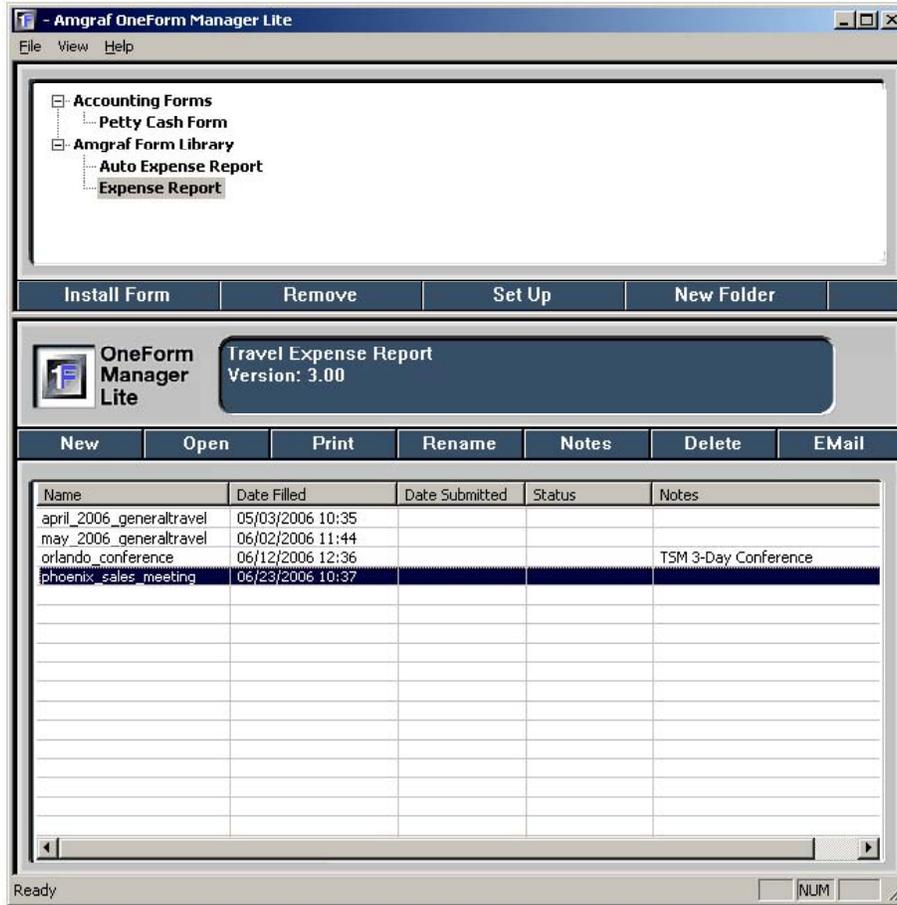


Frequently Asked Questions (FAQ)

USER GUIDE



ONEFORM MANAGER LITE PERSONAL FORMS SERVER



Version 4.1.0.0
June 2006

AMGRAF, INC.

OneForm™ Manager Lite

Personal Forms Server



Copy – Retain – Organize – Manage
All Your Electronic Forms



OneForm Manager Lite is the perfect e-forms management companion to other browser-based reader, viewer, and player programs. OML is available free to end-users and can be downloaded by going to Amgraf's web site www.amgraf.com.

FEATURES:

- Fillable HTML Forms
- Fillable PDF Forms (works with Free Reader)
- E-forms Distribution from Web Sites and/or CD's
- Local and Server Form Filing
- XML-Tagged Fill Data
- Secure Encrypted Form Storage
- Windows 2000/XP Client
- No User License Fees
- Free Download

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Welcome to Amgraf's OneForm Manager Lite

Amgraf's free OneForm Manager Lite (OML) software catalogs HTML and PDF e-forms by classification and date. Through OML, you can keep a secure copy of every electronic form you fill out. When desired, you can also locally open, edit, finalize, and submit the filled forms to Internet servers for centralized data collection.

OML is the perfect e-forms management companion to other browser-based reader, viewer, and player programs.

Key Features of OneForm Manager Lite

- Fillable HTML Forms
- Filled PDF Forms (works with Free Adobe Reader 5.0 and higher)
- E-forms Distribution from Web Site and/or CD's
- Both Local and Internet Server Form Filing
- XML-Tagged Fill Data
- Secure Encrypted Form Storage
- Windows 2000/XP Client
- No User License Fees
- Free Download

OML combines a personal web page server with a forms file manager, and runs on a Windows client computer. Within OML, new unfilled e-forms are saved as *containers* for data, while *form fill data files* are separately stored as XML-tagged text. When you exit after filling-in an e-form, the e-form field data is automatically extracted, optionally encrypted, and locally stored. When you open a filled e-form, the empty base e-form is retrieved and dynamically merged with the selected fill data to display as a populated, fillable e-form. OML E-forms from many sources can be organized and cataloged by OML on your personal computer.

OneForm Manager Lite is available free to end-users and can be downloaded by going to Amgraf's web site www.amgraf.com/pages/omlinfo.html.

OML-compatible e-forms and/or PDF forms can be created in minutes with Amgraf's popular forms design software package OneForm Designer Plus (Version 4.2.6.7 or higher). Contact Amgraf for OneForm Designer Plus licensing information or to locate a service bureau that can enhance your existing forms to work with OML.

You can identify an OML-compatible e-form by looking for the OML button, as shown below:



Figure 1: The OML Forms Manager [Save Form] Button

Using OneForm Manager Lite

The OML interface consists of two windows. The top window shows the list of e-forms installed on your computer, and the bottom window shows all instances of a particular filled and/or submitted e-form. To open an empty e-form, the user locates the desired form from the top list, and clicks the [New] button. This will open the form for filling.

To open a previously filled e-form, the user selects the fill file name from the bottom list, and selects the [Open] button. OML retrieves the empty e-form, locates the fill file, and merges the two together. The result is a filled-in e-form displayed just like it was when it was previously submitted to OML. Then new information can be keyed or old information edited and the e-form can be saved to OML again.

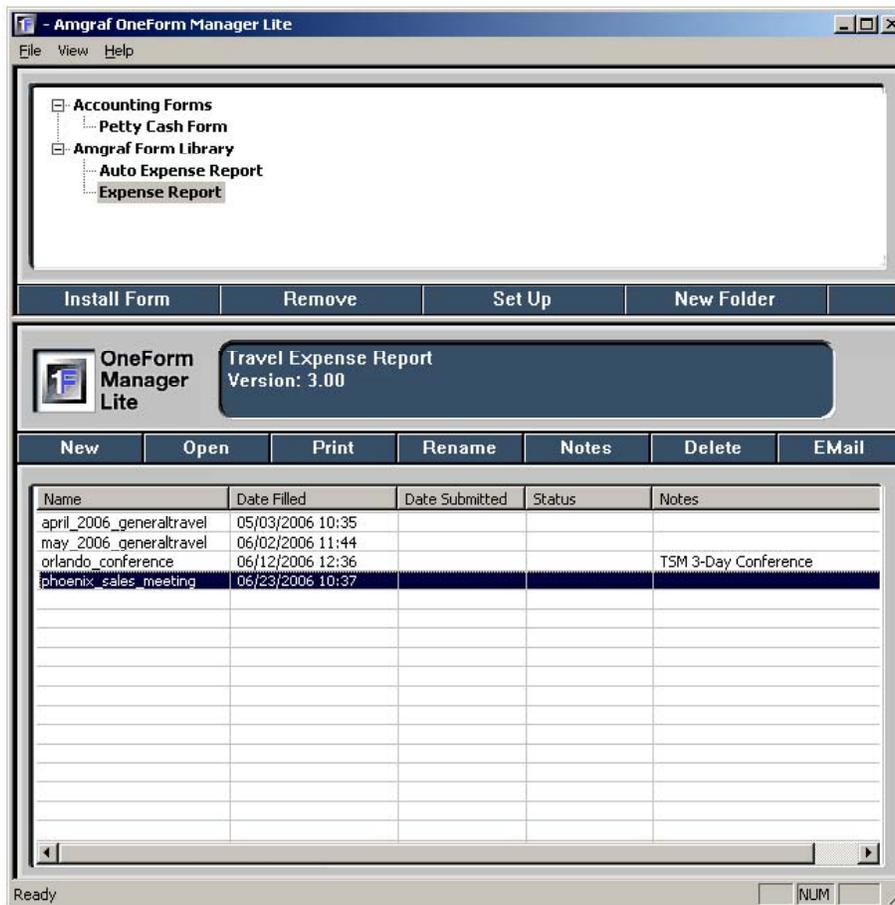


Figure 3: The OML User Interface Lists Forms by Classification

OML e-forms behave exactly as they would if opened from a web site. The e-form is filled out by keying data into the fill-fields, and closed by clicking the OML [Save Form] button. The OML button submits Fill Data to the OML Personal Server.

E-forms are opened and edited as fillable HTML and printed and emailed as flattened PDF forms. The OML fill files are used interchangeably between the two. A screenshot of the Expense Report in each display format is shown below:

TRAVEL EXPENSE REPORT

Name: Susan P. Johnson | Department Name: Sales | Ext. No.: 4000 | Department No. to be Charged: 4000 | Account to be Charged: _____

EXPLAIN PURPOSE OF TRIP: Quarterly Sales Meeting

CHECK ONE OR MORE:
 Sales - Serv. Training | Recruiting
 New Employee Relocation | Participant
 General Travel (Explain) | Attendee } TRADE SHOW

PART I EXPENSES (EXPLAIN PREPAID/CHARGED AMOUNTS IN PART II BELOW.)

TRANSPORTATION

	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY	SUNDAY	TOTALS
City Visited	Phoenix							
Date	06/19/2006							
Air/Rail								
Auto-Rental Taxi/Bus								
Gasoline	14.95							14.95
Misc.*								
SUB TOTAL: TRANSPORTATION								14.95

LODGING & MEALS

	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY	SUNDAY	TOTALS
Room								
Breakfast								
Lunch								
Dinner	76.00							76.00
Business Conference								
Misc.**								

Save Form

TRAVEL EXPENSE REPORT

Name: Susan P. Johnson | Department Name: Sales | Ext. No.: 4000 | Department No. to be Charged: 4000 | Account to be Charged: _____

EXPLAIN PURPOSE OF TRIP: Quarterly Sales Meeting

CHECK ONE OR MORE:
 Sales - Serv. Training | Recruiting
 New Employee Relocation | Participant
 General Travel (Explain) | Attendee } TRADE SHOW

PART I EXPENSES (EXPLAIN PREPAID/CHARGED AMOUNTS IN PART II BELOW.)

TRANSPORTATION

	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY	SUNDAY	TOTALS
City Visited	Phoenix							
Date	06/19/2006							
Air/Rail								
Auto-Rental Taxi/Bus								
Gasoline	14.95							14.95
Misc.*								
SUB TOTAL: TRANSPORTATION								14.95

LODGING & MEALS

	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY	SUNDAY	TOTALS
Room								
Breakfast								
Lunch								
Dinner	76.00							76.00
Business Conference								
Misc.**								

1 of 1

Figure 4: Examples of HTML and PDF E-Forms

The OML E-Form Management Options

The top window lists and controls the management of the e-forms available within the OML Program. Highlighting an e-form will list the following options:

Install Form: This option is always available for installing new e-forms.

Remove: Removing an e-form is done by highlighting the e-form name and selecting the [Remove] button. You may then decide whether to remove all of the existing fill data files captured for that e-form.

Set Up: This unique feature allows you to store preference data for a particular e-form when the form is opened. Simply highlight the e-form name and click the [Set Up] Button. The form will open for editing. Type in the data which is to be populated automatically everytime the form is opened. Click [Save Form] to store the pre-fill data into the preferences of the form, and if a file name is required, use "formpreferences".

New Folder: You can have sub-folders within your e-form main folders. For example, you may want to save your expense reports by month or quarter. To make a new folder, highlight the e-form folder name and select [New Folder]. It will prompt you to name the sub-folder.

The OML File Options

When selecting a file from the list in the bottom window the following buttons are displayed:

New: This opens an empty HTML version of the e-form ready to be filled and saved.

Open: Highlighting an existing file name and clicking the [Open] will bring up the HTML version of the e-form with the previously saved data. You can freely make edits or add new information and re-save.

Print: The print option will always open a flattened PDF version of the e-form. Simply highlight an existing file from the list and click the [Print] button to have OML launch the e-form into the Adobe Reader.

Rename: This will prompt you to type in a new name for the highlighted file. *Note: This will undo a "Finalize" of a file and make it editable again.*

Notes: Comments can be added to the file list.

Delete: This will remove the highlighted file from the list. It will prompt for "Are you sure?". Be aware, after answering "Yes", there is no way to recover the deleted fill data.

Email: Highlighting an existing file name and clicking the [Email] button will open your email software with that e-form attached. The form is a flattened PDF version of the e-form populated with the fill data.

Optional features found under the right-mouse pop-up menu:

Move To: This option allows you to move the file into a sub-folder. Highlight the file to move and then pick on the folder name within the top window. *Note: When moving files, keep them within their e-form category. Only move them into sub-folders.*

Finalize and Submit: Filled data files can be write protected (using Finalize), and then submitted to a centralized data collection site. The Finalize option marks the file as "Final" under the Status Column.

Any files marked Final will then have a Submit option made available. Highlighting a file and clicking [Submit] will send the data to a pre-established Internet Server URL for centralized data collection.

Installing New Sample Forms from Amgraf's Web Site

E-forms installation is easy, you simply click the [Install Form] button and check Install from Web.

The Install from Web option presents a drop-down list of e-forms servers known to you. In its original state, the e-form server list will only have *amgraf.com*. Other server names will be automatically added as they become available to you through e-mail notices or web browsing to other OML e-forms server sites.

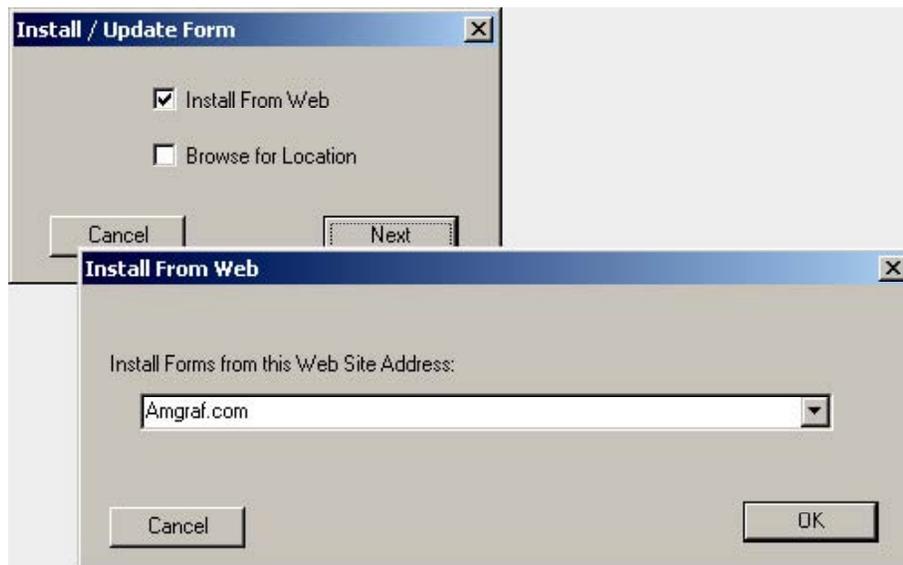


Figure 6: Install E-Forms from a Web Site

Choosing *amgraf.com* and clicking OK, will take you to the Forms Download dialog.

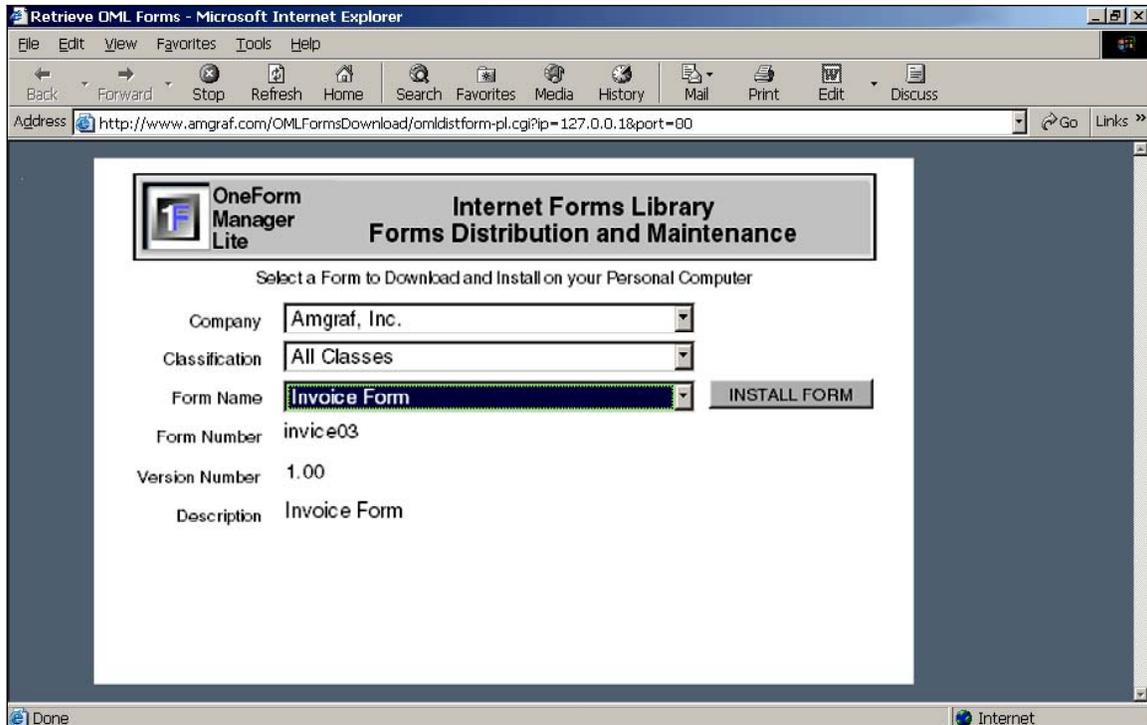


Figure 7: Select an E-Form to Install

Within an e-forms server, the forms are cataloged by Company, Classification, and Name. This allows you to find and select the e-form that you wish to install. On Amgraf's web site there is a short list of sample forms that are useful for testing OML.

Simply select the desired e-form (we chose Invoice Form) from the server's Form Distribution page and click the [Install Form] button. Click the "Close this Window" link and refresh the OML screen by pressing [F5]. OML's list of available e-forms will now be updated and you will see Expense Report and Invoice Form in the top window.

Notice that OML's list of locally available e-forms has been updated to include the Invoice Form. E-form installation was immediate and seamless.

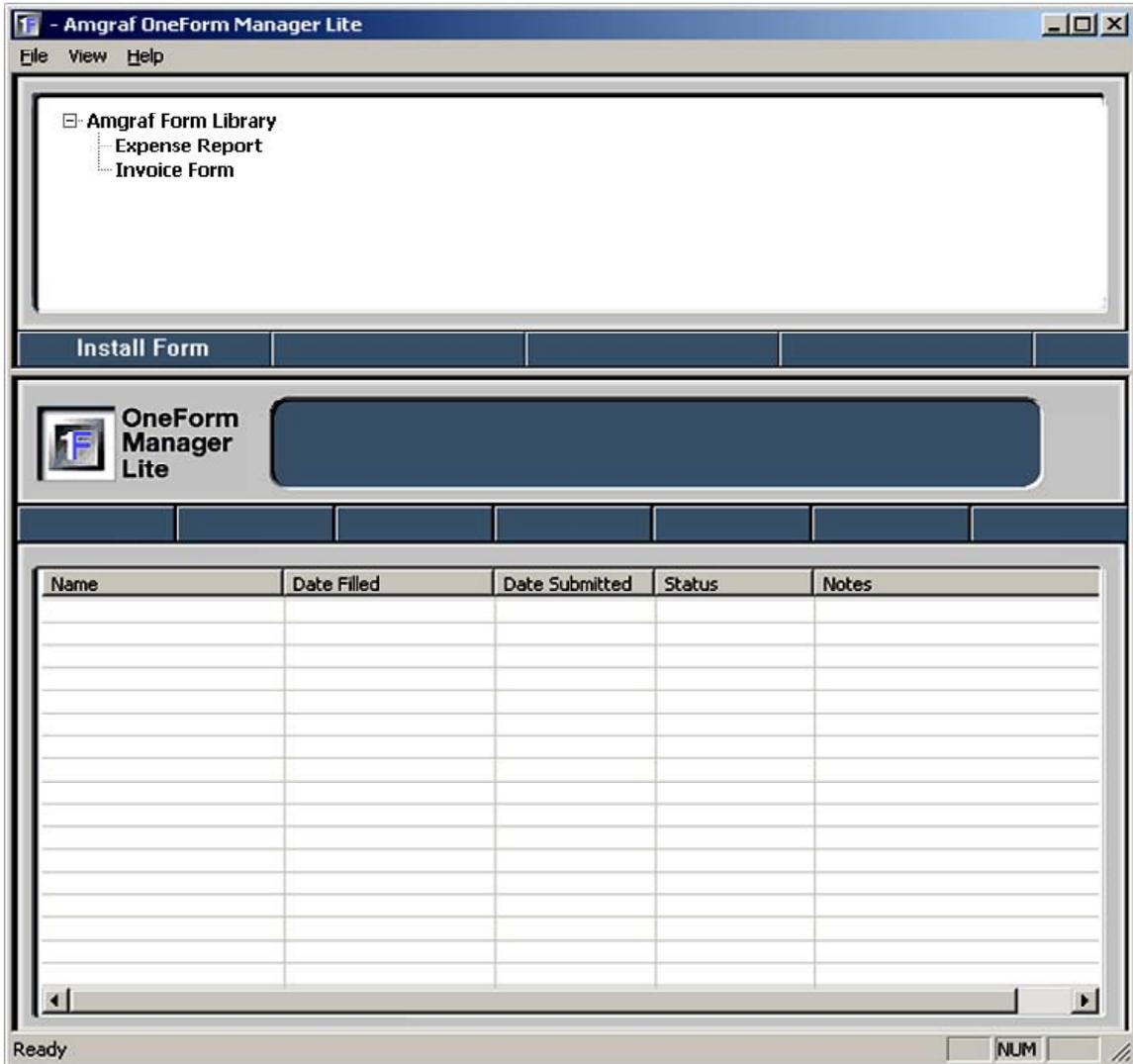


Figure 8: Expense Report and Invoice E-Forms are Ready to Be Opened

Installing New E-Forms by Browsing

If you receive your new e-forms by email, just save the attached e-form folder in a temporary location on your PC.

To install the new form, click the [Install Form] button and check the *Browse for Location* option.



Figure 9: Use the Browse for Location to Install a Form

Locate the folder and highlight the .OMM install file within.



Figure 10: OML Uses an .OMM E-Form Install File

Selecting [Open] will install the new e-form into your local OML form list.

Using the Submit Button to Email a Filled Form

You can email filled form data to other OML users by highlighting the fill file name from the bottom window and then clicking the [Submit] button.

NOTE: OML is preconfigured to work seamlessly with Microsoft Outlook. Other email programs may not work as described here.

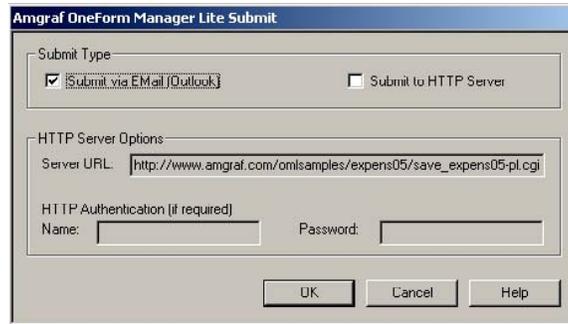


Figure 11: Use the Submit Button to Email Fill Data

Simply checking the Submit via Email (Outlook) option and clicking OK will launch Outlook with a new mail message. The fill data file .oml will be automatically attached and ready to send. Just type in the email address and desired message and click Send.

NOTE: The recommended save location for the “.oml” file is automatically inserted into the email message.

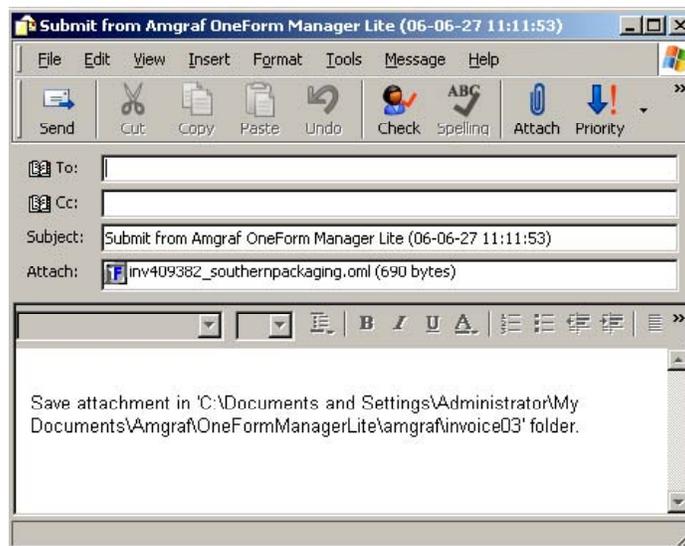


Figure 12: Outlook Opens a New Mail Message with the Form Fill Data Attached

When the recipient receives the email message, the fill data “.oml” fill will be attached. The recipient should then use the “Save” function in his/her email program to save the “.oml” file at the designated location (shown within the email message) so that it is cataloged by OML on the recipient’s PC.

Submit Filled Forms to Internet Servers

When you are connected to the Internet, the form fill data can be sent to an HTTP Server URL. This is useful to submit filled form data to Internet servers for centralized data collection. The sample Invoice Form has been setup to communicate with Amgraf's Internet server as a working example.

To use this feature, highlight the fill file name from the bottom window and right-click to bring up the pop-up menu. Select the "Finalize" option. This file has now been designated as Final and can be submitted. Now, click on the Submit button. Check "Submit to HTTP Server" and click OK. No password is needed for this sample form.

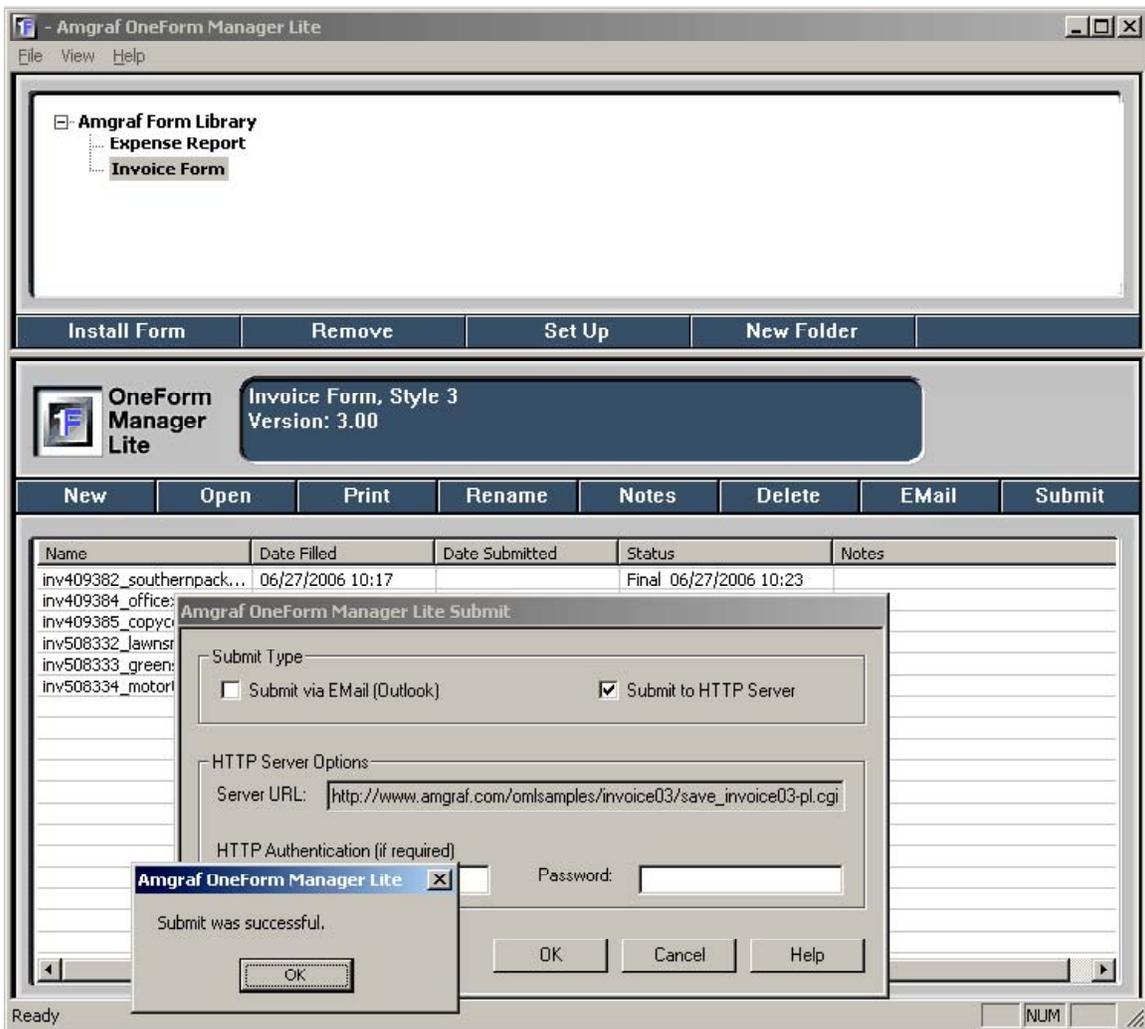


Figure 13: Submit E-Form Data to a Centralized Internet Server

Default File Locations on Your PC

When you install OML on your PC, the default location for the executable program is the following path:

C:\Program Files\Amgraf\OneForm

By default, e-forms are stored under your login's "Document and Settings" path. Each e-form installed on your PC has its own folder, and each folder has a sub-folder for the empty HTML and/or PDF forms and a sub folder for each fill data file.

The file extension for fill data is ".oml".

To remove OneForm Manager Lite from your PC, please use the Windows Control Panel "Add/Remove Programs" function.

Glossary

OFDP – OneForm Designer Plus Software by Amgraf, Inc.

OML – OneForm Manager Lite Software by Amgraf, Inc.

PDF (Portable Document Format) – Adobe Acrobat Portable Document Format. OneForm's Save As option saves to PDF.

XML (eXtensible Markup Language) – A coding method used to represent fill-field data.

LPFM - Frequently Asked Questions (FAQ)

Examples courtesy of TransCanada Corporation

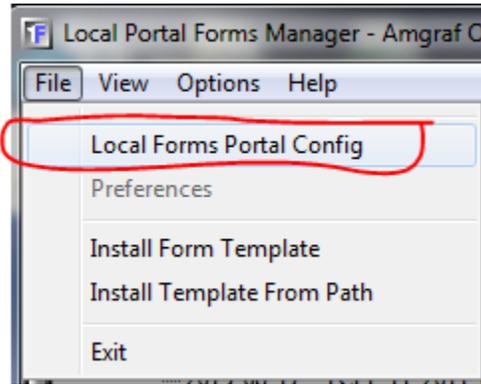
LPFM is a Local Portal Forms Manager. This is an application that allows users to work with E-Forms reports offline. Users could create and synchronize reports with their Online E-Forms account.

1. [How to set up your account?](#)
2. [How to disable Full Screen mode \(Kiosk mode\)?](#)
3. [How to install templates?](#)
4. [How to create new report?](#)
5. [How to open existing report?](#)
6. [How to submit report to your Online account?](#)
7. [How to send form your Online account to LPFM?](#)
8. [How to download report that was sent to LPFM?](#)

1. How to set up your account and select units?

Steps:

- Menu/ File
- Local Forms Portal Config



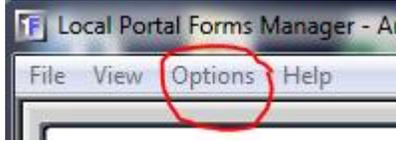
- Select the Portal from the list
- Input Portal User ID which is your email address you're using to login to E-Forms
- Select units: Metric Units (m, mm, C,...), English Units (ft, in, F,...)
- Click OK

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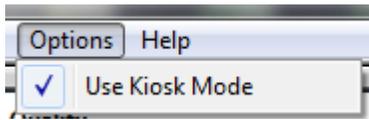
2. How to disable Full Screen mode (Kiosk mode)?

Steps:

- Menu/ Options



- Disable checkbox

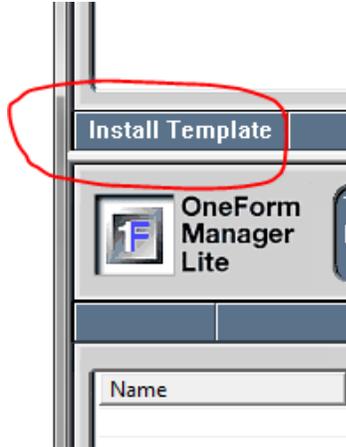


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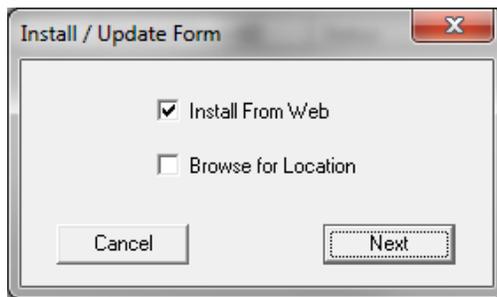
3. How to install templates?

Steps:

- Click “Install Template” button



- Click Next at the message below



- Select the Portal from the list.
- OK
- Select the Form Name from the pick list

Select a Form to Install on your Personal Computer:

Classification: ▼

Form Name: ▼

Form Number:

Version Number:

Description:

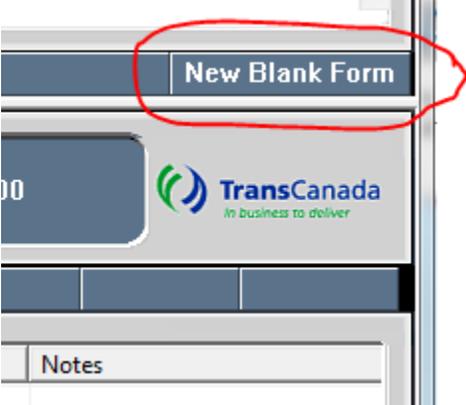
- Click “Install Form”
- Wait (download process could take a few minutes, please ignore any messages regarding app getting not responsive)

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4. How to create new report?

Simple E-Forms

E-Form Collections

All Reports (excluding Integrity Field Report)	Integrity Field Report
<ul style="list-style-type: none">Click on template name at the top section <p>Example:</p> <ul style="list-style-type: none">Gas Quality<ul style="list-style-type: none">Gas Quality Summary ReportPipeline Integrity<ul style="list-style-type: none">Pipeline Inspection Report - 0 <ul style="list-style-type: none">Click button "New"  <ul style="list-style-type: none">Provide name if required (internal for LPFM)	<ul style="list-style-type: none">Click on "TCPL 01 Site Information" <p>Example:</p> <ul style="list-style-type: none">TCPL Integrity Field Report<ul style="list-style-type: none">TCPL 01 Site Information - TCPL_11_2011_01 <ul style="list-style-type: none">Click button "New Blank Form"  <ul style="list-style-type: none">Give report name (internal for LPFM)

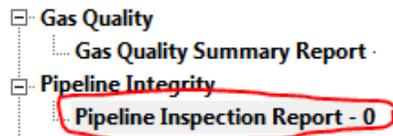
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5. How to open existing report?

Steps:

- Click on template name at the top section

Example:



- Click on report/page at the bottom section (selected report with change color to blue)

A screenshot of a report table. The table has a header row with columns 'Name' and 'Date Filled'. Below the header, there are two rows of data. The first row has '24064' in the 'Name' column and '12/07/2015 11:17' in the 'Date Filled' column. The second row has '74' in the 'Name' column and '12/07/2015 10:54' in the 'Date Filled' column. The first row is highlighted in blue. Above the table, there is a toolbar with buttons 'New', 'Open', 'Print', and 'Co'. The 'Open' button is circled in red.

Name	Date Filled
24064	12/07/2015 11:17
74	12/07/2015 10:54

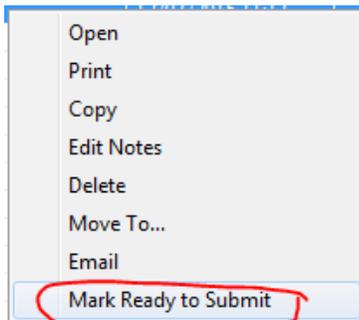
- Either double click on report/page or click button Open

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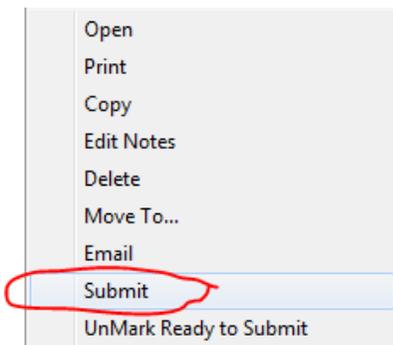
6. How to submit report to your Online account?

Steps:

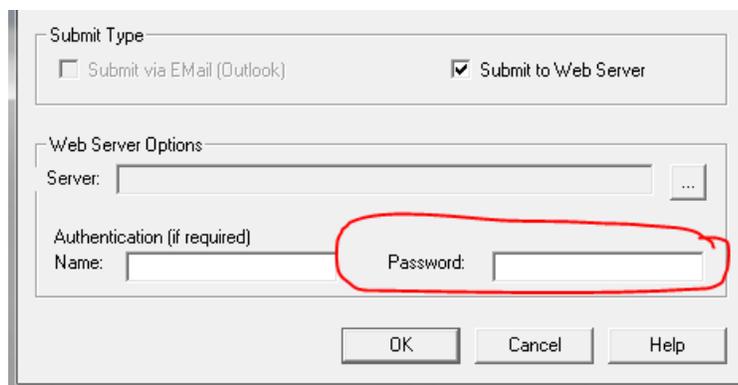
- Navigate to report at LPFM
- Right click on report (for Integrity Field Report, you can do this process with any page)
- Select "Mark Ready to Submit". Report will be locked for editing. The same way you can unmark it.



- Right click again
- Select "Submit"



- Provide password that you are using to login to E-Forms Online.

A screenshot of a dialog box titled 'Submit Type'. It has two sections: 'Submit Type' and 'Web Server Options'. In the 'Submit Type' section, there are two checkboxes: 'Submit via EMail (Outlook)' (unchecked) and 'Submit to Web Server' (checked). In the 'Web Server Options' section, there is a 'Server:' label followed by a text input field and a button with three dots. Below that is an 'Authentication (if required)' section with a 'Name:' label followed by a text input field and a 'Password:' label followed by a text input field. The 'Password:' field is highlighted with a red oval. At the bottom of the dialog box are three buttons: 'OK', 'Cancel', and 'Help'.

- OK
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7. How to send form your Online account to LPFM?

Steps:

- Navigate to/create report at your Online E-Forms Portal
- Open report
- Click button “Submit to Workflow”
- Then
 1. Select first letter of the user’s email who you want to receive this report at LPFM (you can send reports to LPFM to yourself or to other users)
 2. Select user from the pick list
 3. Click button “ADD”
 4. **Check “For LPFM”**. If this checkbox is unchecked report will be send to personal inbox to Online account selected and not to LPFM
 5. If required provide comments
 6. Click button “Submit to Workflow” at the bottom of the page. **Email notification will be send automatically including information that report is in personal inbox Fox LPFM.**

The screenshot shows a web form titled "PERSONAL INBOX" with the subtitle "Submit Your Form to Individual(s)". The form includes several sections:

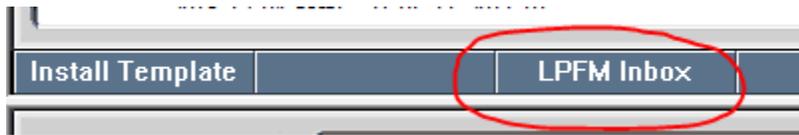
- Find UserID's:** A row of checkboxes for letter ranges: A-D, E-H, I-L, M-O, P-R, S-U, and V-Z. A red circle labeled "1" encompasses this entire row.
- Send to Personal Inbox of T-Forms Client User ID:** A dropdown menu with a blue highlight. A red circle labeled "2" is around the dropdown. To its right are "ADD" and "REMOVE" buttons, with a red circle labeled "3" around the "ADD" button.
- Include comments:** A text area containing the letter "S". A red circle labeled "5" is around this text area.
- For LPFM:** A checkbox on the right side of the form. A red circle labeled "4" is around this checkbox.
- Selections:** An empty rectangular box on the right side of the form.

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8. How to download report that was sent to LPFM?

Steps:

- Open LPFM
- Click button “LPFM Inbox”



- Select Portal from the list
- Select Form name and Report Number from available
- Click Install Report
- Refresh (F5) or restart LPFM if you couldn't find report after installation.

Example:

Select a Report to Download to your Personal Computer:

Inbox:	For LPFM	▼	
Form Name:	Pipeline Inspection Report (1)	▼	INSTALL REPORT
Report Number:	23136	▼	
Version Number:	2.10		
Description:	Pipeline Inspection Report		

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