

Amgraf Forms Portal Software



YES.
IT'S THAT GOOD!

AMGRAF
SOFTWARE TECHNOLOGY

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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 eForms, as well as standard Microsoft Word and Adobe PDF eForms.

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 eForm classifications can be allowed or denied by the Portal Administrator.

Key Features of the Forms Portal

- **Always On** – The Internet based forms repository is available 24/7 around the clock.
- **Custom Catalog with Favorites** – Online forms are organized by their Purpose (or Status) within Form Classification folders.
- **Browser Friendly** – Most eForms are filled using standard HTML web browsers. EForms are always printed and emailed as PDF.
- **Easy to Navigate** – Action buttons to Print a Blank form, Start Filling a New Form, and List/Print/Export filled in forms.
- **Searchable Database** – Every finalized eForm creates a searchable database record. The Search Records button shows a list of eForms that match. The forms can be copied and printed, or the list can be exported as a spreadsheet.
- **Photos, Graphics, and Attachments** – Digital photos and other images can be inserted into eForm graphic fields. External files can be attached and saved along with a filled in eForm record. There is also an optional integrated Sketch tool, ideal for making and modifying simple drawings for merging into eForms.
- **Intelligent Forms** – EForm input fields have real time keystroke validation. Drop-down select lists can be dynamically populated from database tables. All date fields have a pop-up calendar for convenience.
- **Supports Multiple Fill Sessions** – Sometimes eForms cannot be completed in one session, so there is a Save Draft button to preserve work in progress.
- **Forms Workflow** – Sometimes it is necessary for more than one person to be involved when filling out a form. Some forms also need to be approved before a report can be finalized. The Forms Portal supports this kind of online collaboration through Simple Workflow. Clients can send a partially finished eForm to a specific portal user, or to a group inbox that is shared by many users.

Opening, Filling, and Saving eForms

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

The eForms are displayed between top and bottom frames. The top frame is used to navigate from page to page within the eForm by clicking a Page Number tab icon. The bottom frame has a row of control buttons that allow the Client to submit the filled eForm. 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 active eForm
- **Attach Files** – Attach an external file to the saved eForm record
- **List Files** – Display a list of all attached files for the saved eForm record
- **Submit to Workflow** – Submit the eForm to Workflow, either to a Client or to a Group Inbox
- **Return to Sender** – Return the eForm to the Client that submitted it to Workflow
- **Save Draft** – Save the filled eForm for later changes
- **Finalize** – Finalize the eForm record so that it cannot be changed



eForms Workflow and Status

Pre-defined workflows can be embedded into the eForms design using OneForm Designer Plus.

The Forms Portal also supports Simple (ad-hoc) Workflow to allow Clients to notify other Clients that an eForm has been submitted for review, or for further filling by other users. Workflow occurs by directly contacting one (or more) specific Client UserIDs, or by depositing an eForm into a shared inbox. When a Client logs into the Forms Portal, they receive a message if workflow items are waiting for them.

Portal Administrator Sections

The administrative functions include panels to:

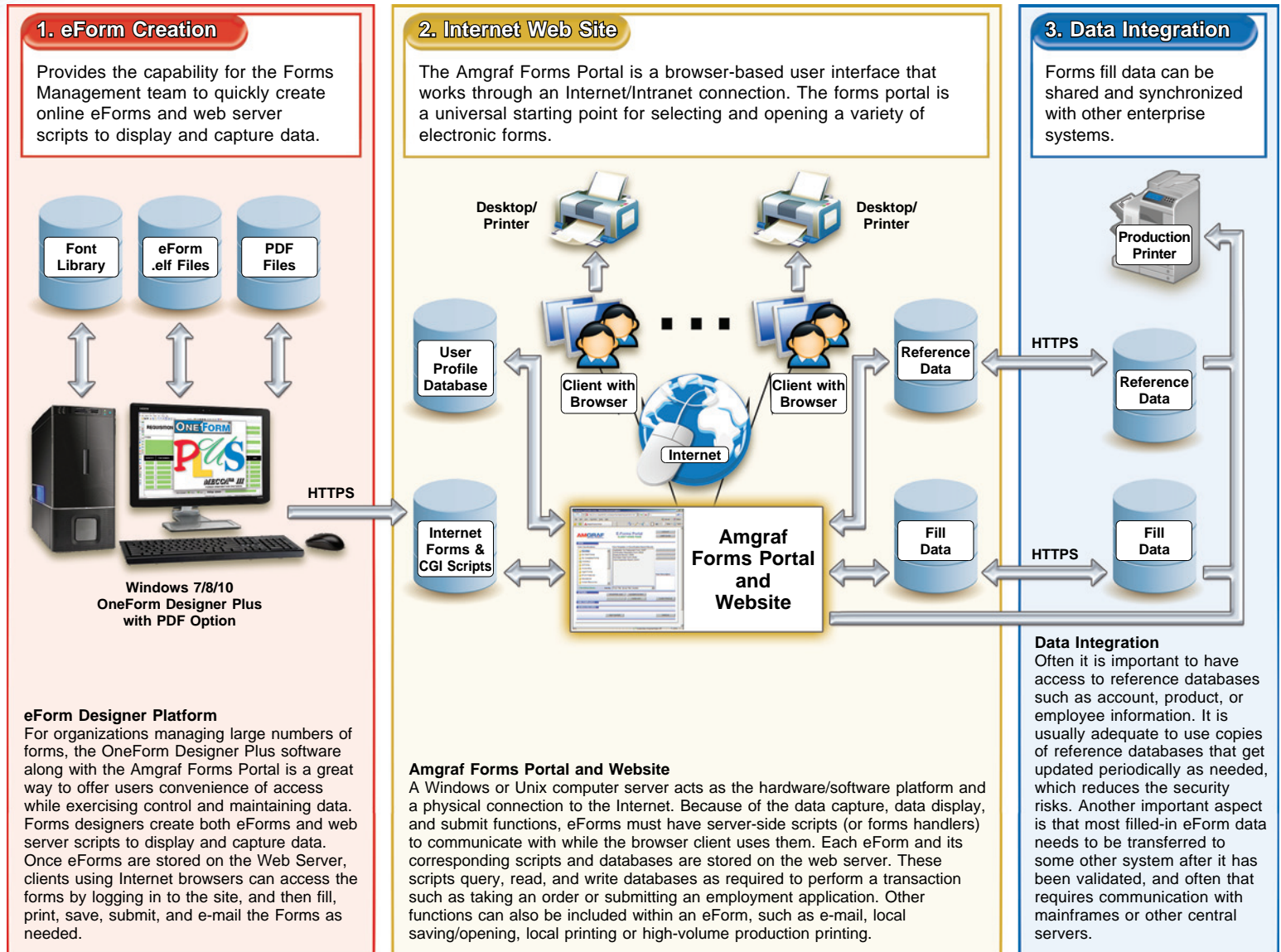
- **Manage Forms** – Create Classifications and Inboxes
- **Manage Users** – Connect Clients to Forms and Inboxes
- **Manage Reports** – Generate reports detailing Portal Usage, Forms Library, and Productivity
- **Manage Workflow** – Manage the workflow table that specifies the routing for eForms as their status and stages change

Client access to eForm classifications can be allowed or denied by the Portal Administrator. Every Client has a Role within the Portal. There is a table used to create and maintain the Roles. The Forms Portal Administrator creates a Role by choosing from the following privileges:

View Blank Form	Submit Form for Review	Add New Forms Template
View Filled Form	Finalize Form	Revise Existing Forms Template
Open and Edit Form	Approve Submitted Form	Design Reports
Save Filled Form as Draft	Search Form Records	Print Reports
Submit Form to Workflow	Print Blank Form	Workflow Stage
Return Form to Sender	Print Filled Form	Re-assign Ownership

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System Diagram — Online eForms Portal Access



Amgraf Forms Portal Capabilities

Primary Portal Features:

- ✓ Online eForms
- ✓ Offline eForms
- ✓ HTML eForms
- ✓ Adobe Reader® PDF eForms
- ✓ Mobile Device Support
- ✓ Cloud Based Solution
- ✓ Centralized Forms Server
- ✓ Input Databases
- ✓ Output Databases
- ✓ Submit Data
- ✓ Save Draft
- ✓ Return to Sender
- ✓ Finalize/Lock eForm
- ✓ Submit eForm to Workflow
- ✓ Attach Files
- ✓ Upload Files
- ✓ Digital Signatures
- ✓ Multi-Page Support
- ✓ Calculation Support
- ✓ Barcode Support
- ✓ Data Validation Requirements
- ✓ Conditional Logic Support
- ✓ Context Sensitive Help
- ✓ Dynamic Table/Section Support (Up To 4000 Rows)
- ✓ Auto Synchronization of Offline Form Data
- ✓ GPS Coordinate Integration
- ✓ Link Fields to Workflow Processes
- ✓ Import/Export CSV Pre-defined Business Rules
- ✓ Searchable Data Repository
- ✓ Add Notes to Fields
- ✓ Form Packets
- ✓ Notification Lists

Administrative Features:

- ✓ Administrator Control Interface
- ✓ Assign User Roles & Task
- ✓ Audit Trail
- ✓ Controlled Form Access
- ✓ Data Reporting
- ✓ Business Rules Support
- ✓ Forms Management
- ✓ Records Management
- ✓ Tracking Support
- ✓ Version Control
- ✓ Workflow and Stages Support

Portal Security Features:

- ✓ Access Control using Passwords
- ✓ Password Format and Reset Procedures
- ✓ Active Directory Support
- ✓ LDAP Support
- ✓ Data Encryption Support
- ✓ Access Control using Single Sign-on
- ✓ Supports Credit Card Processing
- ✓ Automatic Time Out
- ✓ eForms Layering and Hashing
- ✓ Offline eForms File Transfer Procedure
- ✓ Form Classifications
- ✓ Intelligent Inbox Access

OneForm Designer Plus Features:

- ✓ Export HTML, XML, Fillable PDF, ASCII
- ✓ Import File Conversion
- ✓ Form Templates Available
- ✓ Auto Create Web Service Scripts
- ✓ Accessibility Tag Support

The Complete Package for Electronic Forms Design and Deployment

OneForm Designer Plus is a complete eForms authoring tool, with features for the most demanding workflow projects. Because no filler software licenses are needed, OneForm is also the most affordable solution for enterprise-wide electronic forms deployment. Generate both HTML & PDF eForms directly to the Amgraf Forms Portal Online Forms Catalog with full Access Control and Records Management.

Amgraf's OneForm Designer Plus eForm Field Features Demonstration

Report ID: 13802

Selected List Changes Logo and Field Data

North America

1501 Oak Street
Suite 100
Kansas City, MO 64108
U.S.A.

Billing Data - Double Click to Adjust

May 05, 2017

☐ Net 30 ☐ Net 60 ☒ Net 90

Due Date Automatically Set
August 02, 2017

Select List Updates Contact Address Information

Homeland Bakery

101 Main Street
New Orleans, LA 66762

Check to Use Existing Contact Information OR Uncheck to Key New

Component Acceptable

☒ Yes ☐ No ☐ N/A

Scheduled Inspection Day(s)

☒ M ☐ Tu ☒ W ☐ Th ☒ F

Quarterly Percentages (Not to Exceed 100%)

Q1 10% Q2 20% Q3 30% Q4 40% Total 100%

Show/Hide Fields Based on Value (\$1000+ Requires Managers Approval)

Department Charged

Systems Operations

Amount

\$2,400.00

Verified By - Manager

Phone

Date

03/20/2017

Drop-Down Lists With Dynamic Content

Region

Location

Session

Help Edit Notes Attach Files Submit to Workflow Save Draft Finalize Cancel

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