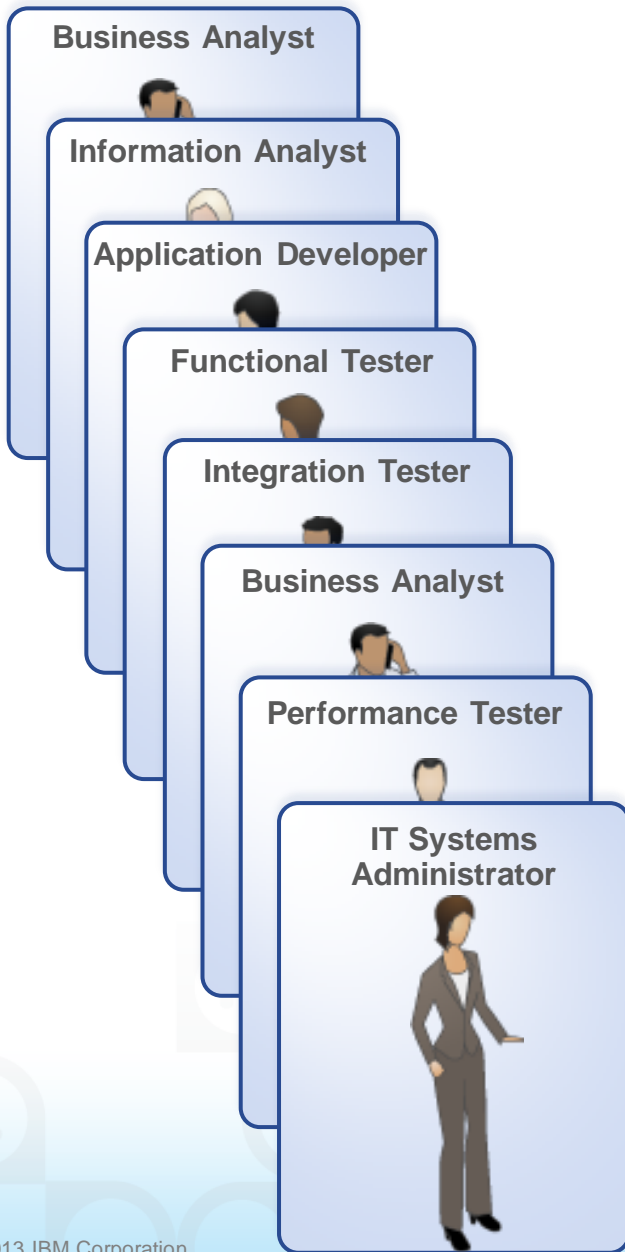
Decision logic externalised into Business Rules

Benefits of managing business rules separately:

- Natural language rules can be easily read
- Externalized rules are easy to change
- Centralized rules enable reuse and consistency

Without Business Rules

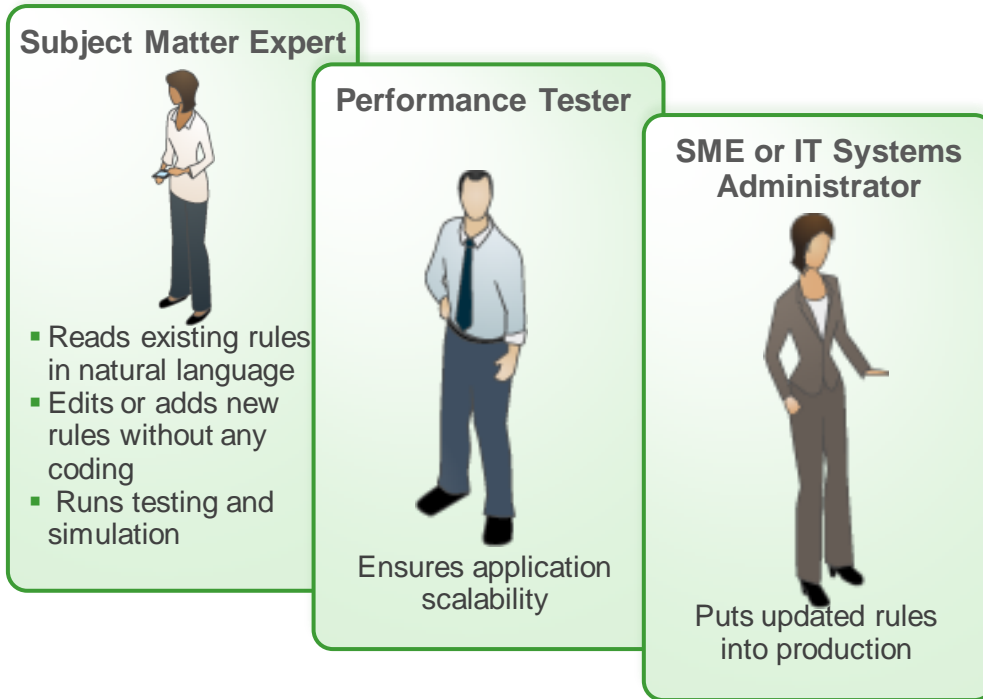
Make changes in months



With Business Rules

Make changes in weeks or days

- Eliminate rework from misinterpreted requirements
- Speed up rule changes



Business users (SMEs) take control of the decision logic & minor rule updates

IT experts ensure application availability, reliability & new application development



How can we ensure the right decision is being made at the right time?

→ *Visibility*



How can we rapidly respond to evolving market demands, competitive actions and regulatory requirements?

→ *Collaboration*



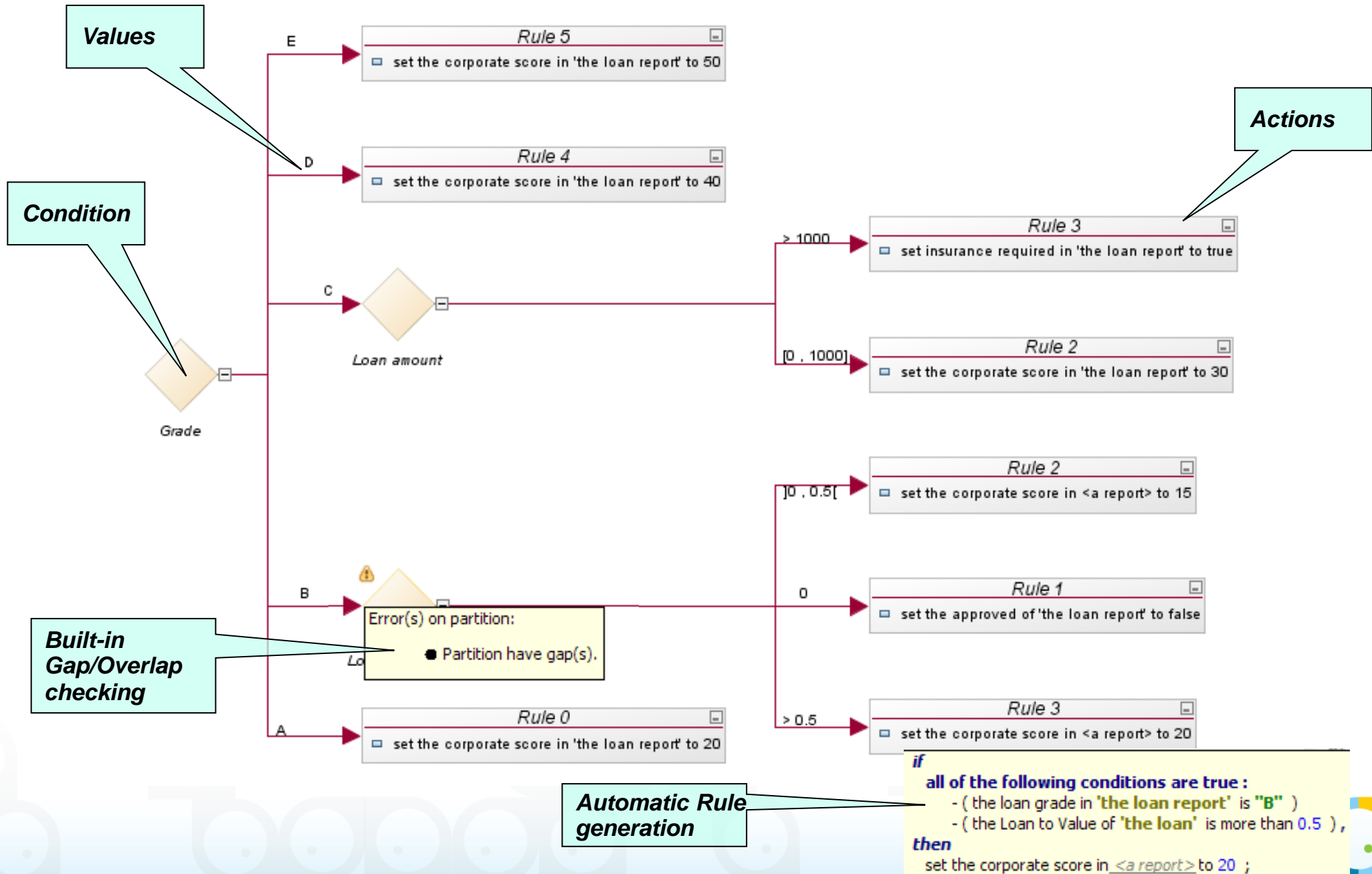
How can we ensure that business decisions are managed in a controlled environment?

→ *Governance*

- Customizable vocabulary specific to your organization, industry, application (etc.)
- Supports language localization
- Integrates with external data sources (e.g. list of countries)
- Drop down lists for customized domain data
- Templates facilitate new rule creation

```
if
  the type of the claim is a Veterinary cost
then
  automate the processing of the claim
else
  process the claim manually
```

```
if
  the credit score of the borrower is less than 200
then
  add "Credit score below 200" to the messages of the loan
  reject the loan;
```



```

if
  all of the following conditions are true :
    - ( the loan grade in 'the loan report' is "B" )
    - ( the Loan to Value of 'the loan' is more than 0.5 ),
then
  set the corporate score in <a report> to 20 ;
    
```

FEB Logic... time to use ODM?

This is getting complex and we have rules in place already - should we be using ODM?

Hint - for this demo - Yes!

- Yes
- No

Add Rule

- Rule 1
- Rule 2
- Rule 3
- ➔ Rule 4 ✕

Details for: Rule 4

When this is true: ?

This is getting complex and...

Does not equal

+ ✕ ✓

A fixed value

Yes
 No
Clear selection

ODM Section

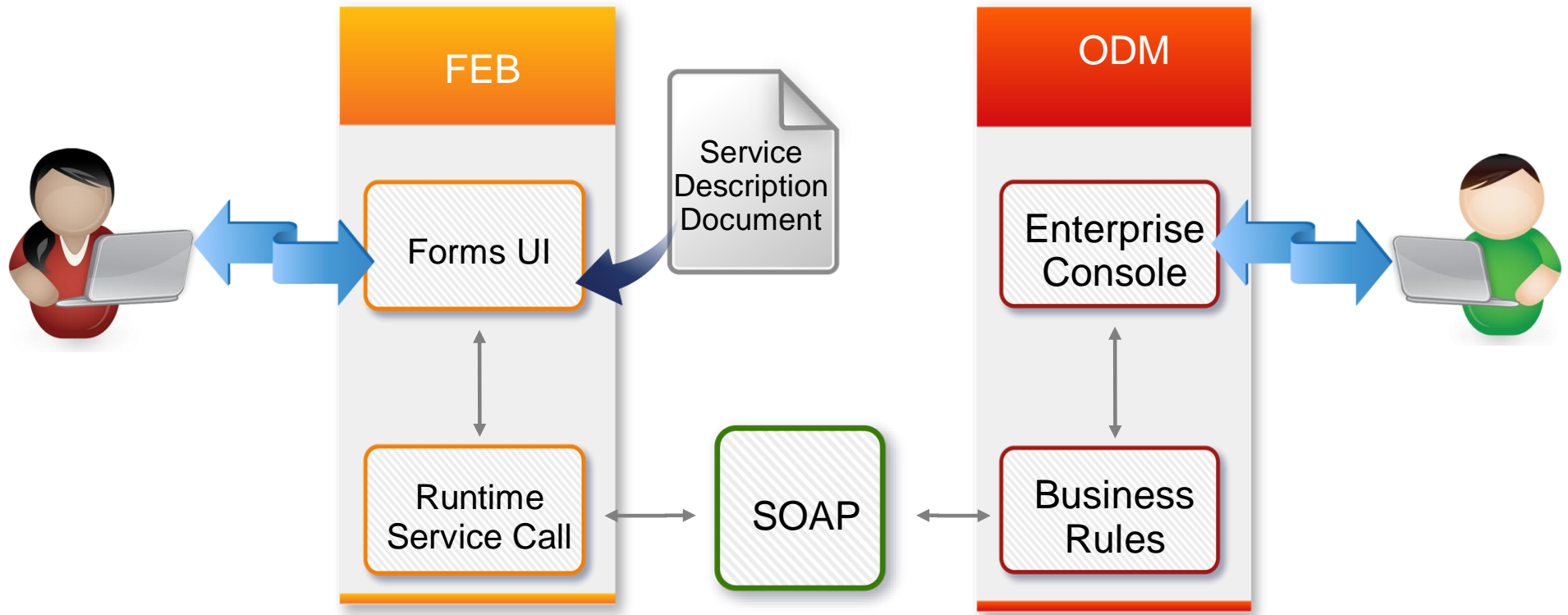
Hide

+ ✕ ✓



Demonstration

How it works



धन्यवाद
Hindi

多謝
Traditional Chinese

Grazie
Italian

ขอบคุน
Thai

Gracias
Spanish



Merci
French

Спасибо
Russian

شكراً
Arabic

Obrigado
Brazilian Portuguese

Danke
German

多谢
Simplified Chinese

நன்றி
Tamil

ありがとうございました
Japanese

감사합니다
Korean

