



DataMotion SecureMail SecureForms Reference Manual

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Part # 0500SF-03

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REVISION HISTORY

This section summarizes significant changes, corrections, and additions to the document. The history appears in chronological order with the most recent changes listed first.

Version 1

The initial version of this document.

1

Introduction

This document discusses the design and deployment of the DataMotion Secure Forms.

DataMotion SecureForms automates, secures, and tracks the collection of confidential information from your customers, employees, and partners. Using SecureForms eliminates the error-prone manual processing of information from a form as it enters a process workflow. The form submitter (shown as user in the diagram below) enters their information into a form that is specific to your business processing needs. This data is transported over an encrypted channel and delivered to an email address chosen by your organization. The data extract is available in machine-readable CSV and XML formats, as well as the ability to be displayed within the original form for printing and reference via the FDF file format.

Figure 1 Secure Forms Process



FORMS CONFIGURATION ON THE DATAMOTION PLATFORM

The DataMotion SecureMail Platform (“DataMotion Platform”) is configured to process forms using a ‘Form Sender’, and a ‘Form Recipient’ address. These addresses are configured by a DataMotion Technician during the initial setup of a Company on the DataMotion Platform as shown below:

Form Recipient Optionally specify an Email Address or just a Domain for addressing Open-Ended Form Messages. If just a domain is specified, the to querystring value will be concatenated with the domain to determine the recipient. Note: The txtTo form field will overrid	<input type="text" value="form-rec@company.com"/>
Form Sender Optionally specify an Email Address that form message under the company will be sent from. If no sender address is specified the default of forms@datamotion.com will be used. Note: The email address specified must have an account on the DataMotion server	<input type="text" value="forms-send@company.com"/>

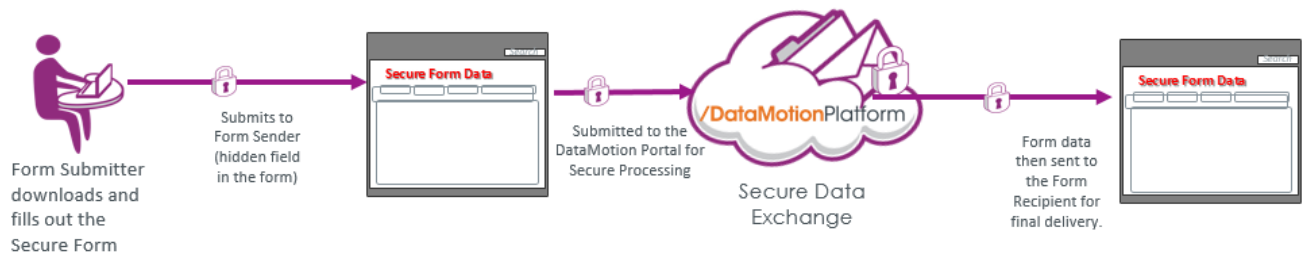
When a form is submitted, the ‘Form Sender’ email address will receive the form data and send it via the SecureMail portal to the ‘Form Recipient’ for downstream processing.

2 Use Cases

SECUREFORMS WORKFLOW

In this workflow, the form is usually hosted on a company’s website in HTML or PDF format. The form will be downloaded, information entered into it, and a simple click on the “Submit” button will cause the entered information to be securely transmitted to the Form Recipient. This workflow includes an easy to distribute form that should be used when the downloadable form initially contains no sensitive data.

Figure 2 Form Submitter Workflow



AN EXAMPLE STORY

Joan went to an out-of-network physician for her yearly physical and now has to submit a claim form to be reimbursed by her medical insurance. Her insurance company provides claim forms on their website for download in the Portable Document Format (PDF).

After downloading the claim form, Joan finds that she can use PDF reader software to enter information into the fields without having to print the form. Instead of entering handwritten information and mailing the form back to the carrier, Joan is able to type in her contact and claim information and click on the “Submit” button with her mouse. Clicking on the “Submit” button is followed with an automated confirmation of the submission that includes a confirmation number.

3

Deploying SecureForms

As a pre-requisite, the company deploying the forms needs to be configured on the DM Platform as a tenant. A Tenant on the DataMotion Platform is a Customer who has established a 'Company' on the DataMotion Platform with SecureMail Accounts. The Form Sender and Form Recipient settings shown above are configured in the Tenant's Company on the DataMotion Platform.

SETUP

HTML FORMS

Some basic knowledge of HTML is required. Visual Web Developer Express 2010 or higher, which can be downloaded for free, is a great tool to build the form. This tool can be used to drag and drop all items onto the form, and then customized by html editing. The HTML customization is required to display all the fields properly to the Form Submitter, and properly names the form fields that will be referred to in the xml attachment. Care should be taken in testing the form with different browsers, and even different versions of the same browser, to identify possible rendering differences. Your SecureMail Web Server will host the CSS and any JavaScript files which will be associated with the form.

Form fields must be validated (e.g. format a phone number as XXX-YYY-ZZZZ), prior to transmitting the form to SecureMail

Once a Form User fills out the HTML form and hits the submit button, the DataMotion Platform receives the message with an XML attachment AND the XML data in the body of the message. The owner of the response on the DataMotion Platform will pull down the XML information into one of their systems and present it in a readable format.

The form should contain the following form fields:

txtto – the email address that will be receiving the form

If the company requires the form recipient to change based on the URL used to access the form, the txtTo field can be replaced by performing the following steps: DataMotion will

configure the recipient domain for the customer’s company created on the DataMotion Portal. The URL that the customer uses to point to the Secure Form can specify the recipient’s prefix via the “to=” query string value. For example, if the server is configured with the domain: @customer.org, and the URL is:

<https://ssl.datamotion.com/form.aspx?co=100&frm=TestForm&to=User>.

The recipient of the secure form will be user@customer.org.

txtsubject – the subject line of the message when the form is submitted.

txtDone – the name of the page that will be displayed after the form is posted to the DataMotion Portal -- i.e. “done” would display “done.html” when the message is successfully posted. This custom page is supplied by the customer as well; otherwise a generic “Message Sent Successfully” page is displayed.

All other form fields are placed in the body of the DataMotion message using field name and value pairs. To exclude a field from the message body, it should start with a double underscore “__”. This is useful for input buttons, etc. that you do not want to be included in the message body.

PDF FORMS

A form user can typically access PDF forms from a Company’s website or receive it via a regular email from the Company. The form user would then fill out the information and submit their data securely.

DESIGNING A SECURE PDF FORM

To create a SecureForms PDF form, the following hidden fields must be added to the PDF document.

co – the coid of the company that is provisioned with the secure forms (provided by DataMotion)

txtto – the email address that will be receiving the form

txtsubject – the subject line of the message when the form is submitted

datesubmitted – a data variable

The following is an example of the hidden fields in a SecureForm:

The Submit Button settings on the form should have the following values:

Enter a URL for this link – <https://ssl.datamotion.com/form2.aspx>

Export Format – Forms Data Format

Adobe Acrobat is required to edit forms and open the FDF. Form users use the Adobe Reader to fill out forms.

Sample Submit Button Configuration in Adobe Acrobat Pro:

Figure 3 Form Configuration

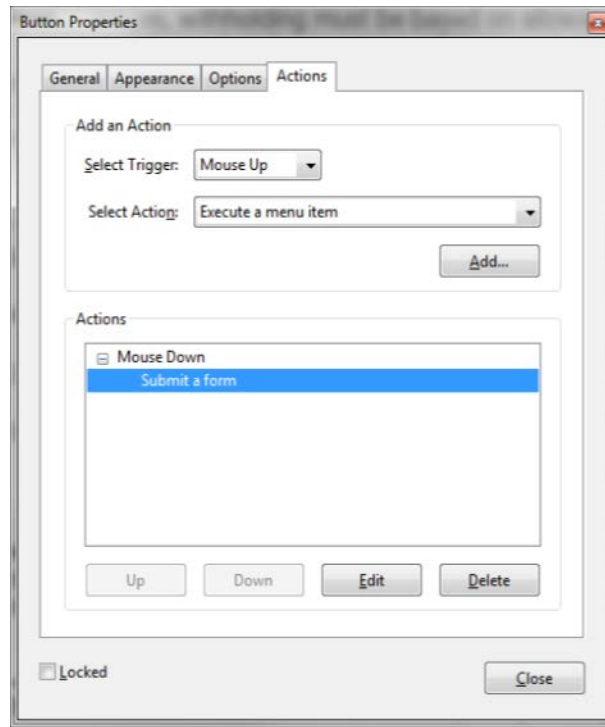
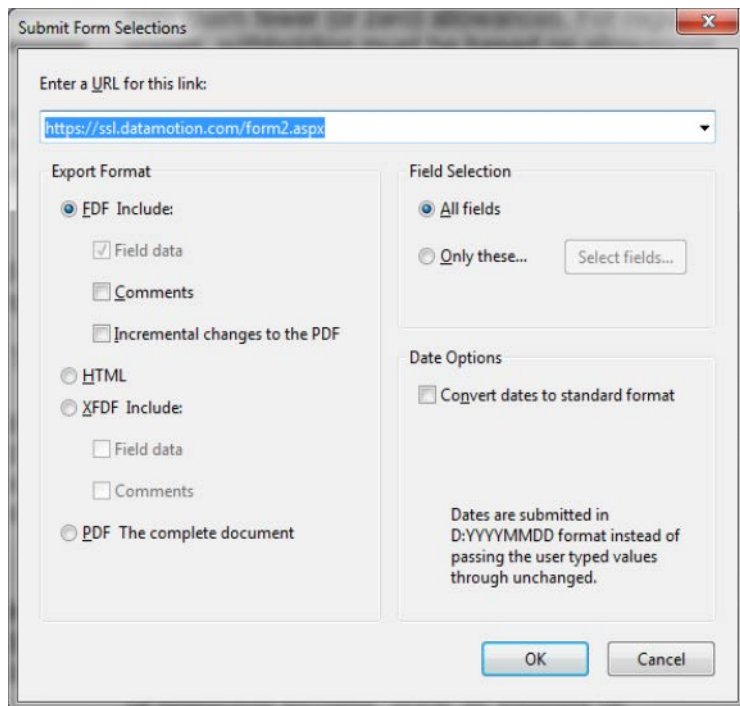
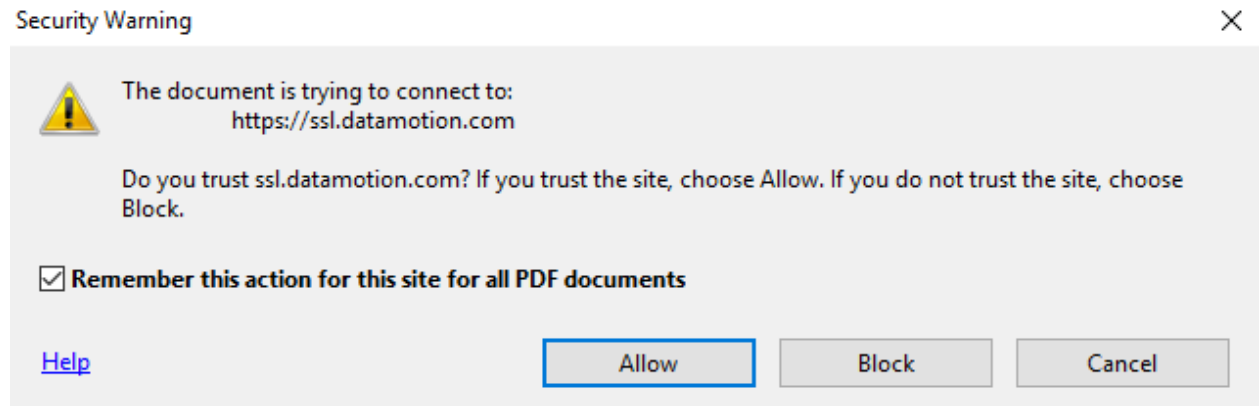


Figure 4 Form Properties



NOTE: Only select the EDF Include radio button, other options are not supported.

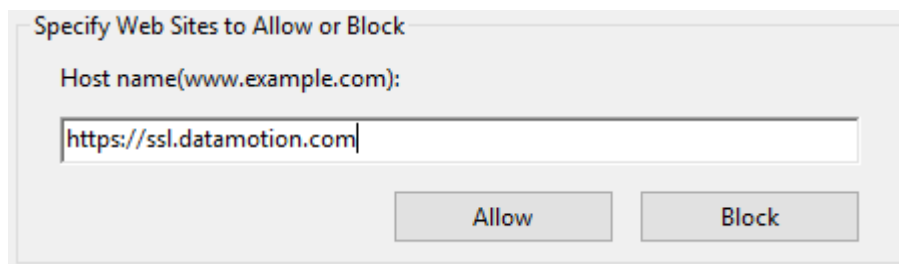
Once a Form User fills out the PDF form and hits the submit button they may notice that the form is requesting to contact <https://ssl.datamotion.com> which is the website where the form transmission is taking place. Users will see the following upon their first attempt to click the Submit button within a form.



Users may be concerned upon seeing this the first time but the site that the form is attempting to connect to is the web portal for the SecureMail Platform itself which is completely secure. Clicking the Allow button and checking the **Remember this action for this site for all PDF documents** checkbox will prevent this pop-up from appearing in the future for all secure forms.

The pop-up can be avoided altogether if users are informed to add the <https://ssl.datamotion.com> site URL to the Adobe Trust Manager. This can be done by performing the following steps:

1. Open Adobe Reader or Acrobat.
2. Click Edit in the top bar.
3. Click Preferences at the bottom of the menu.
4. Click Trust Manager from the menu on the left side.
5. Click Change Settings.
6. Enter <https://ssl.datamotion.com> in the Specify Web Sites to Allow or Block section
7. Click Allow (example below):



Once finished the pop-up will never appear.