

Oregon  
E-government  
Program



*Getting Started  
With Forms Factory*

*Dept. of Administrative Services  
Enterprise Information Strategy and Policy Division  
September 2007*

# TABLE OF CONTENTS

<b>FORMS FACTORY OVERVIEW .....</b>	<b>1</b>
What is Forms Factory? .....	1
What is an e-form? .....	1
How e-forms work .....	2
<b>FORMS FACTORY SERVICES.....</b>	<b>3</b>
Adobe Reader Extensions Services .....	3
Adobe Bar code Services.....	4
Embedded Field Customization Services .....	4
E-form Language Localization Services .....	5
Consulting Services .....	5
<b>HOW AGENCIES ENGAGE WITH E-GOVERNMENT FOR FORMS FACTORY SERVICES .....</b>	<b>6</b>
Estimated Timeline to Implement an E-form Solution .....	7
<b>AGENCY PREPAREDNESS .....</b>	<b>8</b>
Gain agreement on the problem definition .....	8
Understand the business processes .....	8
Understand Stakeholder and End-user Needs .....	8
Measure Success .....	8
<b>FORMS FACTORY SUPPORT AND MAINTENANCE PROCESS .....</b>	<b>9</b>
1 <sup>st</sup> Tier Support.....	9
2 <sup>nd</sup> Tier Support.....	9
3 <sup>rd</sup> Tier Support .....	9
<b>ISSUES AND CONCERNS.....</b>	<b>9</b>
Escalation process for Forms Factory Issues .....	9
Escalation path for Forms Factory Issues .....	9

<b>APPENDIX A: EXAMPLE INTERAGENCY AGREEMENT .....</b>	<b>10</b>
<b>APPENDIX B: FORMS FACTORY REQUEST FORM.....</b>	<b>18</b>
<b>APPENDIX C: FORM FACTORY PRICE TABLE .....</b>	<b>21</b>
<b>APPENDIX D: DATA EXTRACTION TRANSACTION PRICING .....</b>	<b>23</b>
<b>APPENDIX E: FORMS FACTORY SUPPORT .....</b>	<b>24</b>
<b>APPENDIX F: FORMS FACTORY CONTACT INFORMATION .....</b>	<b>25</b>
<b>GLOSSARY .....</b>	<b>26</b>

# Getting Started with Forms Factory

## Forms Factory Overview

### What is Forms Factory?

The Oregon E-government Program (E-government) has developed a process to provide e-form services to agencies at a very low price point. The Forms Factory offers a state-wide enterprise e-form solution using shared infrastructure and volume pricing with Adobe to reduce the cost to implement e-forms. State agencies are able to order e-forms for citizen and business use through the Oregon E-government Program to take advantage of the Form Factory pricing and services.

E-government staff will initially meet with interested agencies to brief them on e-forms capabilities, services and the process to implement an e-form solution. Currently, agencies will be put into a “first come” “first implemented” queue that will be managed by the E-government coordinator. There are tools available for problem definition and business case analysis, including workshops on forms design and workflow strategy.

### What is an e-form?

A simplistic definition for an electronic form is a dynamic document that captures information. e-forms can then be submitted to the agency in a variety of ways: (1) printed and mailed, (2) e-mailed as a PDF, or (3) submitted electronically for data extraction into an agency data file. E-forms streamline and automate business processes by helping people interact with information more effectively.

Permits, purchase orders, or any other agency forms used to collect and track information can be transformed into an e-form. For example, with an e-form purchase order, users are taken step by step through the form-filling process. The e-form could pre-populate itself with contact information and requisition or approval codes, leaving the user to fill out only what is necessary. Embedded form validations prompt the user for required information and ensure that the data is provided in the correct format before the form is submitted. The agency’s employees can then create automated workflows to route the forms to the designated approvals.

E-forms use the ubiquitous Adobe Reader<sup>®</sup> software and PDF and XML standards to capture information from users and integrate that information with an agency’s existing technical infrastructure. By combining forms and business process management functionality, e-forms offer a robust solution that works inside and outside the firewall, online or offline. Constituents have the option to interact with e-forms online or to save them locally and submit the data at a later date.

With e-forms, users have a customized form experience based on their needs and their selections. Data fields can grow or shrink depending on the amount of data entered. Form sections or individual form fields can be shown or hidden if a particular choice is indicated. Form data can also be pre-populated so that the user only has to provide new or revised information.

# Getting Started with Forms Factory

E-forms also provide instant data validation to ensure that all required information is given by the user and that the data is in the appropriate format. On-screen messages assist users to supply the correct data before the form is submitted, thereby reducing errors at both the form completion and form processing stages.

Some of the benefits of using e-forms include the following:

- **Customer satisfaction:** Improve customer response and transaction cycle times with e-forms. Enable end users to easily and intuitively interact online with agencies, promoting faster service and enhanced constituent satisfaction.
- **User-friendly:** Provide step-by-step guidelines for completing the e-form.
- **Accuracy:** Improve data accuracy with data validation and complex business logic and rules built into the e-form itself.
- **Availability:** Fill in and submit government forms electronically on an anytime, anywhere basis. Extend forms and workflows outside the firewall to customers, constituents, partners, and suppliers.
- **Automation:** Integrate e-forms and e-forms processes with existing agency business and enterprise IT systems.
- **Efficiency:** Streamline the processing of forms, license renewals, vehicle registrations, and other documents that require information and approvals from constituents.
- **Cost savings:** Reduce user errors with embedded form validations, decrease form processing time, and eliminate the costs of printing, mailing, and storing traditional forms.
- **Data processing:** Eliminate manual data entry and its associated costs by using e-form functionality for data collection, pre-population, processing, and automated extraction.
- **Security:** Encrypt the e-form to protect the confidentiality of the information submitted.
- **Authentication:** Use a digital certificate to sign the e-form.
- **Accessibility:** For people with disabilities, e-forms are compliant with Federal accessibility requirements (Section 508), including screen readers and other assistive technologies.

## How e-forms work

An agency's Web site will be the primary method for deploying the forms but any avenue of transferring information can be used. The e-forms appear as hyperlinks that when selected open into a dynamic PDF form that accept data typed directly into the form. There are optional editing and validation functions that can be performed to increase data accuracy. The e-forms can be filled out and submitted online, or the form can be filled out offline and submitted to the agency as an e-form, as an email attachment, or printed and submitted as paper. The forms can be designed to look exactly like the original paper forms or redesigned for ease of use. The information collected from the forms can be condensed into a bar code for fast efficient processing or the data extracted online directly into a database. The forms can also be designed to automatically populate fields based on the business need to improve user experience and data accuracy.

*\*Note: To ensure compatibility, State agencies should update to the most current version of the free Adobe Reader software before initiating an e-form project.*

# Getting Started with Forms Factory

## Forms Factory Services

The Forms Factory services described below are available for agencies to select on an as-needed basis, and are intended to meet business needs and to supplement existing agency resources.

Agencies have option of choosing to purchase e-form design services and may elect to maintain the e-form using agency resources once the e-form has been implemented.

Agencies can design their own e-forms or purchase design services from Forms Factory. E-forms created by the Forms Factory are designed by a professional form designer. E-forms will be designed and formatted as cleanly and efficiently as possible for the end user while ensuring all agency requirements are met. A form is defined as a single sheet of paper that can be one- or two-sided. Costs are based on the complexity of the e-form to be designed.

## Adobe Reader Extensions Services

Optional Adobe software allows you to easily share interactive, intelligent PDF documents with other interested parties. Reader Extensions allow you to embed usage rights within a PDF document. These usage rights "turn on" hidden functionality within the free Adobe reader software, allowing users to enter data directly into the PDF documents

Key features of Reader Extensions:

- Activates hidden functionality within the free Adobe Reader;
- Empowers users to electronically submit PDF forms online or via e-mail;
- Enables end users to save, fill in, annotate, sign, and submit PDF documents;
- Provides enhanced security with digital signatures;
- Allows users to interact with PDF documents offline, while retaining their data and comments for submittal when they reconnect;
- Provides users with intuitive tools that make it easy to highlight or underline text, create sticky notes, add stamps, and add attachments to documents.
- If an agency chooses to purchase the license only and wants to undertake e-form development on its own, the agency can submit developed or modified e-forms to the Forms Factory Help Desk to have the e-form Reader Extended. The e-form will be Reader Extended at no additional cost.

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## Adobe Bar code Services



Adobe bar coded e-forms automate the capture of user-supplied data from printed and faxed forms using bar code technology. It effectively unites the convenience of fill-and-print Adobe PDF forms with fast and efficient data capture. When the bar code is scanned, data is extracted with absolute accuracy and is immediately available to agency applications. As a result, bar coded forms dramatically reduce the costs, errors, and time associated with manual processing. In addition, the use of bar codes on forms allows the form to be physically signed and subsequently mailed to the agency.

Using bar coded forms provide the following advantages:

- Extract data from decoded bar codes with a high level of accuracy;
- Automate the capture of fill-and-print form data;
- Provide functionality to capture information and send it into agency applications reducing costly and error-prone manual data entry;
- Offer the potential to improve organizational responsiveness and customer satisfaction.

Manager Division	Fax Number: 408-537-6000 Email: csimms@GlobalCorp.com
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DEPT. OF ENVIRONMENTAL RESOURCES USE ONLY

Office	Transaction No. 123456789-0
 Signature of Responsible Official	

## Embedded Field Customization Services

**Validations:** Agencies can choose to have e-forms developed that contain embedded field validation to ensure that data entered into the e-form fields is in the correct data format. For example, a telephone number field on an e-form can be set to only accept input in the following format: (999) 999-9999.

**Calculations:** Agencies can choose to have e-forms developed that contain embedded field calculations to ensure that calculated field data is correct per defined business rules. For example, the number of miles traveled using a personal vehicle multiplied times the standard per mile rate can be automatically calculated and the result placed into the appropriate field.

**Custom Programming:** Agencies can choose to have e-forms developed that contain embedded field custom programming. For example, the e-form can be programmed to allow for forms to dynamically show or hide relevant information based on options selected in the e-form. This functionality may be used to consolidate multiple similar forms into a single form.

# Getting Started with Forms Factory

## E-form Language Localization Services

Agencies can have e-forms localized into different languages to assist in communicating with the diverse population in the State of Oregon. Initial localization languages available will be Spanish and Russian. Additional languages will be added based on agency requirements. These languages may include, but are not limited to Korean, French, Cambodian and Cantonese. All e-forms will be designed using English. If an agency chooses to use e-form localization, additional versions of the e-form will be created for the language(s) chosen. For example, if an agency orders an e-form and chooses to have the e-form localized in Spanish and Russian, the agency will receive three e-forms, one each in English, Spanish and Russian. The agency will only be charged the e-form Localization Service fee for the two additional e-forms, and will only pay a single form license fee.

## Consulting Services

Agencies will be able to order additional consulting services related to e-forms and the Adobe products, including:

- **Executive Seminar** (half day) – Executive overview of the advantages and benefits to using e-forms, as well as the overall e-form ordering, development and implementation process.
- **Introductory Workshop – Business** – A workshop on the concepts of integrating e-forms into agency processes from a business perspective.
- **Introductory Workshop – Technical** – A workshop on the concepts of integrating e-forms into agency processes from a technical perspective.
- **Business Process Analysis** – Consultants are available to work with agencies to assist in reviewing and improving current business processes, or to create new business processes, that use e-forms.
- **Agency E-forms Strategy Development** – Consultants are available to work with agencies to help develop, review and implement the agency strategy for integrating e-forms into agency processes and services.
- **E-forms Data Integration Planning** – Consultants are available to work with the agency technical staff on the strategies, concepts, development and implementation of extracting e-form data into existing agency back-office solutions and agency business processes.
- **E-forms Fee Collection Planning** – Consultants are available to work with the agency financial staff on the strategies, concepts, development and implementation of collecting fees associated with e-forms.
- **E-forms Signature Capture Strategy** – Consultants are available to work with the agency program and business areas on the strategies, concepts, development and integration of e-form signature capture into existing or new business processes.
- **E-forms Multi-Lingual Strategy** – Consultants are available to work with the agency program and business areas to identify and refine the multi-lingual needs of the agency, and to assist in the development of a strategy and implementation plan for addressing multi-lingual requirements.

## Getting Started with Forms Factory

### How agencies engage with E-government for Forms Factory Services

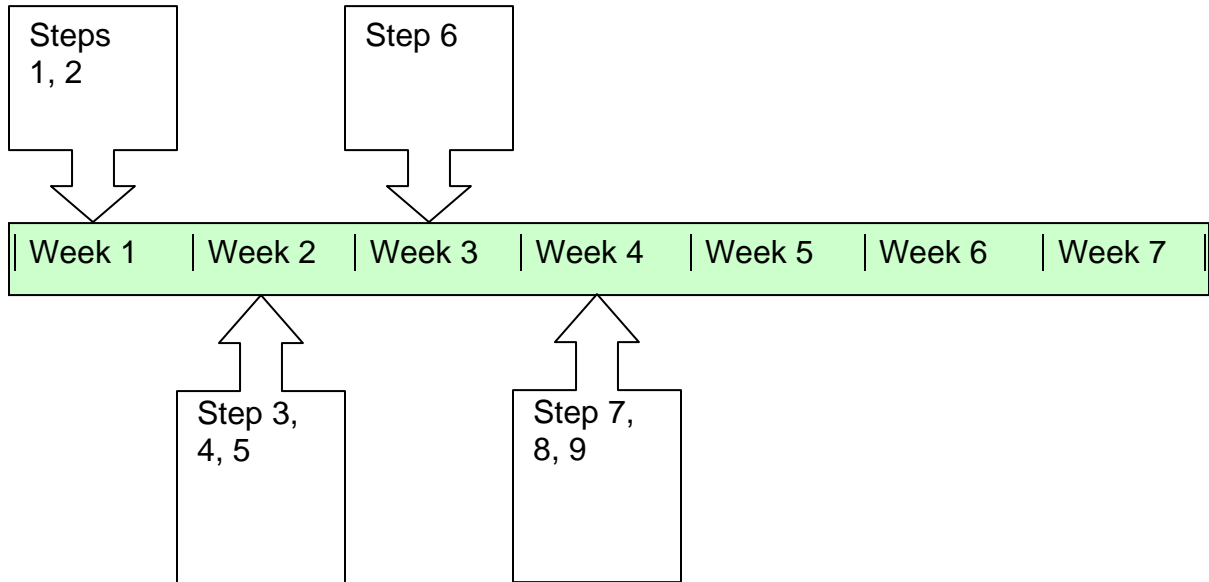
1. Contact E-government to set up an Interagency Agreement (IAG), see Appendix A.
2. Agencies will complete a Forms Factory Service Request for each e-form to be developed and delivered under the agencies' IAG with E-government. Consulting services are available to define the e-form's functional requirements.
3. Forms Factory staff will work with the agency to create a Statement of Work (SOW) for each e-form. The agency will sign off on the SOW, which will include the finalized Forms Factory Service Request.
4. The SOW and Forms Factory Service Request will be submitted to E-government. E-government will provide the cost for the e-forms services requested based on the rate schedule in Appendix C.
5. The agency will review the final quote and on approval, will send notification to E-government which will initiate the development process.
6. Agency approves the e-form and sends notification of acceptance to E-government.
7. E-government bills the agency for e-form development.
8. Agencies post e-form(s) to Web site.
9. Agencies will be billed annually for maintenance fees (refer to Appendix C Services Usage Fees).

*Note: Some of these cycles occur concurrently.*

# Getting Started with Forms Factory

## Estimated Timeline to Implement an E-form Solution

(Times will vary based on complexity and number of forms)



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## Agency Preparedness

The following information is not meant to be a substitute for consulting services. It is merely a guide for agencies to use in developing their e-forms requirements.

### Gain agreement on the problem definition

- Describe the problem.
- Identify stakeholders affected by the problem.
- Describe the impact of this problem on stakeholders and business activity.
- Indicate the proposed solution and list a few key benefits. Use the Forms Factory Business Case Tool.
- Define the project scope.
- Identify the constraints to be imposed on the solution.

Once written, the problem statement and business case can be circulated to stakeholders for comment and feedback.

### Understand the business processes

- By understanding the structure and dynamics of the organization.
- To ensure the end-users and developers have a common understanding of the problem.

### Understand Stakeholder and End-user Needs

- Capture and document needs to determine requirements through the use of interviews, questionnaires and prototyping (iterative examples of the form).
- The requirements will become an itemized list of features and information to be collected by the form.

### Measure Success

- By matching the requirements to the final e-form solution.
- By evaluating stakeholder and end-user satisfaction.
- By documenting time and dollar savings

# Getting Started with Forms Factory

## Forms Factory support and maintenance process

### 1<sup>st</sup> Tier Support

1. Citizen/business accesses e-form via agency Web site on [www.oregon.gov](http://www.oregon.gov).
2. Citizen/business contacts agency with questions on how to complete form, or to report a problem with form functionality. Agency responds to citizen/business questions.

### 2<sup>nd</sup> Tier Support

1. If citizen/business contacts agency to report a problem with the form functionality, agency then contacts Forms Factory Help Desk to open problem ticket.
2. Forms Factory Help Desk resolves form functionality issue and forwards revised form to agency for testing and confirmation that reported problem is resolved.
3. Upon agency confirmation that reported problem is resolved; problem ticket is closed by the Forms Factory Help Desk.
4. Agency posts revised form to Web site.
5. Agency responds to citizen/business on problem resolution.

### 3<sup>rd</sup> Tier Support

1. Third Tier Support is available based on agency need. 24x7x365 support is available on a per-form basis, and must be negotiated based on support requirements.

## Issues and Concerns

### Escalation process for Forms Factory Issues

1. The preferred method for submitting problems, issues or complaints is to complete and submit an issue reporting form. The link to the form will be added to the Interagency Agreement during the Forms Factory engagement process. Please detail any concerns or complaints. This information will be reviewed to improve service delivery and provide input into performance reporting.
2. A secondary method for submitting problems is to contact the first person on the following list either by email or telephone. (Refer to Appendix F for contact information). If unable to get an immediate response continue to the next person on the list.

### Escalation path for Forms Factory Issues

Title
Forms Designer
Forms Factory Coordinator
EDS Account Manager
Manager, Oregon E-government Program

# Getting Started with Forms Factory

## Appendix A: Example Interagency Agreement

E-government Program Agreement Number: -XXXX-XX

**[AGENCY NAME]**  
**MASTER INTERAGENCY AGREEMENT**

This Agreement is made between the [AGENCY NAME], hereinafter called {agency} and the State of Oregon acting by and through the Enterprise Information Strategy and Policy Division, Oregon E-government Program, Department of Administrative Services; hereinafter called the E-government Program.

### **AUTHORITY**

TO ORS 190.110, in performing a duty imposed upon it or in exercising a power conferred upon it, a unit of local government or a state agency of this state may cooperate, by agreement or otherwise, with a unit of local government or a state agency of this or another states, or with the United States, or with a United States governmental agency, or with an American Indian Tribe.

### **WITNESSETH**

WHEREAS {agency} desires electronic government services; and

WHEREAS the performance of such services is consistent, compatible and beneficial to the mission of the E-government Program,

IN CONSIDERATION of the mutual promises and covenants contained herein, the parties hereto agree as follows:

#### **I. RECITALS**

The primary goals of this partnership are to achieve the following:

1. Provide for development and implementation of electronic government services to meet a variety of {agency} business needs.
2. Provide electronic government consulting services to {agency}.
3. Use the E-government Program's expertise and resources in electronic government to provide a cost-effective means by which {agency} can create, connect and implement electronic government services in a variety of ways, including ways not yet contemplated.

## Getting Started with Forms Factory

4. Provide overall electronic government project management and testing services to {agency}.

### **II. LIMITATIONS**

1. This Agreement shall not be construed to include any interagency agreement between {agency} and the E-government Program that may already be in force on the effective date of this Master Agreement.
2. This Agreement shall not be construed to require {agency} to commit a given volume of project activity to the E-government Program, as measured by either dollar volume or number of projects. The E-government Program is likewise free to provide assistance and electronic government services to other public agencies.

### **III. DURATION OF AGREEMENT**

The term of this Agreement shall commence upon the date of the last signature below and shall continue in effect until terminated according to the provision contained herein.

### **IV. OBLIGATION OF FUNDS**

1. The amount obligated by {agency} with respect to this Master Agreement is the aggregation of amounts obligated in the Statements of Work (SOW). The {agency} Contracts Coordinator and the E-government Program must fully execute each SOW before its required performance begins. Each SOW will contain two parts: 1) The Statement of Work as defined in Article V of this Master Agreement; and 2) the amount of compensation for services performed as well as method of payment and billing procedures.
2. {agency} certifies that sufficient funds are available in its current budget to finance the E-government Program's obligation under each SOW.
3. The E-government Program shall maintain fiscal records pertinent to this Agreement for at least six (6) years following completion of work under this Agreement. The E-government Program shall maintain all fiscal records relating to this Agreement in accordance with generally accepted accounting principles. In addition, the E-government Program shall maintain all other records pertinent to this Agreement in such a manner as to clearly document the E-government Program's performance hereunder.

## Getting Started with Forms Factory

4. The E-government Program is not permitted to re-budget costs without prior approval. Re-budgeting requests shall be in writing and directed to the {agency} contact listed below. Should {agency contact} be unable to continue in this capacity, {he/she} shall notify the E-government Program in writing of the appointment of {his/her} successor.

{agency contact},{title}  
[AGENCY NAME]  
{address 1}  
{address 2}  
{phone}

### V. STATEMENT OF WORK

A Statement of Work (SOW) may be processed pursuant to this Master Interagency Agreement. Each SOW shall contain the following elements:

1. Detailed description of the work to be accomplished, deliverables, and standards for acceptance.
2. Anticipated role of the E-government Program staff in providing data and other support, and dates by which each such task shall be completed.
3. Name of the {agency} official responsible for direction and approval of each task.
4. Name of the E-government Program official assigned to provide liaison and to verify timely completion.
5. Date of Project completion, including milestones where appropriate.
6. Costs and payment schedule.
7. Performance reporting requirements.

All SOWs shall be subject to all terms, conditions, and provisions of this Master Agreement and any amendments hereto. Each SOW may include other terms, conditions, provisions, modifications or deletions thereof as both the E-government Program and {agency} may agree to apply to the particular SOW.

### VI. ADMINISTRATION

1. Authorized Representative:
  - A. The E-government Program designates Scott Smith, Manager of the Oregon E-government Program, as its authorized representative in

## Getting Started with Forms Factory

administering this Master Agreement. He shall be the initial point of contact for matters related to performance, payment authorization, and to carry out E-government Program responsibilities. Should Mr. Smith be unable to continue in this capacity, he shall notify {agency} in writing of the appointment of his successor.

- B. {agency} designates {agency representative}, {title}, as its authorized representative to act on its behalf. Should {agency representative} be unable to continue in this capacity, {he/she} shall notify E-government in writing of the appointment of {his/her} successor.

### 2. Written Notice:

Any notice provided for under this Agreement shall be sufficient if in writing and delivered personally to the following addressee or deposited in the United States Mail, postage prepaid, certified mail, return receipt requested, addressed as follows, or to such other address as either party hereafter shall specify in writing to the other party, or via email if approved by both parties;

If to {agency}:

{agency representative}, {title}  
[AGENCY NAME]  
{address 1}  
{address 2}  
{phone}

## Getting Started with Forms Factory

If to the E-government Program:

Scott Smith - Manager  
Oregon E-government Program  
225 Ferry Street SE  
Salem, OR 97301  
(503) 378-2973

### **VII. CONFIDENTIALITY**

This paragraph is subject to the limitations and conditions of the Oregon Public Records Law. The E-government Program agrees that during the term of this Agreement, data provided by {agency} are confidential and shall not be disclosed to any person, firm, or other entity except without expressed written authorization from {agency}. In addition, should this Agreement terminate for any cause, The E-government Program agrees to return or destroy all {agency} data in its possession.

### **VIII. INDEMNIFICATION**

Each party assumes liability for its own wrongful or negligent acts or omissions, or those of its officers, agents, or employees. The E-government Program and {agency} understand that the State of Oregon Insurance Fund insures each with respect to general liability. This fund is a statutory system of self-insurance established by ORS Chapter 278, and subject to the Oregon Tort Claims Act (ORS 30.260 - 30.300). Each party agrees to accept the coverage as adequate insurance of the other party regarding personal injury and property damage.

The E-government Program and {agency} agree that any loss resulting from the parties' performance of this agreement shall be allocated in accordance with law by the Risk Management Division of the Department of Administrative Services and shall be assigned to the responsible party for the purposes of loss experience and the subsequent allocation of self-insurance premiums under ORS 278. The parties agree to notify the Risk Management Division in the event they receive knowledge of any claims arising from the parties' performance of this Agreement.

### **IX. COMPLIANCE WITH LAWS**

This Agreement shall be governed and construed according to the laws of the State of Oregon. Moreover, both parties agree to comply with all applicable requirements of federal and state civil rights and rehabilitation statutes, rules and regulations in their performance under this Agreement.

## Getting Started with Forms Factory

### **X. ASSIGNMENT**

Neither the E-government Program nor {agency} shall assign or transfer any interest in this Agreement. Neither party may assign any claims for money due or to become due during this Agreement, without the prior written approval of the other party. The E-government Program may subcontract for professional services within the scope of the SOWs.

### **XI. PUBLICATION AND OWNERSHIP**

The E-government Program may use, reuse, and analyze the data that The E-government Program developed while performing services under this Agreement for teaching or other electronic government purposes. However, the E-government Program may not disclose the data, or any analysis based on the data, to anyone other than {agency} without {agency}'s express written consent.

Neither the E-government Program nor {agency} shall unreasonably deny permission to publish results. The parties shall provide a copy of any publication to each other prior to publication.

{agency} shall wholly own all intellectual property that it produces under this Master Interagency Agreement. {agency} agrees to grant a royalty-free, non-exclusive and irrevocable license to the E-government Program to reproduce, publish or otherwise use the intellectual property developed by the E-government Program under this Master Interagency Agreement.

The E-government Program and {agency} shall jointly own all intellectual property that they produce while working collaboratively under this Master Interagency Agreement.

### **XII. TERMINATION**

This Agreement, which both the E-government Program and {agency} enter into in good faith, may be terminated by written notice of either party. Termination shall become effective thirty (30) days after receipt of written notice of termination. By such termination, neither party may nullify obligations already incurred for performance or failure to perform prior to the date of termination.

Notice shall be provided no less than 30 days in advance of termination, unless work is being provided using subcontracted sources. For work order contracts that involve subcontracted sources, notice shall be provided in accordance with the existing terms and conditions of the agreement between DAS and the subcontractor.

## Getting Started with Forms Factory

THIS AGREEMENT CONSTITUTES THE ENTIRE AGREEMENT BETWEEN THE PARTIES. THERE ARE NO UNDERSTANDINGS, AGREEMENTS, OR REPRESENTATIONS, ORAL OR WRITTEN, NOT SPECIFIED HEREIN REGARDING THIS AGREEMENT. NO AMENDMENT, CONSENT, OR WAIVER OF TERMS OF THIS AGREEMENT SHALL BIND EITHER PARTY UNLESS IN WRITING AND SIGNED BY ALL PARTIES. ANY SUCH AMENDMENT, CONSENT, OR WAIVER SHALL BE EFFECTIVE ONLY IN THE SPECIFIC INSTANCE AND FOR THE SPECIFIC PURPOSE GIVEN. BOTH {agency} AND THE E-GOVERNMENT PROGRAM, BY THE SIGNATURE BELOW OF THEIR RESPECTIVE AUTHORIZED REPRESENTATIVES, ACKNOWLEDGE HAVING READ AND UNDERSTOOD THE AGREEMENT. BOTH AGREE TO BE BOUND BY ITS TERMS AND CONDITIONS.

## Getting Started with Forms Factory

IN WITNESS WHEREOF the parties hereto have caused this Agreement to be executed as of the date set forth herein by their duly authorized representatives.

[AGENCY NAME]  
{division}

{address 1}  
{address 2}

Dept. of Administrative Services  
Enterprise Information Strategy & Policy  
Division  
255 Center St. NE, 4<sup>th</sup> Floor  
Salem, OR 97301

By:

\_\_\_\_\_  
{agency contact},{title}

By:

\_\_\_\_\_  
Dugan Petty, Administrator

Date: \_\_\_\_\_

Date:  
\_\_\_\_\_

Dept. of Administrative Services  
Contract Services, Operations Division


By:

\_\_\_\_\_  
Lori Le Veaux, Contract Services  
Manager

Date:  
\_\_\_\_\_

# Getting Started with Forms Factory

## Appendix B: Forms Factory Request Form

	<b>Oregon E-government Forms Factory Service Request</b>	<input type="button" value="E-Mail"/>																								
		<input type="button" value="Reset Form"/>																								
<b>Agency</b>																										
<table border="0" style="width: 100%;"><tr><td style="width: 50%;">Agency Name: _____</td><td style="width: 50%;">Agency #: _____</td></tr><tr><td>Division/Unit: _____</td><td>Div/Unit #: _____</td></tr><tr><td>PCA/Program: _____</td><td style="text-align: right;">▼</td></tr></table>			Agency Name: _____	Agency #: _____	Division/Unit: _____	Div/Unit #: _____	PCA/Program: _____	▼																		
Agency Name: _____	Agency #: _____																									
Division/Unit: _____	Div/Unit #: _____																									
PCA/Program: _____	▼																									
<b>Form</b>																										
<table border="0" style="width: 100%;"><tr><td style="width: 50%;">Form Name: _____</td><td style="width: 50%;">Form ID #: _____</td></tr></table> <p>Form Description: (briefly describe what the form will do and who uses it; to attach a sample form: Adobe Acrobat Reader &gt; Document menu &gt; Attach a file....)</p> <div style="border: 1px solid black; height: 150px; width: 100%;"></div>			Form Name: _____	Form ID #: _____																						
Form Name: _____	Form ID #: _____																									
<b>Contact Info</b>																										
<table border="0" style="width: 100%;"><tr><td colspan="3"><b>Form Ordering</b></td></tr><tr><td style="width: 50%;">Name: _____</td><td style="width: 20%;">Phone: _____</td><td style="width: 30%;"></td></tr><tr><td>E-Mail: _____</td><td>Cell: _____</td><td></td></tr><tr><td>Address: _____</td><td>Fax: _____</td><td></td></tr><tr><td colspan="3"><b>Form Authorizing</b></td></tr><tr><td>Name: _____</td><td>Phone: _____</td><td></td></tr><tr><td>E-Mail: _____</td><td>Cell: _____</td><td></td></tr><tr><td>Address: _____</td><td>Fax: _____</td><td></td></tr></table>			<b>Form Ordering</b>			Name: _____	Phone: _____		E-Mail: _____	Cell: _____		Address: _____	Fax: _____		<b>Form Authorizing</b>			Name: _____	Phone: _____		E-Mail: _____	Cell: _____		Address: _____	Fax: _____	
<b>Form Ordering</b>																										
Name: _____	Phone: _____																									
E-Mail: _____	Cell: _____																									
Address: _____	Fax: _____																									
<b>Form Authorizing</b>																										
Name: _____	Phone: _____																									
E-Mail: _____	Cell: _____																									
Address: _____	Fax: _____																									
<p>To be completed by Oregon E-government Program</p> CCR/WO #: _____																										
<hr/> <p>Rev. 1-2007 <span style="float: right;">Page 1 of 3</span></p>																										

# Getting Started with Forms Factory



## Oregon E-government Forms Factory Service Request

### Cost of Services

PDF Form Design			Localization		
	Cost per Page Side	# of Page Sides		Cost per Page Side	# of Page Sides
Simple (<10 fields or 6")	\$1,400	_____	<input type="checkbox"/> Spanish	Simple \$1,400	_____
Medium (11-20 fields or >6")	\$2,100	_____	<input type="checkbox"/> Russian	Medium \$2,400	_____
Complex (>20 fields)	\$2,800	_____		Complex \$3,600	_____
<i>Subtotal</i>			<i>Subtotal</i>		
\$0			\$0		

E-Form Services			E-gov Data Interchange Setup	
	Cost per Form	Annual Cost per Form		One-Time Cost per Agency
<input type="checkbox"/> Enable Reader Extensions	\$2,800	\$400	<input type="checkbox"/> Transfer to Agency FTP Server	\$8,400
<input type="checkbox"/> Embed 2-D Barcode	\$2,600	\$350	<input type="checkbox"/> Transfer to EDS FTP Server	\$1,700
<input type="checkbox"/> Custom Field Programming _____ (\$150 per hour)				
	Cost per Field	# of Fields		
<input type="checkbox"/> Field Validation	\$150	_____		
<input type="checkbox"/> Field Calculation	\$150	_____		
<i>E-Form Subtotal</i>			<i>Subtotal</i>	
\$0			\$0	
<i>Annual Subtotal</i>				
\$0				

E-Forms Consulting		Data Extraction Services	
	Cost per Item		Cost per Form
<input type="checkbox"/> Executive Seminar (half day)	\$2,100	<input type="checkbox"/> Tabular Text	\$1,600
<input type="checkbox"/> Introductory LiveCycle Workshop - Business	\$4,200	<input type="checkbox"/> Excel Spreadsheet	\$1,600
<input type="checkbox"/> Introductory LiveCycle Workshop - Technical	\$4,200	<input type="checkbox"/> XML	\$3,200
<input type="checkbox"/> Business Process Analysis	\$6,500	<input type="checkbox"/> Custom	_____
<input type="checkbox"/> Agency E-Forms Strategy Development	\$10,600	<i>Subtotal</i>	
<input type="checkbox"/> E-Forms Data Integration Planning	\$3,200	\$0	
<input type="checkbox"/> E-Forms Fee Collection Planning	\$8,500	Data Extraction Processing Services	
<input type="checkbox"/> E-Forms Multi-Lingual Strategy	\$2,100		Annual Cost per Form
<input type="checkbox"/> E-Forms Signature Capture Strategy	\$2,100	Peak Monthly Transactions	
<i>Subtotal</i>		<input type="checkbox"/> Up to 7,500	\$9,000
\$0		<input type="checkbox"/> Up to 15,000	\$13,500
		<input type="checkbox"/> Up to 30,000	\$16,000
		<input type="checkbox"/> None	_____
		<i>Subtotal</i>	
		\$0	

E-Form Implementation Estimate	\$0.00	Annual E-Form Estimate	\$0.00
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# Getting Started with Forms Factory



## Oregon E-government Forms Factory Service Request

### Authorization

I agree that this document accurately describes the scope and nature of the work to be performed and that this estimate is complete.

\_\_\_\_\_  
Representative Name

\_\_\_\_\_  
Title

*I affirm the contents of this document.*



\_\_\_\_\_  
Typed Signature

OR

\_\_\_\_\_  
Digital Signature

\_\_\_\_\_  
Date

### E-government

\_\_\_\_\_  
Representative Name

\_\_\_\_\_  
Title

*I affirm the contents of this document.*



\_\_\_\_\_  
Typed Signature

OR

\_\_\_\_\_  
Digital Signature

\_\_\_\_\_  
Date

### EDS

\_\_\_\_\_  
Representative Name

\_\_\_\_\_  
Title

*I affirm the contents of this document.*



\_\_\_\_\_  
Typed Signature

OR

\_\_\_\_\_  
Digital Signature

\_\_\_\_\_  
Date

## Getting Started with Forms Factory

### Appendix C: Form Factory Price Table

Form Factory services must be ordered through E-government and paid for by the agencies on a per-form basis. Prices in the Statement of Work are valid for two years from the date of initial acceptance. Prices may be adjusted annually after the initial two-year period by no more than 5% for three additional years. All prices are based on form pages measuring 8½ by 11 inches.

<b>E-form Design Services Costs</b>	
(A form is a single sheet of paper that can be one or two-sided.)	
A simple form page is 10 or fewer fields AND uses less than 6 vertical inches of space on one side of a sheet of paper	\$1,400 per form page
A medium form page is 20 or fewer fields OR uses more than 6 vertical inches of space on side of a sheet of paper	\$2,100 per form page
A complex form page has more than 20 fields	\$2,800 form per page
<b>Services Costs</b>	
Reader Extension enabled e-form	\$2,800 per form
2-D Bar code enabled e-form	\$2,600 per form
<b>Services Usage Costs</b>	
Reader Extended e-form usage	\$400 per form/year
2-D Bar code e-form usage	\$350 per form/year
<b>Embedded Field Customization Service Costs</b>	
Design e-form embedded field validation	\$150 per field
Design e-form embedded field calculation	\$150 per field
Design e-form embedded custom programming	\$150 per hour
<b>E-form Localization Services Costs</b>	
Localize e-form to additional languages. Bulk text boxes will be negotiated based on effort and will be priced per word. Languages listed will be available in Phase 1, additional languages will be added in later Phases.	
<b>Spanish</b>	
Simple	\$1,400 per page side
Medium	\$2,400 per page side
Complex	\$3,600 per page side
<b>Russian</b>	
Simple	\$1,200 per page side
Medium	\$2,400 per page side
Complex	\$3,600 per page side
<b>E-form Data and Image Extraction Design Services Costs</b>	
Design data extraction to Tabular Text	\$1,600 per form
Design data extraction to Excel Spreadsheet	\$1,600 per form
Design data extraction to XML	\$3,200 per form
Design data extraction to customized output	Negotiated based on effort
<b>Data Interchange Setup Costs – per agency</b>	
Setup transfer to Agency FTP server	\$8,400 one time setup
Setup transfer to EDS FTP server	\$1,700 one time setup

## Getting Started with Forms Factory

<b>Data and Image Transaction Volume Costs – per agency</b>	
Peak monthly transactions up to 7,500	\$ 9,000 annually
Peak monthly transactions up to 15,000	\$13,500 annually
Peak monthly transactions up to 30,000	\$16,000 annually
Transactions above 30,000 month charged at one cent per transaction	
<b>Consulting Service Costs</b>	
Executive Seminar (half day)	\$ 2,100
Introductory Workshop - Business	\$ 4,200
Introductory Workshop - Technical	\$ 4,200
Business Process Analysis	\$ 6,500
Agency e-Forms Strategy Development	\$ 10,600
E-forms Data Integration Planning	\$ 3,200
E-forms Fee Collection Planning	\$ 8,500
E-forms Signature Capture Strategy	\$ 2,100
E-forms Multi-Lingual Strategy	\$ 2,100

# Getting Started with Forms Factory

## Appendix D: Data Extraction Transaction Pricing

Q. When is this cost incurred?

A. When data is extracted from or inserted into a form.

Q. Do I have to have Forms Factory extract the data?

A. No. If you have the software and infrastructure, you can do it yourself.

Q. Why have Forms Factory do this?

A. All of the software and hardware costs can be avoided by paying per transaction.

Q. How are the fees incurred?

A. Based on a combination of peak and annual transactions (see table). Since the infrastructure is sized based on peak need, peak transactions are an important component to the pricing structure. Pricing is per Agency, not per form.

<b>Data and Image Transaction Volume Costs – per Agency</b>	
Peak monthly transactions up to 7,500	\$ 9,000 annually
Peak monthly transactions up to 15,000	\$ 13,500 annually
Peak monthly transactions up to 30,000	\$ 16,000 annually
Transactions above 30,000 month charged at one cent per transaction	

Example 1: I have 9,000 transactions spread evenly throughout the year.

Calculation:  $9,000/12 = 750/\text{month}$ . Fee is \$9,000 annually, or \$1.00 each.

Example 2: I have 20,000 transactions, 12,000 in June:

Calculation: The fee of \$13,500 annually covers all months, or about \$.68 each.

Example 3: I have 60,000 transactions spread evenly throughout the year.

Calculation:  $60,000/12 = 5,000/\text{month}$ . Fee is \$9,000 annually, or about \$.15 each.

Example 4: I have 60,000 transactions per year, and about 40,000 of them in November.

Calculation: The fee of \$16,000 for 30,000 transactions per month covers all but the 10,000 transactions over 30,000 for November. This is calculated at  $\$0.01 \times 10,000 = \$100$ . Thus, the annual payment is \$16,100, or about \$.27 each.

Example 5: I have 240,000 transactions per year, spread evenly throughout the year.

Calculation:  $240,000/12 \text{ months} = 20,000/\text{month}$ . Fee is \$16,000 annually, or about \$.07 each.

Example 6: I have 2.4 million transactions/year, with peaks in March of 1,200,000 and April of 1,000,000.

Calculation: The fee of \$16,000 for 30,000 transactions per month covers the cost of all months except for March and April. March =  $(1,200,000 - 30,000) \times \$0.01$  or \$11,700. April =  $(1,000,000 - 30,000) \times \$0.01 = \$9,700$ . Total for the year is \$37,400, or about \$.016 cents per transaction.

## Getting Started with Forms Factory

### Appendix E: Forms Factory Support

All services purchased through Forms Factory come with help desk support. This support is provided during normal business hours, which are 7:00 AM to 6:00 PM Monday through Friday. Full 24-hour support can be purchased for individual forms.

The support available to agencies is directly related to the type of services purchased. If a service was not purchased through Forms Factory, that service is not covered under the standard support agreement and is subject to a support fee of \$75/half hour.

The following table indicates the different support services included with different Forms Factory service combinations.

Problem Areas	Forms Factory Service Areas			
	Form Only	Form + development services	Form + hosting services	Form + development + hosting services
Adobe software bug	Included	Included	Included	Included
Form functionality or design issue	Fee	Included	Fee	Included
Data validation, sum fields, or other basic forms functionality	Fee	Included	Fee	Included
Custom coding	Fee	Included	Fee	Included
Data extraction	Fee	Fee	Included	Included
Hosting/availability	Fee	Fee	Included	Included
Access control, password resets, other admin tasks generally less than five minutes.	N/A	N/A	Included	Included
Training related issues, 2 <sup>nd</sup> level form user support, other admin tasks generally taking more than five minutes.	Fee	Fee	Fee	Fee
Direct form user or citizen support	Negotiated	Negotiated	Negotiated	Negotiated
24 x 7 form support – only applies to services purchased.	N/A	\$400/form/year	\$400/form/year	\$400/form/year

## Getting Started with Forms Factory

### Appendix F: Forms Factory Contact Information

<b>Name/Title</b>	<b>E-Mail Address</b>	<b>Phone Number</b>
Forms Designer	<a href="mailto:twatanabe@sabercorp.com">twatanabe@sabercorp.com</a>	(503) 798-8485
Forms Factory Coordinator	<a href="mailto:john.gugel@state.or.us">john.gugel@state.or.us</a>	(503) 378-4335
EDS Account Manager	<a href="mailto:shannon.glasscock@eds.com">shannon.glasscock@eds.com</a>	(503) 602-9228
Oregon E-government Program Manager	<a href="mailto:scott.e.smith@state.or.us">scott.e.smith@state.or.us</a>	(503) 378-2973

# Getting Started with Forms Factory

## Glossary

**Adobe Reader®** - Free software that allows users to more securely view, print, search, sign, verify, and collaborate on PDF documents.

**Bar code** - is the small image of lines (bars) and spaces that is affixed to retail store items, identification cards, and postal mail to identify a particular product number, person, or location. The code uses a sequence of vertical bars and spaces to represent numbers and other symbols. A bar code symbol typically consists of five parts: a quiet zone, a start character, data characters (including an optional check character), a stop character, and another quiet zone.

**Bar code Reader** - is used to read the code. The reader uses a laser beam that is sensitive to the reflections from the line and space thickness and variation. The reader translates the reflected light into digital data that is transferred to a computer for immediate action or storage.

**Digital Certificate** –A digital certificate is an electronic "credit card" that establishes your credentials when doing business or other transactions on the Web. It is issued by a certification authority. It contains your name, a serial number, expiration dates, a copy of the certificate holder's public key (used for encrypting messages and digital signatures), and the digital signature of the certificate-issuing authority so that a recipient can verify that the certificate is real.

**Digital Signature** - A digital signature (not to be confused with a digital certificate) is an electronic signature that can be used to authenticate the identity of the sender of a message or the signer of a document, and possibly to ensure that the original content of the message or document that has been sent is unchanged. Digital signatures are easily transportable, cannot be imitated by someone else, and can be automatically time-stamped. The ability to ensure that the original signed message arrived means that the sender cannot easily repudiate it later.

**Firewall** - A system designed to prevent unauthorized access to or from a private network.

**FTP Server** - FTP or File Transfer Protocol is used to connect two computers over the Internet so that the user of one computer can transfer files and perform file commands on the other computer.

**Hyperlink** -(often referred to as simply a link), is a reference or navigation element in a document to another section of the same document, another document, or a specified section of another document, that automatically brings the referred information to the user when the navigation element is selected by the user.

**PDF** - Adobe **P**ortable **D**ocument **F**ormat

**Stakeholder** – individuals and organizations that are actively involved in the project, or whose interests may be affected as a result of project execution or project completion. (PMBOK 3<sup>rd</sup> Edition)

**Statement of Work** – (SOW) sometimes referred to as Problem Statement. A narrative description of products or services to be supplied by the project. (PMBOK 3<sup>rd</sup> Edition)

**XML** - **E**xtensible **M**arkup **L**anguage is a base format for the presentation of data designed especially for Web documents.