



# Formatta XML Support

Feature Sheet

## Access, Exchange, and Manipulate Data Seamlessly

### Extensible Markup Language (XML)

XML is not a programming language like C++ or Java, but a meta-language with an industry-specific vocabulary that enables the access and exchange of data from different systems regardless of the format or source.

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### About XML

Historically, data interchange between applications has required the development and maintenance of costly and complex EDI, messaging systems, protocols, custom interfaces and system integration. However, a new standard for data exchange has recently emerged: XML.

XML is platform independent and not concerned with a specific communications protocol, programming language, or operating system. The goal of XML is to help organizations access, exchange, and manipulate their data in a way that is transparent and seamless to the system that needs it.

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*Formatta's native support  
for XML makes it easy to  
use e-forms with your  
business partners.*

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### Formatta XML Support

The Formatta product suite provides extensive support for XML. Formatta Designer creates e-forms with an embedded XML data structure. Formatta Filler provides the presentation layer to the end user. And Formatta Server extracts data in XML format from submitted e-forms, passing an XML data stream to your database or other information systems applications for further processing.



### XML in Designer

Formatta Designer makes it easy to create an e-form with an embedded XML data structure. Using a standard XML data dictionary, just set the field name in the Property Sheet equal to the desired XML tag.

Updates to e-forms are just as straightforward: simply open the e-form in Designer, change the XML tag, and save the form again.

### XML in Filler

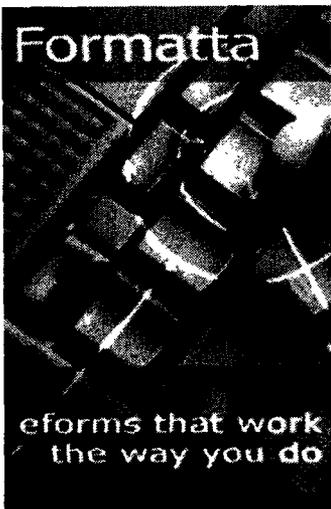
XML is a structured data format, not a presentation format like HTML. End users would have a difficult time deciphering XML directly. Formatta Filler provides the presentation layer to the end user in the context of a form – a very familiar end user interface. This keeps the XML structure of the data entirely transparent to the end user, but still allows an organization to reap the benefits of electronic transactions using XML structured data.

### XML in Server

To ensure maximum interoperability of the Formatta technology, as well as minimize risk on the acquisition and retention of its data distributed and collected via Formatta technology, Formatta Server is explicitly designed as a data and e-form manipulation and transport engine, and not as a data storage engine. Formatta Server accepts data from external systems in XML format and returns it in XML format.

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# Formatta Server 6.0

Product Sheet

## Formatta Server gives life to your e-form solution

### FORMATTA SERVER 6.0

Formatta Server's robust API's allow you to automate all eform processing and update file systems and databases with structured XML or other formats in real-time or as a batch. The Server can connect to data sources and repositories by ADO, XML, CVS, and plain text.

Formatta Server is available both as a COM component to integrate it directly with ASP pages or other scripting languages, or as a C++ library on a multitude of platforms, including Win32, Solaris and other UNIX variants, and .NET.

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*Formatta Server allows  
a business to automate  
every facet of form processing.*

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### OPEN ARCHITECTURE

Formatta's application programming interfaces (API's) are open, flexible, and robust. They are available on Windows and UNIX platforms as a COM component to integrate directly with ASP pages or a Java component to integrate directly with JSP pages. Formatta has also just released Formatta Server 6.0 for .NET.

### COMMITMENT TO XML

To ensure maximum interoperability of the Formatta technology, as well as minimize risk on the acquisition and retention of data distributed and collected via Formatta technology, Formatta Server is explicitly designed as a data and e-form manipulation and transport engine, and not as a data storage engine. Formatta Server accepts data from external systems in XML format and returns it in XML format.

### VIRUS PROTECTION

Formatta Server automatically authenticates incoming forms before processing. Formatta Server checks the encrypted identifying data on the PFF form against the identifying data for the form in the local database. Processing commences only if there is an exact match. This security measure protects your organization against unwanted viruses masquerading as harmless PFF forms.

### SCALABLE SOLUTION

Formatta Server is a robust e-form transaction processing engine. As a basic benchmark, one copy of Formatta Server running on a Pentium-90 PC with 128 MB RAM can process over 200,000 complex form transactions per day. An increased workload is easily supported, since Formatta Server solutions are linearly scalable and can grow to meet increasing demands in a predictable way.

### FULL AUTOMATION OF E-FORM PROCESSING

The Formatta Server product line can automate the full lifecycle of e-form processing for your organization. From pre-population and distribution of your e-forms to the receipt, decryption, extraction of data, and insertion into a database, formatta can support all of your e-form processing needs.

### CONNECTIVITY WITH DATA SOURCES

Formatta Server 6.0 provides full access to the form's data, encryption and signatures. Formatta Server easily connects to existing data sources for pre-fill, security and extraction via a powerful set of Internet protocols and XML.

Formatta Server 6.0 provides full access to the e-Form's data, encryption and signatures. It provides connectivity to data sources and repositories via a powerful set of Internet protocols. Formatta's application programming interfaces (API's) are open, flexible, and robust. They are available on Windows and UNIX platforms as a COM component to integrate directly with ASP pages or a Java component to integrate directly with JSP pages.

### FORMATTA COMPONET SERVERS

Add the specific functionality that you need to automate your business process. Specialized Formatta Server Products include the following:

- Formatta Dual Dimension Barcode Server 6.0
- Formatta Print Server 6.0
- Formatta Certificate Server 6.0
- Formatta Remote Signing Server 6.0
- Formatta Imaging Server 6.0

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## Supported Operating Systems:

- WIN NT/2000
- Unix
- Solaris
- .NET

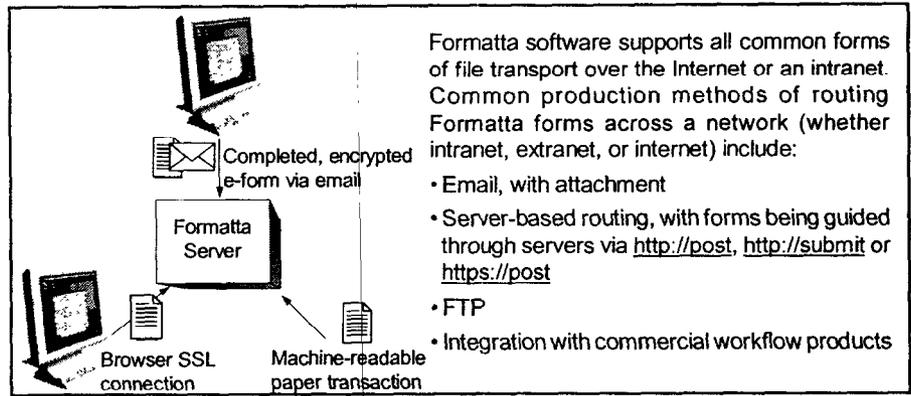
## Supported Development Environments:

- Visual Basic
- Java (J2EE)
- C++
- NET

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### FORMATTA COMPONENT SERVERS:

#### FORMATTA DUAL DIMENSION BARCODE SERVER 6.0

Formatta bridges paper and electronic processes and allows you to collect data from paper for the same cost as electronic forms. Because other solutions lack this hybrid processing option, originators have never had the ability to substantially reduce costs.



Formatta solves this problem by offering Dual Dimension™ Barcode technology. This allows end-users to submit the same form electronically or on paper. This is especially useful when inked signatures are required.

With this hybrid option, the user completes the form on a computer, prints it out with a secure barcode, and sends it via the U.S. Mail. Though the form arrives on paper, the processing can still be done electronically. Any flatbed or handheld scanner can read the barcode, Formatta Server can decrypt the barcode, and the form's contents are extracted into back office file systems or databases.

#### FORMATTA PRINT SERVER 6.0

Formatta Server also has a Print Server addition, to automate your fulfillment functions. Forms can be pre-populated from your database, collated and printed to a high-volume printer. Print jobs can also be batched and forwarded to an outsourced contractor for fulfillment using their high-volume printers.

Whatever your requirements, Formatta allows you to use a single version of a form for high-end printing, distribution and data collection across the Internet, electronic submission from customers and vendors, or internally.

#### FORMATTA CERTIFICATE SERVER 6.0

Formatta Certificate Server extends the functionality of Formatta Server to include support for processing forms signed with digital certificates. Records of the certificates themselves can be stored along with the PFF form so you have a permanent record of the complete electronic transaction.

#### FORMATTA REMOTE SIGNING SERVER 6.0

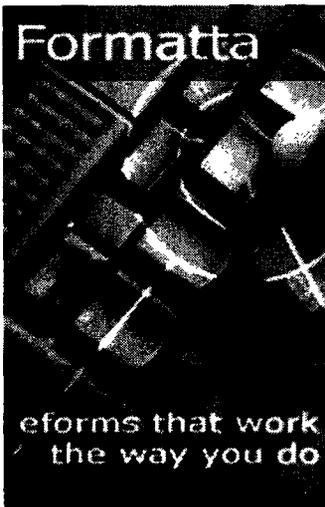
Formatta's Remote Signing Server allows an organization to utilize its current Userid/PIN authentication protocols for signing PFF forms over the Internet/Intranet. This feature authenticates the user, the organization, and the transaction, all without incurring the cost of deploying or maintaining a third party PKI solution.

#### FORMATTA IMAGING SERVER 6.0

Formatta Server integrates with COLD (Computer Output to Laser Disk) systems so you can image forms electronically.

A legacy system or database can pre-populate and collate a set of forms just like a fulfillment center. As forms are automatically pre-filled, Formatta's Imaging Server can also create an image file and write it directly to your OSAR (optical storage and retrieval) — whether or not the form is printed, emailed, or posted to a website.

What's more, as electronic forms are received, they can also automatically be indexed and imaged. Consequently, you not only have the form data extracted to your database, but a legally binding document stored in your OSAR system.



# Formatta Product Suite

Product Sheet

## Formatta Product Line: One Solution for all Your e-form Needs

All forms share the basic purpose of gathering, structuring, storing, and transferring data as accurately as possible. Formatta solutions enhance the way e-forms are:

- Developed
- Deployed
- Completed
- Submitted
- Collected
- Processed
- Stored
- Retrieved
- Secured
- Kept Private

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### Formatta Designer 6.0

Formatta Designer 6.0 is the industry's leading WYSIWYG e-form design application. Using Designer, you will be able to create and convert e-forms quickly and efficiently to help drive adoption and maximize value. To speed e-form deployment, Formatta Designer can import and convert PDF's as well as maintain a library of frequently used catalog components to group, save, and drop into new e-forms.

### Formatta Filler 6.0

Formatta is committed to improving accessibility to e-forms and believes that all end user features must be free. Formatta Filler

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*Formatta solutions support all of your business form needs - from paper to the Internet.*

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6.0 is the industry's only free, fully functional, e-form filler built for portability and security. Formatta Filler 6.0 is also the industry's only e-form filler with native encryption. Formatta Filler 6.0 is about 1.0 MB in size, can be branded by our clients, and can be freely downloaded and distributed to all of your end users.

### Formatta Server 6.0

Formatta Server Products provide full access to the e-form's data, encryption and signatures. They provide connectivity to data sources and repositories via a powerful set of Internet protocols. Formatta's application programming interfaces (API's) are open, flexible, and robust. They are available on Windows and UNIX platforms as a COM component to integrate directly with ASP pages or a Java component to integrate directly with JSP pages.

### Portability

With Formatta, one form satisfies all your distribution needs. The same form can be downloaded from a website, emailed, printed, or faxed. There is no need to keep multiple versions. Filler users can save data locally, export into tools or other applications, attach other files, edit fields, encrypt, decrypt, lock sections, post, email, route, and digitally sign forms.

### Security

Formatta allows users to confidently submit private information electronically or on paper with a secure Dual Dimension™ barcode. If a third party intercepts a Formatta Form on paper, on the client, in transit, or on the server, Formatta's native encryption can prevent the e-form or barcode from being viewed or altered.

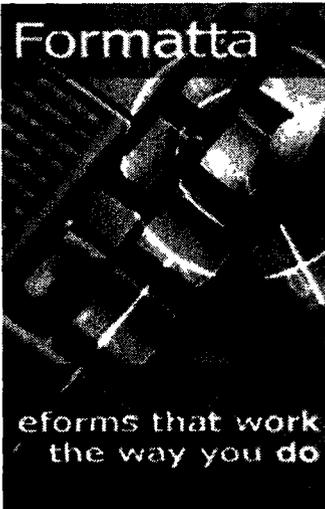
Formatta utilizes well-known and time-tested algorithms for encryption. In addition, Formatta Filler accepts any X.509-compliant PKI certificate and can support multiple digital signatures on a single e-form.

### Automation

Using Formatta's Dual Dimension™ barcode technology, the same e-form can be submitted electronically or on paper. If the e-form is submitted on paper, the Dual Dimension technology provides 100% accurate data capture (unlike OCR or manual data entry), and does not have the cost or delay of manual transcription. This is especially valuable when inked signatures are still required, yet the Form Owner wishes to gain the cost and data quality advantages of e-forms.

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Formatta, and most other e-forms vendors, include support for digital certificates that provide the ability to encrypt data; however, Formatta is the only e-forms company to also include built-in encryption in all of our products. This built in encryption is an important aspect of security and privacy, especially for end users who do not have a certificate or have no other means of securing the data from unauthorized access.

Other e-forms companies have no solution to this problem except for the use of PKI. If users don't have a digital certificate their e-forms cannot be encrypted or locked.

As a result, Formatta products provide unparalleled levels of security to both the e-form author and users across the Internet.

## Formatta Product Suite: Unparalleled security in Data Exchange

### Formatta Security

Formatta products provide unparalleled levels of security to both the form author and users across the Internet. Formatta's e-forms technology incorporates unique security features to secure the form and the client data. In addition Formatta technology protects your computer system from viruses and helps protect your organization from fraud.

Formatta allows users to confidently submit private information electronically or on paper. If a third party intercepts a form on the client, in transit, or on the server - Formatta's native 128-bit encryption prevents the form from being opened or altered.

Formatta utilizes proven algorithms for our features, including: hashing, key exchange, and encryption.

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***Formatta allows end-users to confidently submit private information.***

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### Encryption

Encryption is necessary for the protection, privacy and non-repudiation of e-forms and data. In addition, encryption prevents any changes of form data. Formatta's encryption algorithms are used to control form security and access, so data is always protected whether it's posted to a website or sent via email.

Formatta's encryption uses an encryption key, or set of keys along with the encryption algorithm (the set of instructions on how to use the key to encrypt the data). Once encrypted, the data can only be decrypted using one of the specified keys.

Formatta's native encryption strength is currently set at 128 bits - the same strength used in commercial banking applications.

## Formatta Security

### Feature Sheet

### No Viruses

Formatta's form architecture protects your organization from the transmission of viruses. This is because Formatta forms do not support scripting - so macro viruses cannot be transmitted via a simple Formatta Form.

### Legally Binding e-Forms

Formatta's architecture keeps the form and data together during submission allowing regulated industries to keep legally binding, non-repudiable copies of the form and data as they were originally presented and submitted.

### Form Verification

Formatta's Form Verification function gives you the ability to determine if a received form was altered in any way. When completed forms are sent back to a company via the Internet, Formatta can automatically determine if the completed forms are authentic. This eliminates form tampering.



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Formatta uses industry standard encryption technologies to protect your e-forms and your customer's data. Formatta's native encryption eliminates the need for SSL for secure data exchange, and can even be used to protect forms and data on the local desktop hard drive.

| Security Issue                 | Formatta Solution                            |
|--------------------------------|--|
| Counterfeiting e-forms         | Form Signing                                 |
| Counterfeiting printed e-forms | Dual Dimension Technology                    |
| Form Tampering                 | Form Lock<br>Field Lock<br>Form Verification |
| Viruses                        | Form Architecture                            |
| Hacking                        | Encryption                                   |
| Interception                   | Secure Data Exchange                         |
| ID Spoofing/Fraud              | Authentication                               |
| Spam                           | Validation                                   |

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### Formatta Security Features

Formatta has many security features to meet the needs of e-form users.

#### Authentication

Authentication is necessary when the agency / business must be assured of the identity of the submitter. Formatta supports the authentication of both form publishers and form submitters, practically eliminating spoofing and fraud.

#### Form Signing

Formatta fully supports X.509 digital certificates for signing e-forms. Filler users can check revocation servers to ensure the signature is valid. In addition, e-form authors can limit the root store for trusted certificate authorities and use Formatta Server to automatically process and validate certificates.



#### Validation

Without the necessity for a digital certificate, Formatta Server can automatically validate and authenticate incoming e-forms and reject unauthorized e-forms at the source, before processing.

#### Secure Data Exchange

With Formatta, encrypted data can be securely exchanged between e-form authors and e-form fillers. Even if the e-form were intercepted, it could not be decrypted without the correct password.

### Securing Printed Forms

Form authors can incorporate Formatta's Dual Dimension Technology into e-forms printed by an end user. As the e-form is printed, a small two-dimension barcode is dynamically generated containing all of the data entered in the e-form, together with the appropriate XML tags. The barcode is encrypted so that only the e-form author can decrypt it. This encryption technique provides an effective means for authenticating a printed form. This means that you can distribute your forms on the Internet, allow your users to print the form and submit it, and be able to instantly verify that your form has not been modified. It virtually eliminates counterfeiting of your prized e-forms.

#### Field Lock

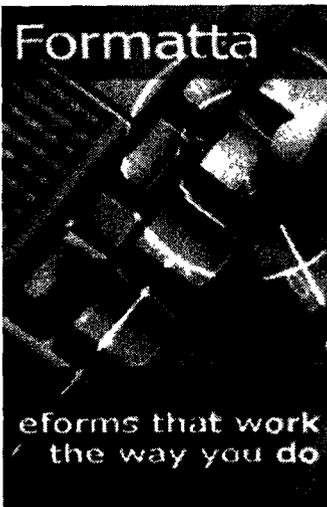
Formatta allows groups of fields to be locked while other groups are unlocked. This type of encryption allows the locked data to be visible while maintaining encryption applied by the user. This is particularly useful when there is a chain of custody or when multiple users exchange the same form and need to lock and un-lock their own sections.

#### Form Lock

Formatta protects the design of your e-forms with our Form Lock. This Feature prevents other users from modifying or otherwise changing the e-form - even if they own a copy of Designer - protecting your forms against tampering and theft.



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Formatta utilizes proven algorithms for our features, including: hashing, key exchange, and encryption.

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Formatta, and most other e-forms vendors, include support for digital certificates that provide the ability to encrypt data; however, Formatta is the only e-forms company to also include built-in encryption in all of our products. This built in encryption is an important aspect of security and privacy, especially for end users who do not have a certificate or have no other means of securing the data from unauthorized access.

Other e-forms companies have no solution to this problem except for the use of PKI. If users don't have a digital certificate their e-forms cannot be encrypted or locked.

As a result, Formatta products provide unparalleled levels of security to both the e-form author and users across the Internet.



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#### Validation

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#### Secure Data Exchange

With Formatta, encrypted data can be securely exchanged between e-form authors and e-form fillers. Even if the e-form were intercepted, it could not be decrypted without the correct password.

### Securing Printed Forms

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With Formatta Filler, we introduced the world to the only freely distributable, full-functional electronic e-forms solution. Since then, over two million copies have been downloaded from our website alone.

Paper forms are freely distributable; electronic forms should be as well. The freely distributable Filler works in conjunction with Formatta Designer and Formatta Server to permit unprecedented flexibility in an organization's approach to form distribution and filling.

Formatta e-forms combine the look and feel of paper forms with the advantages of electronic media. This enables form designers to rely on a single version of a form for printing, faxing, emailing and web-based distribution. These forms are saved as .PFF - Portable Form Files.

## Paper forms are free to end users; e-forms should be as well

### FREE E-FORM CLIENT

Formatta Filler is the industry's first free fully-functional end user e-form client application. End users can save e-forms, export data, route e-forms, attach files to an e-form, encrypt/decrypt form fields (including attachments), electronically submit e-forms, digitally sign e-forms, print and much more.

In addition, Formatta e-forms are also freely distributable. There are no runtime fees or distribution fees of any kind associated with distributing Formatta e-forms. Paper forms are free to end users; e-forms should be as well.

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## *Design forms once, use everywhere with free Formatta Filler 6.0*

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### ONE FORM EVERYWHERE

Formatta e-forms combine the look and feel of paper forms with the advantages of electronic media. This enables form designers to rely on a single version of a form for printing, faxing, emailing and web-based distribution.

Formatta's freely distributable Filler application makes it possible for any organization to distribute fillable forms with the knowledge that everyone can complete these forms for free. Designed for general office use and for distributing and collecting forms over the Internet, Formatta's free filler applications are used to fill out forms electronically and then save, print, fax, or email the forms to the intended recipient(s) - all at no charge to the end user.

## Formatta Filler 6.0

Product Sheet

### ZERO MAINTENANCE

Formatta Filler offers practically zero maintenance for the end user and his/her organization. Formatta's AutoUpdate feature ensures that Formatta Filler is routinely updated to include the latest upgrades and feature sets. Formatta Filler also runs in its own virtual container on the PC, eliminating .dll conflicts and related administrative headaches.

Formatta is also ideal for simplifying and reducing support costs for low-bandwidth or remote users. Formatta Filler has a very small footprint: about 1 MB to download, so even dial-up or other remote users can easily access and install Formatta Filler without requiring a broadband connection. (Competitor filler applications can exceed 9 MB). Formatta .PFF forms are compact as well: the average .PFF form page is about 10 KB, compared to 50 KB for a similar .PDF or even +100 KB for some competitors' e-forms.

### COMPLIANT WITH FEDERAL REGS

Implementing a solution including Formatta Filler enables organizations to achieve compliance with current government regulations, including Section 508, GPEA, HIPAA, and the Privacy Act.

### DIGITAL SIGNATURE SUPPORT

Formatta Filler supports multiple digital signatures on your e-forms. Now you can route e-forms for multiple approvals before final submission. Filler also supports remote document signing so you can use the UserID/PIN authentication system you already have in place.

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## System Requirements\*

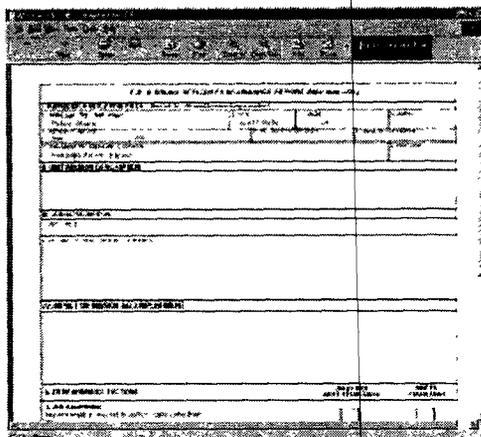
- Intel 486 or faster CPU
- 10 MB RAM
- Windows 95/98/Me/NT/2000/XP
- VGA monitor or better
- Internet Explorer 5.0 or higher, with updates
- Internet connection (recommended) for updates
- E-mail client (recommended)

\*subject to change without notice

**Suggested Retail Price:**  
Free

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## FORMATTA FILLER: A FREE, FULL FUNCTION E-FORMS END USER APPLICATION

- Browser-type interface
- Pre-filled fields
- Customizable Home button with hyperlinks
- Customizable logo with hyperlink on toolbar
- e-form exactly matches paper form
- Sign with X-509 Certificate
- XML data structure
- Save, Print, Email
- Encryption for secure transmission over the internet

## Security

Formatta Filler is designed to protect the security of the end user, not just the form publisher.

Formatta not only includes support for digital certificates for signing e-forms; Formatta is also the only e-forms company to include native encryption in all of our products. This native encryption is an important aspect of security and privacy, especially for end users.

As a result, Formatta products provide unparalleled levels of security to both the e-form author and end users across the Internet. Formatta's e-forms technology incorporates unique security features for a number of significant security issues affecting the end user today. Key security features include:

- **Formatta Encryption:** protects end user data across the Internet
- **Form Lock:** protects forms and data from hackers
- **Form Signing:** verify the identity of the form publisher (is this really an IRS form?)
- **Form Data Signing:** digitally sign and lock completed e-forms
- **Secure Passwords:** end users never need to share their encryption password with anyone – including the form publisher

## Ease of Use

Users shouldn't need to learn a new software application in order to fill out electronic forms. Formatta Filler has a familiar browser-like user interface so form users aren't confused with unnecessary features and complicated menu commands. This eliminates expensive user training and lost productivity. Bubble-Tips provide step-by-step instructions on filling out a form. Sophisticated action buttons control form operations and encryption.

## XML Data Structure

Formatta supports XML to simplify data exchange across the enterprise and with your external customers/partners.

## Legally Binding e-Forms

Formatta Filler saves the form along with the data. This feature ensures that the data



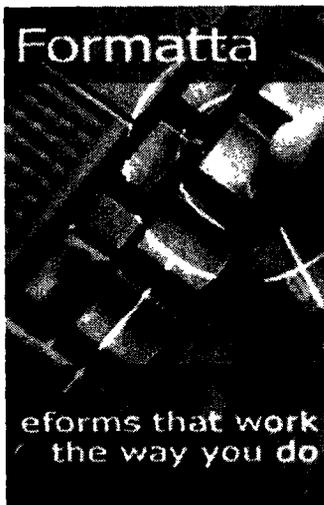
is always associated with the right form, and the right version of that form. This is the minimum requirement to maintain the integrity of a legally binding document, with or

without a digital signature.

## Download Formatta Filler 6.0

Formatta Filler is always free. Fill-out, sign, save, email, route, print or post forms across the Internet. Download your free licensed copy today:

<http://www.formatta.com>



# Formatta Designer 6.0

Product Sheet

With Formatta,  
design your form once,  
Use it everywhere

Formatta Designer is a 32-bit full-function forms conversion and design tool for use in creation and maintenance of Formatta forms.

Formatta's design application is able to create and convert e-forms quickly and efficiently to help drive adoption and speed deployment. Formatta Designer 6.0 is the industry's leading WYSIWYG e-form design application. To speed form deployment, Formatta Designer can import and convert PDF's as well as maintain a library of frequently used catalog components to group, save, and drop in new forms.

## EASY TO USE

Designed for Windows®, and easily accessible to anyone familiar with the Windows operating environment. The available drop-down menus are modeled on the basic Windows paradigm, and the toolbars incorporate standard Windows buttons and icons. Extensive on-line help is only a keystroke away and dynamic tutorials cover every tool and function in Formatta Designer.

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*Formatta Designer  
makes form design easy  
- no programming  
knowledge required.*

---

To assist Filler users in filling out and submitting forms, Action Buttons are linked to pre-programmed functions defined in Formatta Designer and inserted into a form.

Formatta Designer also allows form authors to create Bubble-Tips; a feature that displays field-level help in Formatta Filler, providing Filler users with step-by-step instructions for filling out a form

## RAPID DEPLOYMENT

With Formatta, complex forms take hours – not days or weeks. Formatta Designer allows you to:

- Convert Adobe PDF's into Formatta's PFF's (Portable Form Files)
- Convert paper forms into Formatta PFF's with native Twain support
- Group and re-use common sections within a custom object catalog
- Drag, drop and customize Formatta's pre-programmed action buttons

## FORMS DESIGN TOOLSET

Formatta Designer gives the form author a vast array of design tools that are easy to use and comprehensive in scope. The adjustable alignment grid makes it easy to position objects in exactly the right spot. An independent object alignment tool enables the designer to perfectly align selected objects. Copying objects, layering a form (sending objects to the front or back), grouping and ungrouping selected objects, standard and custom form templates, and point-and-click field and text object creation are just a few of the features that Formatta Designer offers. The catalog combines an object library and style manager together, to simplify the form design. The creation of Action buttons permits the designer to control the movement of the form after it is filled, effectively eliminating the hazards of client controlled reply cycles.



## FORMATTING TEXT OBJECTS

Formatta Designer makes it easy to format text objects within forms. Formatting can be changed at any time with a simple click or two of the mouse. Available options include: justification, font type and size (including numerous common barcode formats), and style effects such as boldface, italic, and underlining.

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*e-forms that work the way you do*

## System Requirements\*

- Intel 486 or faster CPU
- 10 MB RAM
- 20 MB Hard Drive Space
- Windows 95/98/Me/NT/2000/XP
- VGA monitor or better
- Internet Explorer 5.0 or higher, with updates
- Internet connection (recommended) for updates
- E-mail client (recommended)

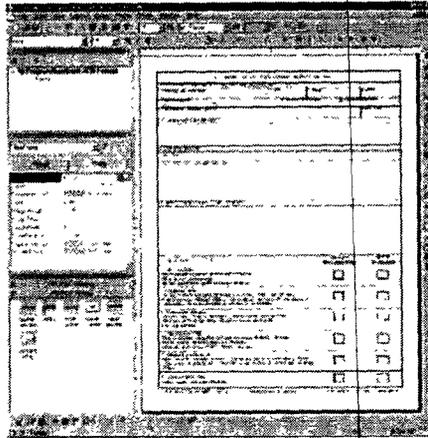
\*subject to change without notice

Suggested retail price:  
**\$995**

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## DESIGNER 6.0: A COMPREHENSIVE, EASY TO USE, WYSIWYG FORM DESIGN TOOL

- Complete form design tool
- Standard Windows look and feel
- Property sheet to quickly and easily set properties for any form object
- Catalog to save and re-use common form objects
- Convert PDF's to PFF's for rapid design and deployment
- Test fill environment to check your form without exiting the program
- Built-in support for XML data structure
- Built-in support for section 508 compliance
- Design forms that look like paper forms

### EXTENSIVE DESIGN FEATURES:

- **XML Data Structure:** Formatta Server works with your existing database and website for XML output, imaging, pre-filled forms, encryption and much more
- **Twain Support:** Import scanned images
- **Dual Dimension Barcodes:** Provides a convenient bridge technology for organizations converting to e-forms
- **Test full Environment:** Test forms without exiting Formatta Designer
- **Form Summary Function:** Allows the form designer to incorporate version control and form management information directly into the form
- **Automatic Form Expiration:** If a user opens an expired form, Formatta Filler notifies him/her the form is expired, and offers to automatically load an updated version
- **Form Author Signing Capacity:** Allows Formatta Filler users to view your certificate and certify who designed and supplied the form
- **Embedded True Type Fonts:** Eliminates font substitutions for Formatta Filler users
- **Edits and Validations:** Validate a specific field or all fields before submission
- **Automatic Calculations:** Automate a number of common functions in the form (calculations, conditional functions, etc.)
- **Action Buttons:** Specify different actions such as attachments, print, email, post
- **Bubble Help:** Add suggestions and/or tips to assist the end user
- **Section 508 Support:** Built-in to the property sheet
- **Hyperlink Support:** Link to external documents (e.g., form instructions)
- **Version control:** Helps manage the form repository
- **Form Lock:** Prevents unauthorized people from modifying the design of a form
- **Form Verification:** Assures that the form has not been tampered with or copied
- **Help:** Provides information about using Designer's features as well as step-by-step help to guide the end user through the program's basic functionality.
- **Encryption:** Encrypts forms so information is exchanged in a safe and secure environment
- **Mult-Page Form:** Create forms with multiple pages
- **Resemble Paper Form:** Maintain the look of paper forms
- **Form Completion Wizard:** Guides the end user step-by-step in completing the form
- **Workflow Design Tool:** Create workflow diagrams
- **Mandatory Field:** Designate any field as mandatory before form submission
- **Digital Signature:** Sign forms using an X.509 digital certificate
- **Multiple Field Types:** Edit box, multi-edit box, check box, radio button, combo box
- **Alignment Controls:** Align object and text in the form
- **Pica Level Positioning:** Allows for precise control in the placement of form elements
- **Freely Distribute Forms:** Create and distribute as many free forms as desired
- **Freely Distribute Formatta Filler:** Freely distribute Formatta Filler to any end user anywhere to fill your forms for free
- **Automate Processing:** Automate all e-form processing using Formatta Server



Formatta makes it easy to achieve compliance with Section 508 requirements for your e-forms. The e-forms that you create with Formatta Designer can be made compliant just by setting one property in the Property Sheet. Nothing could be easier or more exact.

## Section 508 Compliance

Formatta Solution Sheet

# Section 508: eliminating barriers in Information Technology

### Section 508 Requirements

Government agencies are required by Section 508 of the Rehabilitation Act to make electronic and information technology accessible to people with disabilities. In addition, agencies require software solutions and technologies that were designed with these requirements in mind.

### Formatta Section 508 Compliance

Formatta's end user electronic e-forms application, Formatta Filler, fully supports Section 508 compliance. Formatta worked directly with several leading federal agencies, including the Department of Education, the Government Services Administration, the Internal Revenue Service and the Social Security Administration, to incorporate support for Section 508 accessibility standards into our product line. Extensive

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*The Formatta solution fully meets the requirements of Section 508 using in-production technology.*

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testing with these agencies using third party tools such as JAWS, MAGic, ZoomText and others has helped Formatta to provide the most accessible electronic e-forms end user application in the market today.

### Free to End Users

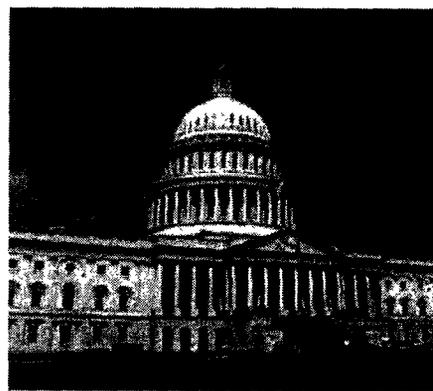
Formatta Filler is free to end users, including users with disabilities. There are no additional products to buy or special versions of Formatta Filler that cost extra. JAWS scripting support can be installed automatically when Filler is installed, or it can be installed separately, depending on the needs of the end user.

### Easy to Use

Formatta makes it easy to achieve compliance with Section 508 requirements for your e-forms. This is because Formatta treats JAWS support just like any other property of a field (e.g., bold, font size, etc.). When creating an e-form in Designer, just enter the desired text relating to a field in the Property Sheet while you are formatting the field. Then when a JAWS user tabs into that field, JAWS will read the text you intend – eliminating the field/label mismatches that can occur with other e-forms products and JAWS.

### Assistive Technology Support

In addition to JAWS, Formatta supports screen magnification software packages as well. In Formatta Filler, the focus is programmatically exposed to these applications, such as ZoomText or MAGic, making Formatta Filler very easy to use with assistive technologies.



**Formatta**  
Corporation

*e-forms that work the way you do*

Formatta Filler is always free to end users, and that includes support for assistive technologies. Unlike some e-forms vendors, Formatta doesn't charge separately for support for these products. Why should end users have to pay extra just because they use assistive technologies?

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### E-Form Compliance

It is crucial to note that with an e-forms solution, compliance of the end user application is only half of the Section 508 compliance problem. The e-forms themselves also have to meet Section 508 compliance requirements. Consider the example of associating a text label with a field on an e-form. With other electronic e-forms solutions, the 'work' of associating a text label with a field is left to the assistive technology (e.g., JAWS). For example, JAWS has to determine which text label to read - the one above the field? The one to the left? Or the one



---

*With Formatta, there is no need to re-design your forms just to achieve Section 508 compliance.*

---

below? While this works for simple e-forms, the assistive technologies can get confused on more complex e-forms, with the end result of speaking the wrong text label for a field to the end user.

### Tell JAWS What to Say



Since many assistive technologies rely on relative positioning of objects to determine which text label to read for each field, agencies that adopt other e-forms solutions may have to re-design their e-forms (e.g., move the text labels around) in order to achieve Section 508 compliance. However, with Formatta, form designers can directly specify which text label is associated with a specific field, eliminating the potential for error by the assistive technology. This also means that there is no need to re-design your paper forms in order to create electronic versions that meet Section 508 compliance requirements (no changes to page layout). Formatta may be the only solution in the market that can achieve this goal.

### Section 508 Commitment

Formatta is committed to Section 508 compliance. We not only worked with several leading federal agencies, we worked with site-impaired employees of those agencies. Formatta built 508 accessibility directly into our products, and then incorporated additional suggestions from these sight-impaired federal employees during review and testing. As a result, Formatta works with JAWS, Magic, ZoomText and others to ensure the sight impaired have equal access to Formatta technology.

### Complex Forms Made Clear

Complex forms can be challenging to convey to users of assistive technologies. A form with tables embedded inside tables or radio buttons in columns can be particularly difficult. In these cases, Formatta BubbleTips can be used by the form designer to provide a narrative description of the form structure and content, making the e-form very easy to use with assistive technologies.

### Rapid Form Conversion

Formatta's industry leading support for assistive technologies makes it quick and easy to convert your existing forms and upgrade them to meet Section 508 requirements. Formatta can even outsource your form conversion and compliance functions for a fraction of the cost of our competitors.

### Accessibility Template

For a detailed review of Section 508 compliance for Formatta Filler, see the Voluntary Product Accessibility Template in the next section. The template has been developed by the Information Technology Industry Council (ITI) to "assist Federal contracting officials in making preliminary assessments regarding the availability of commercial Electronic and Information Technology products and services with features that support accessibility." [<http://www.itic.org/policy/vpat.html>]. The template provides a one-to-one comparison between the regulations stated explicitly in Section 508 and Formatta Filler.



## Voluntary Product Accessibility Template - Version 1.1 8/3/01

[[http://www.itic.org/policy/access\\_0106.htm](http://www.itic.org/policy/access_0106.htm)]

The purpose of the Voluntary Product Accessibility Template is to assist Federal contracting officials in making preliminary assessments regarding the availability of commercial Electronic and Information Technology products and services with features that support accessibility.

|   |  |
|---|--|
| <b>Date:</b><br><b>Name of Product:</b><br><b>Contact for More Information:</b> | <b>1/2/2002</b><br><b>Formatta Filler 6.0</b><br><b>Paul Wernet</b><br><b>(<a href="mailto:wernet@formatta.com">wernet@formatta.com</a>)</b> |
|---|--|

### Section 1194.21 Software Applications and Operating Systems - Detail Voluntary Product Accessibility Template

| Criteria   | Supporting Features   | Remarks and Explanations |
|--|---|--------------------------|
| a) When software is designed to run on a system that has a keyboard, product functions shall be executable from a keyboard where the function itself or the result of pre-Forming a function can be discerned textually.   | All of the functions supported by Formatta Filler, where the function itself or the result of pre-Forming the function can be discerned textually, can be executed from the keyboard.   |                          |
| (b) Applications shall not disrupt or disable activated features of other products that are identified as accessibility features, where those features are developed and documented according to industry standards. Applications also shall not disrupt or disable activated features of any operating system that are identified as accessibility features where the application programming interface for those accessibility features has been documented by the manufacturer of the operating system and is available to the product developer. | Testing of Formatta Filler 6.0 has not indicated that Formatta Filler 6.0 will disrupt or disable the accessibility features of any other products. Similarly, testing of Formatta Filler 6.0 has not indicated that Formatta Filler 6.0 will disrupt or disable the accessibility features of any operating systems. |                          |
| (c) A well-defined on-screen indication of the current focus shall be provided that moves among interactive interface elements as the input focus changes. The focus shall be programmatically exposed so that Assistive Technology can track focus and focus changes.   | Formatta Filler provides a well-defined on-screen indication of the current focus that moves among interactive interface elements as the input focus changes. The focus is programmatically exposed so that Assistive Technology can track the focus and focus changes.   |                          |

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Formatta provides extensive support for JAWS, the most widely used assistive technology product on the market today. Formatta also supports other assistive technologies, such as screen magnification applications. In Formatta Filler, the focus is programmatically exposed to these applications, such as ZoomText or MAGic, making Formatta Filler very easy to use with assistive technologies.

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| Section 1194.21 Software Applications and Operating Systems - Detail<br>Voluntary Product Accessibility Template   |  |  |
|--|--|--|
| Criteria   | Supporting Features  | Remarks and Explanations   |
| (d) Sufficient information about a user interface element including the identity, operation and state of the element shall be available to Assistive Technology. When an image represents a program element, the information conveyed by the image must also be available in text. | Formatta Filler provides information about a user interface element including the identity, operation and state of the element to Assistive Technology. When an image represents a program element, the information conveyed by the image is also available in text. | Every field in an e-Form is exposed to assistive technology. The assistive technology (e.g., JAWS) can identify the type of field (e.g., editbox, checkbox, listbox, etc.), the state of the field (e.g., read the contents if textual, or speak 'checked' or 'not checked' as appropriate), and the operation (e.g., provide instruction to type in text or press the space bar to select a checkbox). Formatta Filler also supports description tags (called "Bubble Tips") that can be used by the person creating the e-form to provide up to 6k of textual description, instructions, or other information for each field.<br><br>When an image is used to convey a feature or function (e.g., a page icon to move to the next e-form page), the same feature or function is also available textually (e.g., from the View menu, the user can use the keyboard or mouse to select Page>Next). |
| (e) When bitmap images are used to identify controls, status indicators, or other programmatic elements, the meaning assigned to those images shall be consistent throughout an application's performance.   | When bitmap images are used to identify controls, status indicators, or other programmatic elements, the meaning assigned to those images is consistent throughout Formatta Filler's performance.  |  |
| (f) Textual information shall be provided through operating system functions for displaying text. The minimum information that shall be made available is text content, text input caret location, and text attributes.  | Formatta Filler provides textual information, including text content and text input caret location.  | Text attributes such as bold, italic, are not supported.   |

Some form design elements are inherently visual and therefore difficult to represent to the visually impaired. The association of text labels to fields may be insufficient. For example, what do you do when forms have tables nested inside other tables? Formatta BubbleTips enable you to provide extensive narrative descriptions of your forms to end users, simplifying the presentation of complex forms and making them easier to use.

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| Section 1194.21 Software Applications and Operating Systems - Detail Voluntary Product Accessibility Template  |   |   |
|--|---|---|
| Criteria   | Supporting Features   | Remarks and Explanations  |
| (g) Applications shall not override user selected contrast and color selections and other individual display attributes.   | Formatta Filler does not override user selected contrast and color selections and other individual display attributes.  |   |
| (h) When animation is displayed, the information shall be displayable in at least one non-animated presentation mode at the option of the user.  | Formatta Filler does not support animations.  |   |
| (i) Color coding shall not be used as the only means of conveying information, indicating an action, prompting a response, or distinguishing a visual element.   | Formatta Filler does not use color coding as the only means of conveying information, indicating an action, prompting a response, or distinguishing a visual element.   |   |
| (j) When a product permits a user to adjust color and contrast settings, a variety of color selections capable of producing a range of contrast levels shall be provided.  | Formatta Filler does not permit a user to adjust color and contrast settings.   | Formatta Filler does not interfere with color and contrast settings selected by the user for other applications or at OS level.             |
| (k) Software shall not use flashing or blinking text, objects, or other elements having a flash or blink frequency greater than 2 Hz and lower than 55 Hz.   | Formatta Filler does not use flashing or blinking text, objects, or other elements.   |   |
| (l) When electronic e-forms are used, the e-form shall allow people using Assistive Technology to access the information, field elements, and functionality required for completion and submission of the e-form, including all directions and cues. | Formatta Filler is an electronic e-forms application. Formatta Filler allows people using Assistive Technology to access the information, field elements, and functionality required for completion and submission of an e-form, including all directions and cues. | Formatta supports a variety of assistive technologies, including screen readers, screen magnifiers, keyboard controls, and Braille devices. |

**Formatta Filler  
System Requirements\***

- Intel 486 or faster CPU
- 10 MB RAM
- Windows 95/98/Me/NT/2000/XP
- VGA monitor or better
- Internet Explorer 5.0 or higher, with updates
- Internet connection (recommended) for updates
- E-mail client (recommended)

\*subject to change without notice

**Suggested Retail Price:**  
Free

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**Section 1194.31 Functional Performance Criteria - Detail  
Voluntary Product Accessibility Template**

| Criteria  | Supporting Features   | Remarks and Explanations   |
|---|---|--|
| (a) At least one mode of operation and information retrieval that does not require user vision shall be provided, or support for Assistive Technology used by people who are blind or visually impaired shall be provided.  | Formatta Filler 6.0 provides support for Assistive Technologies to enable users who are blind or visually impaired to operate the software and interact with Formatta e-forms.  | Formatta Filler 6.0 supports screen readers (to provide data in audio format).   |
| (b) At least one mode of operation and information retrieval that does not require visual acuity greater than 20/70 shall be provided in audio and enlarged print output working together or independently, or support for Assistive Technology used by people who are visually impaired shall be provided. | Formatta Filler 6.0 provides support for Assistive Technologies to enable users who are blind or visually impaired to operate the software and interact with Formatta e-forms.  | Formatta Filler 6.0 supports both screen readers (to provide data in audio format) and screen magnifiers (to provide enlarged print output on screen). |
| (c) At least one mode of operation and information retrieval that does not require user hearing shall be provided, or support for Assistive Technology used by people who are deaf or hard of hearing shall be provided   | There are no features or functions in Formatta Filler 6.0 that rely exclusively on the sense of hearing to convey information to the user. Any feature or function that does utilize audio to convey information to the user also has a visual component. |  |
| (d) Where audio information is important for the use of a product, at least one mode of operation and information retrieval shall be provided in an enhanced auditory fashion, or support for assistive hearing devices shall be provided.  | Not applicable.   |  |
| (e) At least one mode of operation and information retrieval that does not require user speech shall be provided, or support for Assistive Technology used by people with disabilities shall be provided.   | Not applicable.   |  |
| (f) At least one mode of operation and information retrieval that does not require fine motor control or simultaneous actions and that is operable with limited reach and strength shall be provided.   | All of the functions supported by Formatta Filler 6.0 can be executed from the keyboard.  |  |

|                    |  |
|--------------------|--|
| <b>Formatta</b>    |  |
| about              |  |
| solutions          |  |
| partners           |  |
| forms              |  |
| downloads          |  |
| demos              |  |
| designer & filler  |  |
| dispute resolution |  |
| sf171              |  |

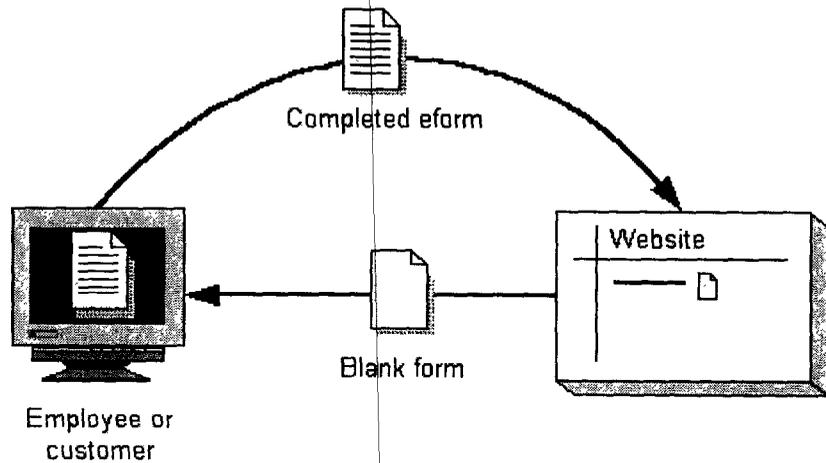
- home
- solutions
- partners
- forms
- demos
- downloads

### Formatta Product Demonstration

Formatta offers several on-line product demonstrations for business solutions using eforms, utility of the web, and add flexibility and customer service so that eforms are truly integrated

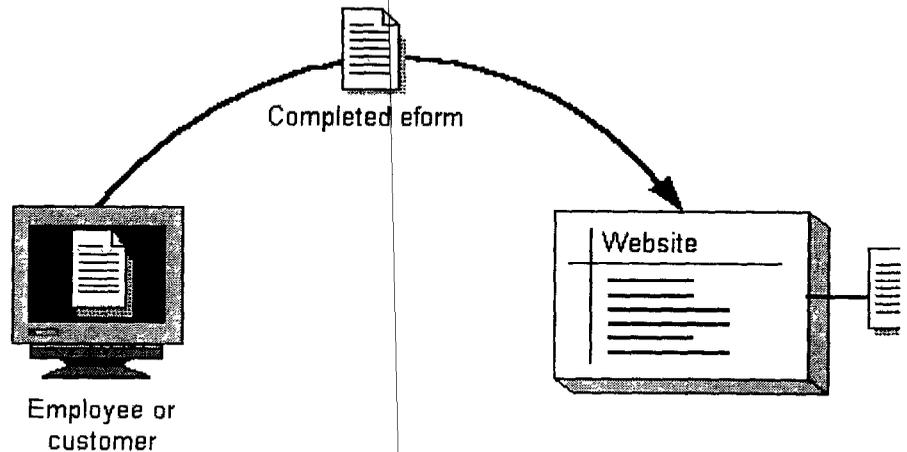
#### Download Fillable Forms

1. Eforms are posted on a website. These forms look exactly like their paper counterpart
2. Employees or customers can freely download, complete, save, encrypt, route, post an original website. In fact, customers can even print, sign, and send the completed paper software can still process this paper document for the same cost as an electronic form
3. Form processing costs are reduced, and more importantly, customer service is dramatic addition, this process enables agencies to comply with the Government Paperwork Eli



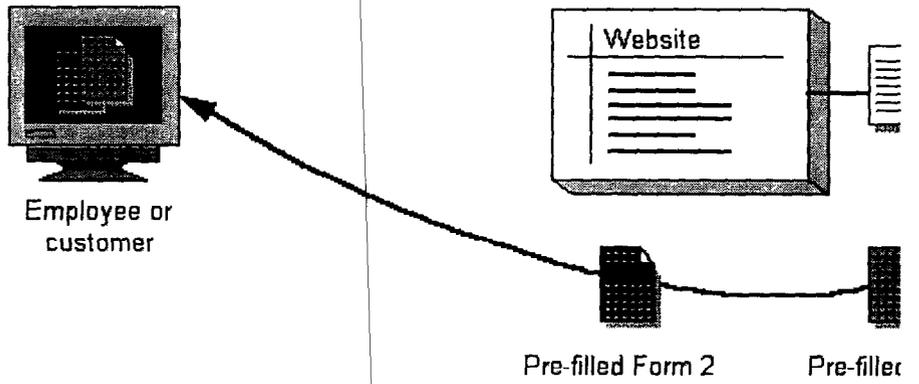
#### Form Data

4. Once the completed form is received by a user, the XML data populates an existing da web page.



#### Actions Based on Form Data

5. Just as important, your existing database edits can be used to evaluate form data. If required, other forms can automatically be pre-filled and securely sent to each individ



**Schedule a Demonstration**

The above examples highlight just a few of the possibilities using eforms with your web server. Call us today to schedule a demo: (888) 993-6767.

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