

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.

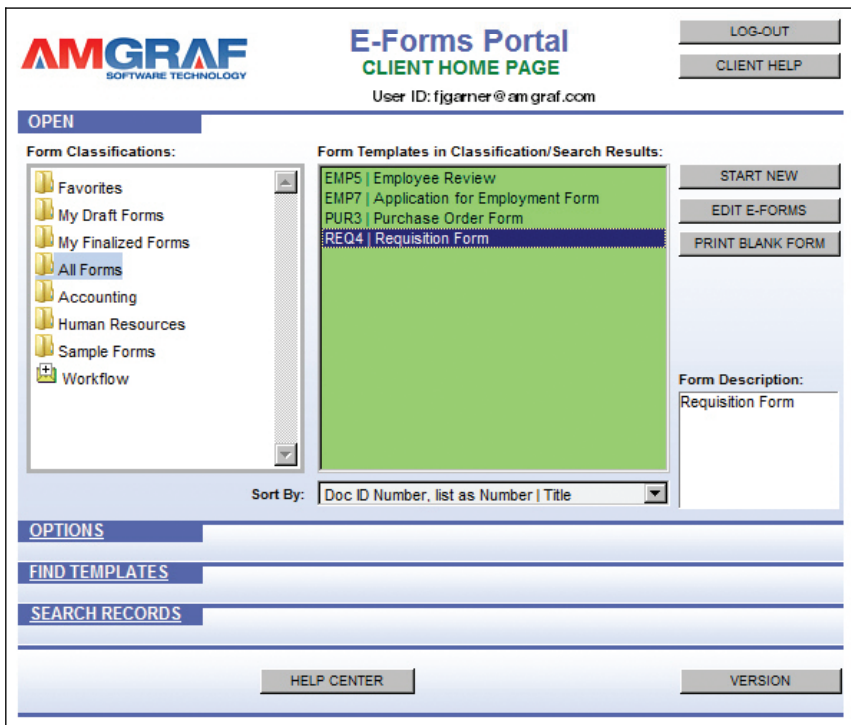
Opening, Filling, and Saving E-Forms

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

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.

