



# Amgraf Forms Portal Software

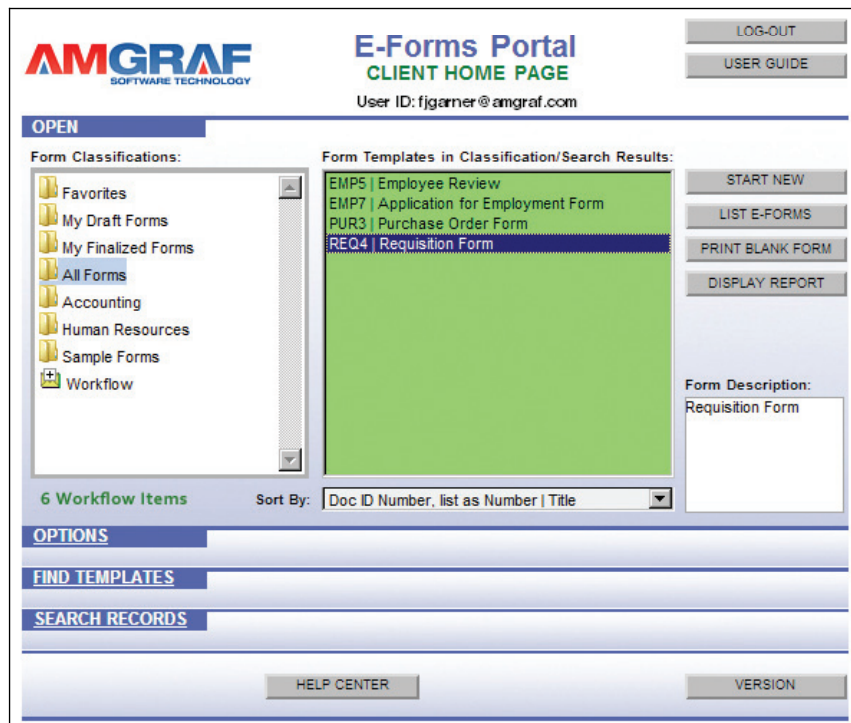
## Managing Secure Client Access to a Repository of Electronic and Paper Forms

### Online Forms Catalog with Access Control and Records Management

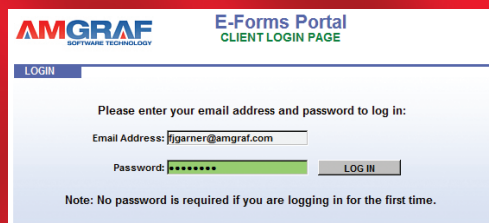
The best way for an organization to manage client access to a large repository of electronic forms is with the Amgraf Forms Portal. The Forms Portal is a browser-based user interface that works through an Internet or Intranet connection. The forms portal is a universal starting point for selecting and opening a variety of electronic forms. It gives users a convenient place to store database connected OneForm HTML I-forms, as well as standard Microsoft Word and Adobe PDF e-forms.

With OneForm, a forms designer can upload almost any e-form to the forms portal. These e-form types include:

- **Print-on-Demand** – Forms that can be selected, opened, and printed.
- **Fill-and-Print** – These can be opened, filled out, and then printed.
- **Intelligent Database-Connected Forms** – OneForm e-forms that can be opened, filled out on-screen, submitted (with fill data stored in a database table record), reopened for editing, routed via email, and printed on a local printer.



Forms are classified in a variety of ways, usually by department or function. This allows forms to be grouped by use and made easier to locate. Classifications are determined by the Portal Administrator and assigned to a form before it is placed on the hosting server. Client access to e-form classifications can be allowed or denied by the Portal Administrator.



### Opening, Filling, and Saving E-Forms

This **Start New** button opens the selected form in the browser and makes it available for Client input as defined in the specific form. The **Edit E-Forms** button allows a Client to reopen e-forms that have been previously filled out and Saved as Draft. Once opened, the form data can be modified and saved again.

The e-forms are displayed between top and bottom frames. The top frame is used to navigate from page to page within the e-form by clicking a Page Number tab icon. The bottom frame has a row of control buttons that allow the Client to submit the filled e-form. Clients are not allowed to save a blank form as a data record.

The buttons in the control frame include:

- **Help** – Display the Help Document for the current e-form
- **Attach Files** – Attach an external file to the saved e-form record
- **List Files** – Display a list of all attached files for the saved e-form record
- **Submit to Workflow** – Submit the e-form to Workflow, either to a Client or to a Group Inbox
- **Return to Sender** – Return the e-form to the Client that submitted it to Workflow
- **Save Draft** – Save the filled e-form for later changes
- **Finalize** – Finalize the e-form record so that it cannot be changed

### E-Forms Workflow and Status

The Forms Portal supports Simple Workflow to allow Clients to notify other Clients that an e-form has been submitted for review or for further filling by other users. Workflow occurs by directly contacting a specific user, or by depositing an e-form into a shared inbox.

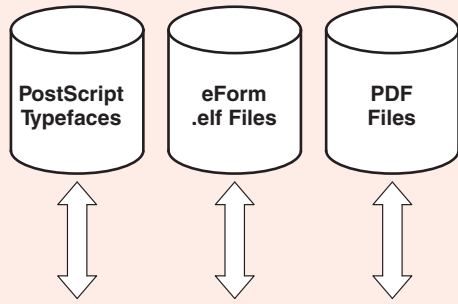
### Portal Administrator Sections

The administrative functions include panels to:

- **Manage Forms** – Create Classifications and Inboxes
- **Manage Users** – Connect Clients to Forms and Inboxes
- **Create Reports** – Generate reports detailing Portal Usage, Forms Library, and Productivity



## 1. eForm Creation

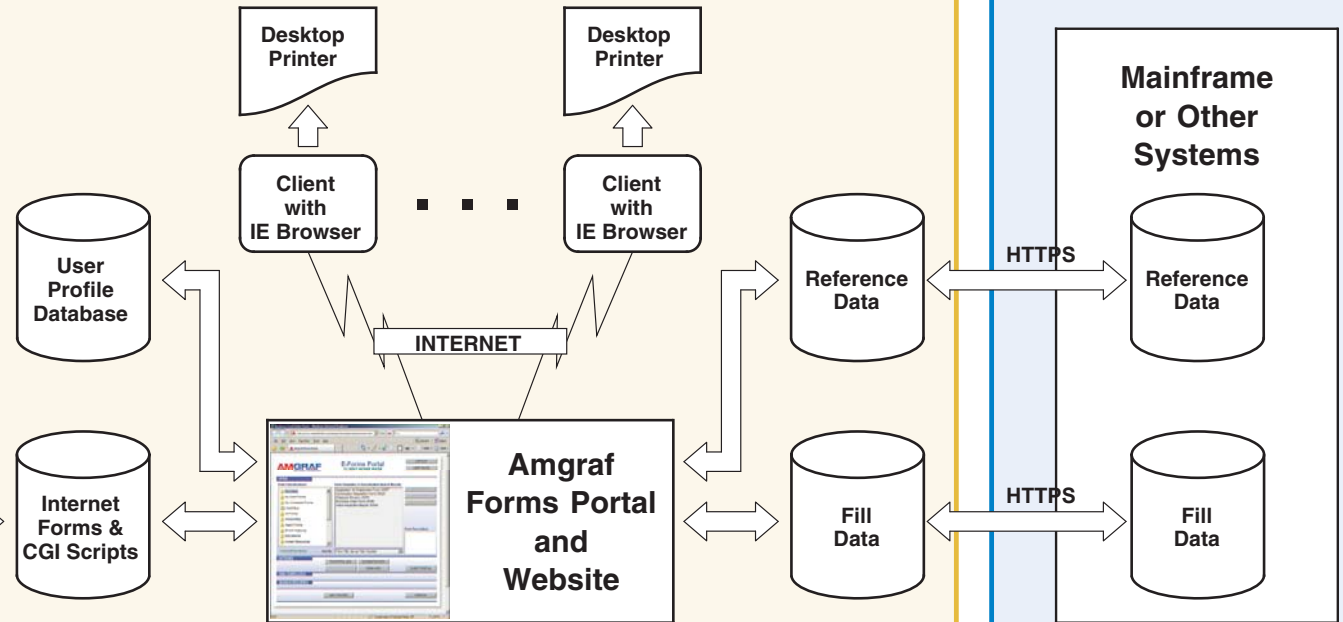


Windows XP/Vista/7  
OneForm Designer Plus  
with PDF Option

### eForm Designer Platform

For organizations managing large numbers of forms, the OneForm Designer Plus software along with the Amgraf Forms Portal is a great way to offer users convenience of access while exercising control and maintaining data. Forms designers create both eForms and web server scripts to display and capture data. Once eForms are stored on the Web Server, clients using Internet browsers can access the forms by logging in to the site, and then fill, print, save, submit, and e-mail the Forms as needed.

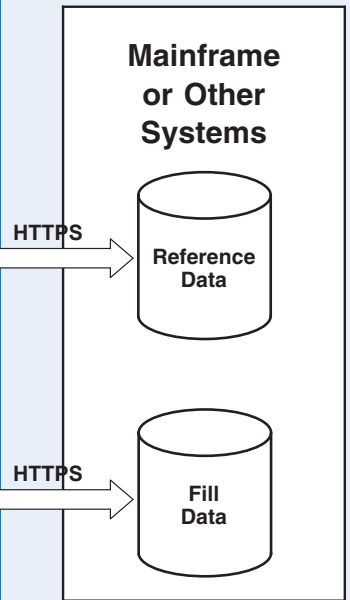
## 2. Internet Web Site



### Amgraf Forms Portal and Website

A Windows or Unix computer server acts as the hardware/software platform and a physical connection to the Internet. Because of the data capture, data display, and submit functions, eForms must have server-side scripts (or forms handlers) to communicate with while the browser client uses them. Each eForm and its corresponding scripts and databases are stored on the web server. These scripts query, read, and write databases as required to perform a transaction such as taking an order or submitting an employment application. Other functions can also be included within an eForm, such as e-mail, local saving/opening, and printing.

## 3. Data Integration



### Data Integration

Often it is important to have access to reference databases such as account, product, or employee information. It is usually adequate to use copies of reference databases that get updated periodically as needed, which reduces the security risks. Another important aspect is that most filled-in eForm data needs to be transferred to some other system after it has been validated, and often that requires communication with mainframes or other central servers.

**Diagram 1**  
**Typical System Configuration of Forms Portal Solution**

Amgraf proposes to deliver a secure Internet based eForms Portal solution based on the three subsystems shown on this diagram.

### Subsystem 1: eForm Creation.

Provides the capability for the Forms Management team to quickly create online eForms and web server scripts to display and capture data

### Subsystem 2: Internet Web Site

The Amgraf Forms Portal is a browser-based user interface that works through an Internet/Intranet connection. The forms portal is a universal starting point for selecting and opening a variety of electronic forms. ••

### Subsystem 3: Data Integration

Forms fill data can be shared and synchronized with other enterprise systems.

**AMGRAF, INC.**  
**FORMS PORTAL**

**System Diagram**  
**Online E-Forms**  
**Portal Access**