# Informed® Desktop eForms User's Manual

## Release 4.1.0

FileNet Corporation
3565 Harbor Boulevard
Costa Mesa, California 92626
800.FILENET (345.3638)

Outside the U.S., call:
1.714.327.3400
www.filenet.com

# Contents


## Introduction i-2

Informed Desktop eForms . . . . . . . . . . . . . . . . . . . . . . . . . . . . . i-2
Highlights/Intelligence Features. . . . . . . . . . . . . . . . . . . . . . . i-2
Attachments. . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . i-2
Digital Signatures . . . . . . . . . . . . . . . . . . . . . . . . . . . . i-3
Database Features . . . . . . . . . . . . . . . . . . . . . . . . . . . . i-3
The Informed Desktop eForms Manual Set . . . . . . . . . . . . . . . i-3
About This Manual . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . i-4
Conventions Used in This Manual . . . . . . . . . . . . . . . . . . . . . . i-5
Terminology . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . i-5
Finding Information . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . i-5
Definitions of Terms. . . . . . . . . . . . . . . . . . . . . . . . . . . . . . i-5
Notes. . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . i-6
Commands and Control Names . . . . . . . . . . . . . . . . . . . . . . i-6
Cross-platform Notes . . . . . . . . . . . . . . . . . . . . . . . . . . . . . i-6

## Chapter 1 Overview 1-2

How Forms are Designed . . . . . . . . . . . . . . . . . . . . . . . . . . . . 1-2
Informed Plug-ins . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . 1-3
Distribution of Templates . . . . . . . . . . . . . . . . . . . . . . . . . . . 1-4
Setting Internet Preferences. . . . . . . . . . . . . . . . . . . . . . . . . . 1-5
Scripting Preferences. . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . 1-5
The Templates Folder . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . 1-6
Filling Out Forms . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . 1-6
Form Tracking. . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . 1-7
Where Everything Goes. . . . . . . . . . . . . . . . . . . . . . . . . . . . . . 1-7
Applications . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . 1-7
Plug-ins. . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . 1-8

Templates Folder . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . 1-8
Preferences . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . 1-8
Online Help . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . 1-8
Spell Checking . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . 1-9
Informed Preferences . . . . . . . . . . . . . . . . . . . . . . . . . . . 1-9
Changing Folder Path Locations . . . . . . . . . . . . . . . . . . . 1-9

## Chapter 2 Managing Documents 2-2

Informed Documents . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . 2-2
Templates . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . 2-2
Informed Desktop Templates (.itp) . . . . . . . . . . . . . . 2-2
Informed XML Templates (.itx) . . . . . . . . . . . . . . . . . 2-2
Documents . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . 2-3
Informed Data (.ifm) . . . . . . . . . . . . . . . . . . . . . . . . . 2-3
Informed XML Data (.ifx) . . . . . . . . . . . . . . . . . . . . . 2-3
Informed Package (.ipk) . . . . . . . . . . . . . . . . . . . . . . 2-3
Informed Interchange (.iif) . . . . . . . . . . . . . . . . . . . . 2-4
The Templates Folder . . . . . . . . . . . . . . . . . . . . . . . . . . . . . 2-4
Template Information . . . . . . . . . . . . . . . . . . . . . . . . . . . . 2-4
Creating New Data Documents . . . . . . . . . . . . . . . . . . . . . . 2-5
The Recent Templates List . . . . . . . . . . . . . . . . . . . . . . 2-6
New Document Preferences . . . . . . . . . . . . . . . . . . . . . . 2-6
Setting Passwords . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . 2-7
Opening Data Documents . . . . . . . . . . . . . . . . . . . . . . . . . 2-8
Opening Recently Used Data Documents . . . . . . . . . . . . 2-10
Opening a Package . . . . . . . . . . . . . . . . . . . . . . . . . . . . 2-11
Opening an XML File (Windows Only) . . . . . . . . . . . . . 2-11
Duplicate Template IDs . . . . . . . . . . . . . . . . . . . . . . . . . . . 2-12
Missing Fonts . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . 2-13
Closing Data Documents . . . . . . . . . . . . . . . . . . . . . . . . . . 2-14
The Auto-Save Preference . . . . . . . . . . . . . . . . . . . . . . . 2-14
Saving Data Documents . . . . . . . . . . . . . . . . . . . . . . . . . . 2-15
Saving Copies of a Data Document . . . . . . . . . . . . . . . . 2-15
Saving as XML Files (Windows Only) . . . . . . . . . . . . . . 2-16
Saving as TIFF Files . . . . . . . . . . . . . . . . . . . . . . . . . . . 2-17
Saving as PDF Files . . . . . . . . . . . . . . . . . . . . . . . . . . . . 2-18
Collecting Data Documents . . . . . . . . . . . . . . . . . . . . . . . . 2-19
Updating Data Documents . . . . . . . . . . . . . . . . . . . . . . . . . 2-19
Obtaining New Templates . . . . . . . . . . . . . . . . . . . . . . . . . 2-20
Obtaining New Templates Using Informed Desktop eForms . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . 2-20
Downloading a template from an eForms Workplace . . . . 2-21
ODMA Support (Windows Only) . . . . . . . . . . . . . . . . . . . . . 2-22
How it Works . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . 2-22
Creating and Saving New Documents . . . . . . . . . . . . . . . 2-22
Retrieving an Existing Document . . . . . . . . . . . . . . . . . . 2-23

## Chapter 3 Filling Out Forms 3-2

Activating a Record . . . 3-2
Accepting the Current Record . . . 3-3
Entering Information . . . 3-3
Font, Font Style, and Size . . . 3-5
Display-only Cells . . . 3-5
Required Cells . . . 3-6
Optional Cells . . . 3-6
Recommended Cells . . . 3-6
Entering Text . . . 3-6
Entering Character Values . . . 3-6
Entering Numbers . . . 3-7
Entering Names . . . 3-7
Entering Dates and Times . . . 3-7
Century Wrap Preference . . . 3-8
Entering Boolean Values . . . 3-9
Entering Checkbox Values . . . 3-9
Entering Pictures . . . 3-9
Inserting a File or Picture . . . 3-9
Setting a Cell’s Value for Multiple Records . . . 3-10
Errors When Using the Set Value Command . . . 3-11
Scrolling Fields . . . 3-11
Memorizing Values . . . 3-12
Tab Order . . . 3-13
Filling Out Tables . . . 3-14
Inserting and Removing Rows . . . 3-14
Expandable Rows in Tables . . . 3-15
Scrolling Tables . . . 3-15
Using Buttons . . . 3-16
Pages of a Form . . . 3-17
The Work Page . . . 3-17
Changing Pages . . . 3-17
Intelligence Features . . . 3-18
Restoring Calculated Values . . . 3-19
Data Verification . . . 3-19
Viewing Choice Lists . . . 3-20
Selecting a Choice . . . 3-22
Editing Choice Lists . . . 3-22
Help Messages for Cells . . . 3-23
Help Messages on Windows . . . 3-23
Help Messages on Macintosh . . . 3-24
Check Formulas and Help Messages . . . 3-25
Lookups . . . 3-26
Lookup Errors . . . 3-27
Getting The Next Form Number . . . 3-28

## Chapter 4 Using Digital Signatures 4-2


Signature Cells . . . . . 4-2
Signature Preferences . . . . . 4-4
Signing Forms and Verifying Digital Signatures . . . . . 4-6
Verifying a Signature . . . . . 4-7
The Signature Icon . . . . . 4-9
Automatic Verification . . . . . 4-10
Working with Multiple Records . . . . . 4-10
Template Verification . . . . . 4-11
Verifying Templates . . . . . 4-12
Setting Template Authorization Preferences . . . . . 4-13
Logging Off Your Signing Service . . . . . 4-14
Signing Plug-ins . . . . . 4-15
I-Sign Plug-ins . . . . . 4-15
Configuring I-Sign (POP) and I-Sign (IMAP) . . . . . 4-16
Signing Forms with I-Sign (POP) or I-Sign (IMAP) . 4-16
Signing Forms with I-Sign (Quadra) . . . . . 4-17
Logging Off the I-Sign (Quadra) Signing Service . . . 4-18
Entrust (Windows Only) . . . . . 4-18
CapiCom for Microsoft CSP (Windows Only) . . . . . 4-19
Signing . . . . . 4-19
Signature Verification . . . . . 4-20


## Chapter 5 Attachments 5-2


The Attachments Window . . . . . 5-2
Windows and Macintosh File Types . . . . . 5-3
Attaching Files . . . . . 5-4
Extracting Attachments . . . . . 5-5
Opening Attachments . . . . . 5-6
Deleting Attachments . . . . . 5-7
Signing Attachments . . . . . 5-7


## Chapter 6 Spell Checking 6-2


Setting Spelling Preferences . . . . . 6-2
Spell Checking Your Forms . . . . . 6-4
Spell Checking From the Record List . . . . . 6-6


## Chapter 7 Annotation 7-2


Placing, Moving, and Removing Notes . . . . . 7-3
Typing Notes . . . . . 7-4
How Design Changes Can Affect Notes . . . . . 7-5

## Chapter 8 Record Management 8-2

Collection of Records . . . . . 8-2
The Record List . . . . . 8-3
The Record List . . . . . 8-4
Adding Cells to the Record List . . . . . 8-5
Adding and Removing Columns . . . . . 8-5
Changing a Column's Position . . . . . 8-8
Changing a Column's Width . . . . . 8-9
Changing a Column's Title . . . . . 8-9
Changing a Column's Alignment . . . . . 8-10
Selecting Records and Columns . . . . . 8-10
Current Record Indicator . . . . . 8-11
Totaling or Averaging a Column . . . . . 8-12
Showing and Hiding the Totals Line . . . . . 8-14
Saving Record List Formats . . . . . 8-14
Removing a Record List Format . . . . . 8-15
Adding New Records . . . . . 8-16
Editing Existing Records . . . . . 8-16
Reverting Records . . . . . 8-17
Clearing Records . . . . . 8-17
Duplicating Records . . . . . 8-17
Finding Records . . . . . 8-18
Match Options . . . . . 8-19
Finding Words . . . . . 8-20
Finding Dates and Times . . . . . 8-20
Finding Names . . . . . 8-20
Finding Boolean and Checkbox Values . . . . . 8-21
Find Options . . . . . 8-21
Indexed cells . . . . . 8-23
Finding All Records . . . . . 8-23
Sorting Records . . . . . 8-23
Omitting Records . . . . . 8-24
Browsing Through Records . . . . . 8-25
Removing Records . . . . . 8-26
Removing Records from a Collection . . . . . 8-27
Creating Tags and Recalling Collections . . . . . 8-27
Adding Records to a Tagged Collection . . . . . 8-28
Removing a Tag . . . . . 8-29
Record Information . . . . . 8-29

## Chapter 9 Printing Forms 9-2

Page Setup . . . . . 9-2
Setting Print Preferences . . . . . 9-3
Printing Forms . . . . . 9-4
Print Options . . . . . 9-5

Collating Forms . . . . . . . . . . . . . . . . . . . . . . . . . . . . . 9-5
Printing Repeating Forms . . . . . . . . . . . . . . . . . . . . . . . 9-6
Printing From the Record List . . . . . . . . . . . . . . . . . . . . . . 9-7
Printing Records in a List . . . . . . . . . . . . . . . . . . . . . . . 9-8

## Chapter 10 Mailing Forms 10-2

Setting Mail Preferences . . . . . . . . . . . . . . . . . . . . . . . . . . . . 10-2
Mailing Forms . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . 10-3
Resolving Recipients . . . . . . . . . . . . . . . . . . . . . . . . . . . . 10-5
Suggested Routes . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . 10-6
Overriding Suggested Routes . . . . . . . . . . . . . . . . . . . . . 10-7
Adding, Changing, and Removing Suggested Routes . . . . 10-7
Mail Cells . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . 10-9
Form Tracking. . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . 10-10
Mail Plug-ins. . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . 10-10
Windows Mail Plug-ins . . . . . . . . . . . . . . . . . . . . . . . . . 10-10
Macintosh Mail Plug-ins . . . . . . . . . . . . . . . . . . . . . . . . 10-11
SMTP Mail . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . 10-11
Addressing Using SMTP . . . . . . . . . . . . . . . . . . . . 10-11
Configuring the SMTP Plug-in. . . . . . . . . . . . . . . . . 10-12
Configuring Your SMTP Address Book . . . . . . . . . 10-13

## Chapter 11 Form Tracking 11-2

How it Works . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . 11-2
Tracking Forms . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . 11-3
Setting Tracking Preferences . . . . . . . . . . . . . . . . . . . . . . . . 11-3
Displaying a Form's Tracking Status . . . . . . . . . . . . . . . . . . . 11-4

## Chapter 12 Submitting Forms 12-2

Overview. . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . 12-2
Submitting Records. . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . 12-2
Submitting Multiple Records. . . . . . . . . . . . . . . . . . . . . . 12-3
Successful Submit Indication. . . . . . . . . . . . . . . . . . . . . . 12-3
Errors When Submitting Records . . . . . . . . . . . . . . . . . . 12-4

## Chapter 13 Exchanging Information 13-2

File Formats . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . 13-2
Delimited Text Files . . . . . . . . . . . . . . . . . . . . . . . . . . . . 13-2
Quote Characters . . . . . . . . . . . . . . . . . . . . . . . . . . 13-3
Merge Format . . . . . . . . . . . . . . . . . . . . . . . . . . . . . 13-3
Include Notes . . . . . . . . . . . . . . . . . . . . . . . . . . . . . 13-4
Tables . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . 13-4
Multi-line Cell Values . . . . . . . . . . . . . . . . . . . . . . . 13-6
Limitations of the Delimited Text File Format . . . . . 13-6

Informed Interchange Files. . . . . . . . . . . . . . . . . . . . . . . . . 13-7
Informed Data Files . . . . . . . . . . . . . . . . . . . . . . . . . . . . . 13-7
dBase Files . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . 13-7
FormFlow ASCII Files (Windows Only). . . . . . . . . . . . . . 13-7
XML Files (Windows Only) . . . . . . . . . . . . . . . . . . . . . . 13-7
Informed XML Data Files (Windows Only) . . . . . . . . . . . 13-8
Exporting Records . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . 13-8
Importing Records . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . 13-11
The Import Process. . . . . . . . . . . . . . . . . . . . . . . . . . . . . 13-12
Importing Notes . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . 13-14

**Chapter 14 Form Template Distribution 14-2**

Background . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . 14-2
How it Works. . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . 14-2
Accessing Distribution Centers . . . . . . . . . . . . . . . . . . . . . . . . 14-3
Setting Revision Check Options . . . . . . . . . . . . . . . . . . . . . . . 14-4
Viewing Revision Status . . . . . . . . . . . . . . . . . . . . . . . . . . . . . 14-6

**Appendix A - Prefixes and Suffixes A-2**

**Appendix B - Shortcuts B-2**

**Glossary G-2**

**Index X-1**

# Introduction

In this chapter:


- Informed Desktop eForms   i-2
- The Informed Desktop eForms Manual Set   i-3
- About This Manual   i-4
- Conventions Used in This Manual   i-5

# Introduction

Electronic forms offer an efficient, intelligent, and secure alternative to the traditional paper-based forms. The Informed applications provide you with everything you need to design, distribute, fill, route, approve, submit and track electronic forms.

## Informed Desktop eForms

In many organizations, "fill, sign, and send" is the most common process for a form. For example, a purchase order form might be filled out, signed by an approving manager, and sent to the purchasing department to be entered into the organization's accounting or database system. Traditionally, this process has been performed using a paper forms system. This manual shows you that filling out eForms is more efficient and accurate than filling out paper forms.

### Highlights/Intelligence Features

Informed Desktop eForms processes eForms—or *templates**—that have been created with Informed Designer. Using Informed Desktop eForms, you can electronically fill out and store any type of form, from expense forms and purchase orders to time cards and human resource forms. As you enter data, "intelligence" features such as calculations, database lookups, *choice lists*, and error checking work automatically to make filling out forms as fast and accurate as possible. You can also use Informed Desktop eForms' spell checking feature to further ensure the accuracy of your data.

#### Attachments

With paper forms, associated information such as blueprints or diagrams are often attached to a form using a paper clip. Informed Desktop eForms provides the same capability by allowing you to attach electronic documents to eForms. The attached files become part of a *record*, just like the information in each of the blanks on the form.

*For definitions of *italicized* terms, please see the glossary at the back of this manual.

### Digital Signatures

Once forms are filled out, you can sign them electronically with a digital signature, and mail them (using your existing email system) to other users from within Informed Desktop eForms. When the form is completed and approved, you can submit it directly into an accounting system, database, or information system, eliminating the costs of re-keying data.

### Database Features

In a paper forms system, forms are stored in file cabinets or in stacks on someone's desk, making it difficult and tedious to find a particular form or forms. Informed Desktop eForms' database features let you store your forms electronically, making it easy for you to search for, sort, and group records. And for better integration with other information systems, Informed Desktop eForms can import and export information in standard file formats.

## The Informed Desktop eForms Manual Set

The Informed Desktop eForms manual set is designed to provide you with a complete reference to the features and functionality of Informed Desktop eForms. The manuals combine text and graphics to thoroughly document every aspect of the software. In addition to your Informed Desktop eForms Users Manual, the set contains the *Informed Quadra Getting Started Guide*. This guide provides you with instructions on installing and registering Informed Desktop eForms, and also describes the minimum hardware and software configurations required to use the Informed Desktop eForms application.

## About This Manual

This manual provides a complete reference to Informed Desktop eForms. General topics are organized in the following chapters:

- Chapter 1, “Overview,” provides an introduction to the concept of eForms. It describes the Informed products and explains how each application works and integrates with the others to provide a complete eForms solution. The flexible nature of Informed’s architecture and how it can be customized to fit your organization’s environment is also discussed.
- Chapter 2, “Document Management,” teaches you about the different types of Informed documents. Instructions are provided on how to open, close, and copy documents.
- Chapter 3, “Filling Out Forms,” instructs you on how to fill out a form. You’ll learn about entering information into new or existing forms or records, and about using the variety of *intelligence features* that make it easy for you to fill out a form.
- Chapter 4, “Using Digital Signatures,” discusses Informed’s digital signature capabilities, how *digital signatures* work, and the steps necessary to sign forms and verify digital signatures. You’ll also learn how to verify the authenticity of associated templates.
- Chapter 5, “Attachments,” provides information about how to attach files to records. The *Attachments window* is described as well as the Attach and Extract commands.
- Chapter 6, “Spell Checking,” explains how to use the spell checking feature to ensure the accuracy of data entered in *cells*. Setting spelling preferences and spell checking multiple records are also discussed.
- Chapter 7, “Annotation,” shows you how to include annotated text notes with your forms.
- Chapter 8, “Record Management,” describes how to add, remove, find, change, duplicate, and *tag* records. The *Record List* is also described in detail.
- Chapter 9, “Printing Forms,” explains how you print forms with Informed Desktop eForms. It describes the Page Setup and Print commands as well as the printing options.
- Chapter 10, “Mailing Forms,” describes how you can use email systems to send forms to other users. This chapter also discusses the routing feature and describes the various email systems supported by Informed.
- Chapter 11, “Form Tracking,” provides information on how to track an eForm as it moves through your organization.
- Chapter 12, “Submitting Forms,” explains how form data can be electronically submitted to, and stored in, other information systems.
- Chapter 13, “Exchanging Information,” teaches you how to transfer information between different Informed documents, different applications, and even different computers. You’ll learn about the Import and Export commands, and the standard file formats that Informed supports.
- Chapter 14, “Form Template Distribution,” describes how *Informed Desktop templates* can be stored and distributed in your organization, and how they can be accessed. The revision checking feature is also discussed.

# Conventions Used in This Manual

This section describes the conventions used in this manual to ensure that you can easily find and understand the information you need to perform specific tasks with Informed Desktop eForms.

## Terminology

| Term | Definition |
|---|---|
| User | Fills out forms in Informed Desktop eForms. |
| eForms designer | Creates and manages templates using Informed Designer. |

## Finding Information

In addition to the table of contents at the beginning of this manual, you'll also find a table of contents at the beginning of each chapter, that lists the main sections in that chapter. The example below shows the table of contents for Chapter 13, "Exchanging Information."


- File Formats 13-2
- Exporting Records 13-8
- Importing Records 13-11


In each chapter, the main topics appear in a shaded bar like the one at the beginning of this section. This makes it easy for you to quickly scan a page to find the topic of your choice. Subsections for each topic are highlighted with a large, bold font.

## Definitions of Terms

To help you understand the terms used in this manual, definitions are included in a glossary at the back of the manual. The first time a term is used in a chapter, it appears in *italicized* text. A note is included at the beginning of each chapter that refers you to the glossary for definitions of italicized terms.

## Notes

Throughout this manual, you'll see paragraphs of text in shaded boxes with the label "Note" in the left margin. These notes contain important information such as warnings, reminders, and conditions to be aware of. The following example shows a typical note:

**Note** Important information about Informed Desktop eForms appears in shaded boxes like this one.

## Commands and Control Names

When instructions for how to perform a certain task are given in this manual, the commands and button names are shown in a bold type. The name of the menu where the command is found is also given in each instance. For example, for the spell check instructions, you'll see the following text:

**To spell check your current record**:

1. Choose **Edit > Spelling > Check Template**.
2. Click **Done**.

In dialog boxes, the names of options, fields, and drop-down lists are shown in single quotes. Items that are selected from a drop-down list are shown in double quotes. For example:

Select "All records," "Collected records," or "Current record" from the 'Include' drop-down list.

## Cross-platform Notes

Although this manual has tried to be platform neutral, the cross-platform nature of Informed requires that special care be taken when documenting the features of Informed Desktop eForms.

Throughout this manual you'll see pictures of dialog boxes and windows. Some of the screens show Windows dialog boxes and windows; others are from the Macintosh. In cases where a dialog box or window is substantially different between the two platforms, both versions are shown.

In cases where a specific feature of Informed Desktop eForms is only applicable to one platform (Windows or Macintosh), an icon depicting the Windows or Macintosh platform is displayed in the left margin next to the description of the feature as shown below.

The Windows Metafile and Enhanced Metafile formats are not supported on Macintosh.

# 1 Overview

In this chapter:


- How Forms are Designed 1-2
- Informed Plug-ins 1-3
- Distribution of Templates 1-4
- Setting Internet Preferences 1-5
- Setting Scripting Preferences 1-5
- The Templates Folder 1-6
- Filling Out Forms 1-6
- Form Tracking 1-7
- Where Everything Goes 1-7

# Overview

Like many software products, Informed Desktop eForms consists of different components, including an application, documents, preference files, and special files and *folders** that serve unique purposes. The organization of these components is flexible, allowing for custom configurations to better suit your specific needs.

This chapter describes the components of Informed Desktop eForms and how they're organized. Depending on how forms are designed and administered in your organization, you may not use all the features available in Desktop eForms. However, understanding the information in this chapter can be of benefit to Informed Desktop eForms users.

## How Forms are Designed

The design of a form is called a *template*. A template is created using Informed Designer and stored in a form template document. The *eForms designer* creates a template by typing text and drawing graphical objects—such as *fields* and tables—using a variety of drawing tools.

In addition to the graphical appearance of a form, a template contains *cells*. Cells are the placeholders for the information that you enter to fill out a form. To aid you when entering information, the eForms designer can configure cells to use a variety of "intelligence" features. These include automatic formatting, calculations, error checking, lookups, *choice lists*, online help, and other features that make it fast and accurate to enter information.

The design of a template also involves linking the template to other *services* or systems used in your organization. For example, a template might be linked to a SQL Server so that you can "submit" completed forms electronically, therefore eliminating the need to re-key the form information into other systems. The use of other services such as email for sending forms, and security services for signing forms with *digital signatures* is also available.

In addition to customizing a template, the eForms designer can customize the commands and menus available in Informed Desktop eForms' menus. That way, custom commands that are specific to the processing of the form can be added, and unnecessary commands can be removed. The eForm begins looking more like a custom application rather than a custom form.

*For definitions of *italicized* terms, please see the glossary at the back of this manual.

**Note** Since the eForms designer can customize the menus that you see, the menu commands that are described in this manual can be named differently, positioned in a different menu, or even hidden.

# Informed Plug-ins

Many of the services that Informed Desktop eForms can link to are accessed via Informed *plug-ins*. An Informed plug-in is a file that contains the code that interacts with a particular service. For example, in order to mail a completed form using a particular email system, you must have the Informed mail plug-in for that email system installed. Informed Desktop eForms comes with a variety of plug-ins for accessing email systems, databases, signing services, and other information services.

The table below lists the types of plug-ins that Informed Desktop eForms can use.

| Plug-in Type | |
|---|---|
| Mail | Send templates or completed forms using email. |
| Data access | Look up information from a database or data source.<br>Submit completed forms to a database or data source.<br>Obtain unique form numbers from a database or data source.<br>Track forms with a database or data source. |
| Signing | Authorize and verify templates using Informed Designer.<br>Sign and verify completed forms. |
| Data translation | Import, export, or mail form data in a particular data format. |
| Distribution | Distribute templates via a particular type of *distribution center*. |
| Spelling | Check the spelling of text on your template or the text entered on a completed form using an alternate spell checking system. |

Informed plug-ins must be installed in a folder named “Plug-ins.”

## Distribution of Templates

In order to fill out a form of a particular type, Informed Desktop eForms must have access to the appropriate template. Templates can be stored in a distributed manner, locally on your computer, or centrally on a server and shared among all users.

If you store your templates on your local drive, you can take your computer anywhere and still have access to the templates you need. A network connection is not necessary to access templates. Furthermore, each time you access a template, it's not at the expense of network bandwidth.

Centralized storage of templates has advantages. Although access to templates requires a network connection, the distribution of a new revision of a template requires only that the eForms designer replace a single template on the network file server with the new version. You and all other users are instantly up to date since you all share the same template. If templates are stored on your local drive, when a new revision is distributed, you must obtain the new version.

The method with which users access templates is often determined by the eForms designer (and possibly involves the input of a network administrator). The size of your organization, your network configuration, and the mobility of all users must be taken into account.

To aid in the distribution of templates, Informed Designer and Informed Desktop eForms come with built-in distribution features. These features automate the distribution of new templates and revisions of existing templates. With proper configuration by the eForms designer, you can access templates at one or more distribution centers. A distribution center can be an eForms Workplace, a file server, or an FTP server.

Once you've obtained a template from a distribution center, Informed Desktop eForms checks periodically to see if a new revision of the template is available. If a new revision is available, you're automatically notified when you open or create an *Informed data document*, and the revision replaces the previous version.

## Setting Internet Preferences

You can use the Internet preferences dialog box to set different proxy servers for your computer.

**To change the Internet preferences:**

1. Choose **Edit > Preferences** (Windows and Macintosh OS 9.1 and 9.2.2) or **[Application menu] > Preferences** (Macintosh OS X v10.1.3) to display the Preferences dialog box.
2. Click the Internet icon in the list.
3. Click **Set Preferences**. The Internet dialog box appears.

   If your internal network is behind a firewall, you may be required to select some of the settings below. For more information, see your network administrator.

   - **Use FTP Proxy at:** Enter the address of the FTP proxy server. This proxy is used for FTP Revision Distribution.
   - **FTP using passive mode (PASV):** Controls how an FTP protocol is done. It is used for FTP Revision Distribution.
   - **Use HTTP proxy at:** Enter the address of the HTTP proxy server. This proxy is used for HTTP form distribution, Lookups, Submits, and auto-increments.
   - **Use SOCKS proxy at:** Enter the address of the SOCKS proxy server.
   - **Don't use proxies:** Enter the addresses of the servers you want to connect to directly. For example, servers inside your local network.
4. Click **OK** until all the dialog boxes are closed.

## Scripting Preferences

The scripting preferences are used only by eForms Designers.

## The Templates Folder

Whether you access templates on a shared file server or from your local drive, Informed Desktop eForms needs to know where the templates are located.

Templates are located in the Templates folder. On Windows 98, 98SE, ME, XP Home, 2000, and XP Pro) this folder is in the **My Documents > My Forms** folder. On Windows NT, the Templates folder is in the **Winnt > Profiles > [Username] > Personal > My Forms**. On Macintosh OS 9.1, 9.2.2, and X v10.1.3, the Templates folder is in the **Documents > My Forms** folder.

Although we do not recommend it, you can change the location of the Templates folder using the Preferences command. For information about moving your Templates folder, see “Changing Folder Path Locations,” on page 1-9.

Information about templates is stored in Informed *preferences files*. For example, Informed Desktop eForms allows you to list the information about multiple forms or *records* in a list format by displaying the Record List window.


You can change which information is included on the Record List and its order and format according to your specific needs and personal preferences. These and other preferences are stored in preference files on your local drive.

## Filling Out Forms

To the user, templates are like hidden files. Informed Desktop eForms automatically locates and opens templates when needed as you fill out new forms and open previously filled out forms.

When you request a new document, Informed Desktop eForms presents a list of available templates to choose from. You select a template and a blank form appears, ready for filling. The information you enter to fill out a form is stored in an Informed data document. A data document can store the information for one completed form, or many completed forms. A single completed form is called a record. For casual users who fill out very few forms, it’s easiest to store one record in each data document. If you fill out many forms, storing all records for a particular type of form in one data document allows you to use Informed Desktop eForms’ database features.

# Form Tracking

For many types of forms, processing involves routing the form from person to person for approval purposes. Informed's built-in form *tracking* capabilities make it easy for you to find out where a particular form is in the routing process.

When you send a form, Desktop eForms connects to a central tracking database and records information, such as your name and the name of the recipient, the form identification numbers (that is, the type of form and a unique number, such as an invoice number or purchase order number), and the date and time the form was sent. Other information can also be tracked.

At any time, you can request the tracking status for a completed form. Desktop eForms connects to the tracking database and retrieves the tracking information for a form. This information is displayed in a dialog box.

# Where Everything Goes

When you install Informed Desktop eForms, you're asked to accept the default location or to specify a location for the Informed folder. The Informed folder contains the Informed Desktop eForms application, as well as other important components.

The Informed folder is a special folder. It contains certain items that are required in order for Informed Desktop eForms to work properly. Although we don't recommend it, some of the items in the Informed folder can be moved to different locations. The following sections describe the purpose of each item and the possible storage locations. For information about moving the Informed folder to a different location, please see "Changing Folder Path Locations" on page 1-9.

## Applications

On Windows, the Informed Desktop eForms application is comprised of the executable file ("Filler.exe") and other associated files. These files are found in the Informed folder. On the Macintosh, the application is a single file and is named "Informed Desktop eForms®."

You can store the application locally on your computer, or you can access it from a file server or applications server.

## Plug-ins

The Plug-ins folder contains Informed plug-ins and associated files. Informed plug-ins provide access to external services such as email systems and databases. See “Informed Plug-ins” on page 1-3 for more information about plug-ins.

## Templates Folder

The Templates folder contains the templates available for use with Informed Desktop eForms. Although we don’t recommend it, the location of the templates folder can be changed using Informed Desktop eForms’ Preferences command.

## Preferences

On Windows 98, 98SE, ME, XP Home, 2000, and XP Pro, preferences and distribution profiles are stored in files in **Documents and Settings > [user name] > Application Data > Shana > Informed**. On Windows NT, preferences and distribution profiles are stored in files in **Winnt > Profiles > [Username] > Application Data > Shana > Informed**. On Macintosh OS 9.1 and 9.2.2, preferences and distribution profiles are stored in the System folder. On Macintosh OS X v10.1.3, preferences and *distribution center profiles* are stored in files in **Home > [user name] > Library > Preferences > Shana > Informed**.

One of the preference files contains a list of the templates contained in your Templates folder. Desktop eForms uses this list to quickly find the correct template when you open a data or package document. Preference files also contain user-specific preferences for the templates (e.g., details about record lists and memorized cell values).

Distribution profiles contain the information you need to access the distribution centers in your organization. For detailed information about distribution profiles and the built-in forms distribution capabilities of Informed, please see, Chapter 14, “Form Template Distribution.”

Although it’s not recommended, you can move the preferences files or folder to a different location. For more information, please see “Changing Folder Path Locations” on page 1-9.

## Online Help

If you choose to install online Help, installation includes the necessary Help files. On Windows and Macintosh, the Help files are installed in a folder named “Help” inside the Informed folder. The Help files must remain in these locations.

**Note** To view the online Help files on Macintosh, you require a web browser and the Informed WebLink plug-in.

## Spell Checking

If you choose to install Informed's spell checking option, you'll see a folder named "Spelling" in your Informed folder. The spelling folder contains the spell checking dictionaries and related files.

## Informed Preferences

In addition to the items installed in the Informed folder, installation places a preferences file among your system-related files. On Windows, this file is located in the Windows registry. On Macintosh OS 9.1 and 9.2.2, the file is named Informed Preferences and is found on your system's Preferences folder. On Macintosh OS X v10.1.3, the file is found in **Home > Library.**

The Informed preferences files contain information necessary for Informed Desktop eForms to find items such as the Informed folder, the Templates folder, and the Preferences files and folder.

Other preferences associated with Informed Desktop eForms are also stored in the Informed preferences files.

## Changing Folder Path Locations

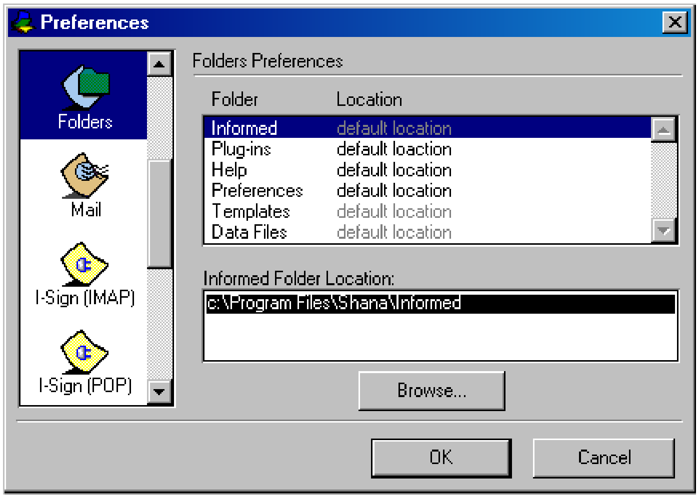
When you install Informed Desktop eForms, the Informed preferences files are automatically updated with the locations of your Informed folder, Templates folder, and Preferences files and folder. When you run Informed Desktop eForms, it reads these locations from your Informed preferences file in order to locate the appropriate files.

Although we do not recommend it, you can move the Informed folder, Templates folder, or Preferences folder to any location. However, you must then specify the new location using Informed Desktop eForms' Preferences command.

**Note** On Windows, if you move the Informed, Templates, or Preferences folder, you're not able to repair, modify, or remove an Informed installation. We strongly recommend that you accept the default locations provided in the installer and thereafter use the Add/Remove Programs function in the Control Panel to change or remove an Informed installation.

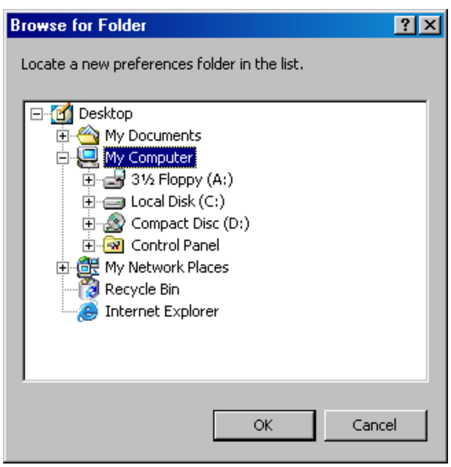
**To change the path to the Informed, Templates, or Preferences folder:**

1. Choose **Edit > Preferences** (Windows and Macintosh OS 9.1, and 9.2.2) or **[Application menu] > Preferences** (Macintosh OS X v10.1.3) to display the Preferences dialog box. Then click the Folders icon to display the Folders preferences panel.




The location of each folder is shown in the Informed Folder Location field.

2. In the list, highlight the folder you want to relocate.
3. Click **Browse**. A dialog box appears that allows you to select a new location.




4. Navigate to the new location and select a folder in the list. Then click **OK** (Windows) or **Choose** (Macintosh).

**Note** Changing the location of a folder using Informed Desktop eForms' Preferences command does not automatically move the contents of the folder to the new location. You must do this yourself.

If the Informed, Templates, or Preferences folder cannot be found at its expected location, you'll see a dialog box message indicating this. Informed uses the default location.

# 2 Managing Documents

In this chapter:


- Informed Documents 2-2
- The Templates Folder 2-4
- Template Information 2-4
- Creating New Data Documents 2-5
- Setting Passwords 2-7
- Opening Data Documents 2-8
- Duplicate Template IDs 2-12
- Missing Fonts 2-13
- Closing Data Documents 2-14
- Saving Data Documents 2-15
- Collecting Data Documents 2-19
- Updating Data Documents 2-19
- Obtaining New Templates 2-20
- ODMA Support (Windows Only) 2-22

2

# Managing Documents

Informed provides rich document management features on its own and through other document management systems. This chapter describes how to manage Informed documents using both environments.

## Informed Documents

An Informed document is a file that contains information about a form. There are four types of Informed documents: *data documents**, *XML data documents*, *package documents*, and *interchange documents*. All documents are derived from *Informed templates*. *Templates* that are for use with Informed Desktop eForms are called "*desktop templates*." Templates that are for use in a web browser are called "XML templates."

### Templates

Informed templates contain the framework, the *intelligence features*, and the graphic elements of a form. Users fill out a form by entering information in the blanks on the form.

#### Informed Desktop Templates (.itp)

Blank forms that are filled out using Informed Desktop eForms are derived from *Informed desktop template*s. When you download a desktop template, on Windows 98, 98SE, ME, XP Home, 2000, and XP Pro it is copied to **My Documents > My Forms > Templates**. On Windows NT, it is copied to **Winnt > Profiles > [Username] > Personal > My Forms > Templates**. On Macintosh OS 9.1, 9.2.2, and X v10.1.3 it is copied to **Documents > My Forms > Templates**.

#### Informed XML Templates (.itx)

A template that is created in Informed Designer and saved as an .itx file. When you open an XML template, you create an XML data document that you work with in a web browser window. These templates reside in an Informed Quadra eForms Workplace.

*For definitions of *italicized* terms, please see the glossary at the back of this manual.

# Documents

## Informed Data (.ifm)

An Informed data document contains only a form's data. The framework, intelligence, and graphic elements are derived from the template that is associated with the form. When you open a desktop template, you fill out the form with Informed Desktop eForms. When the form is saved, a data document is created. You can store one completed form or *record* in each data document, or you can store many records in a single data document using Informed Desktop eForms's built-in database capabilities. To open and work with a data document, you must have the appropriate template.

When you save a data document, you can save it in your **My Documents > My Forms** *folder* (Windows 98, 98SE, ME, XP Home, 2000, and XP Pro), **Winnt > Profile > [Username] > Personal > My Forms** (Windows NT), or **Documents > My Forms** (Macintosh OS 9.1, 9.2.2, and X v10.1.3). When you send a form to another user, you usually send it as a data document. See *Informed Package Documents* and *Informed Interchange Documents* for more information about other document types that you can send.

## Informed XML Data (.ifx)

An *XML data document*, which contains only form data, is created from an *Informed XML template*. The framework, intelligence, and graphic elements are derived from the template that is associated with the form. To open and work with an XML data document, you must have access to an Informed Quadra eForms Workplace. When you save an XML data document, it is saved to your My Forms page in the Workplace.

## Informed Package (.ipk)

A package document combines a template and its associated data in a single file. It is created using Informed Desktop eForms and is used primarily when you mail a form to someone who doesn't have the corresponding template. When the recipient opens the package document in Informed Desktop eForms, the data document and template (if needed) are extracted. If the recipient's Templates folder does not already contain the template, the one extracted from the package is copied there and opened. The data document is opened as an untitled document that can later be saved in a new file.

### Informed Interchange (.iif)

Informed Interchange documents contain all the data for one or more completed forms (or records), and are used primarily for transferring information between different applications and different versions of Informed. They're created and read using Informed Desktop eForms, and they store all types of information, including stylized text values, pictures, signatures, and *annotations*.

In addition to the Informed Interchange documents, Informed Desktop eForms can import and export form data stored in other standard formats, including tab-delimited and comma-delimited text. These formats are used primarily for transferring form data between Informed Desktop eForms and other applications.

## The Templates Folder

Although you don't create and work with *templates* in the same way that you create and work with data documents, you need templates in order to fill out forms in Informed Desktop eForms. When you create a new data document, you're asked to select a template to use. When you open an existing data document, Informed Desktop eForms automatically locates and opens the appropriate template.

Therefore, Informed Desktop eForms must know where to find the templates that you use.

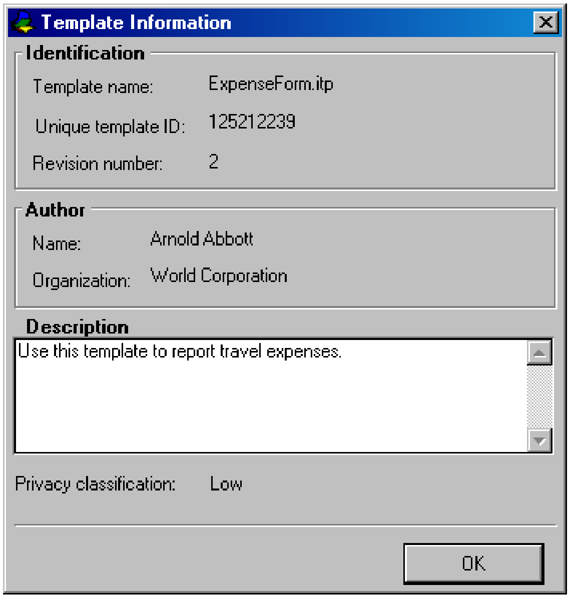
On Windows 98, 98SE, ME, XP Home, 2000, and XP Pro, Informed Desktop eForms finds your templates in the Templates folder which is in **My Documents > My Forms**. On Windows NT, Desktop eForms finds templates in the templates folder which is in **Winnt > Profiles > [Username] > Personal > My Forms**. On Macintosh OS 9.1, 9.2.2, and X v10.1.3, Desktop eForms finds templates in the Templates folder which is in **Documents > My Forms**.

## Template Information

Template information is used to identify which template is used with a particular data document. The template information includes a template name, *template ID* and a revision number.

**To view the template information for the current template:**

1. Choose **View > Template Information**. The Template Information dialog box appears.




The ‘Template name’ might offer a more descriptive title compared to the filename of the template. ‘Unique template ID’ and ‘Revision number’ are intended to identify the template and its version. Since templates and their data documents are separate files, the template ID is stored with each form so that Informed Desktop eForms can automatically identify and open the appropriate template when a data document is opened.

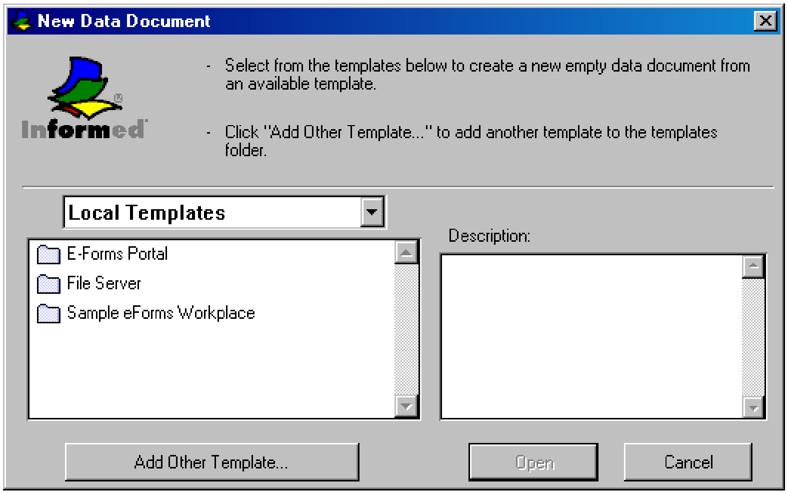
The Name and Organization information identify the person who created the template. The *eForms designer* can also provide a brief description of the template. The eForms designer might specify a privacy classification to indicate the sensitivity of the data on the form. The privacy classification (if specified) can be Low, Medium, or High.

## Creating New Data Documents

The data for a form that you fill out is stored in a data document.

**To create a new untitled data document:**

1. Choose **File > New Document**. The New Data Document dialog box appears, showing a list of all the templates in your Templates folder.




2. Select the template you want from the list; then click **New**. A new untitled data document for that template is created and displayed in a form window.

3. To select a template that is not in your Templates folder, click **Add Other Template**. The standard Open dialog box appears, allowing you to select a template from an accessible volume or disk. Informed Desktop eForms then copies and places the selected template in your Templates folder.

   You can also access template *distribution centers* to obtain new templates either by using the controls on the New Data Document dialog box or by downloading the template from the distribution center. For more information, see “Obtaining a New Template” on page 2-20.

## The Recent Templates List

Another method of creating a new data document is to use the Recent Templates list.

**To create a new data document using the Recent Templates List:**

1. Choose **File > Recent Templates** and select a template from the available items.

## New Document Preferences

The New Document preference allows you to specify what actions occur when you choose the **File > Recent Templates** commands and open a data document. This is useful for forms that may be filled out once or twice a year (e.g., vacation requests). Rather than creating a new data document each time you fill out a vacation request, you can configure Informed Desktop eForms open the old vacation request data document and add a new record to it. Alternately, you can have Informed Desktop eForms ask you what you would like to do.

**To set your New Document Preference:**

1. Choose **Edit > Preferences** (Windows and Macintosh OS 9.1 and 9.2.2) or **[Application menu] > Preferences** (Macintosh OS X v10.1.3) to display the Preferences dialog box. Then click the General icon in the list. The General Preferences panel appears.
2. Click the 'When creating new documents' drop-down list and select one of the following choices:

   **Create new data file:** A new data document is created.

   **Open last data file used:** The last data document that was created with the selected template is opened.

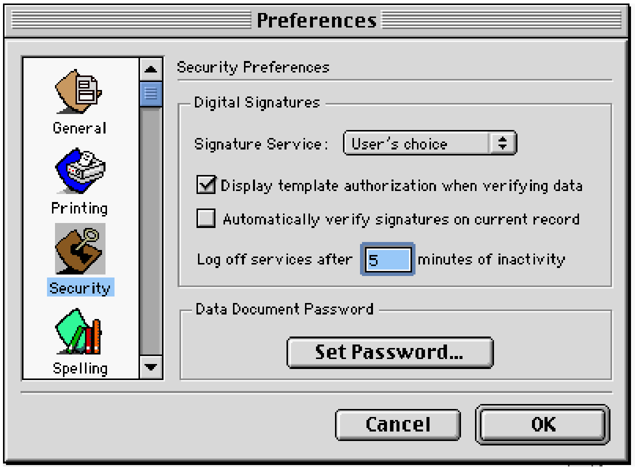
   **Ask what to do:** Desktop eForms asks if you want to create a new data document with the selected template or if you want to open the last data document that was created with the selected template.
3. Click **OK**.

## Setting Passwords

Passwords allow you to protect your data documents by preventing other users from opening and changing them with Informed Desktop eForms. If a data document has a non-blank password, you're prompted to enter it when you try to open the document. For more information, see "Opening a Data Document" on page 2-8.

**To set a password for a data document:**

1. Choose **Edit > Preferences** (Windows and Macintosh OS 9.1 and 9.2.2) or **[Application menu] > Preferences** (Macintosh OS X v10.1.3) to display the Preferences dialog box. Then click the Security icon in the list. The dialog box changes to show the Security Preferences panel.




2. Click **Set Password**. The Set Password dialog box appears.


3. Type the password in the 'New password' *field*. Then press Tab.
4. Type the password again in the 'Confirm password' field. Then click **OK**.

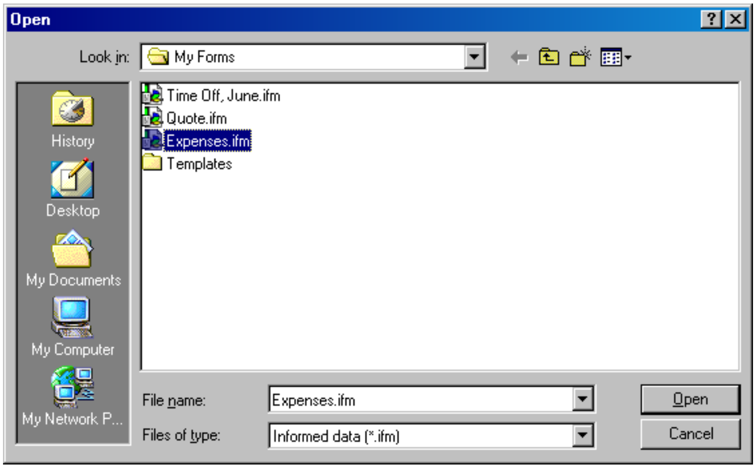
   If a password already exists, you must enter that password in the 'Old password' field before entering the new password.

## Opening Data Documents

To locate and select a template, use the standard Windows or Macintosh Open dialog box. When you select the correct template, Informed Desktop eForms copies it to your Templates folder and then opens it and the data document.

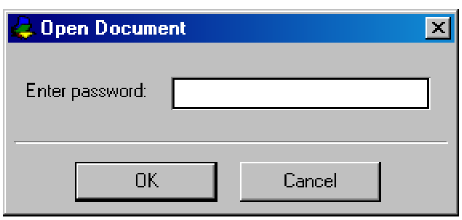
**To open an existing data document:**

1. Choose **File > Open**. The standard Open dialog box for your operating system appears, showing the last directory that you browsed.



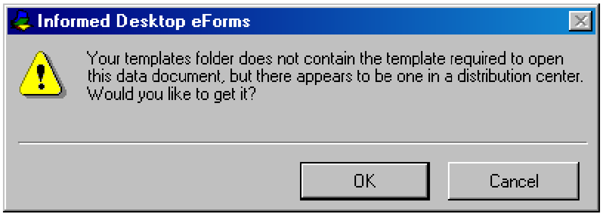

2. Select a data document; then click **OK**.

   If the data document has a password, you'll be asked to enter it before Desktop eForms opens the document.



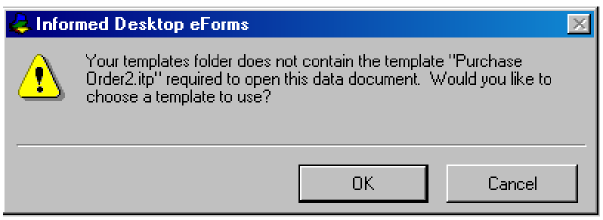

When you open a *data document*, Informed Desktop eForms first examines the document's Template ID. Informed Desktop eForms then looks in your Templates folder for a template with the same Template ID as that in the data document. If found, the data document is opened along with the template and displayed in a form window.

If your Templates folder does not contain the required template, Informed Desktop eForms might attempt to obtain one automatically from a distribution center in your organization. Chapter 14, "Form Template Distribution," describes Informed Desktop eForms' built-in forms deployment features. If the eForms designer has made the required template available in one or more distribution centers, and if the distribution information is available in the data document that you're attempting to open, Informed Desktop eForms displays the following message.




This message indicates that the template you need is available from an accessible distribution center. If you click **Yes**, Informed Desktop eForms places a copy of the template in your Templates folder and then continues to open it and the data document.

If your Templates folder does not contain the required template, and the template is not available from a distribution center, you'll see a message asking if you'd like to look for the template.




If you have the appropriate template located in a different place on your local drive, you can locate and select it by clicking **OK** in the message box.

## Opening Recently Used Data Documents

You can quickly locate and open data documents that you've used recently.

**To open a data document that you've used recently:**

1. Choose **File > Recent Data Documents** and select the file you want.

**Note** If your New Document preference is set to 'open last data file used,' you can also choose **File > Recent Templates** and select a file. Informed Desktop eForms opens the last data file that was created with the selected template. For more information, see "New Document Preferences" on page 2-6.

## Opening a Package

A *package document* contains a *data document* and a *template* in a single file. Package documents are available so you can save, mail, or transfer completed forms or records and the appropriate template in a single document.

If a person sends you a form using email and is unsure whether or not you have the required template, he or she might send you a package document instead of a data document. Then you'll be able to open the form even if you don't have the required template.

**To open a package document:**

1. Double-click the package document icon.

   Or

   Choose **File > Open** to display the Open dialog box. Then select the package and click **Open**.

   When you open a package document, Informed Desktop eForms automatically extracts the data document and, if necessary, the template. If your Templates folder already contains a template with a Template ID that matches the one in the data document in the package, then that template is used. If your Templates folder does not contain the necessary template, Informed Desktop eForms extracts the template from the package, copies it to your Templates folder, and opens it and the data document.

   Once you've opened the package and made changes to the data, saving your changes does not update the original data document in the package. Instead, Informed Desktop eForms saves the data in a new data document, just as if you were saving a new untitled data document. You'll be asked to name the data document and specify its location the way you usually do.

## Opening an XML File (Windows Only)

XML (Extensible Markup Language) provides a way of sharing the format and data of a document over the World Wide Web, intranets, and elsewhere.

Informed allows you to save, open, import and export data documents as XML. This is useful if your organization uses Informed Desktop eForms on the desktop and Informed HTML eForms. For example, a form could be filled out with Informed Desktop eForms on the desktop and saved as an XML document. The same document could then be opened by someone using Informed HTML eForms, and vice versa.

**To open an XML file:**

1. Choose **File > Open**. The standard Open dialog box for your operating system appears.
2. Select the XML file and click **OK**.

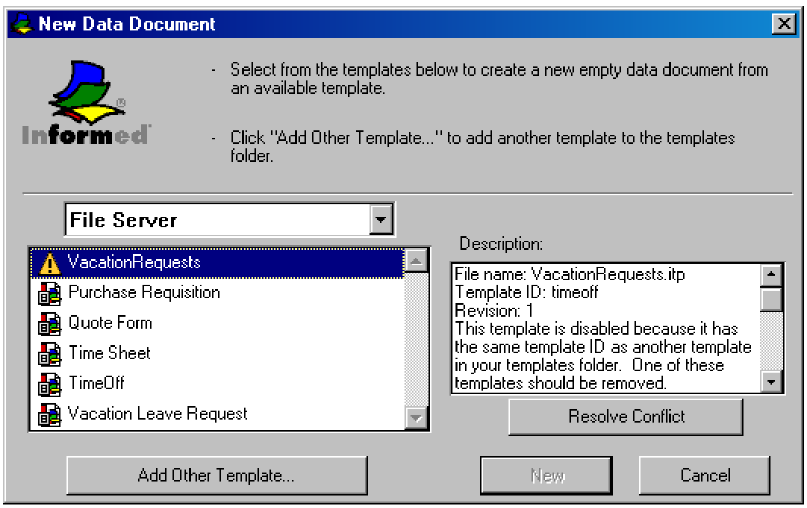
**Note**

> You must have the appropriate template in your Templates folder in order to open the document. If you don't have the appropriate template, Informed Desktop eForms asks you to locate it.

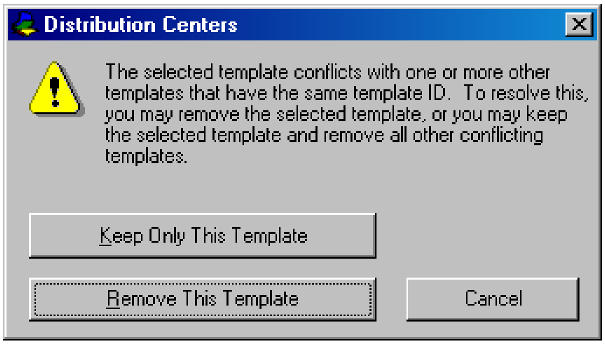
## Duplicate Template IDs

It's important that each of the templates in your Templates folder has a unique template ID. If two templates have the same template ID, Informed Desktop eForms does not know which template to use when you open a data document or package.

If Informed Desktop eForms detects two or more templates with the same template ID, it selects and uses one of them and marks the others as duplicates. Once a duplicate template is marked, it appears with a warning sign in Informed Desktop eForms' New Data Document dialog box.



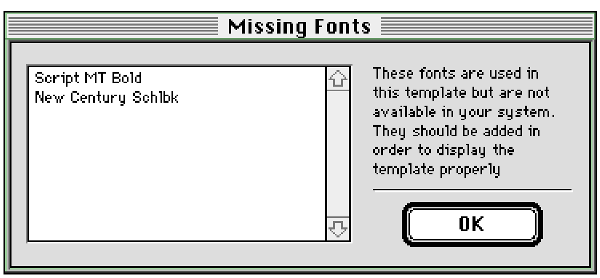

The warning sign is an indication that you must choose the template that you want to keep. Click **Resolve Conflict**; then click the appropriate button.




## Missing Fonts

When you open a template (as a result of opening a form data or package document, or creating a new data document), Informed Desktop eForms checks to ensure that the fonts used on the template are available on your system. Different systems on different computers can have different fonts installed. If a template is drawn on one computer and then transferred to a different computer, that computer might not have the fonts that were originally used to draw the template.

If Informed Desktop eForms detects that at least one font is missing from your system, you'll see the following dialog box.




Text that uses an unavailable font displays using a font that's available on your system.

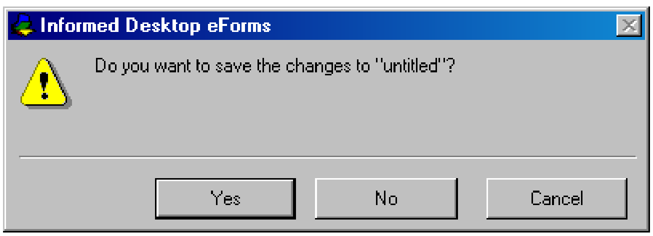
## Closing Data Documents

When you click **Close**, the action that Informed Desktop eForms takes depends on whether or not changes were made to the document.

**To close a data document:**

1. Choose **File > Close** or click the window's close button.

   If you're closing a new data document that has not been changed, the document is closed immediately. If you're closing a new document to which changes have been made, Informed Desktop eForms warns you to save the changes.

2. Click **Yes** to save the changes, click **No** to close without saving changes, or click **Cancel** to cancel the Close command and leave your document open for editing. If you click **Yes**, you'll see the standard Save dialog box for your operating system.
3. Type a name for the new data document, select a location to store it; then click **OK**.

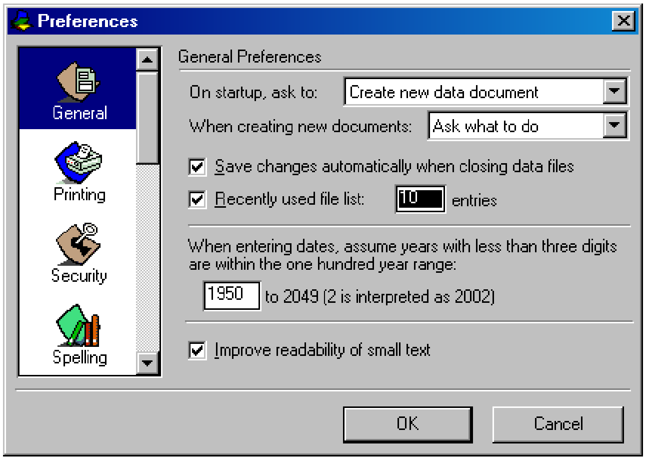
If you're closing an existing data document (a document that was created previously), Informed Desktop eForms first checks to see if you've made changes to the document. If your data document has not changed since you last opened it, it's closed immediately. If you have made changes to the document, Informed Desktop eForms asks if you want to save the changes before closing.

## The Auto-Save Preference

You can have Informed Desktop eForms save your data documents automatically when you close them.

**To set the Auto-Save Preference:**

1. Choose **Edit > Preferences** (Windows and Macintosh OS 9.1 and 9.2.2) or **[Application menu] > Preferences** (Macintosh OS X v10.1.3) to display the Preferences dialog box. Click the General icon in the list. The General Preferences panel appears.




2. Select the ‘Save changes automatically when closing data files’ checkbox.
3. Click **OK**.

## Saving Data Documents

The Save command saves the currently active data document—the front window on your screen. This command is only available when changes have been made to the currently active data document.

**To save a data document:**

1. Choose **File > Save**. If the data document has been saved once before, it’s saved without warning.

   If you’re saving a new data document for the first time, the standard Save dialog box for your operating system appears.

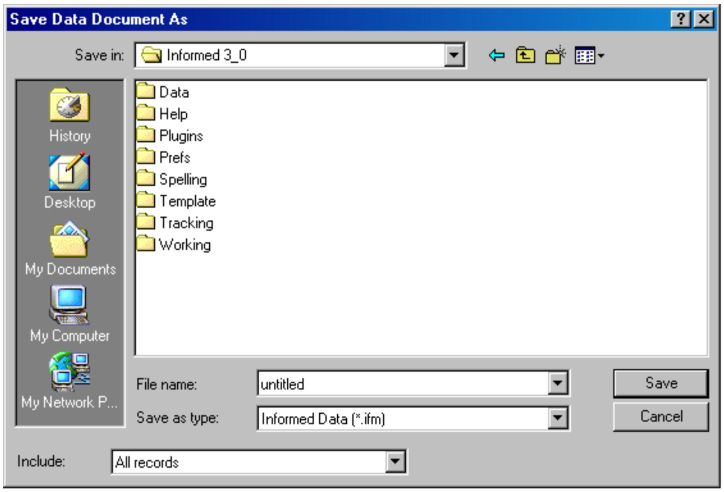
   Name the document and specify the location to store it. Click **OK**.

## Saving Copies of a Data Document

Use the Save As command to save a copy of a data document with a different name or to save it to a different location. You can also use the Save As command to create a *package document* containing the active data document and its accompanying template.

**To save copies of a Data Document:**

1. Choose **File > Save As**. You'll see the standard Save As dialog box for your operating system.




2. Enter a file name and a location to save the file in.

3. Select the format that you want to save the data in. If you select "Informed data," only the form data is saved (this is the most common format). If you select "Informed package," the data and the template are saved together. (See the following sections for information about the other Save As options.)

4. Select "All records," "Collected records," or "Current record" from the 'Include' drop-down list.

5. Click **Save**.

After saving a new data document, Informed Desktop eForms leaves the new document open for editing and closes the original document. If you save a new package document; however, the original data document remains open instead.

## Saving as XML Files (Windows Only)

XML (Extensible Markup Language) provides a way of sharing the format and data of a document over the World Wide Web, intranets, and elsewhere. Informed allows you to save, open, import, and export data documents as XML. This is useful if your organization uses both Informed Desktop eForms and Informed HTML eForms. For example, a form could be filled out with Informed Desktop eForms and saved as an XML document. The same document could then be opened by someone using Informed HTML eForms, and vice versa.

**To save a document as XML:**

1. Create a new *data document* or open an existing one.
2. Choose **File > Save As**. The Save As dialog box appears.
3. Enter a name and a location to save the file in.
4. Select “XML File” as the format to save the data in.
5. Specify which records to include by selecting an option form the ‘Include’ drop-down list.
6. Click **Save**.

## Saving as TIFF Files

The Save As TIFF feature allows you to save data records in the TIFF format. To use the Save As TIFF feature you must have the SaveAs (TIFF-PDF) *plug-in* installed in your Plug-ins folder.

**To save a form record as a TIFF file:**

1. Open your data document and find the record that you want to save as a TIFF file.
2. Choose **File > Save As** to display the Save As dialog box.
3. Enter a name for the file and select a location to save it in.
4. Select “TIFF image” from the ‘Save as type’ drop-down list.
5. Click **Save**.

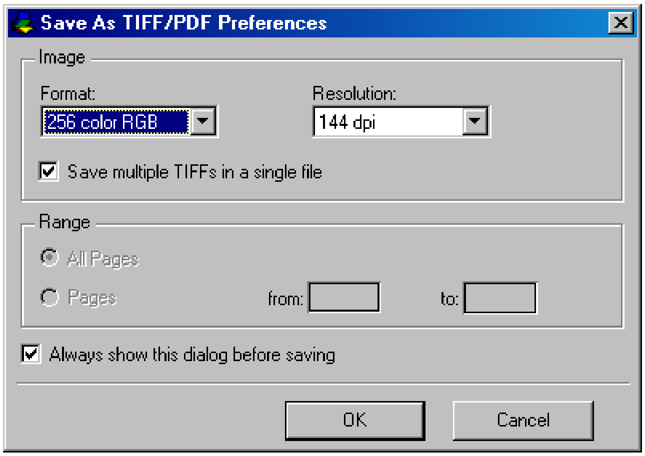
**Note**

When you select “TIFF image,” the ‘Include’ drop-down list changes to “Current record.” All other options are disabled.

| Option | Description |
|---|---|
| Format | 256 Color RGB, CCITT G4 Fax |
| Resolution | 72 dpi, 144 dpi, 288 dpi |
| Multipage TIFFs | Option to save multiple pages in a single TIFF file. |
| Page Range | Specify the page range |
| Show Prefs | Option to always show the preference settings before saving |

**To modify the form record save settings:**

1. Choose **Edit > Preferences** (Windows and Macintosh OS 9.1 and 9.2.2) or **[Application menu] > Preferences** (Macintosh OS X v10.1.3) to display the Preferences dialog box.
2. Click the TIFF/PDF icon in the list.
3. Click **Set Preferences**. The Save As TIFF/PDF Preferences panel appears.




4. Select the appropriate options and click **OK** to accept the new settings.
5. Click **OK** to close the Preferences dialog box.

## Saving as PDF Files

The Save As PDF feature allows you to save data records as PDF (Portable Document Format) files. To use the Save As PDF feature you must have the SaveAs (TIFF-PDF) plug-in installed in your Informed Plug-ins folder.

**To save a record as a PDF file:**

1. Open your data document and find the record that you want to save as a PDF.
2. Choose **File > Save As** to display the Save As dialog box.
3. Enter a name for the file and a location to save it in.
4. Select “PDF File” from the ‘Save as type’ drop-down list.
5. Click **Save**. When you select “PDF File,” the ‘Include’ drop-down list changes to “Current record.” All other options are disabled.

**Note** The image files created with our PDF feature are bitmaps. As a result, text items cannot be selected in Acrobat Reader.

## Collecting Data Documents

If you're responsible for approving forms, you'll likely receive forms one at a time from other people for approval. If you want to retain a copy of these forms, you might want to collect them into a single data document. That way you can sort the forms, list them on the *Record List*, and use Informed Desktop eForms' other database features.

Informed Desktop eForms allows you to import the data from one data document into another. You can do this using Informed Desktop eForms' Import command. If you use a Macintosh computer, you can drag a data document onto the form window that corresponds to the data document you want to collect into. For detailed information about Informed Desktop eForms' Import command, see "Importing Records" on page page 13-11.

## Updating Data Documents

As explained earlier (see "Opening a Data Document" on page 2-8 and "Opening a Package" on page 2-11), Informed Desktop eForms automatically locates and opens the appropriate template when you open a data document. When Informed Desktop eForms opens a template (as a result of opening a data or package document), it automatically checks to ensure that the data matches the template.

If the template has changed since the last time you opened the data or package document, or if you've received a data or package document from someone who has a different version of the template, Desktop eForms might notice differences between the data and the template. For example, the template might contain a new cell for which there is no data in the data document. Or maybe a cell's type has changed.

If differences are detected, Informed Desktop eForms updates the data to match the template. The time that it takes to update the data depends on the differences and the number of records in the data document. You'll see a progress dialog box during the update process.

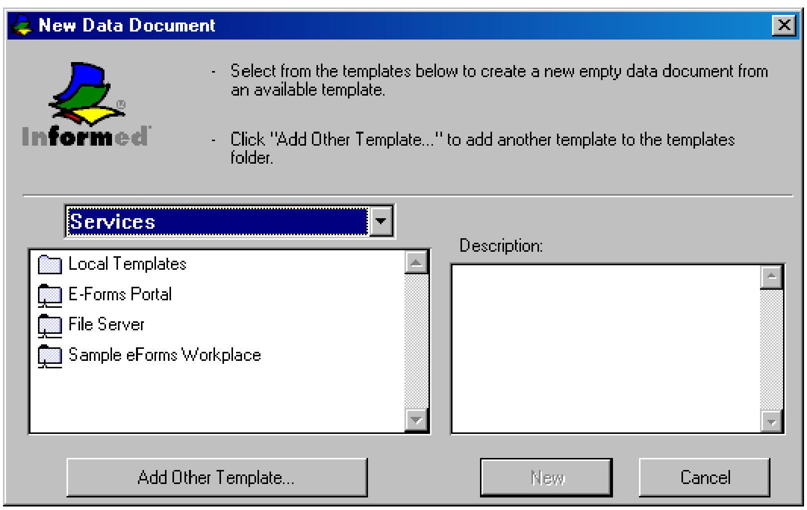
# Obtaining New Templates

Chapter 14, “Form Template Distribution,” describes Informed’s built-in forms deployment features. After designing a new template, the eForms designer can make the template available at one or more distribution centers. Different types of distribution centers are supported, including eForms Workplaces, file servers, and FTP servers.

You can obtain a new template by using Informed Desktop eForms to select the template you need from a distribution center. If your company uses an eForms Workplace to store Informed Desktop templates, you can also download a desktop template directly from the Workplace.

## Obtaining New Templates Using Informed Desktop eForms

The most common method of obtaining a new distributed template is by means of Informed Desktop eForms’ New Data Document dialog box. This dialog box appears when you choose the New Document command from Informed Desktop eForms’ File menu.




**To obtain a template from a distribution center:**

1. Click the drop-down list at the top of the dialog box and select ‘*Services*.’ The list changes to show the distribution centers that correspond to the *distribution center profiles* found in your Distribution Profiles folder on Windows or in the Distribution Centers folder on Macintosh. A distribution center profile is a file containing the information necessary to identify and connect to a distribution center. See Chapter 14, “Form Template Distribution” for information about distribution center profiles.

2. Select the center's name in the list and click **Open**. The list changes to show the available templates.

3. Select the *template* you want in the list. Then click **New**. Informed Desktop eForms copies the distributed template to your Templates folder and opens it, creating a new untitled data document.

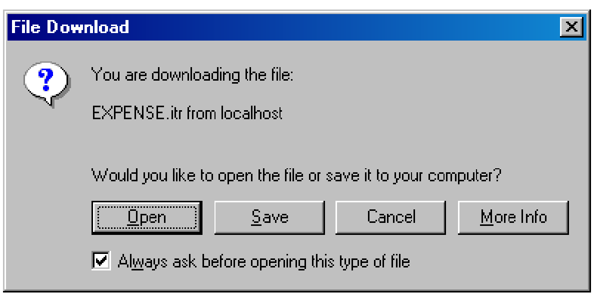
Once you've obtained a new template from a distribution center, Informed Desktop eForms automatically notifies you when a new version of the template is available. For detailed information about how revision checking works, and the various commands and preferences associated with *template distribution*, please see Chapter 14, "Form Template Distribution."

## Downloading a template from an eForms Workplace

You can download the Informed desktop template you want from an eForms Workplace. For more information about working with templates and forms in a Workplace, please see your *Informed Quadra eForms Workplace User's Manual.*

**To download an Informed Desktop template from the Workplace:**

1. On the Blank Forms page of the Workplace, click the name or icon of the desktop template you want. A file download message appears. The example below shows the File Download dialog box for Internet Explorer 6.0.




2. Do one of the following:
   - Click **Open** to open the template in Informed Desktop eForms. A new data document is created.
   - Click **Cancel** to cancel the operation.
   - Click **More Info** to get information about downloading files to your browser.

**Note** It's best not to click **Save** on the File Download dialog box to save your template. This option will save your template as an Informed template reference (.itr). Instead, open the template first and then save it after filling it out. For more information, see "Saving Data Documents" on page 2-15.

# ODMA Support (Windows Only)

The Informed *ODMA* (Open Document Management API) plug-in allows you to link Informed Desktop eForms to an ODMA-compliant document management application. This arrangement combines Informed Desktop eForms' form filling features with the organizational strengths of a document management system.

**Note** The ODMA plug-in must be installed in your Plug-ins folder.

## How it Works

A document management application is used to control and manage documents in an organization, thus streamlining and speeding up the access and flow of information. In a document management system, each document is assigned specific labels such as a document name, author and document type. These labels make it easy to store, search for, and retrieve information.

When the ODMA plug-in is installed, you can fill out forms with Informed Desktop eForms and then save and retrieve the completed forms using your document management application's interface, rather than storing your forms locally.

## Creating and Saving New Documents

You create a new data document the way you usually would with Informed Desktop eForms.

**To create and save a new document:**

1. Choose **File > New Document.** The New Data Document dialog box appears.
2. Select the template you want to use. Click **New**. A form appears, ready for filling out.
3. Fill out the form.

   After the form is completed, you can save it to your document management system from within Informed Desktop eForms.
4. Make sure your document management application is running.
5. In Informed Desktop eForms, choose **File > Save**. Instead of the standard Windows Save dialog box, you'll see the Save dialog box that corresponds to your document management system.
6. Enter the document information according to the rules defined for your document management system. Then click **OK**.

## Retrieving an Existing Document

You can retrieve an existing data document from your document management system from within Informed Desktop eForms.

**To retrieve an existing document:**

1. Choose **File > Open**. Instead of the standard Windows Open dialog box, you'll see the Document Retrieval dialog box that corresponds to your document management system.
2. Select the document you want to open. Then click **OK**. The document management system retrieves your form and opens it in Informed Desktop eForms' window.

Details about specific document management systems are not included in this section. For information about your organization's system, please see the documentation that came with the application, or consult your document management system administrator.

# 3 Filling Out Forms

In this chapter:


- Activating a Record 3-2
- Accepting the Current Record 3-3
- Entering Information 3-3
- Memorizing Values 3-12
- Tab Order 3-13
- Filling Out Tables 3-14
- Using Buttons 3-17
- Pages of a Form 3-17
- Intelligence Features 3-19

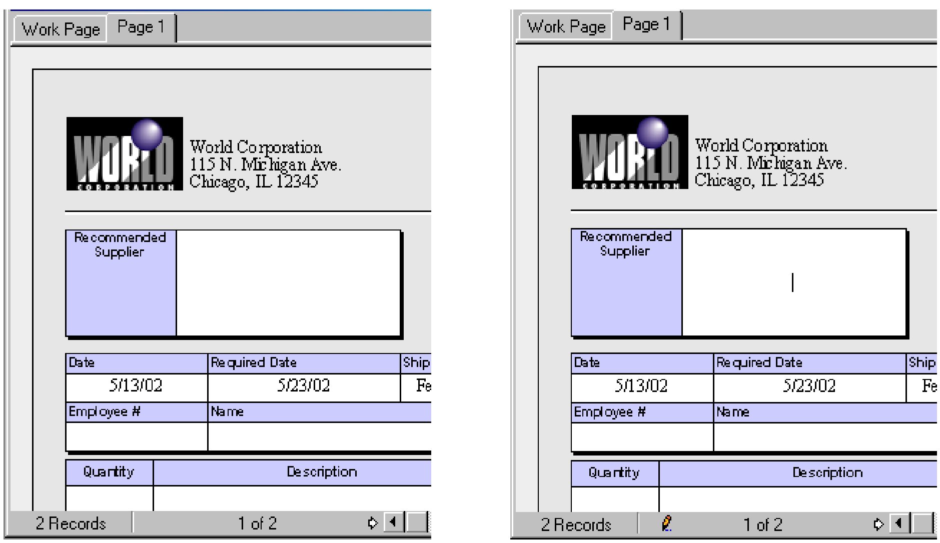
# Filling Out Forms

Forms contain areas called *cells** where you enter information. The *eForms designer* specifies the type of information that you can store in each cell, as well as the desired formatting options. Calculations, choices, lookups, and other *intelligence features* are also added to a form.

This chapter describes how to fill out a form. You’ll learn how to enter information and use the variety of intelligence features that make it easy for you to fill out a form. You can fill out new *records* or you can edit existing records. For information about creating, finding, removing, duplicating, and sorting records, see “Chapter 8, Record Management.”

## Activating a Record

Before you can change the information on a form, you must activate the *current record*. While a record is active, you can tab from cell to cell and enter information by typing on the keyboard or pasting from the Clipboard. The figure below shows a form that’s inactive (left) and active (right).




The small pencil in the collection information box indicates visually that the record is active. See “Collection of Records” on page 8-2 for more information. Notice that the insertion point is in the ‘Recommended Supplier’ cell. The form on the left is inactive and therefore has no *current cell*.

*For definitions of *italicized* terms, please see the glossary at the back of this manual.

**To activate the current record:**

1. Press the Tab key.

   Or

   Click a cell. Using the mouse, position the pointer over a cell; then press the mouse button. Informed Desktop eForms activates the record and shows a blinking insertion point in the cell that you clicked. If you click a checkbox, picture, or *signature cell*, you'll see a bold, blinking border inside the cell instead of a blinking insertion point.

Once you've activated a record, you can enter information by tabbing from cell to cell and typing or pasting values. See "Tab Order" on page 3-13 for more information.

## Accepting the Current Record

After you've entered a new record or made changes to the information on an existing record, you accept the record by pressing the Enter key on the numeric keypad. The pencil indicator no longer appears and the current cell on the form is deselected. If your Windows keyboard does not contain a numeric keypad, you can press Ctrl + Enter. On Macintosh, press Command + Return.

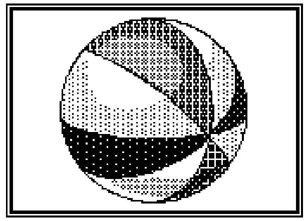
**Note** If you choose a command such as Print or Close while a record is active, Informed Desktop eForms automatically accepts the record before performing the command.

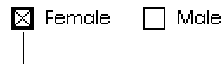
As you'll learn later in this chapter, the eForms designer can create *check formulas* for the cells on a form. A check formula is a formula that examines the value of a cell to check for errors. When you attempt to accept a record, Informed Desktop eForms checks for errors in order to prevent accepting an invalid record. If an error is detected, a beep sounds and the record remains active with the invalid cell value selected. Correct the mistake, then press the Enter key on the numeric keypad again to accept the record.

## Entering Information

To fill out a form you enter information in each cell on the form. You can move between cells by pressing keys such as Tab or Shift + Tab, or click a cell with the pointer. The cell which is currently selected is called the current cell; it's the cell that's ready to accept information.

With the exception of checkbox, picture, and signature cells, the current cell contains either a blinking insertion point or a selected cell value. Selected checkbox, picture, and signature cells contain a bold, blinking outline.




Bold, blinking outline.

Blinking insertion point.

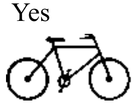
After selecting a cell, you can enter information in it by:

- Typing
- Pasting the Clipboard contents (choose **Edit > Paste**)
- Selecting a choice from a choices palette or drop-down list (for certain cells)

See “Intelligence Features” on page 3-18 for more information about using choice lists.

As you enter information, Informed Desktop eForms can help by automatically calculating, looking up, and checking values for you. These and other intelligence features make it easier to fill out forms quickly and accurately.

Each cell on your form accepts a particular type of information. The eForms designer is responsible for properly naming and choosing the most appropriate type for each cell. Informed allows the use of nine cell types. The following table lists these types with examples.

| **Cell Type** | **Example** | |
|---|---|---|
| Text | Business form #29 | 12345 - 123 Street, A Big City |
| Character | (555) 555-1212 | 02983-1283 |
| Number | 101 | $12,550.75 |
| Name | Mr. John Smith | Jones, Mr. Tom F. |
| Date | 10/25/89 | Wednesday, November 8, 1989 |
| Time | 14:20 | 03:15:04 PM |
| Boolean | Yes | |
| Picture |  | |
| Signature | Mary Ann Hancock | |

When you enter information in a cell, the value must be appropriate for the type of information that the cell holds. For example, you can’t type a name into a cell that stores numbers. If you enter an incorrect cell value, Informed Desktop eForms beeps and selects the value when you attempt to accept the record or tab to a different cell.

Associated with each cell type are formatting options that make it easier to enter information. Rather than typing formatted values, Desktop eForms can do the formatting for you. For example, a cell might be formatted to display numbers with a currency symbol, thousand separators, and two decimal places of accuracy. eForms can automatically convert a typed value, such as “1500,” to the formatted value “$1,500.00.”

## Font, Font Style, and Size

The eForms designer specifies the font, font style, and size attributes used to display information in each cell on the form. When you enter text in a cell, the information is always displayed according to those specifications. However, by selecting certain options, the eForms designer can allow you to change these attributes cell by cell.

**To change the font, font style, or size:**

1. Select the text in a cell.
2. Choose a new setting from the commands under the Cell menu. On Windows, you’ll see only the Font command. Choosing this command displays the Font dialog box where you can select different fonts, font styles, and sizes.

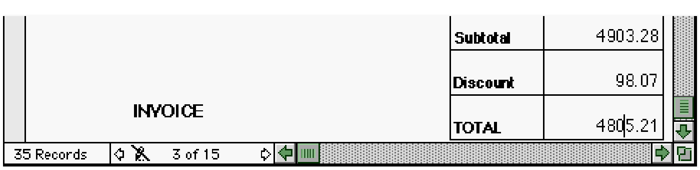
   On Macintosh, you’ll see the Font, Size, and Type Style submenus under the Cell menu.

   For Windows and Macintosh, the commands and submenus that are available depend on which options the eForms designer has allowed. For example, if you’re only allowed to change the font and type style, the Size control is unavailable.

The following types of styles are not available on Windows compatible computers: Outline, Shadow, Condensed, and Extended.

## Display-only Cells

The eForms designer can prevent you from entering information in a cell by making the cell display-only. *Display-only cells* often obtain their values from other cells on the form. When you tab from cell to cell, Informed Desktop eForms skips past the display-only cells. When a display-only cell is selected, a line appears through the pencil icon in the collection information box.




If you try to enter information or change the cell’s value, Informed Desktop eForms beeps and displays an alert message that the cell is display-only and you cannot change its value.

## Required Cells

You must enter information in a required *field*. If you don't, a message prompts you for a value. In a table, the warning appears only once for a column.

## Optional Cells

You can enter information in an optional field or leave it blank.

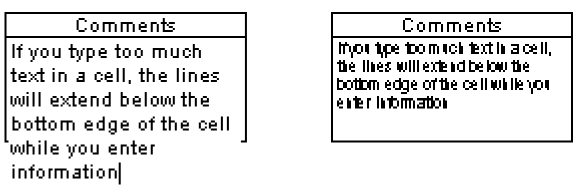
## Recommended Cells

You should enter a value in a recommended field. If you leave the cell blank, a message indicates that a value is recommended.

## Entering Text

The text cell type is used for cells that hold text information such as an address, a comment, or a memo. Formatting options can automatically capitalize letters, words, or sentences in the information you enter. When you enter information into a cell, you can type more lines than will actually fit in the cell area. When you press Tab to move to the next cell, the information that doesn't fit is hidden.

Text cells can also make use of a formatting option called 'Allow auto-shrink.' If this option is selected, Informed Desktop eForms automatically shrinks the type size of the information so that it fits entirely in the cell area.




## Entering Character Values

The character cell type also stores text values. However, unlike the text cell type, character values must match a specific format that the eForms designer defines. The character cell type is often used to store information such as telephone numbers, zip codes, or values that are always formatted the same way.

When you enter a value into a character cell, Desktop eForms verifies that the value matches the cell's format. Format characters such as dashes and spaces are automatically entered for you. If you enter an incorrect value, Desktop eForms beeps and selects the value when you try to move to a different cell or accept the record. A message appears picturing the required format.

## Entering Numbers

The number cell type stores numbers in a variety of formats. Desktop eForms automatically formats a number you enter according to the cell's format. Format characters such as the currency symbol, thousand separators, and the decimal point are entered for you.

## Entering Names

The name cell type stores names. A name has up to five parts: a prefix (e.g., Mister or Professor), a first name, a middle name, a last name, and a suffix (e.g., Junior). Multiple prefixes, middle names, and suffixes are allowed. A cell's name format can include all parts or only selected parts in either full or abbreviated form.

When you enter a name, Desktop eForms identifies each part that you type, then formats the name according to the cell's name format. You should enter the parts of a name in the following order: prefix, first name, middle name, last name, and then suffix. If you type a comma after the first part, Desktop eForms interprets that part as the last name.

To help identify the parts of a name that you type, Desktop eForms refers to a list of known prefixes and suffixes. This list can be found in Appendix A of this manual.

## Entering Dates and Times

Informed Desktop eForms makes it easy to enter dates and times. Rather than typing a value in a particular format, you can type a date or time in any format you like. For example, to enter the date "January 1, 1999," you can type "jan 1 99" or "1 1 99." Informed Desktop eForms interprets what you type and formats the date or time value according to the formatting options of the cell.

**To enter a date:**

1. Select the cell that you want to enter the date in.
2. Type the date.

   Or

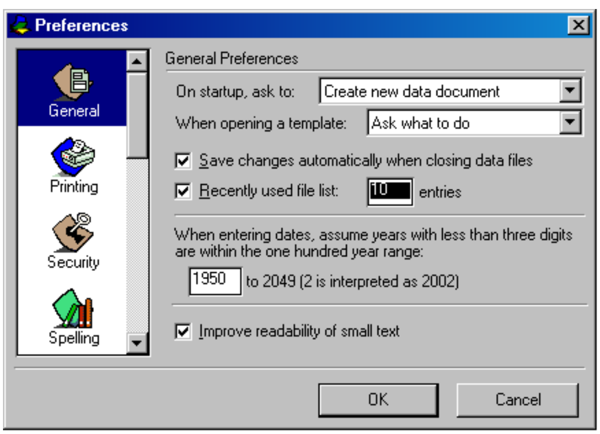
   Choose **Edit > Insert Date**. On Macintosh, Informed Desktop eForms automatically enters today's date in the correct format. On Windows, Informed Desktop eForms displays the Date Picker, allowing you to click and select the date you want.


## Century Wrap Preference

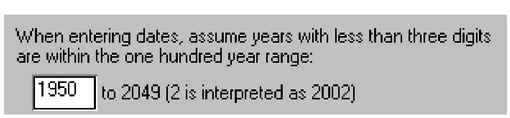
Informed provides a preference to specify the treatment of dates that are entered with centuries of less than three digits. The default setting is 1950 - 2049. Entries made with two digits are interpreted to be between 1950 and 2049. For example, 2/1/79 would result in Feb. 1, 1979 whereas 2/1/38 would result in Feb. 1, 2038. You can change the date range at any time.

### To change the date range:

1. Choose **Edit > Preferences** (Windows and Macintosh OS 9.1 and 9.2.2) or **[Application menu] > Preferences** (Macintosh OS X v10.1.3) to display the General Preferences panel.




2. Enter a new starting value in the field. Informed automatically updates the end value.



## Entering Boolean Values

A boolean cell can have one of the following pairs of values: Yes or No, True or False, or On or Off.

Desktop eForms ensures that you enter only values that are appropriate for that format. If you type only part of a value, it is converted to its full form. For example, to enter “No” into a Yes/No style boolean cell, type the letter “n” and press Enter or Return.

## Entering Checkbox Values

There are eight checkbox styles. The following table lists each style in its checked and unchecked state.

| | | | |
|---|---|---|---|
| ☒ | Yes | ☐ | No |
| ☒ | True | ❑ | False |
| ☑ | On | ☐ | Off |
| ☑ | Male | ❑ | Female |
| ✕ | Yes | _ | No |
| ✓ | On | _ | Off |
| ◉ | Up | ○ | Down |
| ■ | Yes | ☐ | No |

Rather than typing a value in a checkbox, click the cell with the pointer or press any key. The cell’s value toggles between checked and unchecked.

## Entering Pictures

You can enter a picture into a picture cell by using the Insert File command or by pasting from the Clipboard. If you’re using a Macintosh computer with Macintosh OS 9.1 or later, you can also enter a picture by using the drag and drop method. Informed Desktop eForms stores pictures in a variety of formats.

## Inserting a File or Picture

Another way to fill out parts of a form is to use the Insert File command. This command allows you to import a text *file* into a text cell, or a picture into a picture cell. For the command to be available, the current cell must be a text or picture cell, and its ‘Display only’ option must be turned off.

**To insert a file or picture:**

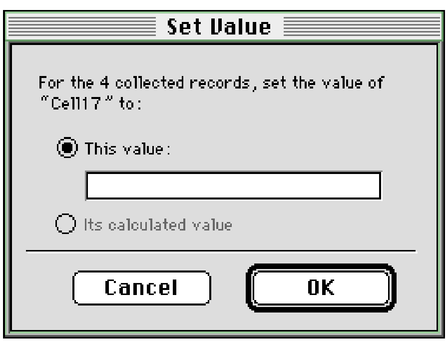
1. Select the cell.
2. Choose **Cell > Insert File**. For picture cells only, pressing the Enter (Windows) or Return (Macintosh) key is a shortcut for selecting the Insert File command. The standard Open dialog box appears, allowing you to select a file. For text cells, the selected text file is inserted into the cell at the current insertion point. For picture cells, the selected picture replaces the current picture in the cell.

## Setting a Cell's Value for Multiple Records

You might want to set the value of a single cell on more than one record. For example, if a customer pays ten outstanding invoices with one check, you have to mark each invoice as being paid. Instead of changing the value of the "Payment Status" cell from "Unpaid" to "Paid" on each record individually, you can set the value of the cell for all ten records at once with the Set Value command.

**To set the value of a cell on multiple records:**

1. Find and show that *collection of records* on the *Record List*. Make sure that the Record List contains only the records that you want to change. See Chapter 8, "Record Management" for more information about the collection of records and using the Record List.
2. Display the Record List and select the column that contains the cell you want to change.
3. Choose **Cell > Set Value** to display the Set Value dialog box.




4. Select the 'This value' option; then enter the new value in the field and click **OK**. The value of the cell is changed for each selected record. If you're setting the value for many records, Informed Desktop eForms displays a progress dialog box.

   If you want to change the value for a checkbox cell, the Set Value dialog box looks similar to the following.


Instead of typing a value, select either the 'Checked' or 'Unchecked' option.

**Note** If the selected column on the Record List corresponds to a table cell on the form, the 'This value' option is not available. You can only use the 'Its calculated value' option. Please see "Restoring Calculated Values" on page 3-19 for more information.

You can use the Set Value command to change the value of any cell except for display-only cells, or picture and signature cells. If the cell or Record List column that you select is one of these, the Set Value command is not available. You can also use the Set Value command to reset the value of a calculated cell. See "Restoring Calculated Values" on page 3-19 for more information.

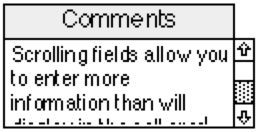
### Errors When Using the Set Value Command

As you'll learn in "Data Verification" on page 3-19, the eForms designer can create a check formula for any cell so that Desktop eForms automatically checks for mistakes when you fill out a form. A check formula is a formula that examines a cell value to determine if an error has been made.

When you use the Set Value command to change a cell's value for many records, it's possible that the value you set might be invalid for one or more records in the collection, based on the cell's check formula. If this occurs, Desktop eForms leaves those records unchanged and *tags* them with the tag name "Set Value Errors." See "Creating Tags and Recalling Collections" on page 8-27 for more information on tagging records.

## Scrolling Fields

The eForms designer can include a scroll bar with any field on a form. A field that includes a scroll bar is called a *scrolling field*. A scrolling field allows you to enter more data than will display in the cell area. You view all the data by scrolling up and down using the scroll bar.




The scroll bar is active, indicating that the cell area contains more data.

Depending on which option the eForms designer has chosen, the scroll bar on a scrolling field might be visible at all times, or only when you select or tab to that cell.

When a record that contains scrolling fields is filled out and printed, Desktop eForms repeats the printing of the page or pages that contain the scrolling fields, until all the data in those fields has been printed. For example, if page 2 of a two page form contains a scrolling field, Informed Desktop eForms prints page 1, then page 2, then page 2 again until all the data in the scrolling field has been printed. The extra copies of page 2 only contain the data in the scrolling field; all other fields print blank.

## Memorizing Values

Many forms contain information that is specific to the person filling out the form. For example, if you fill out a time card, information such as your name or employee number is always the same. Instead of typing an entry each time, you can type an entry once, and use Informed Desktop eForms' Memorize command to "memorize" that value. The next time you add a new record to your data document, the "memorized" value is automatically filled in.

**To memorize a value:**

1. Select the value in the cell.
2. Choose **Cell > Memorize**. The value you're memorizing appears as part of the Memorize command in the Cell menu. For example, if you fill in the value "Linda Green" in the "Name" cell on your form, the Memorize command displays as **Memorize "Linda Green"** when the cell is selected. After you choose the Memorize command, the name "Linda Green" is automatically filled in when you add a new record to your data document.

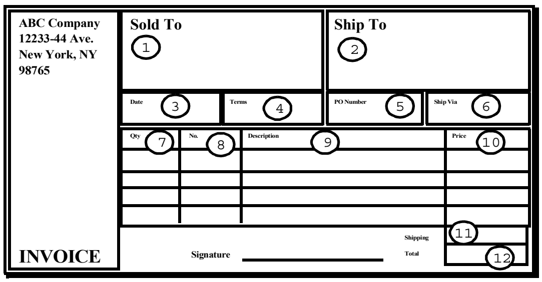
Often different types of forms contain some common information. For example, purchase requisition and travel expense forms contain cells for employee information. For a particular employee, this information is the same on every record, for purchase requisitions and travel expense forms. If the eForms designer has selected the 'Memorization is shared' option for a particular cell (such as the "Name" cell), any value that you memorize for that cell is also memorized for the same cell on other forms.

**Note** A cell's memorized value is shared only if the 'Memorization is shared' option is selected by the eForms designer. The memorized value is shared only with cells on other forms that have the same cell name and the 'Memorization is shared' option selected.

To cancel the effect of memorization, enter a blank value in a cell; then choose **Cell > Memorize**.

# Tab Order

Each form has a predefined *tab order* (configured by the eForms designer) that determines the order in which the cursor moves from cell to cell each time you press the Tab key. You can't change a form's tab order using Informed Desktop eForms. The following figure illustrates tab order.




The circled numbers indicate an appropriate tabbing order for this form.

When you fill out a form, pressing the Tab key moves the cursor from one cell to the next in the tab order. Pressing Shift + Tab moves the cursor in the reverse direction. If your form contains more than one page, when you tab out of the last field on on a page, the cursor automatically moves to the first cell on the next page. For cells that cannot have more than one line, pressing Enter (Windows) or Return (Macintosh) has the same effect as pressing Tab.

Informed's *Quick-Tab* feature allows you to bypass the normal tab order of a form. While filling out a form, pressing F2 (Windows) or Command + Tab (Macintosh) moves the cursor to the next Quick-Tab cell in the tab order. Pressing Shift + F2 (Windows) or Command + Shift + Tab (Macintosh) moves the cursor to the previous Quick-Tab cell instead. Like the tab order of a form, you can't change the *Quick-Tab cells* using Informed Desktop eForms. Quick-Tab cells are specified by the eForms designer.

The first row of the first column cell in every table is a Quick-Tab cell. You can therefore automatically move from table to table on your form by pressing F2 or Shift + F2 (Windows) or Command + Tab or Command + Shift + Tab (Macintosh). The first field cell following a table is also a Quick-Tab cell.

The eForms designer might also have configured conditional tabs for certain cells on the form. A conditional tab moves the cursor to another area of the form, based on the information that you've entered in the cell you're tabbing out of. For example, the eForms designer might configure conditional tabs for 'Local' and 'Out of Town' checkboxes on a travel expense form.

If you select the 'Local' checkbox, you would tab past sections for claiming expenses such as 'Hotel Accommodation' and 'Airline Travel' and go directly to sections for claiming expenses such as 'Parking' and 'Fuel.'

# Filling Out Tables

Each table on your form has one or more columns and one or more rows. You fill out a table by tabbing from column to column and row to row, entering data in each cell. The direction that you tab in a table—either across the rows or down the columns—is configured by the eForms designer.

The eForms designer also specifies when tabbing leaves a table. Usually, if you're tabbing across the rows, tabbing leaves the table when you tab through one empty row. However, the eForms designer can also configure the tab order so that tabbing leaves the table after you tab out of the first column of an empty row.

## Inserting and Removing Rows

Occasionally you may want to insert or remove a row in a table that already contains information. You can use the Insert Row and Remove Row commands to add and delete rows. As an example, consider the table of information shown in the following figure.

| Part | Qty | Description | Price | Amount |
|---|---|---|---|---|
| A0-003 | 3 | Gadgets | 79.23 | 237.69 |
| A0-041 | 2 | Widgets | 771.10 | 1,542.20 |
| A0-032 | 1 | Light Bulbs | 2.50 | 2.50 |
| A0-007 | 5 | Light Sockets | 3.49 | 17.45 |
| A0-010 | 2 | Light Switches | 7.10 | 14.20 |
| | | | | |
| | | | | |

**To add a new row between items A0-032 and A0-007:**

1. Select any cell in the row containing item A0-007.
2. Choose **Edit > Insert Row**. Desktop eForms moves all rows starting at the one containing the current cell down by one. Then insert a blank row.

| Part | Qty | Description | Price | Amount |
|---|---|---|---|---|
| A0-003 | 3 | Gadgets | 79.23 | 237.69 |
| A0-041 | 2 | Widgets | 771.10 | 1,542.20 |
| A0-032 | 1 | Light Bulbs | 2.50 | 2.50 |
| | | | | |
| A0-007 | 5 | Light Sockets | 3.49 | 17.45 |
| A0-010 | 2 | Light Switches | 7.10 | 14.20 |
| | | | | |
| | | | | |

If the last row in the table already contains information, you cannot insert a new row. Instead, you'll see the following message:


Before you can insert a row in a full table, you have to clear the information in the last row.

**To use the remove row command:**

1. Select a cell in the row that you want to remove.
2. Choose **Edit > Remove Row**. Informed Desktop eForms moves the information in all remaining rows up by one row.

## Expandable Rows in Tables

If the eForms designer has selected the '*Expandable rows*' option for a table, the spacing of individual rows can expand if you enter more data than the chosen row spacing can display. With this option selected, all rows in the table are expandable, but only the rows that contain extra data are affected. For example, if only one row in a table contains more information than it could usually display, only that row expands. The other rows retain their original spacing.

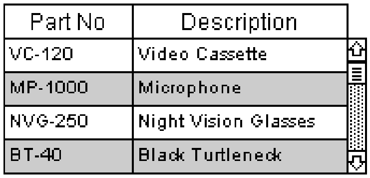
| Qty | Description | Item No. |
|---|---|---|
| 1 | Boot Polish | BP100 |
| 1 | Recipe for Disaster Cook Book | RD1313 |
| 2 | Fishing Line | FL222 |
| | | |

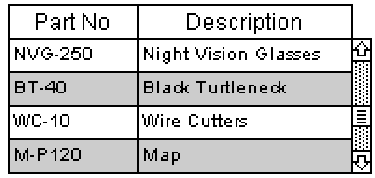
Only the row with extra information expands. All other rows retain their original spacing.

If all the rows in a table already contain data, Desktop eForms does not allow you to expand any rows in the table, since that would cause the last row of the table to disappear. If you try to expand a row when all rows in the table already contain data, you'll be alerted with a message.

## Scrolling Tables

The eForms designer can include a scroll bar with any table on the form. A table that includes a scroll bar is called a *scrolling table*. Informed Desktop eForms automatically adds new rows to the scrolling table when you enter more data than the table can display. You can view all the data in the table by scrolling up and down using the scroll bar.




You can view all the information by using the scroll bar.

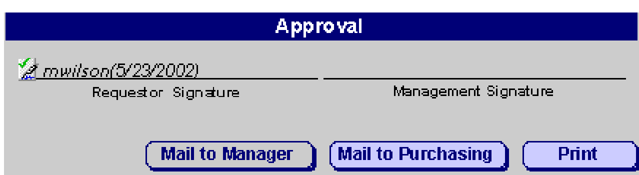
Depending on which option the eForms designer has chosen, the scroll bar on a scrolling table might be visible at all times, or only when you select or tab to the table.

When a form that contains scrolling tables is filled out and printed, Informed Desktop eForms repeats the printing of the page or pages that contain the scrolling tables, until all the data in those tables has been printed. For example, if page 2 of a two page form contains a scrolling table, Informed Desktop eForms prints page 1, then page 2, then page 2 again until all the data in the scrolling table has been printed. The extra copies of page 2 only contain the data in the scrolling table; all other fields prints blank.

**Note** Scrolling tables do not store an infinite number of rows. For best results, it's recommended that the scrolling table feature be used to store only a few extra rows of data.

## Using Buttons

As an alternate method for invoking commands and actions, the eForms designer can include buttons on your *templates*. Clicking a button invokes a command or action according to the button's configuration.




Click this button to print the form.

Clicking a button often performs a command just as though you chose the command from a menu. For example, the mail button on the form above provides an alternative method for selecting Desktop eForms' Send command. Other buttons might select settings or perform custom actions as specified by the eForms designer.

Like menu commands, a button is available only when its associated command or action is permitted. For example, if a button is configured to reveal the next record in the data document, this button is unavailable if the current record is the last record.

# Pages of a Form

Each form has a *work page* and at least one numbered page. If the form has more than one numbered page, you'll see a set of tabs at the top of the form window that indicate the name or number of each page. A form can have a maximum of 99 numbered pages and each page can have up to 99 parts.

The number of pages and the number of parts per page is determined during the design process using Informed Designer. You cannot change these attributes of a form using Informed Desktop eForms.

## The Work Page

Every form contains one work page. Like the numbered pages of a form, the work page can contain graphics, text, and cells. The only difference between the work page and numbered pages is that the work page doesn't print when you print a form. For more information on how to print the work page, please see "Print Options" on page 9-5.

There are two common uses of the work page:

- A place for the eForms designer to put instructions to help you fill out a form. For example, your form's work page could include instructions for distributing a form after it has been filled out. In this case, the eForms designer would configure the form to display the work page and could name the work page tab 'Instructions.'
- A place for the eForms designer to put fields that should not print with the rest of a form. For example, employee wage rates could be placed on the work page to be used by other calculated fields on the form. In this case, the eForms designer would configure the form to hide the work page.

Whether you can see the work page or not, you can tab to fields on the work page and, if the eForms designer has allowed it, change their values. When you print the form, the work page won't print unless you select the 'Work page' option in the Print dialog box.

## Changing Pages

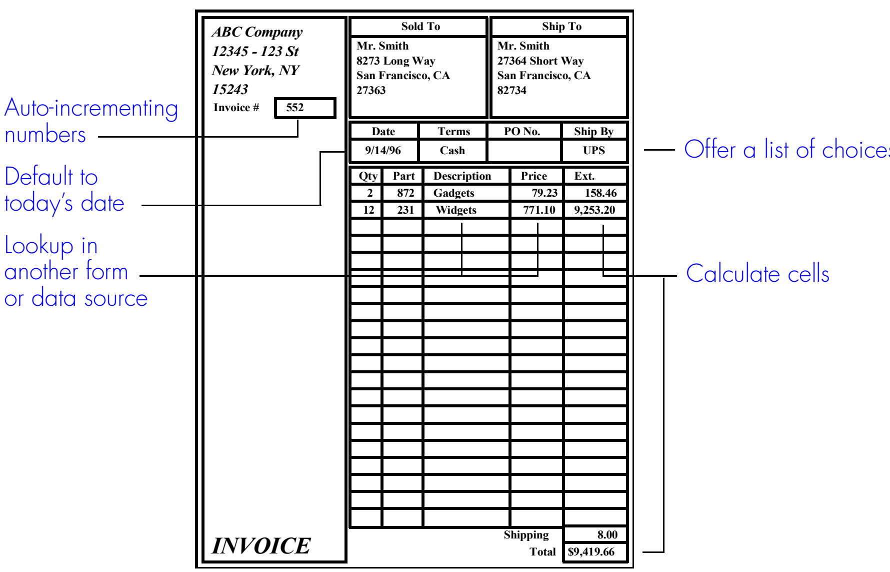
On multi-page forms, Informed Desktop eForms automatically changes pages when you tab from a cell on one page to a cell on a different page. You can also use the page Tabs located along the top of the document window to change pages manually.


**To change from one page to another:**

1. Click the Tab that corresponds to the page you want to go to. If the form contains so many pages that all the Tabs cannot be displayed at once, a set of 'left and right' arrows appears at the top right corner of the document window. Click the arrows to move forward or backward between the excess pages.

## Intelligence Features

Informed's data intelligence features make it easy to fill out forms quickly and accurately. With Informed Desktop eForms, forms can automatically format, calculate, look up, and verify data. The following figure shows a completed form with various intelligence features identified.




As explained in "Informed Documents" in "Chapter 2, Document Management" on page 2-2, the template of a form consists of the graphical appearance of the form as well as its intelligence features. The eForms designer sets up the intelligence of a template using Informed Designer.

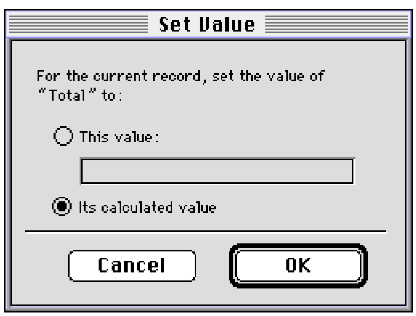
## Restoring Calculated Values

Informed Desktop eForms automatically fills in calculated cells. A calculated cell is a cell that obtains its value based on other cells on your form. A cell's *calculation formula* is evaluated when the value of any cell that participates in the formula changes. For example, suppose that a cell called "Extension" is calculated as 'Quantity * Price.' When you type a different value in either of the "Quantity" or "Price" cells, Informed Desktop eForms automatically calculates and displays the new value of 'Extension.'

As explained in "Display-only Cells" on page 3-5, the eForms designer can prevent you from changing the value of any cell (including a calculated cell) by making the cell display-only. If a calculated cell is not display-only, you can change its value as you can for any other cell. For example, if you have an invoice with a calculated cell called 'Discount,' you might want to give a customer more than the calculated discount. If the cell is non-display-only, you can override the calculated value by entering a different value.

**To change the cell back to its calculated value:**

1. Select the cell on the form or the column on the Record List.
2. Choose **Cell > Set Value**. The Set Value dialog box appears.

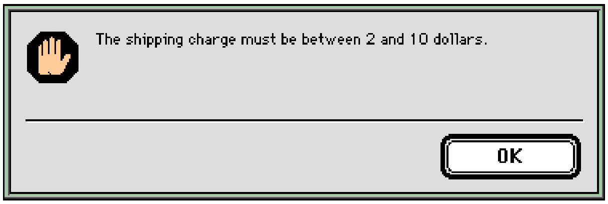



3. Select the 'Its calculated value' option; then click **OK**.

## Data Verification

The eForms designer can enter error checking rules for cells so that Informed Desktop eForms automatically checks for mistakes as you fill out a form. Each time you enter a cell value, Informed Desktop eForms checks the value according to the cell's check formula. A check formula is a formula that examines a cell value to determine if an error has been made. For example, a check formula might check to ensure that a cell's value is within a particular range.

Some check formulas detect errors, whereas others warn you of specific conditions. You'll hear a beep when you try to select a different cell or accept the record. Some check formulas even present an alert dialog box with a message. Others add a message to the cell's help dialog box. See "Help Messages for Cells" on page 3-23 for more information. The following figure shows an alert dialog box.




Once an error has been reported, Desktop eForms allows you to move to a different cell without first correcting the mistake. However, depending on how the eForms designer has configured the form you might not be able to save, mail, print or submit a record until all errors have been corrected. Again, depending on how the form was configured, cells with missing or invalid data might appear filled in with color to indicate that there is a problem.

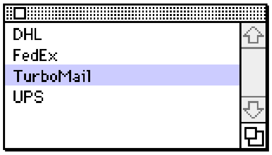
**Note** If you're unaware of how to correct an error, you can always revert or remove the record. For more information, see Chapter 8, "Record Management."

When an alert dialog box appears, Informed Desktop eForms automatically adds the message to the cell's help dialog box. This allows you to later view the alert message by selecting the cell then choosing **Cell > Help**. See "Help Messages for Cells" on page 3-23 for more information.

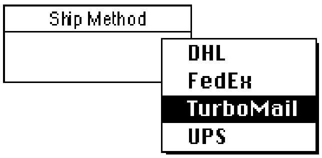
## Viewing Choice Lists

Often a cell takes on a variety of common values. For example, the shipping method on an order form might always be Mail, UPS, or Federal Express. The eForms designer can enter a list of choices for any cell. Instead of typing a cell value, you can select a choice.

Depending on how the eForms designer has configured a cell's choice list, the choices are displayed either in a palette or in a drop-down list.

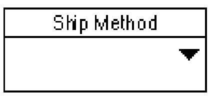



Choices for 'Ship Method' displayed in a palette.




Choices for 'Ship Method' displayed in a drop-down list.

If the choices for a cell are configured to display in a drop-down list, you'll see an arrow on the right side of the cell's title section, indicating the presence of a choice list.



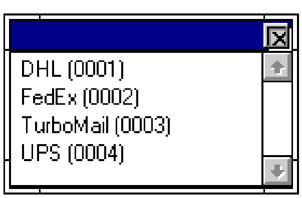

Choice list indicator.

To display the choice list, click the arrow and hold the mouse button.

Depending on how the eForms designer has set up the form, choices in a palette display automatically when you tab to the cell, or you may have to choose **View > Show Choices**.

If you show the palette by choosing the Show Choices command, the palette remains visible until you close it manually by clicking the palette's close button or by choosing **View > Show Choices** again. If the palette is set to display automatically, Desktop eForms also hides the palette for you automatically when you select a different cell or accept the record.

The eForms designer can add descriptive text to a cell's list of choices that won't appear in the cell once a choice is made. For example, if you select the choice "TurboMail (0003)," only the text in parenthesis, in this example "0003," appears in the cell.



## Selecting a Choice

Depending on whether a choice list is displayed in a drop-down list or in a palette, you use different methods to select a choice.

**To make a selection from a drop-down list:**

1. Click the arrow indicator on the cell's title section.
2. In the drop-down list, click the choice you want.
3. Your choice appears in the cell.

When choices are displayed in a palette, you can select a choice by double-clicking it in the list or by using the Up and Down arrow keys.

Another convenient way to select a choice from either a choice palette or a drop-down list is to type the first few characters of the value. As you type characters, Desktop eForms selects the choice that most closely matches the typed value. For example, suppose that the sales person cell on a sales slip has the choices listed in the following table.

| Sales Person Choices |
|---|
| Brown, Tom |
| Dawson, Greg |
| Dickens, Sharon |
| Johnson, Cindy |

Typing the letter "D" would select "Dawson, Greg," the first choice that starts with that letter. Typing "Da" would also select "Dawson, Greg." However, typing "Di" would select "Dickens, Sharon" instead. In each case, Desktop eForms copies the entry into the cell as the selection is made.

The only exception to this is when you type the first characters of choices that have descriptive text added to them. For example, if you have TurboMail (0003) as one of the choices, typing the letter "T" selects the choice in the list but doesn't automatically display the value (0003) until you tab out of the cell.

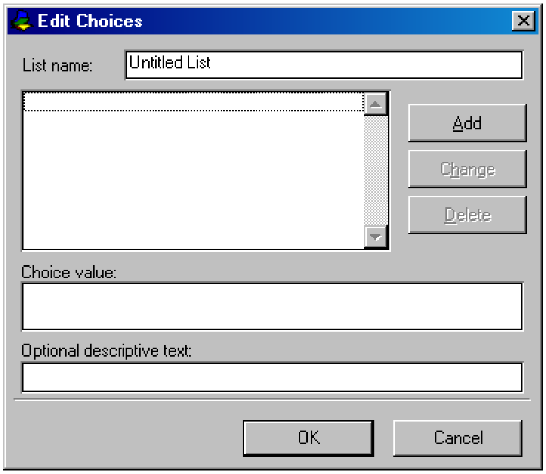
Once you've selected the correct choice, press Tab to accept the choice and move to the next cell. If you press Tab without selecting a choice, Informed Desktop eForms leaves the cell blank and moves to the next cell.

## Editing Choice Lists

Although you cannot edit or remove the original choices in a choice list, you may add extra items to a cell's choice list, provided that the eForms designer allows that action.

**To add more choices to a choice list:**

1. Choose **Cell > Extra Choices** to display the Edit Choices dialog box.




2. To add a new choice, type the entry in the field below the list and click **Add**. The new choice is added to the list in sorted order. Although there's no practical limit to the number of choices a cell can have, we recommend that you enter no more than 40 or 50.

3. To change or remove an extra choice, first select the choice by clicking it in the list; the selected choice appears in the field. To remove the selected choice, click **Delete**. To change the selected choice, type the new value; then click **Change**.

After you've entered all choices for the selected cell, click **OK** to dismiss the Edit Choices dialog box. The next time you tab to that cell, the choice list shows your *extra choices* as well as the original choices.

**Note** When you add extra choices, they're only available for the cell that you added them in. The extra choices do not appear in other cells, even if they use the same choice list.

## Help Messages for Cells

Each cell on a form can display a custom help message created by the eForms designer. The help message contains useful information or special instructions on filling in the cell.

### Help Messages on Windows

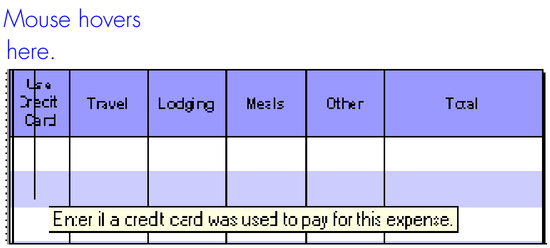
On Windows, help messages are displayed in the status bar at the bottom of the Desktop eForms window, on the Help palette and in tip windows.

**To display the help message for a cell on Windows:**

1. Select the cell. The help message for that cell appears automatically in the status bar at the bottom of the Informed Desktop eForms window.


**To view a help message in a tip window:**

1. Hover the cursor over a cell until the message appears.




**To display help messages on the Help palette:**

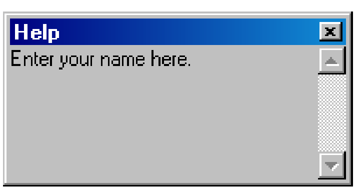
1. Click the ? icon at the bottom left corner of the Informed Desktop eForms window.

   Or

   Choose **View > Show Help**.

   Or

   Use the Ctrl + ? key combination. The Help palette appears.

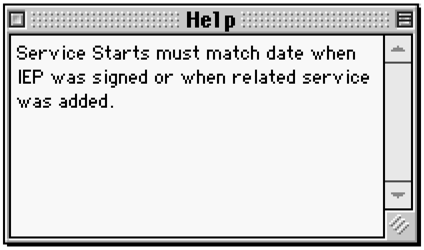



## Help Messages on Macintosh

On Macintosh, help messages can be shown on the Help palette or in Help balloons.

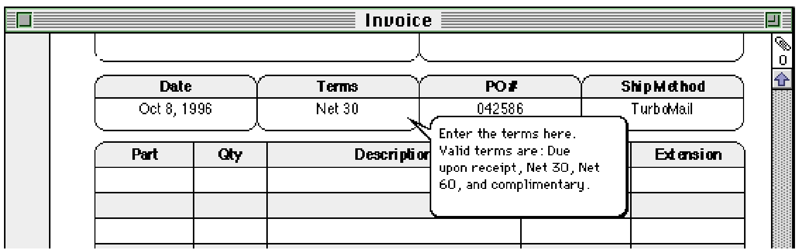
**To show help messages on the Help palette:**

1. Select the cell.
2. Choose **Cell > Help** or press the Cmd + ? key combination. The Help palette appears.




**To display the Balloon help:**

1. Choose **Help > Show Balloons** and point at the cell of interest. A balloon appears showing the cell's help message:

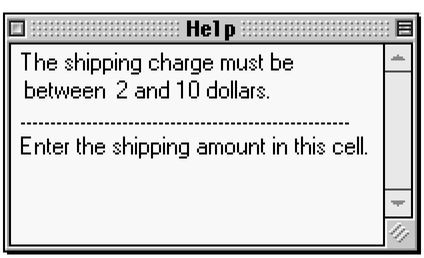



To turn off the Balloon help, choose **Help > Hide Balloons**.

## Check Formulas and Help Messages

As discussed in "Data Verification," on page 3-19, a cell's check formula can append a message to the help message. You might, therefore, see a different message on the help dialog box depending on the value of the current cell.

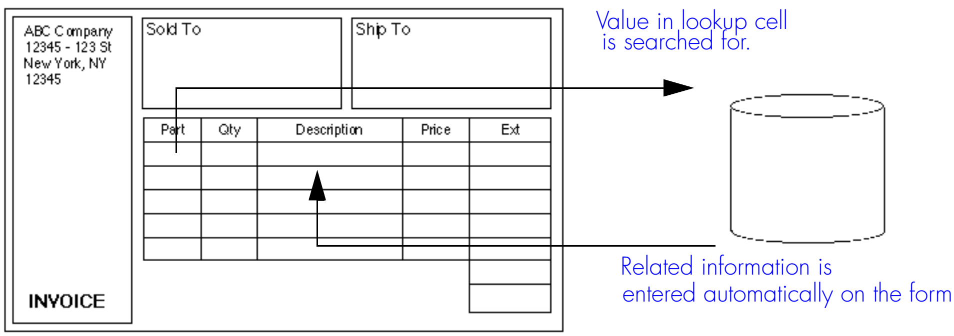
When a check formula uses an alert or help message, the message is added to the cell's custom help message. The check formula message is separated from the cell's help message by a dashed line on the Help dialog box.




The check formula message remains part of the help message until you change the cell's value.

## Lookups

The eForms designer can configure forms to look up information. For example, if you enter a part number on an invoice form, you could look up related inventory information in another data document or database and fill it in on the form. Lookups reduce the amount of typing necessary to fill out a form and improve the accuracy of the information entered.



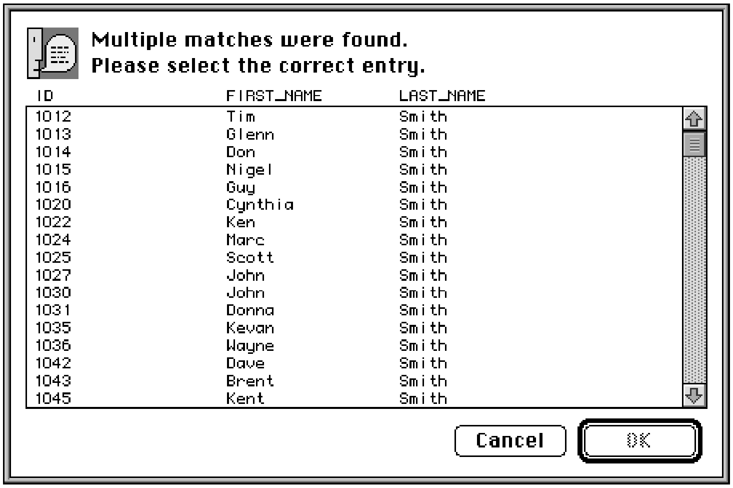

The cell for which information is looked up is called the *lookup cell*. In the figure above, the Part cell is the lookup cell.

Informed Desktop eForms can look up information in other form data documents and in other information systems. An information system can range anywhere from a small database running locally on your computer, to a high capacity, high performance SQL database running on a mainframe. The place where Informed Desktop eForms looks up information is called the lookup source. Lookups are configured by the eForms designer.

Lookups can be configured using other form data documents or by choosing connection types such as Scripting (Java Script), HTTP or ODBC (Windows only). If you're using Informed for Macintosh, AppleScript is supported. Other types of lookup sources are accessed using Informed data access *plug-ins*. Data access plug-ins must be installed in your Plug-ins *folder*.

A lookup is performed when you enter a value in a lookup cell and press Tab to leave the cell. You might be prompted to enter some information, such as your name and a password. This depends on the particular lookup source and how the connection is configured. The eForms designer can include the necessary connection information in the template or leave it blank.

When a lookup is performed, the value that you type in the lookup cell is searched for in the lookup source. If a single match is found, the related information is returned and entered automatically on the form. If the search fails, you'll see a message indicating this. If multiple matches are found, you may see a dialog box requesting that you select a single match.

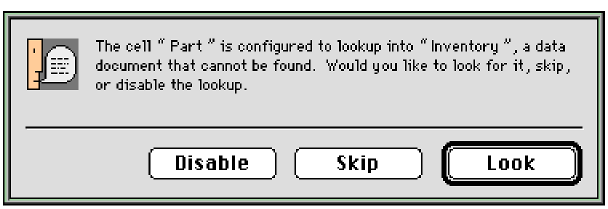



If this happens, select the desired match; then click **OK**.

## Lookup Errors

When you do a lookup the lookup source must be available to perform the lookup. If Informed Desktop eForms is unable to find or connect to the lookup source, you'll see an error message indicating this.

Depending on the type of lookup source, the specific error message and the options available vary. For some lookup sources, the error is described and the lookup is canceled. For others, options include skipping the lookup and looking for the lookup source.




Clicking **Look** allows you to try and locate the lookup source. For example, if the lookup source is a data document and Informed Desktop eForms cannot find the document, clicking **Look** on this dialog box allows you to browse available volumes to locate the document. Clicking **Skip** ignores the lookup that time only. This means that the error message appears the next time the lookup is attempted. The 'Disable' option ignores the lookup until the data document is closed and later opened again. For some lookup sources, the **Look** option is not available. Instead, you'll see a button labeled **Retry**. Click **Retry** to perform the lookup again.

## Getting The Next Form Number

Forms such as invoices and purchase orders often contain unique numbers for identification purposes. Each time you fill out a form, you enter a new form number. The eForms designer can configure a cell that contains an *auto-incrementing* number.

Form numbers can be obtained from a variety of sources. For instance, the next available number might be stored in the template, or it can be obtained from another application or data source. Data sources are accessed using Informed's data access plug-ins.

If the auto-incrementing cell obtains its number from another data source, you might be prompted for some information such as a name and password. This depends on the particular form number source and how the connection is configured. The eForms designer can include the necessary connection information in the template or leave it blank.

In cases where the source of your form numbers is unavailable, you can use the Assign Next Value command to obtain values at a later time. For example, suppose you're waiting at an airport while on a business trip and you want to fill out an expense form that gets its number from a database back at your office. You can fill out the entire form except for the form number. Then, when you return to your office, you can connect to your network and choose **Cell > Assign Next Value**. Informed Desktop eForms obtains the next available value from the database, and fills in the cell on your form.

The Assign Next Value command is also used for cells that are configured to auto-increment manually when you request a value. To manually obtain the next available value for a cell, first select the cell, then choose **Cell > Assign Next Value**.

You can manually assign values to multiple records on the Record List. With the collected records displayed in the Record List window, select the column that contains the cells that require values and choose **Cell > Assign Next Value**. Desktop eForms obtains the next available values and assigns them to the selected cells. For information on how to find a collection of records and how to use the Record List, see Chapter 8, “Record Management.”

# 4 Using Digital Signatures

In this chapter:


- Signature Cells 4-2
- Signature Preferences 4-4
- Signing Forms and Verifying Digital Signatures 4-6
- Template Verification 4-11
- Logging Off Your Signing Service 4-14
- Signing Plug-ins 4-15

# Using Digital Signatures

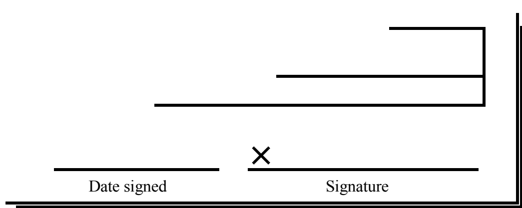
Approval is often a necessary step in the processing of a form. Today, technology allows us to sign forms electronically with *digital signatures**. Signing electronically reduces the need to print forms and, in some ways, offers more security than paper signatures.

A digital signature is like a special number that's derived from information about the person signing and the data being signed. This number can reliably identify the signer and detect any changes in the signed data. The *eForms designer* configures a form for signing by drawing one or more signature *cells* on the *template*. Each signature cell can sign the entire form or only certain parts of the form. With a properly configured form, you can easily sign completed forms and check the validity of signatures and templates.

Informed supports digital signatures through the use of signing *plug-ins*. Regardless of which signing service you use, the process for signing forms, verifying signatures and verifying templates is essentially the same. Please see "Signing Plug-ins" on page 4-15 for more information about the different signing services supported by Informed.

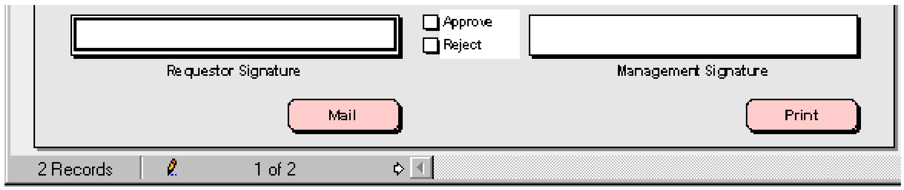
## Signature Cells

A signature cell is a cell that can store a digital signature. The eForms designer configures a template for electronic signing by drawing one or more signature cells on the form. A signature cell can look just like the space for a signature on a paper form.

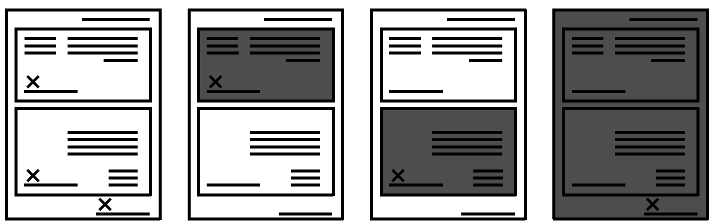



Like any cell, a signature cell has a tab position. The tab position determines where the cell appears in the tabbing order. You can select a signature cell like any other cell: by tabbing to the cell, or by clicking the cell with the mouse. When selected, a bold frame flashes in the cell's interior.

*For definitions of *italicized* terms, please see the glossary at the back of this manual.




Each form can have more than one signature cell, and each signature cell can sign different information. For example, a form that has two sections which are often filled out by two different people could have two signature cells. Each cell would sign only those cells in its respective section. You could even have a third signature cell which signs the entire form including the other signatures.



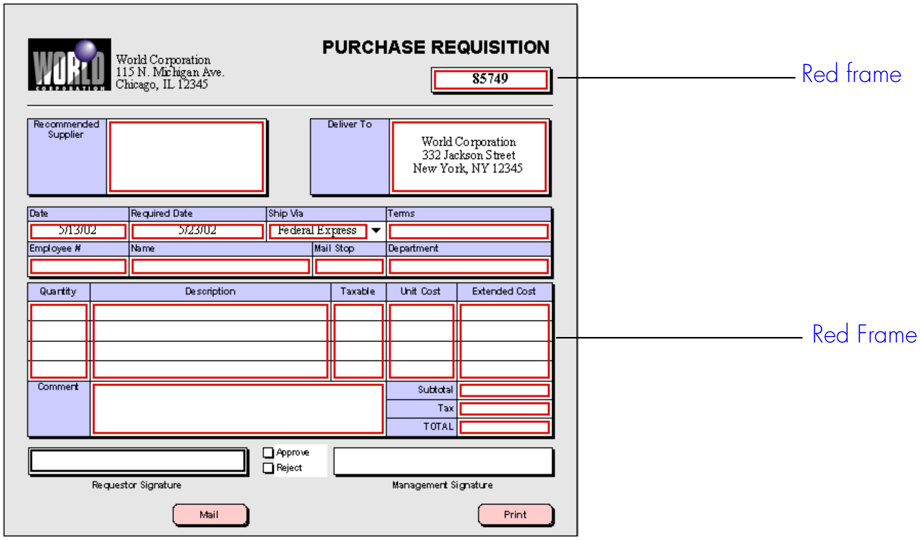
Form with three signatures. 1st signature cell signs 1st section. 2nd signature cell signs 2nd section. 3rd signature cell signs all cells.

In addition to signing cells, the eForms designer can configure a signature cell to sign attachments. For information on attachments, see Chapter 5, “Attachments.”

**To see which cells on a form are signed by a particular signature cell:**

1. Select the cell.
2. Choose **Edit > Signatures > Show Signed Cells**. This feature is useful if you’re about to sign a form and want to see which cells you’re signing, or if you’re viewing a form that’s already been signed and want to see which cells have been signed by the existing signature.

   With the Show Signed Cells option selected, Informed Desktop eForms draws a red frame around each signed cell when you select the signature cell. Only those cells which are signed (or will be signed) by the selected signature cell are revealed. To turn the Show Signed Cells option off, choose **Show Signed Cells** again.




Informed Desktop eForms also allows you to see whether or not any attachments are signed by a particular signature cell. If the selected signature cell does not contain an actual signature and the cell is configured to sign attachments, you'll see a red frame around the *Attachments window* and the paperclip indicator. This is to indicate that if you sign the *record* in that signature cell, all of the currently attached files are signed as well. If the selected signature cell does contain a signature and the cell is configured to sign attachments, you'll see a red frame around only those attached files that were present when the record was signed.

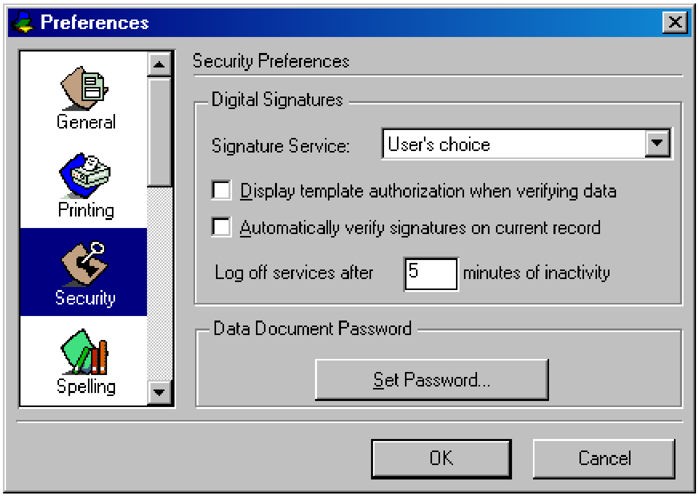
Once a record has been signed with a signature that signs attachments, you can add other attachments without compromising the digital signature. Desktop eForms knows which attachments a signature has signed. Once an attachment has been signed, you cannot delete it without first removing the signature.

## Signature Preferences

Informed allows you to specify various security preferences such as which signature service you want to use and whether or not to display template authorization information when you verify data.

**To set your signature preferences:**

1. Choose **Edit > Preferences** (Windows and Macintosh OS 9.1 and 9.2.2) or **[Application menu] > Preferences** (Macintosh OS X v10.1.3) to display the Preferences dialog box. Then click the Security icon in the list. The Security Preferences panel appears.




2. Select your preferred signature service from the ‘Signature Service’ drop-down list. If you don’t specify a service, you’ll be asked to select one each time you sign a form.

   If you want to display template authorization information when you verify data, select the ‘Display template authorization when verifying data’ checkbox to verify the authenticity of a template at the same time you verify a signature.

   If you want Informed Desktop eForms to automate the verification process for you, select the ‘Automatically verify signatures on current record’ checkbox. This automatically verifies all digital signatures on the form each time you display a different record in the form window. With this preference set, when you verify a signature, you can display the information about the person who signed the signature cell and the information about the person who authorized the template.

   For some signing services, once you’ve identified yourself, or logged in, the first time after launching Informed Desktop eForms, you’ll remain logged in until you quit Informed Desktop eForms. For security reasons, you can specify an automatic log off time by entering a value in the ‘Log off service after’ *field*.

3. Click **OK** to save your preferences.

## Signing Forms and Verifying Digital Signatures

You can sign forms that contain signature cells using Informed Desktop eForms' Sign command. You can sign one record at a time, or you can sign multiple records using the *Record List* window. See "Working with Multiple Records" on page 4-10 for more information.

**To sign a form:**

1. Select the signature cell.
2. Choose **Edit > Signatures > Sign**. As a shortcut, you can also double-click an empty signature cell or press Enter (Windows) or Return (Macintosh) to choose the Sign command. If you have more than one signing plug-in installed and the eForms designer has not configured the signature cell to use a particular service, you'll first be asked to select the service you want to use.


3. Select the service you want to use from the 'Sign using' drop-down list; then click **OK**. If you're not already logged on to the signing service, Informed Desktop eForms requests that you identify yourself. The dialog box you see is specific to the signing service used.

   After you've identified yourself, Desktop eForms creates the digital signature and stores it in the signature cell. The *signature icon* and your name appear in the cell. Depending on how the eForms designer configured the cell, you might also see the signing date next to the signer's name.


**Note** You should not trust the validity of the name and date displayed in a signature cell. Only by verifying the signature can you be sure of the date and the signer's identity. The signing date may or may not be available depending on the signing service you're using.

Once you've signed a form, Desktop eForms automatically locks all signed cells to prevent changes to the signed information. Although you can select a signed cell, you cannot change its value. The pencil in the collection information box provides a visual indication that the cell is locked.

## Verifying a Signature

After signing a form, anyone with the same signature service installed on their computer can verify the digital signature.

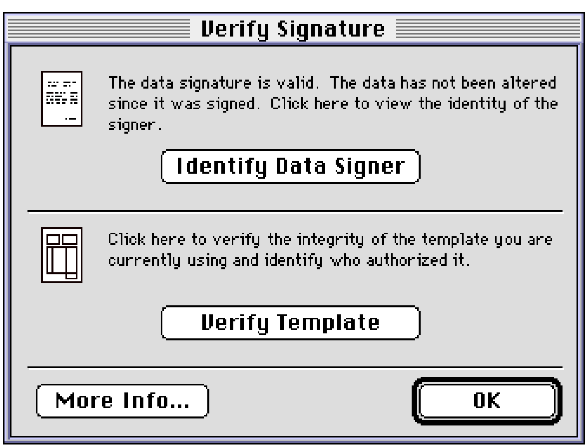
**To verify a signature:**

1. Select the signature cell.
2. Choose **Edit > Signatures > Verify**.

The verification process involves re-creating parts of the digital signature using current data, then comparing the results with the original signature. If they match, the signature is valid. This means that the person identified on the verification dialog box is truly the person who signed the form, and the signed data has not changed in any way.

If verification of a digital signature fails, you'll see a message dialog box indicating this. Verification fails if the originally signed data or the digital signature has been changed or tampered with.

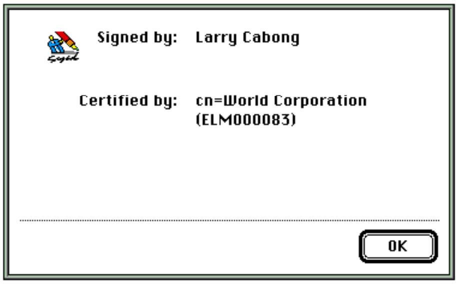
Like signing, you might be asked to identify yourself when you choose the Verify command. Depending on your setting of the 'Display template authorization when verifying data' preference, you'll see either a dialog box with additional options, or only the results of verifying the data signature. With the preference turned on, if the digital signature verifies successfully, Desktop eForms displays the dialog box that follows.



Using the controls on the Verify Signature dialog box, you can identify the person who signed the data, you can verify the template you're currently using, and you can display information about the template that was used when the data was originally signed.

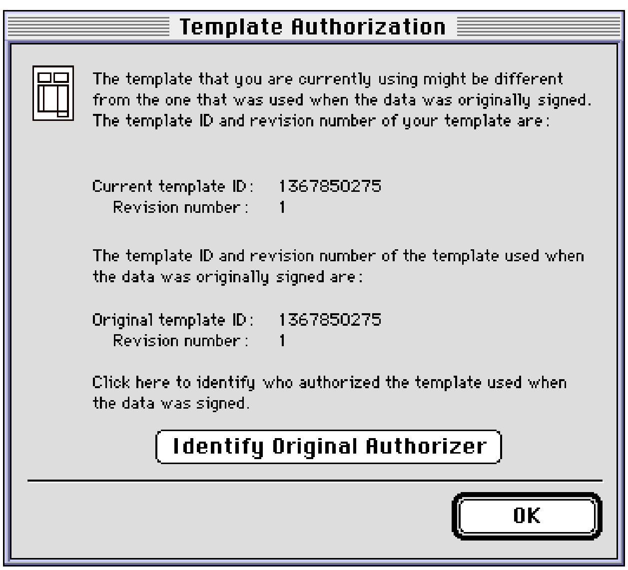
**To see the name of the person who signed the data:**

1. Click **Identify Data Signer**. Informed Desktop eForms displays the person's name in a dialog box.




If you click **Verify Template**, Informed Desktop eForms verifies your *current template* and displays the name of the person who authorized it. You can also verify your template by choosing **Edit > Signatures > Verify Template**. See "Verifying Templates" on page 4-12 for more information.

When a completed form is signed with Informed Desktop eForms, information about the version of the template being used and the person who authorized it is included with the signature. To view this information, click **More Info**. The Template Authorization dialog box appears.



The Template Authorization dialog box allows you to compare the template ID and the revision number of the template you're currently using with those of the template that was used when the data was originally signed (which may be different). You can see the name of the person who authorized the template that was used when the completed form was signed by clicking **Identify Original Authorizer**.

Having access to the names of the people who authorized both templates is helpful if there is discrepancy between the two templates. Using this information, you can quickly tell if either one of the templates was authorized by a person without proper authority.

If the 'Display template authorization when verifying data' preference is turned off, only the identity of the data signature (the dialog box that appears when you click **Identify Data Signer** on the Verify Signature dialog box) is displayed when you verify a signature.

For information about verifying multiple digital signatures at the same time, please see "Working with Multiple Records" on page 4-10 for more information.

## The Signature Icon

The signature icon is a standard icon that applications use to indicate the presence of a digital signature. With Informed Desktop eForms, the name of the signer, and optionally, the date that the form was signed, appears to the right of the signature icon.

The state of a digital signature can be determined only by verifying the signature. For most signing services, the signature icon is a visual indicator of the signature's validity.

When you view a signed record, the signature icon contains a question mark. This indicates that the validity of the signature is unknown. If the signature is successfully verified, you'll see a checkmark inside the signature icon. An invalid signature displays an "x" in the signature icon.

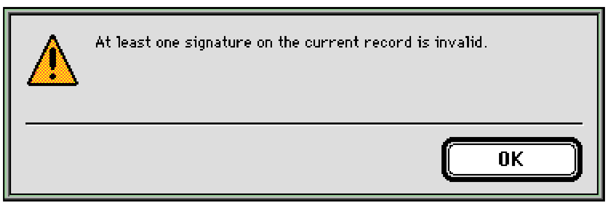

**Note** Each time you view a signed record, the signature icon contains a question mark (even if you've recently verified the signature). For example, if you verify the signature on record number 6 in your data document, the signature icon displays a checkmark. If you move to another record in the data document and then return to record 6, the signature icon contains a question mark again. This is because, while difficult, it's possible that the data could be tampered with between the time the signature was verified and the time you viewed the record again.

In order to sign forms and verify digital signatures, you must have the signing service and the appropriate Informed signing plug-in installed on your computer. If either of these are missing, you can still open forms that contain signature cells. However, rather than seeing the standard signing service-specific signature icon, a generic signature icon appears instead.

## Automatic Verification

Rather than manually verifying each digital signature as you find or browse through different records, Desktop eForms can automate the verification process for you. With the 'Verify signatures on current record' preference selected, Informed Desktop eForms automatically verifies all digital signatures on the form each time you display a different record in the form window. See "Signature Preferences" on page 4-4 for more information about setting this preference.

If Informed Desktop eForms detects an invalid signature during automatic verification, a message appears indicating this.




Since verifying a digital signature can take several seconds or more, you might want to use the auto-verification preference only if the computer you're using is fast.

## Working with Multiple Records

To work with more than one record, you can use the Record List window. The Record List window displays records in a list, making it easy to see the information on multiple records at a glance. The Record List window also makes it easy to sign multiple records or verify multiple digital signatures at the same time.

Like any cell, a signature cell can appear as a column on the Record List. For each record displayed, the name of the person who signed the record is shown in the signature cell's column.

| Total Amount | Paid By | Authorize Signature |
|---|---|---|
| $2,034.98 | Visa | Jane Ambrose |
| $3,999.99 | Visa | Lisa Martel |
| $7,999.98 | Cheque | Anne Webb |
| $534.99 | Mastercard | Tom Johnson |
| $3,999.99 | AMEX | Anne Webb |

If you need to sign more than one record, rather than signing each one individually, you can sign them all at once using the Record List.

**To sign multiple records:**

1. Find the records you want to sign and display them in the Record List.
2. Select the signature cell column, then choose **Edit > Signatures > Sign**. As always, you'll be asked to identify yourself in a manner according to the signing service you're using. Informed Desktop eForms then signs all records in the Record List.

You can verify multiple digital signatures in the same way.

**To verify multiple signatures:**

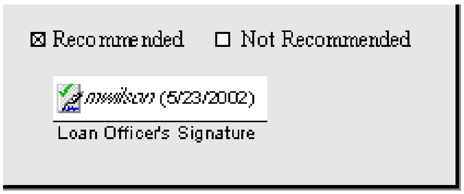
1. Select a signature cell column on the Record List window, then choose **Edit > Signatures > Verify**. Desktop eForms verifies the digital signatures for all signed records on the Record List. After all signatures have been verified, you'll see a message indicating the results.


If one or more digital signatures are found to be invalid, Informed Desktop eForms identifies the corresponding records by selecting them on the Record List window. An exclamation mark appears to the left of any invalid signatures on the Record List.

## Template Verification

Before distributing a template for use with Desktop eForms, the eForms designer can authorize it so that you can verify its authenticity. Otherwise, the template is vulnerable to tampering. For example, suppose a loan application must go through two levels of screening before it can be approved. A loans officer interviews the client and then selects the 'Not recommended' checkbox on the application form and signs it with a digital signature. The application then goes to the bank manager who has the final authority to approve or reject the loan application.

If a person wanted that loan to be approved, he could alter the template used by the bank manager so that the application appears to have been recommended by the loans officer. To do this, he would use Informed Designer to change the title of the 'Not recommended' checkbox field to 'Recommended,' and the 'Recommended' title to 'Not recommended.' When the bank manager views the data with the altered template, it might look like the following dialog box.




Verifying the loans officer's signature would show that the data on the form has not been altered because the value of the checkbox has not changed. However, by switching the cell titles on the template, the meaning or context of those values is different. The bank manager would be misled to believe that approval of the loan application was recommended.

The eForms designer can raise the level of security in the eForms process by using digital signatures to authorize the templates used in an organization. Authorizing templates provides the same authentication and tamper detection for templates as signing completed forms with Informed Desktop eForms does for form data.

## Verifying Templates

When a template has been authorized, you can verify it to ensure that it's valid before you fill out your form. Verifying a template reveals the details of the person who authorized it for use. If you verify a template and see that it was authorized by a person without proper authority, it may be an indication that the template is not authentic, and should not be used.

**To verify the template associated with the current data document:**

1. Choose **Edit > Signatures > Verify Template**. If you're not already logged on to your signing service, you may be asked to do so. Informed Desktop eForms verifies the template and displays the name of the person who authorized it.

If the signature fails to verify, you'll see a different message indicating that the template, or the authorization signature, has been altered.

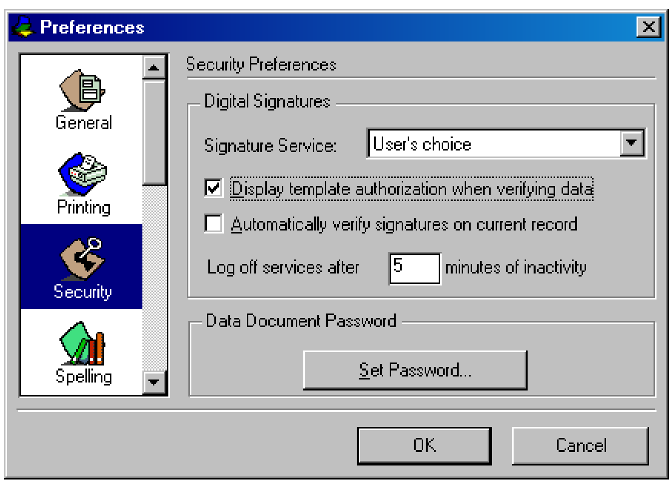
When you sign a completed form, information about the version of the template you're using and the person who authorized it is included with the signature. This information can be displayed later when verifying the signature on the completed form. See "Signing Forms and Verifying Digital Signatures" on page 4-6 for more information.

## Setting Template Authorization Preferences

You can set a preference that displays signature information about the person who authorized the template. This information is made available in the same dialog box that you use to verify the signature in a signature cell.

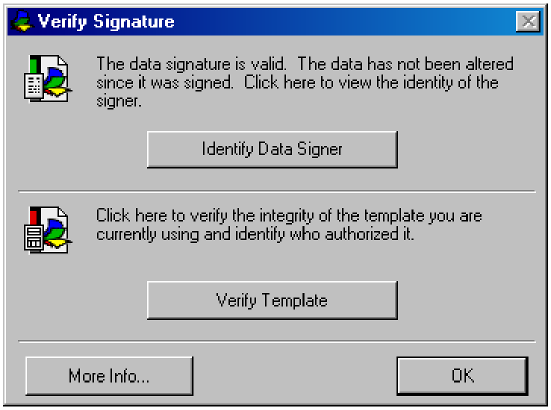
**To set your template authorization preferences:**

1. Choose **Edit > Preferences** (Windows and Macintosh OS 9.1 and 9.2.2) or **[Application menu] > Preferences** (Macintosh OS X v10.1.3) to display the Preferences dialog box. Then click the Security icon in the list. The Security Preferences panel appears.
2. Select the 'Display template authorization when verifying data' checkbox to verify the authenticity of a template at the same time you verify a signature.




3. Select the 'Automatically verify signatures on current record' checkbox to automatically verify all digital signatures on the form each time you display a different record in the form window.
4. Click **OK** to continue or click **Cancel** to close the dialog box without setting the preference.

With this preference set, when you verify a signature, you can display the information about the person who signed the signature cell and the information about the person who authorized the template.




Click **Identify Data Signer** to display signature information about the person who signed the signature cell. Click **Verify Template** to display signature information about the person who authorized the template. Click **More Info** to display information about the template and signature information for the person who authorized the template.

## Logging Off Your Signing Service

For some signing services, once you've identified yourself (logged in), you'll remain logged in until the signing service times out or until you quit Informed Desktop eForms. This allows you to sign forms and verify signatures without having to identify yourself each time. Do not leave your computer unattended once you've logged in to your signing service. Otherwise, a different person could use your computer to falsely sign forms using your identity.

**To log off your signing service:**

1. Choose **Edit > Signatures > Log Off Service**.

## Signing Plug-ins

Informed supports digital signature technology through the use of Informed signing plug-ins. At the time this documentation was prepared, Informed provided the following signing plug-ins:

- Informed's proprietary plug-ins:
  - I-Sign™ (Quadra)
  - I-Sign™ (POP)
  - I-Sign™ (IMAP)
- Entrust (Windows Only)
- CapiCom for Microsoft CSP (Windows only)

See the following sections for instructions on how to use each signing plug-in.

**Note** I-Sign signatures are not considered legally binding. If this is an issue, it is strongly recommended that you implement Entrust (Windows Only) or Microsoft CSP (Windows Only) digital signing services.

### I-Sign Plug-ins

I-Sign™ is Informed's proprietary, built-in signing service that lets you create and verify digital signatures based on a user ID and password. I-Sign is available in three versions: I-Sign (POP), I-Sign (IMAP), and I-Sign (Quadra).

Most signing services require additional software and have fairly complex administration procedures. I-Sign is included with Informed and is easy to set up and use. For I-Sign (POP), all you require is the I-Sign (POP) plug-in and a POP (Post Office Protocol) based mail system. For I-Sign (IMAP), you need the I-Sign (IMAP) plug-in and an IMAP (Internet Message Access Protocol) based mail system. I-Sign (POP) and I-Sign (IMAP) use your organization's email system as a way to verify a person's identity. If the user can log in to the mail system, then the user must be who he or she claims to be.

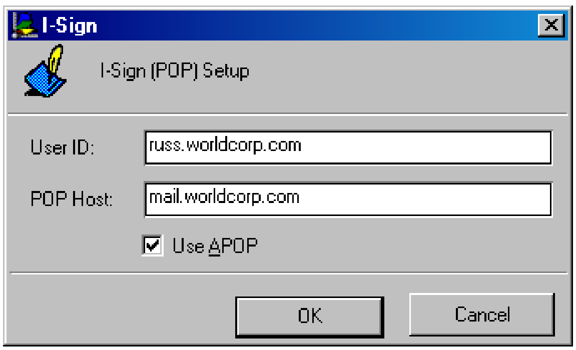
With I-Sign (Quadra), a user's signing identity is based on the user name and password he or she uses to log in to an Informed Quadra eForms Workplace.

## Configuring I-Sign (POP) and I-Sign (IMAP)

Before you can use I-Sign (POP) or I-Sign (IMAP) to sign a form, you must set up your I-Sign plug-in by specifying the address of your POP or IMAP host and your user ID. The following instructions apply to the I-Sign (POP) and I-Sign (IMAP) plug-ins.

**To configure I-Sign (POP) or I-Sign (IMAP):**

1. Choose **Edit > Preferences** (Windows and Macintosh OS 9.1 and 9.2.2) or **[Application menu] > Preferences** (Macintosh OS X v10.1.3) to display the Preferences dialog box.
2. Click the I-Sign (POP) or I-Sign (IMAP) icon in the list and click **Set Preferences**. The I-Sign setup dialog box appears.



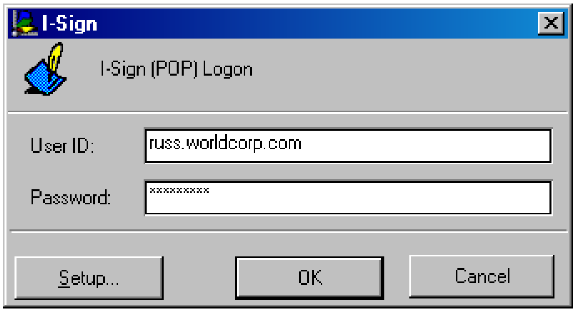

3. Enter your user ID and host name.
4. Select the ‘Use APOP’ (Authenticated Post Office Protocol) checkbox to encrypt your password; then click **OK**.

**Note** If you do not specify your POP or IMAP host and user ID using the Preferences command, Informed Desktop eForms displays the I-Sign Preferences panel and requests the information the first time you attempt to sign a form.

## Signing Forms with I-Sign (POP) or I-Sign (IMAP)

**To sign a form with I-Sign (POP) or I-Sign (IMAP):**

1. Choose **Edit > Signatures > Sign**. The I-Sign dialog box appears, requesting that you log on to your mail system by entering a password. You’ll see either the I-Sign (POP) or the I-Sign (IMAP) logon dialog box, depending on which of the two services the eForms designer used to configure the form.




2. Enter your password; then click **OK**.

   If you've logged on to your mail system successfully, your name appears in the signature field.

Once you log on to your mail system and sign a form, Informed Desktop eForms remembers your password until the signing service times out or until you quit the application. That way, if you choose to sign a form again, you do not have to re-enter your password. For security reasons, you must always log off your service if you're going to leave your computer unattended.

**To Log off I-Sign (POP) or I-Sign (IMAP):**

1. Choose **Edit > Signatures > Log Off Service**.

## Signing Forms with I-Sign (Quadra)

The I-Sign (Quadra) signing plug-in verifies your identity by using the user name and password with which you log on to an eForms Workplace.

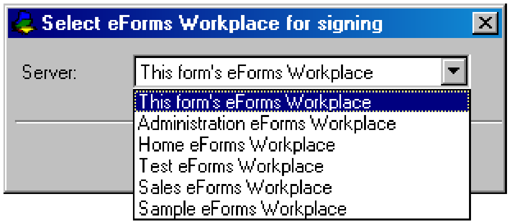
**Note** You do not have to configure the I-Sign (Quadra) plug-in before using it to sign a form.

**To sign a form using I-Sign (Quadra):**

1. Choose **Edit > Signatures > Sign**.

   If you have access to only one Workplace, your name automatically appears in the form's signature field.

   If you have access to more than one Workplace, the 'Select eForms Workplace for signing' dialog box appears. In the drop-down list, you'll see "This form's eForms Workplace" followed by the names of the eForms Workplaces to which your organization has given you access.




2. Select the eForms Workplace you want to use to sign the form. In most cases, you use the Workplace from which you obtained the form (“This form’s eForms Workplace”). If you’re not already logged on to the Workplace, a logon dialog box appears. Once you have successfully logged on to a Workplace, your name appears in the signature field.

   While you’re logged on to the I-Sign (Quadra) signing service, you can continue to sign forms from the same eForms Workplace without having to re-select the Workplace. If you download a form from a different Workplace, you’ll again be asked to select a Workplace for signing.

### Logging Off the I-Sign (Quadra) Signing Service

Once you log on to the I-Sign (Quadra) signing service and sign a form, your operating system remembers which Workplace you selected for signing and your Workplace logon information. When you quit Informed Desktop eForms, the operating system no longer has this information. For security reasons, you must always close Informed Desktop eForms if you’re going to leave your computer unattended.

## Entrust (Windows Only)

Entrust by Nortel is a scalable security product that can offer different strengths of security and different infrastructures for key management. In order for the Entrust signing plug-in to work, you must have a properly configured version of the Entrust client software installed on your computer. You must also have an Entrust profile—a unique personal identity for signing purposes.

When you sign a form, you’re asked to log in to Entrust with your password.

The Entrust Login dialog box also allows you to change your Entrust password and choose a different Entrust profile.

**To change your password:**

1. Click **Change Password**. A dialog box appears requesting that you enter your old password and then the new password.

**To choose a different Entrust profile:**

1. Click **Find Profile**. The method of finding a different profile depends on the method of key management used in your organization. Please contact your security or network administrator for more information.

After you sign a form or verify a digital signature for the first time, Informed Desktop eForms remains logged on to Entrust. That way, if you later choose to sign a form again, Informed Desktop eForms can do this without requesting that you log on again. Do not leave your computer unattended after you've signed a form. Otherwise someone else might use your signing identity to sign forms.

**To log off Entrust:**

1. Choose **Edit > Signatures > Log Off Service**.

**Note** The Entrust signing service has its own security preference settings that allow you to control when to automatically log off the service. Please see your Entrust documentation for more information.

## CapiCom for Microsoft CSP (Windows Only)

The CapiCom plug-in allows you to sign forms and verify signatures and templates using the CryptoAPI cryptographic standard. If you use a password when you sign forms, you must enter the password for each form that you sign.

### Signing

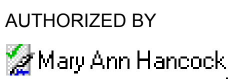
You can sign forms electronically with your digital signature.

**To sign a form:**

1. Enter the signature cell then either press the Enter key or double-click the signature cell. Depending on the security setting chosen when your signing certificate was created, one of the following three things happens:
   - The signature takes place without verification (low setting).
   - A dialog box appears asking for permission to sign (medium setting).

- A dialog box appears asking for a password followed by a dialog box asking for permission to sign (high setting).


2. In this case, click **OK** to complete the signature. Once the signature has been created it's placed in the signature cell and looks like the one below.

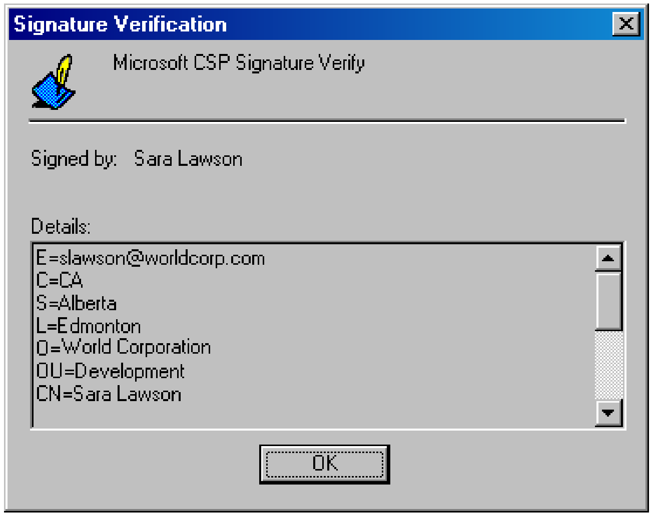



## Signature Verification

You can check the validity of a signature by viewing it.

**To verify a signature:**

1. Double-click an already signed cell. If the signature is valid, the following dialog box appears.




2. Click **OK** to dismiss the dialog box.

# 5 Attachments

In this chapter:

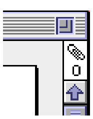

- The Attachments Window 5-2
- Windows and Macintosh File Types 5-3
- Attaching Files 5-4
- Extracting Attachments 5-5
- Opening Attachments 5-6
- Deleting Attachments 5-7
- Signing Attachments 5-7

# Attachments

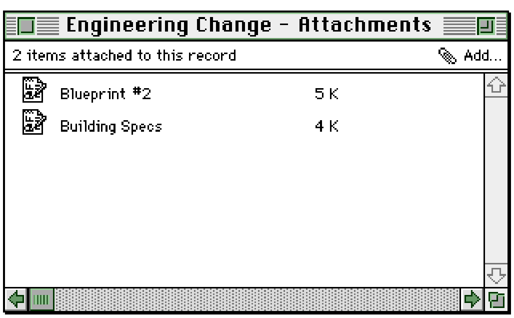
A paper form, often has associated documents or information attached to it using a paper clip. Informed Desktop eForms provides this same capability by allowing you to attach electronic documents to eForms. Any file, regardless of its size or content, can be attached to a *record**. Although not visible on the form, an attached file becomes part of a record (just like the information in each of the *cells*) and is stored with the record in the data document. If you mail a record to another person, the attached files are included. The recipient can extract the files so that they can be accessed or viewed using the appropriate application.

This chapter explains how you can attach files to records. The *Attachments window* is described as well as the Attach and Extract commands.

## The Attachments Window




Above the scroll bar along the right edge of the form window is a paper clip with a number below it. The number indicates the number of files that are attached to the *current record*. Files that are attached to a record are not visible on the form. Instead, attached files can be seen in the Attachments window.




**To show the Attachments window:**

1. Choose **Window > Show Attachments** or click the paper clip icon on the form window. To close the Attachments window, choose **Window > Hide Attachments** or click its close button.

The Attachments window is like any window; it can be resized and repositioned on the screen the usual way. Each attached file, along with its size, is listed in the Attachments window.

*For definitions of *italicized* terms, please see the glossary at the back of this manual.

## Windows and Macintosh File Types

Since Windows and Macintosh are two different operating systems, there are differences in the way that files are stored within each one. Although these details are not important to the typical computer user, it's useful to understand certain differences as they relate to Informed Desktop eForms' attachments feature.

The type of a file determines the type of information that is contained in the file. On Windows, a file's type is specified by the three character DOS extension in the file's name. For example a text file has the extension ".TXT."

On Macintosh, a file's type is stored separately from its name and is usually reflected in the appearance of its icon. Each file's type is represented as a four character code that is maintained by Macintosh. This code is usually not visible to the user. A text file on the Macintosh has a file type of "TEXT."

If you attach a file to a record on one platform (Windows or Macintosh), and then mail the record to a user on the other platform (Macintosh or Windows), Informed Desktop eForms has to know which file type to use when the file is extracted. For example, if a Windows user attaches a file with the ".TXT" DOS extension to a record, Informed Desktop eForms uses the "TEXT" type when a Macintosh user extracts the file.

When a file is attached or extracted on the Macintosh, Desktop eForms looks up the file's type or extension to find the corresponding extension or type. If a Windows file is being extracted, the file's DOS extension is looked up to find the corresponding Macintosh file type. If a Macintosh file is being attached, the corresponding DOS extension is looked up and stored so that it can be used later if a Windows user extracts the file.

A list including many of the common DOS extensions and Macintosh file types is built into Informed Desktop eForms. In addition to this list, the Macintosh user can add others using the PC Exchange control panel.

The information available in PC Exchange is utilized only if entries are found for the text file type and Informed's data document type. The table below shows the settings you should use.

| DOS Extension | Associated Application | Macintosh File Type |
|---|---|---|
| .TXT | SimpleText | Text document (TEXT) |
| .IFM | Informed Desktop eForms™ | Form data document (IDoc) |

For detailed information about PC Exchange, please see the documentation that came with your Macintosh computer.

# Attaching Files

To attach files to a record, you can drag files onto the paper clip or the Attachments window or use the Attach command.

**To attach a file by dragging:**

1. Click the file's icon and hold the mouse button.
2. Drag the file onto the paper clip or the Attachments window.
3. When a highlighted frame appears, release the mouse button.

   To drag and attach multiple files at once, select them all, then drag them onto the paper clip or Attachments window.

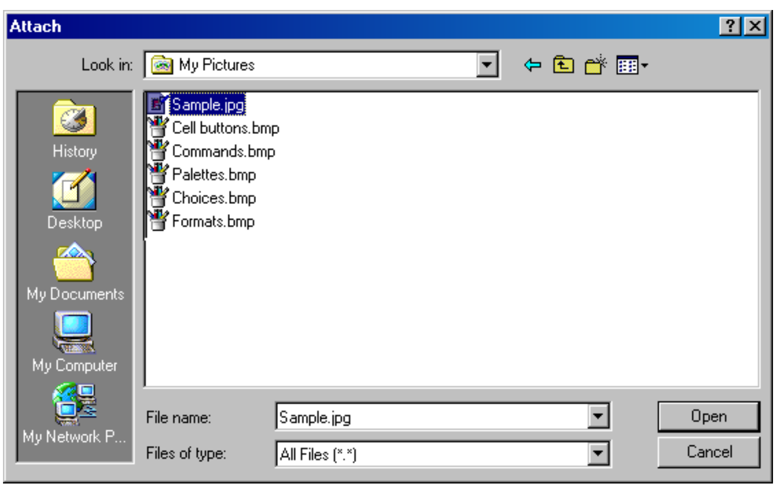
**To use the Attach command:**

1. Choose **File > Attach**

   Or

   Click the paper clip icon to display the Attachments window; then click **Add**. The Attach dialog box appears.

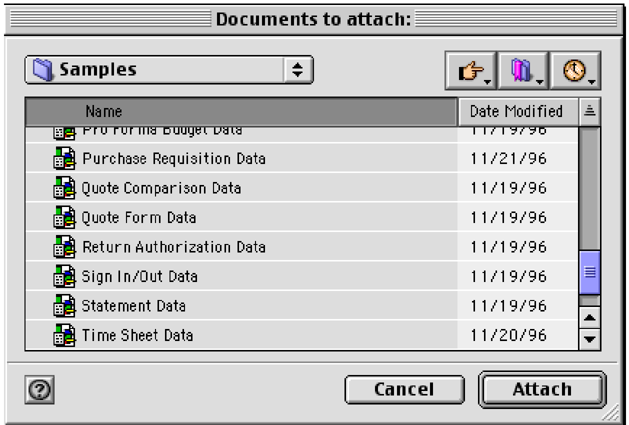
   On Windows, you'll see a dialog box similar to the following.




2. Select the file you want; then click **Open**. The file appears in the Attachments window.

**Note** If you hold the Ctrl or Shift keys you can select multiple files at one time.

Macintosh users see a dialog box similar to the one that follows.



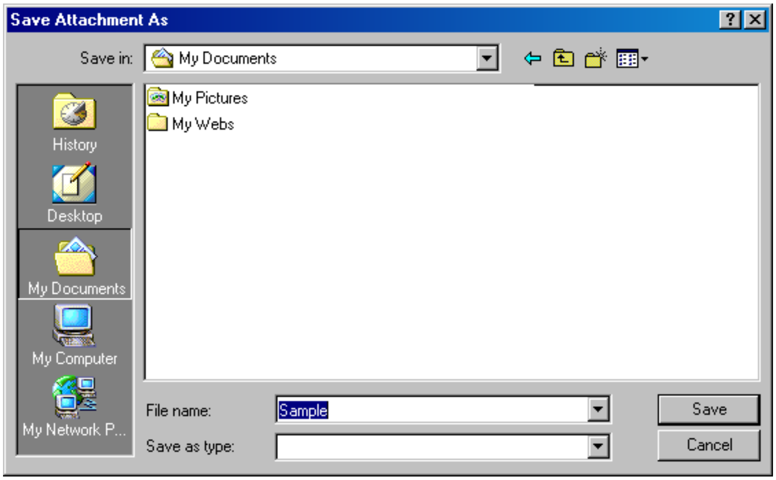

3. Select the file(s) you want; then click **Attach**. The number of attachments appears below the paper clip icon on the form.

## Extracting Attachments

When a file is attached to a record, the file's content is stored along with the record's data in the data document. Before you can access an attached file, you must extract the file. Extracting a file places a copy of the file at a location that you specify on your local drive.

**To extract an attachment:**

1. Select the file in the Attachments window.
2. Choose **File > Extract**. The standard Save dialog box for your operating system appears.




3. Enter a file name and select a location to store the file; then click **Save**.

**Note** You can extract multiple files at once if you first select each of them in the Attachments window before you choose the Extract command. For each of the selected files, you'll see the Save dialog box allowing you to specify the name and location of each file separately.

For Macintosh users with Macintosh OS 9.1 or later, you can drag an attached file from the Attachments window to a place on your local drive. You can select and drag more than one item at the same time.

## Opening Attachments

You must open the Attachments window in order to view and open attachments.

**To open an attachment:**

1. Click the paper clip icon to display the Attachments window.
2. Double-click the file to open it. On Macintosh, you can click and drag one or more attachments onto the desktop; then double-click each item for individual viewing.

## Deleting Attachments

You can delete attachments from your form.

**To delete an attachment:**

1. Click the file in the Attachments window.
2. Choose **Edit > Clear** or press the Delete key.

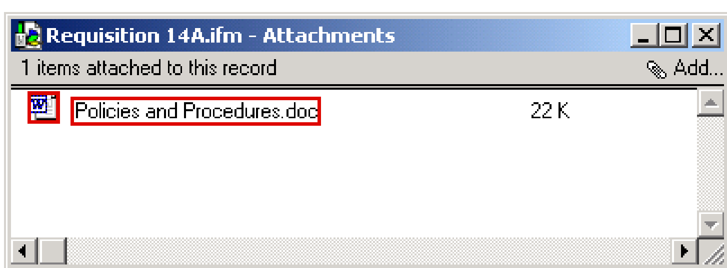
   If you're running a Macintosh computer with Macintosh OS 9.1 or later installed, you can also delete an attachment by selecting it in the Attachments window and dragging it to the Trash.

## Signing Attachments

A *signature cell* can sign all cells on a form or only certain cells. Furthermore, the *eForms designer* can configure a signature cell to sign attachments in addition to information in cells. A signature that signs attachments includes the contents of any attached files with the data in cells that are signed when you sign a record. That way the integrity of attached files can also be protected.

**To see whether or not attachments are signed by a particular signature cell:**

1. Select the signature cell.
2. Choose **Edit > Signatures > Show Signed Cells**.




If the selected signature cell is configured to sign attachments but does not contain an actual signature, you'll see a red frame around the Attachments window. This indicates that if you sign the record in that signature cell, all of the currently attached files are signed as well. If the selected signature cell does contain a signature and the cell is configured to sign attachments, you'll see a red frame around only the attached files that were present when the record was originally signed.

Once a record has been signed with a signature that signs attachments, you can add other attachments without compromising the digital signature. Desktop eForms knows which attachments a signature has signed and prevents you from deleting them.

# 6 Spell Checking

In this chapter:


- Setting Spelling Preferences 6-2
- Spell Checking Your Forms 6-4
- Spell Checking From the Record List 6-6

6

# Spell Checking

Informed Desktop eForms comes with a built-in spell checker. You can ensure the accuracy of the data entered in text and name *cells** by checking for spelling mistakes on all pages of a form or only on particular sections. Informed Desktop eForms' spell checker detects misspelled words, double words, and other questionable occurrences.

## Setting Spelling Preferences

By setting Informed Desktop eForms' spelling preferences, you can specify certain criteria used when spell checking is performed on your form. For example, you can choose which language dictionary to use and select various language options.

**To set Informed Desktop eForms' spelling preferences:**

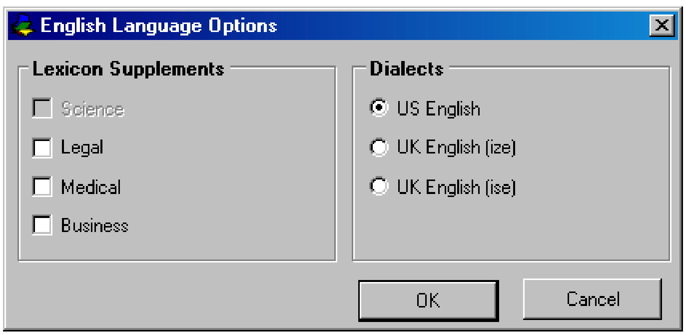
1. Choose **Edit > Preferences** (Windows and Macintosh OS 9.1 and 9.2.2) or **[Application menu] > Preferences** (Macintosh OS X v10.1.3) to display the Preferences dialog box. Then click the Spelling icon in the list. The Preferences dialog box changes to show the Spelling Preferences panel.


2. Click the 'Language' drop-down list and select the dictionary you would like to use for spell checking. Other languages appear only if you specify these dictionaries during a custom installation.

*For definitions of *italicized* terms, please see the glossary at the back of this manual.


By default, Informed Desktop eForms provides alternate spellings for questionable words when you perform spell checking. If you don't want to see alternate spellings, clear the 'Always provide alternative spellings' checkbox.

You can set options for each of the dictionaries by clicking **Language Options**. The Language Options dialog box appears. Depending on which language you've chosen, the dialog box displays different options. The following dialog box shows the options available for the English dictionary.




3. Select the appropriate options or checkboxes; then click **OK**.

**Note** The options you select on the Language Options dialog box do not take effect until you click the **OK** button on the Spelling Preferences panel.

If you move your Informed *folder* or change the location of the Spelling folder, Informed Desktop eForms cannot find the spelling dictionaries when you attempt to spell check a form. If this happens, the **Language Options** button on the Preferences dialog box changes to **Set Up Spelling**. Click this button to select the 'Spelling' folder in its new location.

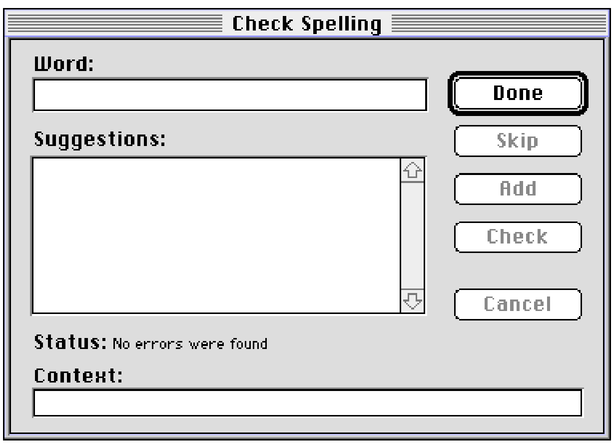
## Spell Checking Your Forms

Desktop eForms allows you to check the spelling of data entered in text and name cells. When a spell check is performed, Informed Desktop eForms checks words and names. Questionable words on your form (that is, words that are not found in the spell checking dictionary you've chosen) are flagged and displayed on the Check Spelling dialog box. The only exceptions to this are *display-only cells* and cells that have been signed with a digital signature. These cells are skipped when spell checking is performed.

**To check the spelling on your form:**

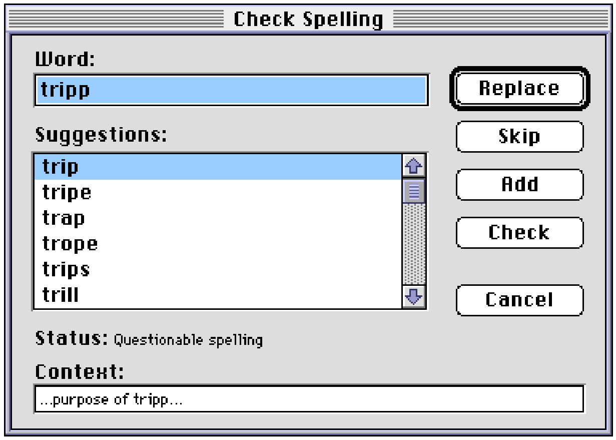
1. Choose **Edit > Spelling > Check.** There are three Check commands that you can choose:
   - **Check Current Record**: Checks the currently active form *record*.
   - **Check Collected Records**: Checks all records in the current collection.
   - **Check Selection**: Checks the spelling in a selected cell on the form.

   After you choose one of the submenu items, the Check Spelling dialog box appears.




If no questionable words are found, the fields and list in the dialog box remain blank, and only **Done** is available. Click **Done** to return to the record.

If a questionable word is found, Informed Desktop eForms flags it and displays it in the 'Word' *field*. If the 'Always provide alternative spellings' preference is turned on, Informed Desktop eForms displays a list of possible replacement words in the 'Suggestions' list. Below the list of suggestions is a status line that describes the type of questionable word. The 'Context' field at the bottom of the dialog box displays the questionable word in context.




When a questionable word is found, you can replace it with a word from the 'Suggestions' list, you can skip the word, you can add the word to the dictionary, or you can type a different word in the 'Word' field.

**To replace a questionable word with one of the alternate spellings:**

1. Select the alternative in the 'Suggestions' list; then click **Replace** or double-click the alternative word in the list. Informed Desktop eForms replaces the word and continues checking the form.

   You can skip a questionable word by clicking **Skip**. Clicking **Skip** passes over the word during the current spell check. The next time you spell check the form (without changing the questionable word), Informed Desktop eForms flags and displays the word again.

**To add a word to the dictionary:**

1. Click **Add**. This feature can be very helpful if you have an uncommon name or an unusual spelling that you enter into a name or text cell. For example, the last name "Brachi" is not very common and is not recognized in Informed Desktop eForms' English dictionary. Usually, the word "Brachi" would be questioned when you spell check the form. By adding the word to the dictionary, Informed Desktop eForms accepts it as a valid word.

When a questionable word is found, Informed Desktop eForms provides a list of alternative spellings in the 'Suggestions' list. If the word you're looking for is not in the list, you can check the dictionary for other alternatives. For example, if the word "surreal" was misspelled as "cureal," the list might show the following alternatives: cruel, cure-all, and churl. Since neither of these are the correct word, you can try to find other alternatives by changing the spelling in the 'Word' field and clicking **Check**. If you change the spelling to "sureal" and click **Check**, the 'Suggestions' list shows the correct spelling of "surreal" as an alternative.

When spell checking is completed, and you've dealt with any questionable words, the Check Spelling dialog box changes to show **Done**. Click **Done** to return to the form window.

It’s possible that changing the value in a cell by spell checking can cause an error based on the cell’s *check formula*. If this occurs, Informed Desktop eForms stops the spell checking operation and returns you to the form window. The cell with the invalid value is selected and an error message might be displayed (depending on the cell’s check formula).

If the invalid value causes an error to occur in another cell on the form (such as a *calculated cell*), Desktop eForms alerts you when spell checking is finished or, in the case of checking multiple records, when moving to the next record.

## Spell Checking From the Record List

As explained in Chapter 8, “Record Management,” the *Record List* window displays records in a list. This makes it easy to see the information for multiple records at a glance. You can also perform spell checking on records displayed in the Record List.


**To spell check from the Record List:**

1. Choose **Window > Show Record List** to display the Record List.
2. Select one or more records; then choose **Edit > Spelling > Check.**

   With the exception of the Check Selection command, the spell checking commands perform the same as when you spell check from the form window. Choose **Check Current Record** to check the *current record* (identified by a black rectangle in the left margin of the Record List window) and choose **Check Collected Records** to check all records in the collection.

   When you choose the Check Selection command with the Record List displayed, you’ll spell check a selection of records rather than a selection of text.

   After you choose one of the spell checking commands, the Check Spelling dialog box appears and Informed Desktop eForms begins checking the requested records. If Informed Desktop eForms is checking the collected records or a selection of records, you’ll see the current record indicator moving down the Record List as each record is checked in succession.
3. Click **Done** in the Check Spelling dialog box to return to the Record List window.

# 7 Annotation

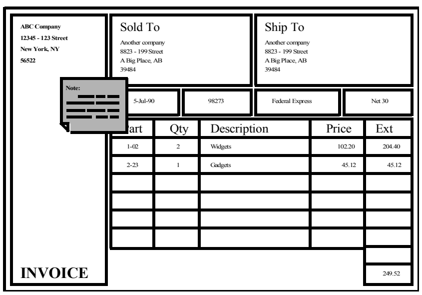
In this chapter:


- Placing, Moving, and Removing Notes 7-3
- Typing Notes 7-4
- How Design Changes Can Affect Notes 7-5

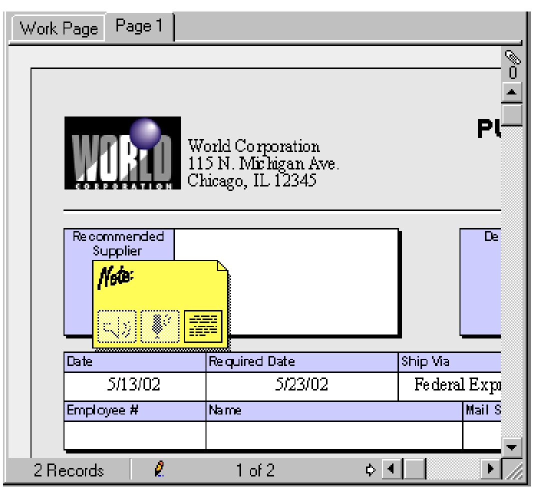
# Annotation

In addition to the information that you enter in each cell on a form, you can include annotated notes or comments using Informed Desktop eForms' *annotation** features. An annotated note is usually a comment of some sort that's intended to bring something important to the reader's attention. For example, you might attach a note to an invoice to instruct the shipper to hold the order until the customer's account is paid.

Traditionally, notes have been hand written either directly on the paper form, or on small pieces of yellow paper (sometimes called 'yellow stickies') and then placed on a form.




Informed Desktop eForms uses the 'yellow sticky' analogy to show annotated notes. You can place and position notes on any form. A note appears on your screen much as a small piece of yellow paper appears attached to a paper form.




*For definitions of *italicized* terms, please see the glossary at the back of this manual.

The familiar appearance of a note is intended to make the distinction clear between a note and the information on the form. An annotated note should contain auxiliary information that's associated with the form to which it's attached. For example, unlike the order date on a purchase order form (which appears on every purchase order form), a comment such as "Please get approval from Jane before submitting this purchase order." applies specifically to one particular form only.

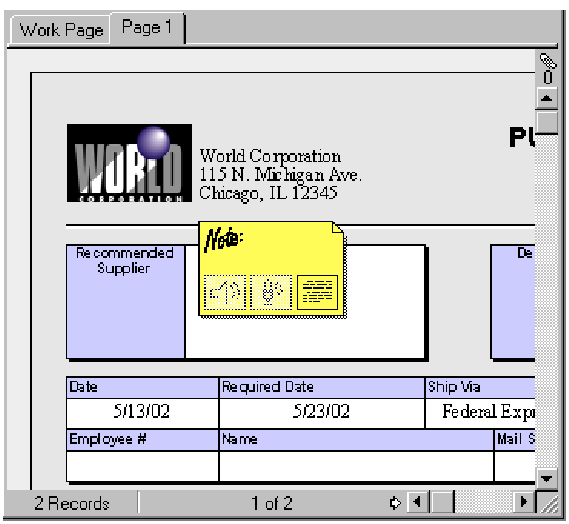
The remaining sections of this chapter describe the annotation features of Informed Desktop eForms. You'll learn how to place and position notes. You'll also learn how notes are affected when the design of a form is changed by the *eForms designer*. For information about importing and exporting notes, see Chapter 13, "Exchanging information."

## Placing, Moving, and Removing Notes

Desktop eForms allows you to place and position as many notes as you like.

**To place a new note:**

1. Find the *record* that you want to annotate and bring the form window to the front.
2. Choose **Edit > Place Note** to display a blank note that is centered in the form window.




You can move a note to any position on your form by clicking and dragging it with the mouse. You should always position a note next to the information to which it specifically applies.

For example, if you enter a note as a reminder that a customer's telephone number has changed, you should position the note next to the new number. Once you've created a note, it automatically appears when you see the record in the form window.

**To remove an existing note:**

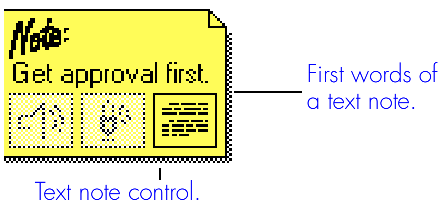
1. Click the note. The note color turns blue to indicate that it's selected.
2. Choose **Edit > Clear** or press the Delete (or Backspace) key.

**To transfer a note to the Clipboard:**

1. Select the note and choose **Edit > Cut** to remove the note and place it on the Clipboard.
2. After changing pages, choose **Edit > Paste** to transfer the note from the Clipboard back onto a different page on the form.

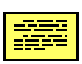
## Typing Notes

When you've placed a note on a form, you can enter the text of the note.

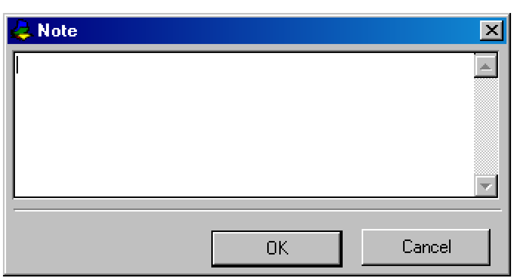



Informed Desktop eForms displays the first few words of a text note on the note. If the entire note doesn't fit in the space provided, you'll see only the first few words followed by an ellipsis ('...').

**To enter, view, or change the text of a note:**



1. Click the note's Text control. The Note dialog box appears.
2. Type a note in the blank window.



A text note can be as long as you like. If you type past the end of a line, or if you press the Enter (Windows) or Return (Macintosh) key, Informed Desktop eForms starts a new line for you. If you enter more lines than the *field* can display, you can use the scroll bar to scroll the text up or down.

3. Click **OK** to add the note to your form.

## How Design Changes Can Affect Notes

It's quite common for the design of a form to be revised and updated by the eForms designer. Certain design changes can affect the data that's already stored in a data document (deleting a cell, for example). Other changes can affect notes that have been placed on the forms. For example, if a note is placed next to the right edge of a form, and the eForms designer reduces the form's width, the note automatically slides back on the page when the form is opened with Informed Desktop eForms.

Notes are affected when a *template* is changed by the following:

- Size reduction of the form.
- Page removal from the form.

If the eForms designer removes a page of a template that contains notes, the notes themselves are moved onto the *work page* the next time the data document is opened with Informed Desktop eForms. You can then move the note from the work page back to a numbered page. For information on how to move notes between pages, see "Placing, Moving, and Removing Notes" on page 7-3. For an explanation of the work page, see "The Work Page" on page 3-17.

# 8 Record Management

In this chapter:


- Collection of Records 8-2
- The Record List 8-3
- Adding New Records 8-16
- Editing Existing Records 8-16
- Reverting Records 8-17
- Clearing Records 8-17
- Duplicating Records 8-17
- Finding Records 8-18
- Finding All Records 8-23
- Sorting Records 8-23
- Omitting Records 8-24
- Browsing Through Records 8-25
- Removing Records 8-26
- Creating Tags and Recalling Collections 8-27
- Record Information 8-29

# 8 Record Management

Informed Desktop eForms allows you to store and manipulate completed forms using its built-in database. You can enter new forms or change existing forms. You can also find, duplicate, remove, print, sort, and total forms.

Chapter 3 explains how to fill out a form. In this chapter you'll learn about storing and retrieving completed forms or *records** using the commands found in the Database menu.

You'll also learn about how the *Record List*, lists and manages multiple records. The List menu contains commands that let you to set up and customize the Record List to suit your own personal preferences. For information about printing forms, please see Chapter 9, "Printing Forms."

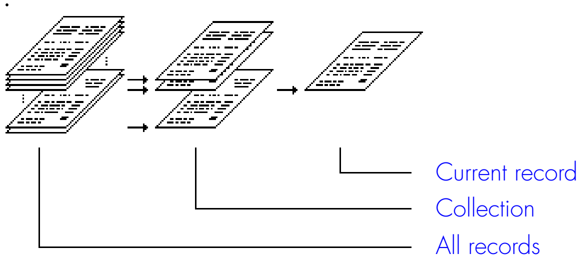
## Collection of Records

The information that you enter to fill out forms is stored in form data documents. Each data document contains a database that can store the information for one or more completed forms. The set of information (such as name, address, and phone number) that you enter to complete a single form is called a record.

The record that you see in the form window is called the *current record*. This is the record that you can edit by typing in each cell.

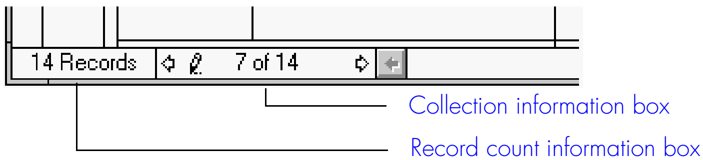
The current record is always a member of the current *collection of records*. The collection represents a group of records that can consist of one record, all records, or a particular set of records in your data document. By using the Find, Find All, Omit, and Omit Others commands, you can add or remove records from the collection. Certain commands such as Print and Send allow you to select the current record or those records in the collection. And as you'll learn later in this chapter, the Record List displays a list of the collected records. The figure below illustrates all records, the collected records, and the current record.

.




*For definitions of *italicized* terms, please see the glossary at the back of this manual.

Positioned at the lower left corner of the document window are two information boxes. They show you the number of records in the data document, the number of records in the collection, and which record in the collection is the current record.




The ‘7’ in the collection information box identifies the current record. It means you’re looking at the seventh record in the collection. The ‘14’ indicates the number of records in the collection. You can use the Record List, or the Next, Previous, First, and Last commands to browse through the records in the collection. For more information, see “Browsing Through Records” on page 8-25.

## The Record List

When you open a data document, the form window automatically appears displaying the contents of the form. In this window, you fill out and edit records. The form window is not always suitable for browsing through different completed forms since you can see only one record at a time.

To work with more than one record, Desktop eForms provides the Record List window. The Record List window displays records in a list, making it easy to see the information of multiple records at a glance. The following figure shows a typical Record List window.


You can move the Record List to any position on your screen by clicking and dragging the window’s title area. To view a different area of the Record List, click the scroll bar controls.

**To show the Record List:**

1. Choose **Window > Show Record** to view record list details. While the Record List window is the front-most window, this command changes to Hide Record List.

The Record List window can be customized to suit your own personal preferences. You can choose which columns appear on the Record List and in what order they appear. You can sort any column or calculate a column’s total or average.

You can also save different Record List formats so you can easily switch between your most common formats. For more information about Record List Formats, see “Saving Record List Formats” on page 8-14. You can even print the Record List to produce summary reports of your records. For information on printing the Record List, see Chapter 9, “Printing Forms.”

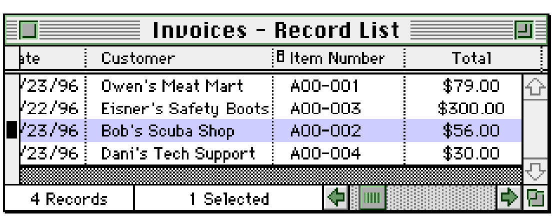
## The Record List

Information on the Record List is divided into rows and columns. Each row represents one record. Each column corresponds to one cell on the form. You can choose which columns appear on the Record List and their order and alignment.

The Record List displays only those records in the current collection. As you use commands that affect the collected records, the contents of the Record List changes accordingly. For example, suppose that you use the Find command to find all invoices with a total amount greater than $500. After searching, Informed Desktop eForms replaces the contents of the collection—and therefore the Record List as well—with those records found. The information box near the lower left corner of the window indicates how many records are on the Record List.

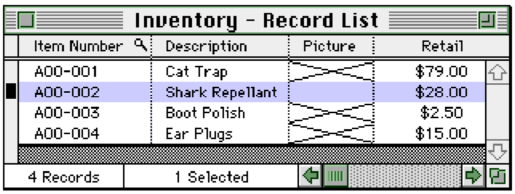
Although Informed Desktop eForms allows you to show picture *cells* on the Record List, the pictures themselves do not appear. Instead, if a picture exists for a particular record, an ‘X’ shows on the corresponding row on the Record List. Therefore, at a glance you can see which records have pictures and which do not.


You can show *field* cells and table cells in the Record List window. A field cell has one value, whereas a table cell can have multiple values, one for each row in the table. To indicate that a column represents a table cell, Informed Desktop eForms draws a small table icon next to the column heading on the Record List.



Even though a table cell can have more than one value, only the value found on the first row of the table appears on the Record List. In the previous table, each row represents one invoice. The values in the Item Number column correspond to the values found on the first rows of the Item Number column on the different completed invoices. To see the remaining rows of the table, view the record in the form window.

The *eForms designer* can choose to index a cell so that searching with Informed Desktop eForms is faster. See "Indexed cells" on page 8-23 for more information. For *indexed cells* that are displayed on the Record List, you'll see a small magnifying glass symbol near the right edge of the column title.




You cannot change which cells are indexed with Informed Desktop eForms.

## Adding Cells to the Record List

When you add a cell to the Record List, a column is created for the cell. The name of the cell is used for the column heading. The values in the column correspond to the cell values on the records in the form.

**To add a cell to the Record List:**

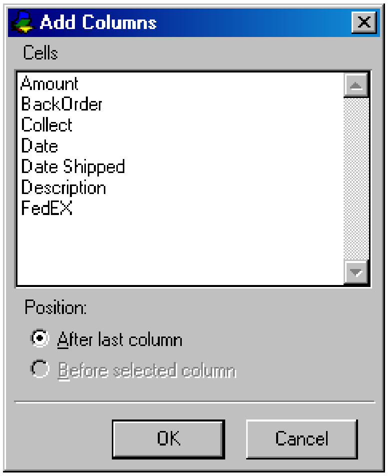
1. Click a cell.
2. Choose **Cell > Add to Record List**.
3. Choose **Window > Show Record List** to display the record list.
4. Choose **Window > Hide Record List** to hide the record list.

## Adding and Removing Columns

Informed Desktop eForms allows you to choose which columns appear on the Record List. Initially, the Record List contains columns for up to 10 cells on the form; indexed cells first, then the remaining cells by *tab order*. You can add columns to or remove columns from the Record List.

**When the Record List window is open, you can add columns from a list of cell names by:**

1. Selecting **List > Add Columns** to display the Add Columns dialog box.




The list contains the names of all cells on your form.

2. To add a cell to the Record List, click the cell name. If you want to add more than one column, select each cell while holding the Control (Windows) or Command (Macintosh) key. Pressing the Shift key while clicking selects the range of cells starting with the first cell currently selected and ending with the last one you click.

Specify the position of the selected cell(s) by selecting one of the ‘Position’ options.You can position the selected cell (or cells) either at the end of the Record List after the last column, or between two existing columns.

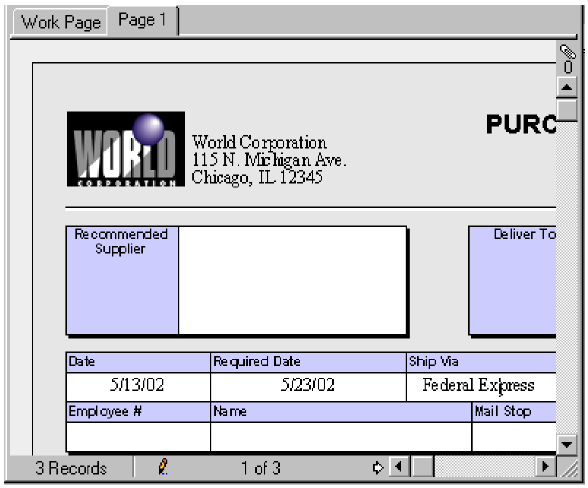
Like Add Columns, the Add to Record List command adds a new column to the Record List. However, instead of choosing a cell from a list of cell names, you select a cell on the form window. This command is more convenient if you don’t know how the cells on your form have been named.

**To use the Add to Record List command:**

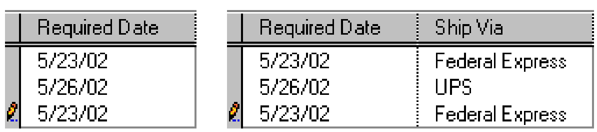
1. From the form window, click in the cell that you want to add.

2. Choose **Cell > Add to Record List**. Informed Desktop eForms adds the selected cell to the end of the Record List.

Click to select a cell on the form window
(in this example, the 'Ship Via' cell was clicked).




Then choose Add to Record List.



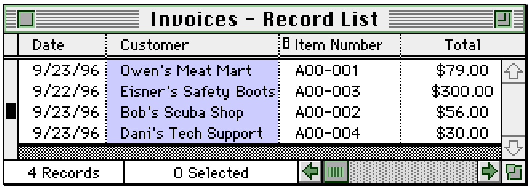

You can show as many columns on the Record List as you like. You can even show the same column more than once. If the total width of all columns exceeds the width of the Record List window, use the scroll bar along the bottom edge of the window to scroll the columns in either direction.

**To remove a column from the Record List:**

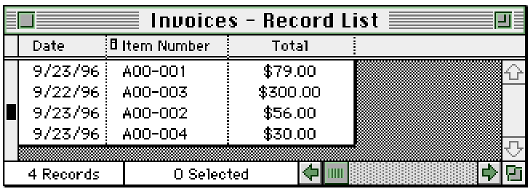
1. Select the column by clicking its title area on the Record List.
2. Choose **List > Remove Column**. The column no longer appears on the Record List.

**Note** Removing a column from the Record List does not remove data from the database of records.

Select the column to remove.




.Then choose Remove Column.




The remaining columns on the Record List automatically move to occupy the original position of the removed column.

## Changing a Column's Position

You can change a column's position on the Record List.

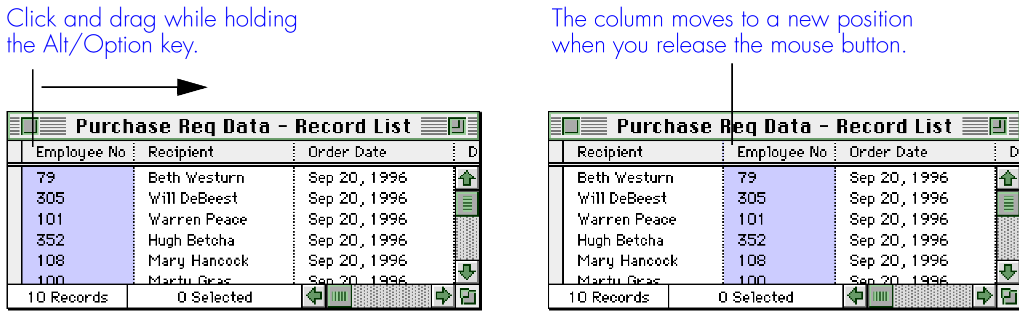
**To change the position of a column on the Record List:**

1. Select the column you want to remove.
2. Choose **List > Remove Column**.
3. To insert the column to the left of an existing column, select the existing column.

   To place the column in the rightmost position, do not select a column.
4. Choose **List > Add Columns**. From the list, select the cell (the name of the column) that you removed.
5. To insert the column to the left of the column you selected in step 3, select the 'Before selected column' option.

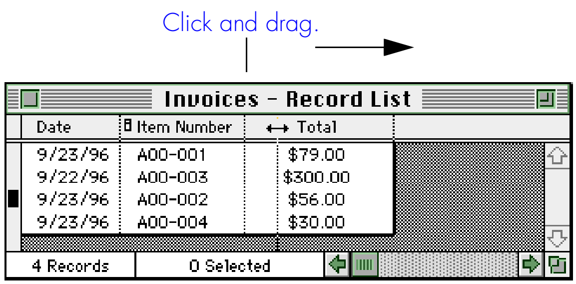
   To place the column in the rightmost position, select the 'After last column' option.
6. Click **OK**.

   As a shortcut, you can click and drag a column's heading to the left or right while holding the Alt (Windows) or Option (Macintosh) key. When you release the mouse button, the column is placed in the new position.




## Changing a Column's Width

When you add a new column to the Record List, Desktop eForms automatically sets its width to approximately one inch. You can change the width of a column by dragging the right edge of its heading.



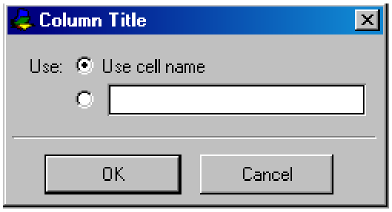

When you drag a column divider, only the size of the column on the left changes. The columns on the right, if any, move with the position of the column divider. If you hold the Control (Windows) or Command (Macintosh) key while dragging a column divider, instead of moving the columns on the right, Desktop eForms changes the widths of both adjacent columns.

## Changing a Column's Title

You can change the title of a column on the Record List from its original cell name to a custom name.

**To change a column's title:**

1. Click the column heading on the Record List.
2. Choose **List > Column Title** to display the Column Title dialog box.




3. Type in a new name in the space provided.

4. When you have entered the name, click **OK**. The new name replaces the cell name on the Record List. If you want to revert and use the cell name, select the 'Use cell name' option; then click **OK**.

## Changing a Column's Alignment

You can change the alignment of each column on the Record List to improve the readability of the records. For example, it's common to align the right sides of numbers in a column so that the decimal points line up. Or you may want to center a column of dates. Each column on the Record List can be left, center, or right aligned.

| Invoice No | Date | Total |
|:---|:---:|---:|
| 00101 | 6-Jul-90 | $348.50 |
| 00102 | 22-Jul-90 | $247.25 |
| 00103 | 26-Aug-90 | $289.00 |
| 00104 | 29-Aug-90 | $90.00 |
| 00105 | 5-Sep-90 | $232.25 |
| 00106 | 11-Sep-90 | $302.50 |

**To change a column's alignment:**

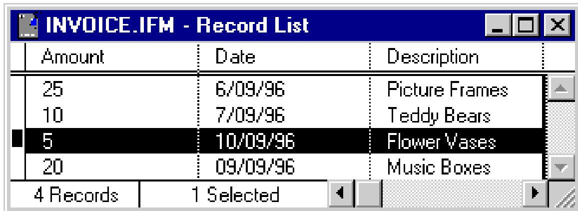
1. Select the column by clicking its heading.

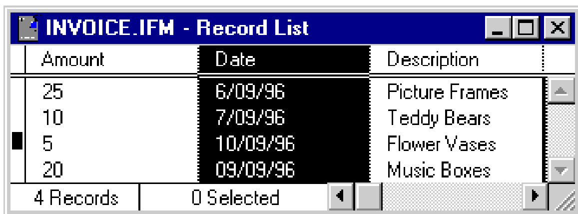
2. Choose **List > Alignment > (left, center, or right)**. To change the alignment of multiple columns, select them all at the same time, then choose the new setting.

## Selecting Records and Columns

You can select information on the Record List by clicking rows or columns. Many of the commands described later in this chapter can apply to information that is selected on the Record List. For example, you can remove a record by selecting it on the Record List, then choosing **Database > Remove**. Or you can sort a column by selecting it and choosing **Sort**.

Clicking a row selects the corresponding record, whereas clicking a column's heading selects the entire column. You can't select a row and a column at the same time.




When you click to select a row or column, Informed Desktop eForms automatically deselects all others that are currently selected. Pressing the Ctrl (Windows) or Command (Macintosh) or Shift keys while clicking allows you to select more than one row or column at the same time. You could, for example, select five records and then print them using the Print command. If you hold the Ctrl/ Command key, Desktop eForms selects the corresponding row or column in addition to those currently selected. If you press the Shift key instead, all columns or rows between the first one currently selected and the one clicked on (inclusive) are selected.

**Note** The small rectangular region to the left of the column headings on the Record List window has a special purpose. As a shortcut, clicking it deselects all rows and columns on the Record List.

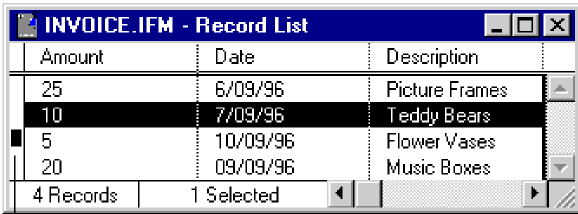
You may also use **Edit > Select All** to select all records on the Record List.

As you select and deselect records on the Record List, the right information box along the bottom edge of the window changes to display the current number of selected records.

## Current Record Indicator

As defined earlier in this chapter, (see “Collection of Records” on page page 8-2), the current record is the one that appears in the form window. When you browse through the collected records using commands such as Next, Previous, First, and Last, the current record changes to reveal each different record in the form window.

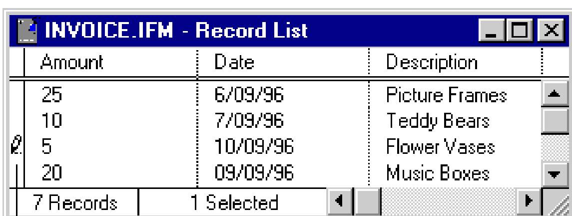
On the Record List window, the current record is identified by a small rectangular icon along the window’s left edge.




Current record indicator.

With the Record List window active, you can change the current record by clicking in the current record indicator area next to the desired record. You can also change the current record by double-clicking a different row on the Record List. However, in addition to changing the current record, double-clicking brings the form window to the front.

While you edit the current record on the form window, if that record is visible on the Record List, Desktop eForms shows a pencil icon in place of the current record indicator.




Pencil indicates that the current record is being edited.

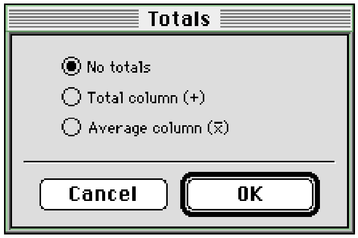
As you change the record by typing in each cell, the corresponding columns on the Record List are not updated. Informed Desktop eForms updates the contents of the Record List only when you accept the record by pressing Enter.

## Totaling or Averaging a Column

Informed Desktop eForms can calculate the total or average of a column on the Record List. This feature is useful for summarizing the information in a collected set of records. For example, after finding all overdue invoices, you could total the amount due column to obtain the total amount overdue.

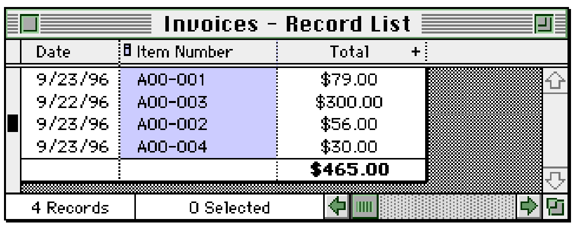
**To calculate totals or averages for each of the selected columns on the Record List:**

1. Select the desired column or columns.
2. Choose **List > Totals**. The Totals dialog box appears.




The Totals dialog box shows the current setting of the selected columns (totaled, averaged, or no totals). If you've selected two or more columns that are configured differently, the Totals dialog box shows no setting.

3. Choose a setting; then click **OK**. Informed Desktop eForms calculates the results and displays them below the last record on the Record List. Each value appears bold and aligned according to the column's alignment.




To indicate that a column is totaled or averaged, Desktop eForms draws a small symbol to the right of the column's heading. Totaled columns have a plus sign, whereas averaged columns have an 'X' with a bar over it (the statistical symbol for average).

While totals are calculated, progress information is displayed on the totals line. The amount of time required to calculate the results depends on the number of records on the Record List. Note though, that Desktop eForms lets you do other work at the same time. For example, you can edit a record while a column is totaled.

Although you can total or average any column on the Record List, the resulting value is informative only if the column contains numeric, boolean, or checkbox values. If a column represents a non-number cell, Desktop eForms attempts to convert each cell value to a numeric equivalent as the total or average is calculated. The result is the sum of those values that look like numbers.

For boolean values and checkboxes, the values Yes, True, On, and a checked checkbox become 1, whereas the values No, False, Off, and an unchecked checkbox become 0. Therefore, you can count the number of Yes, On, True, or selected checkbox values in a column by totaling the column.

**Note** When you total or average a column that represents a table cell (for example, the quantity sold cell on tabular invoice), the resulting total or average is calculated based on all values on all rows of the records on the Record List. It's therefore possible, and often likely, that a total or average won't match the values above it on the Record List. This is because the Record List shows only those values found on the first row of each record on the Record List. See "The Record List" on page 8-3 for more information.

### Showing and Hiding the Totals Line

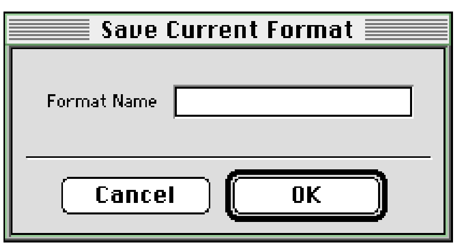
When you total or average a column, Desktop eForms automatically shows the totals line on the Record List. You can manually show and hide the totals line using the Show or Hide Totals command under the List menu. For example, you may want to temporarily hide the totals when printing the Record List.

## Saving Record List Formats

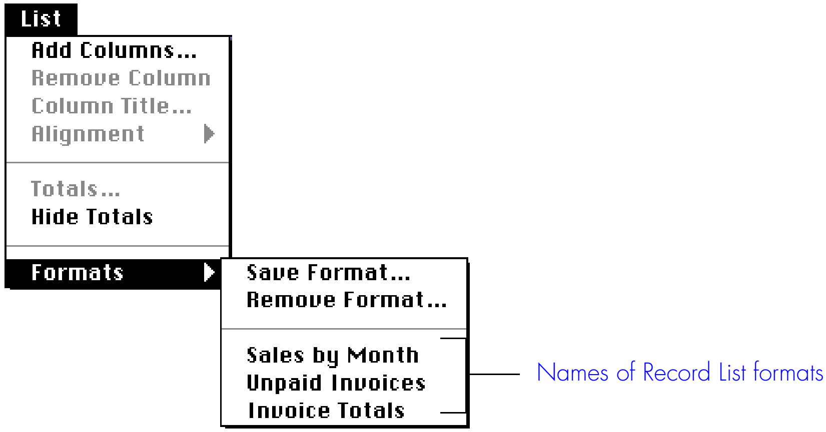
As described earlier, you can customize the Record List by choosing which columns appear in it and what position they occupy. You can also change the names and widths of columns, and calculate totals or averages for any column. The configuration of columns that you specify is called a Record List format. These formats are useful if you need to print different summary reports from the Record List. Rather than configuring a special format each time you want to display the Record List in a particular way, Desktop eForms allows you to save your custom formats so that you can instantly switch the Record List to the format you want.

**To save the new format after configuring the Record List:**

1. Choose **List > Formats > Save Format** to display the Save Current Format dialog box.




2. Enter the name of your Record List format in the field and click **OK**. Informed Desktop eForms saves the current Record List format and displays the format name in the Formats submenu.



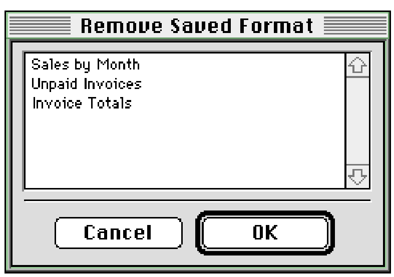

To switch from one format to another, choose the format name from the Formats submenu and Informed Desktop eForms displays the Record List in the appropriate format.

## Removing a Record List Format

You can remove one or more Record List formats at a time.

**To remove Record List formats:**

1. Choose **List > Formats > Remove Format** to display the Remove Saved Format dialog box.




2. Select the formats that you want to remove and click **OK**. Informed Desktop eForms removes the selected formats from the Formats submenu.

## Adding New Records

When you create a new, untitled data document using **File > New Document**, Informed Desktop eForms automatically adds a new blank record, ready to be filled out. However, you may need to add a record to an existing data document. The new record is added after the last record in the data document.

**To add a new record to an existing data document:**

1. Choose **Database > Add Record**. Informed Desktop eForms creates a new blank record, fills in default values and *auto-incrementing* cells, and then selects the first cell on the form.
2. While the new record is active you can enter information to complete the form. A small pencil in the collection information box indicates that the record is active. For complete instructions on how to fill out a form, please see Chapter 3, "Filling Out Forms."
3. When you finish filling out the new form, press the Enter key on the numeric keypad. Pressing Enter indicates to Informed Desktop eForms that you've finished entering information and that the record should be accepted.

## Editing Existing Records

You can edit records after they've been created.

**To edit an existing record:**

1. Find the record using either the Find command or the browse commands. See "Finding Records" on page 8-18 and "Browsing Through Records" on page 8-25 for more information.
2. With the form window in front, activate the record by pressing Tab or clicking to select a cell. While the record is active, you can move from cell to cell and enter or change information. A small pencil in the collection information box indicates that the record is active.
3. When you're finished editing the record, press the Enter key on the numeric keypad, or Ctrl + Enter (Windows), or Command + Return (Macintosh) to accept the record. For complete instructions on how to fill out or edit a record, please see Chapter 3, "Filling Out Forms."

## Reverting Records

If you make unintentional changes to a record's information you can use the Revert command. The Revert command reverts the current record to its most recent version prior to last activating the record. If you revert a newly created record, Informed Desktop eForms clears the record to its blank state and fills in any default values.

**To revert the current record:**

1. Choose **Database > Revert**.
2. Click **OK** for confirmation before completing the operation.

## Clearing Records

You don't have to remove a record to erase information. Instead, you can clear information from a record.

**To erase the information from a record:**

1. Choose **Database > Clear Record**. If the form window is in front, Clear Record clears the current record. If the Record List window is in front, the single selected record is cleared instead. If two or more records are selected at the same time, the Clear Record command is unavailable.
2. Click **OK** for confirmation before completing the operation.

Like the Add Record command, Clear Record automatically fills in the default cell values after clearing the record. The form window is then activated for editing.

**Note** The Clear Record command does not clear attachments or the values of auto-incrementing cells.

## Duplicating Records

Duplicating an existing record lets you avoid re-entering the same information.

**To duplicate a record:**

1. Choose **Database > Duplicate**. If the form window is in front, Informed Desktop eForms duplicates the current record. If the Record List window is in front, the single selected record is duplicated instead. Informed Desktop eForms does not allow you to select and duplicate multiple records on the Record List simultaneously.

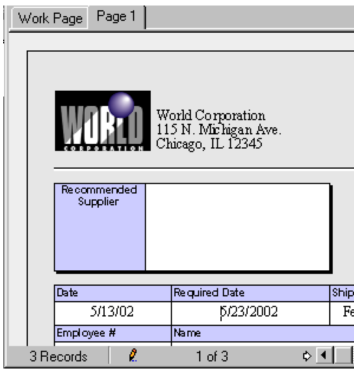
# Finding Records

Informed Desktop eForms lets you perform a search on any cell with the exception of pictures and signatures.

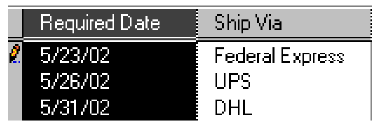
**To find records:**

1. Choose **Database > Find** to display the Find dialog box.

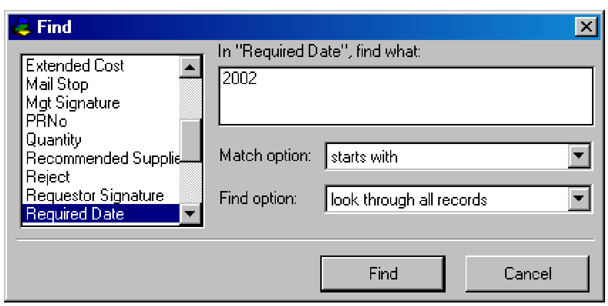
Click to select a cell




or a column.




Then choose the Find command.




The Find dialog box contains a field where you type the value or text you're looking for. This value is called the *search value*. The list contains the names of all cells on the form.

2. From the list, select the cell in which you want Informed Desktop eForms to search.

**Note** If you select a cell on the form or a column on the Record List before choosing the Find command, Informed Desktop eForms automatically selects the corresponding cell on the Find dialog box.

3. After you enter the search value and choose the match and find options, click **Find** to begin searching. As Informed Desktop eForms searches, the information box on the window in front displays progress information. If no records match, you'll see a message indicating that no records were found. If at least one match is found, Informed Desktop eForms acts according to your choice of find option. See "Find Options" on page 8-21 for more information.

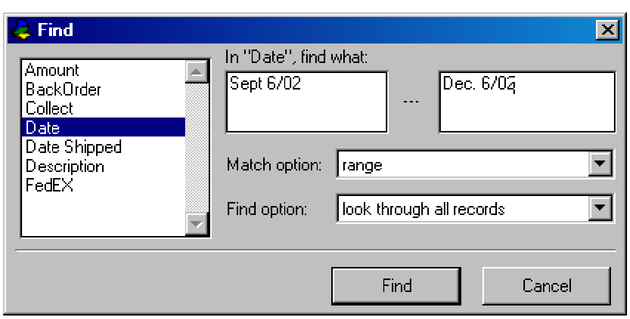
## Match Options

Match options allow you to find exact matches, partial matches, or ranges of values. For example, instead of searching for an exact telephone number, you might want to find all numbers that contain the area code '408.' Or maybe you want to find all invoices with a total amount greater than or equal to $500.

The 'Match option:' drop-down list offers ten different matching options. The following table lists each option with a brief description.

| Option | Description |
|---|---|
| Starts with | Finds values that start with the text search value. |
| Ends with | Finds values that end with the text search value. |
| Contains | Finds values that contain the text search value. |
| Is equal to | Finds values that match the search value exactly. |
| Is not equal to | Finds values that do not match the search value exactly. |
| Is greater than | Finds values that are greater than the search value. |
| Is greater than or equal to | Finds values that are greater than or equal to the search value. |
| Is less than | Finds values that are less than the search value. |
| Is less than or equal to | Finds values that are less than or equal to the search value. |
| Range | Finds values that are within a range of values. |

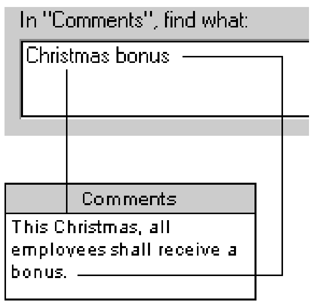
All match options with the exception of "range" accept a single search value. When you select "range," the Find dialog box changes to allow for two search values.



With “range” selected, Informed Desktop eForms finds all values that lie between and including the two search values. The second search value must be greater than the first. With the settings in the previous dialog box figure, Informed Desktop eForms finds all dates greater than or equal to Sept. 7, 1996, and less than or equal to Oct 8, 1996.

## Finding Words

When you find records by searching in a text cell, Desktop eForms tries to match the search value with each individual word in the cells that are examined. For example, if you search for the value “Christmas bonus” in the comment cell on your forms, Informed Desktop eForms finds all records with comments that contain both words (regardless of position and order).




If you use match options such as “starts with” or “ends with,” the option is applied as each word of a cell is examined.

## Finding Dates and Times

When you enter a date or time search value, you can type the value in any format you like. You can type a complete value or only certain parts of a value. If you enter a partial value, Desktop eForms ignores the parts that are missing. For example, suppose that you want to find all sales slips that were entered in May of 2002. You could either use the “range match option and enter “May 1, 2002” as the first search value and “May 31, 2002” as the second, or you could use the “equals” match option and enter “May 2002” as the single search value.

## Finding Names

A name value consists of up to five different parts: the prefix, first name, middle name, last name, and suffix. Multiple prefixes, middle names, and suffixes are allowed. A name value displays on your form according to the format of the cell in which it’s stored.

When you type a name search value, you can enter all parts or only certain parts of the name. Like dates and times, if you leave out a name part, Informed Desktop eForms ignores that part when it compares name values. For example, you could enter the search value ‘Smith’ to find all names with a last name ‘Smith,’ whereas the search value ‘John Smith’ would find all names with a first name ‘John,’ and a last name ‘Smith.’

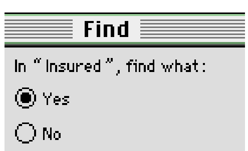
If you type a name that consists of only one part, Desktop eForms interprets that part as the last name. If you type more than one part, the order of each part is used to interpret the name. If a comma appears next to the first part, that part is assumed to be the last name. A list of known prefixes and suffixes is used to help properly identify each name part. This list can be found in Appendix A.

If you want to find all names that have a particular first name, you must enter the wild card symbol (*) as the last name when you type the search value. This is because, as explained above, if you type the first name alone, Desktop eForms assumes that it's the last name. By typing the first name followed by the wild card symbol, the name parts are interpreted properly. For example, to find all names where the first name is 'John,' enter the search value 'John *' (note that there's a space between 'John' and '*'). The wild card symbol tells Desktop eForms to ignore the last name when comparing name values. To enter the wild card symbol, type the asterisk key.

If you use an inequality match option ('is less than,' 'is less than or equal to,' 'is greater than or equal to,' or 'is greater than'), Informed Desktop eForms compares the parts of two names in the following order: last name, first name, middle name, prefix, then suffix. When a name part in the search value is found that doesn't equal the corresponding part in the comparison value, the match option determines whether or not the name matches the search value.

### Finding Boolean and Checkbox Values

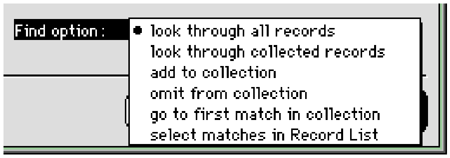
Boolean and checkbox cells can take on one of two different values. When you find records using a boolean or checkbox cell, Informed Desktop eForms displays the two possible values on the Find dialog box. For example, if a boolean cell has the Yes/No format style, the Find dialog box looks like the one below.




Rather than typing a search value, select the value by selecting either of the two choices. The only match option available is "equals."

## Find Options

The 'Find options' drop-down list contains six different find options. These options let you choose what happens when Informed Desktop eForms finds the records you're searching for.




Often you'll want to collect records that match different search criteria. For example, you might want to find and print all invoices that you entered today along with those that are overdue. By using different find options and commands such as Omit and Omit Others, you can easily collect the specific records that you're interested in.

- *Look through all records*. Desktop eForms searches through all records that match a particular search value and replaces the current collection with those found.
- *Look through collected records*. The 'look through collected records,' option is useful for finding records that match more than one criterion. For example, suppose that you want to find all invoices for customers in New York for which the total charge is greater than $500. First, look through all records to find the invoices for customers in New York. Then search through the collected records to find only those with a total charge greater than $500.
- *Add to collection*. Use the 'Add to collection,' option to combine other records with those currently in the collection. For example, you may want to find and print all invoices for customers in New York and Boston. First use the 'look through all records' option to find the invoices for customers in New York. Then find the invoices for customers in Boston using the 'Add to collection' option. Desktop eForms adds the records found to the collection.
- *Omit from collection*. After it removes records from the collection, Desktop eForms displays the number of records that were found and omitted.

**Note** Because the collection must always contain at least one record, Desktop eForms automatically performs the **Find All** command if you attempt to omit all records. The Find All command places all records in the collection. Informed Desktop eForms warns you before performing the command. See "Finding All Records" on page 8-23 for more information.

- *Go to first match in collection*. This option does not change the contents of the collection. Instead, it searches for and reveals the first record in the collection that matches the search value. This option is useful if you want to browse through a set of collected records. Rather than using commands such as Next, Previous, First, and Last to view each record individually, you could use the Find command and the 'go to first match in collection' find option. Informed Desktop eForms finds the first record that matches and makes it the current record. If the Record List window is frontmost, you'll see the record selected.
- *Select matches in Record List*. This option is available if a Record List has been created for a form. Informed Desktop eForms selects the records on the Record List that match the search value.

After using the Find command with the 'go to first match in collection' find option, you can reveal the next record that matches by choosing **Database > Find Again**. This command repeats the find starting with the record immediately following the current record.

## Indexed cells

When a form is created with Informed Designer, the designer can choose which cells have indexes. An index is a pre-sorted list of cell values that Informed Desktop eForms maintains automatically as you add, remove, and change records. Although you never see an index, you can certainly notice its effect when you use the Find command to find records.

If a cell is indexed, Desktop eForms can quickly search through thousands of records to find a matching value. Depending on the speed of your computer and the number of records in your data document, searching can be as fast as one or two seconds. If a cell is not indexed, each record must be examined individually to find those that match the search value. Searching can take considerably longer if a cell is not indexed.

# Finding All Records

Various commands allow you to browse through the records in your data document. You can use commands such as Next, Previous, First, and Last to view and edit each individual record in the collection. The records in the collection also appear listed on the Record List.

**To find all records in the collection:**

1. Choose **Database > Find All**.

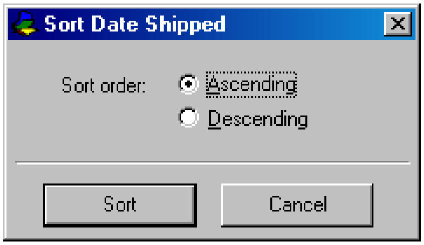
The Find All command places all records in the collection, allowing you to list or browse through all records in your data document.

# Sorting Records

With the exception of picture and *signature cells*, Informed Desktop eForms lets you sort any cell on your form.

**To sort the records in the collection:**

1. Select the cell that you want to sort by either clicking it on the form window or selecting its column on the Record List.
2. Choose **Database > Sort** to display the Sort dialog box.




3. Choose the Ascending or Descending sort order; then click **Sort**. Desktop eForms displays progress information as sorting occurs.

   Once the sorting process has started, you can cancel the Sort command by clicking **Cancel** on the progress dialog box. If you cancel sorting, the order of the records in the collection remain unchanged.

   To sort records by two or more cells, sort each cell individually, starting with the least significant cell and ending with the most significant cell.

**Note** The sorted order of records in the collection is not preserved as you add and change records, or when you close the data document.

A certain amount of memory is required to perform a sort. If Informed Desktop eForms can't obtain the required memory, you'll see a message indicating this.

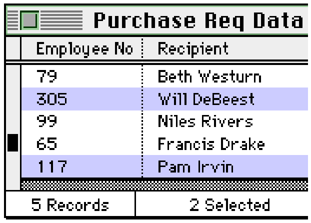
## Omitting Records

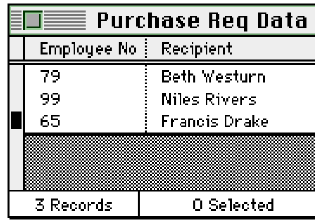
In addition to the 'Omit from collection' option of the Find command, Desktop eForms provides two commands for omitting records from the collection.

With the form window in front, the Omit command omits the current record that is visible in the window. The next record in the collection becomes the current record. If there's no next record, the previous record is made current instead.

**To omit more than one record:**

1. Select each record on the Record List.
2. Choose **Database > Omit**. The following figure shows the Record List window before and after omitting the selected records.



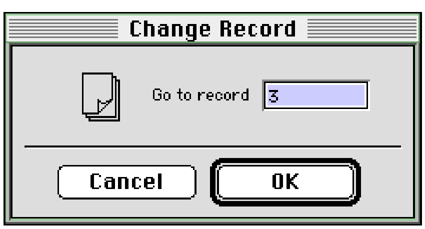

Since the collection must always contain at least one record, Informed Desktop eForms won't let you omit the last record. If there's only one record in the collection, or if you've selected all records on the Record List, the Omit command is unavailable.

The Omit Others command also omits records from the collection. If the form window is in front, all records except the current record are omitted. If the Record List window is in front, Omit Others omits all records that are not selected. If the collection contains one record, or if either all records or no records are selected on the Record List, the Omit Others command is unavailable.

## Browsing Through Records

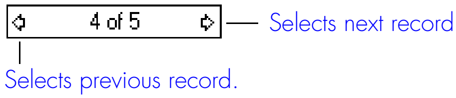
The **Database > Go To** submenu contains five commands for browsing through the collection of records: Record, Next, Previous, First, and Last.

The Record command allows you to move to a specific record in the collection. When you choose **Database > Go To > Record**, the Change Record dialog box appears.




Type the number of the record that you want to go to; then click **OK**. The number that you type must be within "1" and the number of records in the collection. The record that you specified becomes the current record and is displayed in the form window. As a shortcut to choosing the Record command, you can double-click the record information box to display the Change Record dialog box.

The Next and Previous commands move you one record forward or backward, respectively. The First and Last commands move you to the first or last records in the collection.You can also browse through collected records by clicking either arrow in the collection information box.



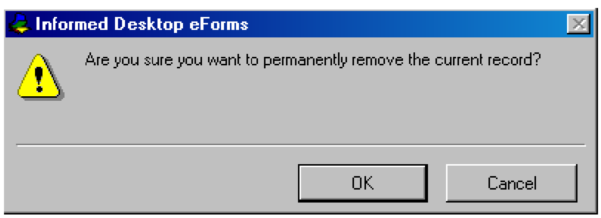

Clicking the right or left arrow performs the Next or Previous command, respectively. If the current record is the first one in the collection, the left arrow disappears. The right arrow disappears if the current record is the last one in the collection.

## Removing Records

The Remove command permanently removes records from your data document. You can remove current records, selected records on the Record List, or records from a collection.

**To remove the current record:**

1. With the form window active, choose **Database > Remove**. A confirmation message is displayed (or hold the Alt key while choosing **Remove** to remove the record without confirmation).

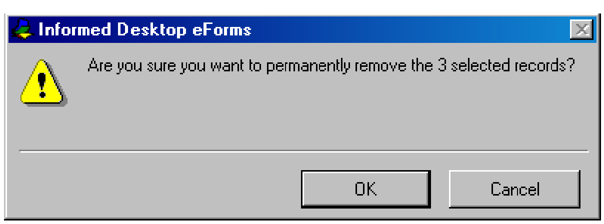



After removing the current record, the next record in the collection becomes the current record. If there's no next record, the previous record is made current instead.

2. To continue, click **OK**.

**To remove more than one record:**

1. With the Record List window active, select the records you want to remove.
2. Choose **Database > Remove**. A confirmation message is displayed (or hold the Alt key while choosing **Remove** to remove the record without confirmation).

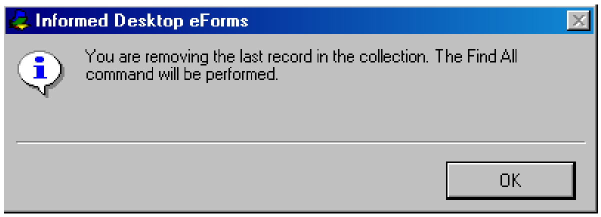



3. To continue, click **OK**.

## Removing Records from a Collection

You can remove records from a collection using the procedures described for removing current records and for removing more than one record.

If you remove the last remaining record in a collection, Desktop eForms automatically performs the Find All command and displays the following message:



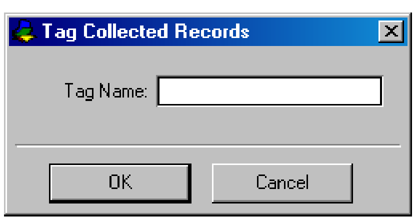

4. Click **OK** to continue. All remaining records in the data document are placed in the collection. See “Finding All Records” on page 8-23 for more information about the Find All command.

# Creating Tags and Recalling Collections

Informed Desktop eForms’ *Tag* feature provides an easy way for you to identify unique collections of records so that they can be quickly recalled and viewed. For example, if you were processing a batch of expense forms and found that some of the expenses needed clarification before they could be paid, you could mark those records with a tag such as “Clarify before processing.” You could then process all the other expense forms first, and easily recall the collection of *tagged records* later by choosing the tag name from a list.

**To create a tag for a collection of records:**

1. Find the records, then choose **Database > Tag Records** to display the Tag Collected Records dialog box.




2. Type the name of the tag in the field and click **OK**. Your entire current collection is tagged, and the name of the tag is displayed in the Tags submenu.


In certain cases, Desktop eForms automatically tags a collection of records for you. For example, if you submit a batch of records to your company database and an error occurs that prevents some of the records from being accepted, Desktop eForms marks those records with a tag such as "Records not submitted" and inserts the tag name in the Tags submenu.

**To recall a tagged collection of records:**

1. Choose **Database > Tags > [the tag name]**. Desktop eForms returns the records associated with that tag as the current collection.

**Note**

Recalling a tagged collection is not the same as performing a find. For example, if you found 25 invoices over $100 and then tagged that collection as "Invoices over $100," the tag applies only to those records. If you add another 20 invoices over $100 to your data document and then choose the "Invoices over $100" tag, Informed Desktop eForms reveals only the original 25. To reveal all 45 invoices, create a new tag for them.

## Adding Records to a Tagged Collection

Often, you might want to include additional records in a tagged collection. Suppose that you've processed all the expense forms for the month and tagged the collected records as "Expenses 09/96." At the last minute, the VP of Sales and Marketing submits one that had been forgotten. After processing the extra form, you'll want to include that record in your "Expenses 09/96" collection.

**To add records to an existing tagged collection:**

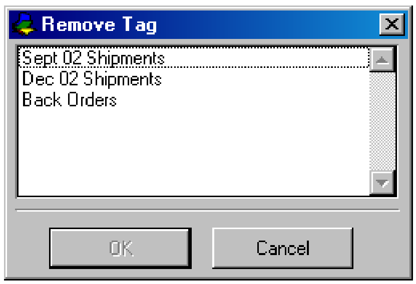
1. Perform a search to return the tagged records as well as the records that you want to add.
2. Choose **Database > Tags > Tag Records**.
3. Enter the original tag name in the field and click **OK**. You'll see a message asking you to confirm if you want to replace the original tag with the new one (the original collection plus the new records).
4. Click **OK** to close the message box.

## Removing a Tag

If you no longer require a tag you can remove it.

**To remove a tag:**

1. Choose **Database > Tags > Remove Tag**. The Remove Tag dialog box appears.




2. Select the name of the tag that you want to remove and click **OK**.

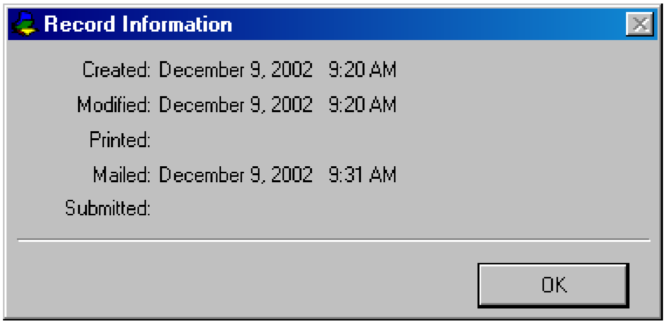
**Note** When you remove a tag, you're only removing a reference to that collection of records, not the records themselves.

# Record Information

Each record in a data document has specific information stored with it. This information includes the creation date of the record, the last time it was modified and when it was last mailed, printed or submitted.

**To view the record information for the current record:**

1. Choose **View > Record Information**. The Record Information dialog box appears showing the details of the record.




2. Click **OK** to dismiss the dialog box.

# 9 Printing Forms

In this chapter:

- Print Setup (Page Setup) 9-2
- Setting Print Preferences 9-3
- Printing Forms 9-4

# 9 Printing Forms

This chapter describes printing forms with Informed Desktop eForms. You can print forms on printers that are compatible with the Windows and Macintosh OS operating systems. For instructions on installing printer software and choosing your printer, please see your printer's documentation.

## Print Setup (Page Setup)

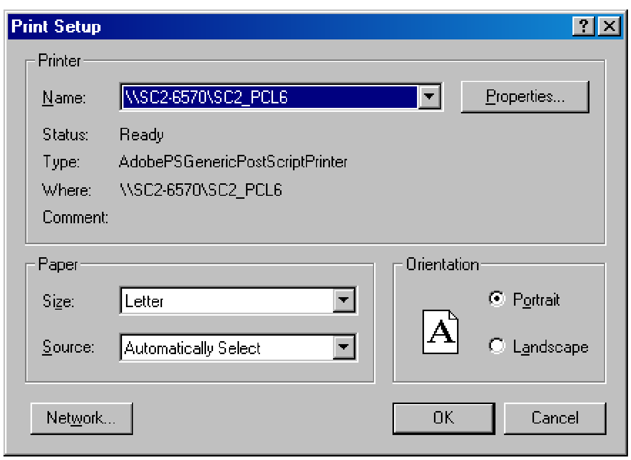
You can specify your printer, paper, and orientation setup in the Print Setup dialog box.

**Note** If the form you're designing will be used on Windows and Macintosh computers, you must select your print or page setup settings on both platforms.

**To specify your page setup:**

1. Choose **File > Print Setup** (Windows) or **File > Page Setup** (Macintosh). The Print Setup dialog box appears.

   If you're printing from Windows, you'll see a dialog box similar to the one that follows.




2. Select your options; then click **OK**.

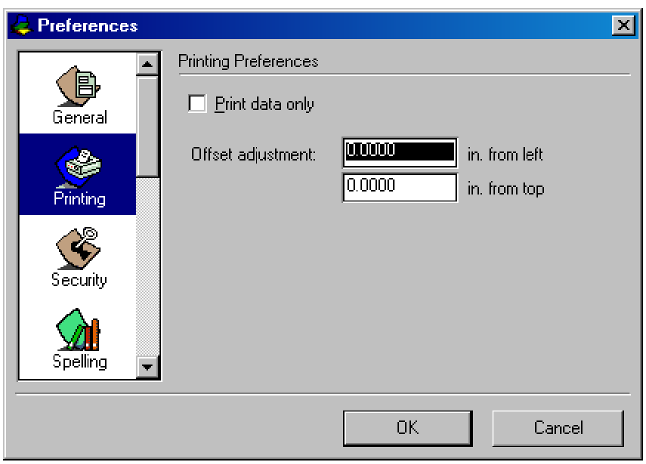
## Setting Print Preferences

When printing forms, Informed Desktop eForms allows you to choose whether you want to print the data and the *template** (the graphical image shown in the form window) or the data only.

By default, the template and the data for a form are printed. This is useful for forms that are printed on blank paper. When the form is to be printed on pre-printed paper forms, you can set the preference so that only the form data is printed.

**To set your print preferences:**

1. Choose **Edit > Preferences** (Windows and Macintosh OS 9.1 and 9.2.2) or **[Application menu] > Preferences** (Macintosh OS X v10.1.3) to display the Preferences dialog box.
2. Click the Printing icon in the list to display the Printing Preferences panel.




3. Select the ‘Print data only’ checkbox to print the form data without the template.

The Printing Preferences panel contains two *fields* in which you can specify an offset adjustment for printing. This feature allows you to adjust the position of the form on the printed page.

For printing data on pre-printed forms, the offset adjustment feature can be used to accurately align the data with the blanks on the pre-printed form. The entire form is shifted by the distance specified in the ‘Offset Adjustment’ fields. Positive values shift the form down and to the right. Negative values shift the form up and to the right.

*For definitions of *italicized* terms, please see the glossary at the back of this manual.

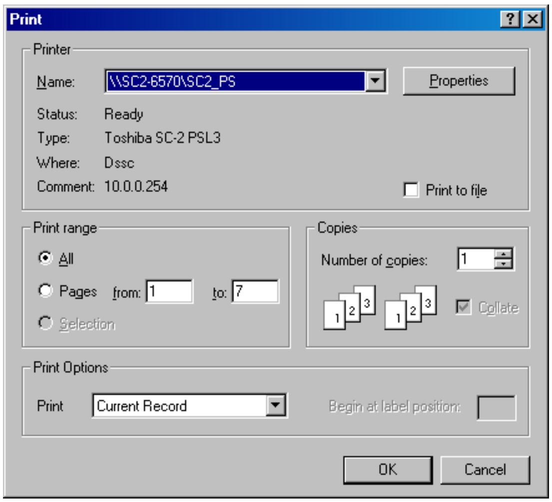
# Printing Forms

You can print more than one form at a time.

**To print one or more forms:**

1. Choose **File > Print**. The Print dialog box appears.

   If you're printing from Windows, you'll see a dialog box similar to the one that follows.




   On Macintosh, you can display printing options specific to Informed Desktop eForms.

   When the size of a form is larger than the selected paper size, Desktop eForms *tiles* the form on multiple sheets of paper. For example, suppose that you're printing a tabloid size form (11" by 17") on standard US letter sheets (8.5" by 11"). Desktop eForms produces four sheets of paper for each copy of the form that you print.

   If you choose a different paper size (see "Print Setup (Page Setup)" on page 9-2), Informed Desktop eForms automatically readjusts the tiling to print properly on the new paper size.

2. After selecting your print options, click **OK** to begin printing.

   You can cancel printing at any time by clicking **Cancel**.

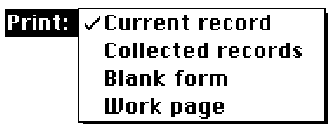
## Print Options

Informed Desktop eForms' print options allow you to do the following:

- Print the current or collected *records*.
- Print a blank form.
- Print the form's *work page* (available only if the work page is displayed in the form window).
- *Collate* the printed forms.

**To specify your print options:**

1. Choose **File > Print** to display the Print dialog box.
2. Click the 'Print' drop-down list in the 'Print Options' section and make a selection from the available options.




| Print Option | Action |
|---|---|
| Current Record | Prints only the *current record* displayed in the form window. |
| Collected Records | Prints all records in the current collection. |
| Blank Form | Prints the template without any data; use this option to print a blank copy of your form. |
| Work Page | Prints the work page instead of the numbered pages of the current record. This option is available only if the form designer has configured the template to allow you to view the work page. If the form designer has assigned a name to the work page, you'll see this name in the 'Print' drop-down list instead of "Work Page." |

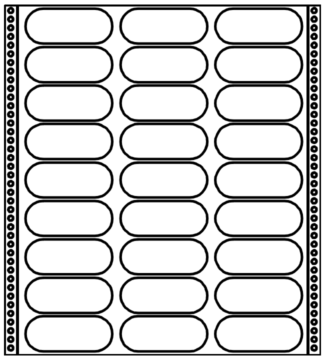
### Collating Forms

There are two page ordering options for printing multiple page forms. When you print two or more records, the 'Collate' option determines the page ordering. If you leave this option unchecked, Desktop eForms prints the records one page at a time—that is, all page ones, then all page twos, and so on.

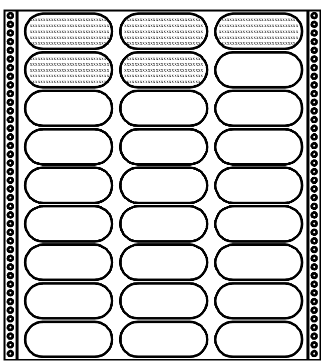
If you check the 'Collate' option, Desktop eForms prints each complete record individually—that is, all pages of the first record, then all pages of the second record, and so on. With this option, you can avoid manually collating the printed pages.

## Printing Repeating Forms

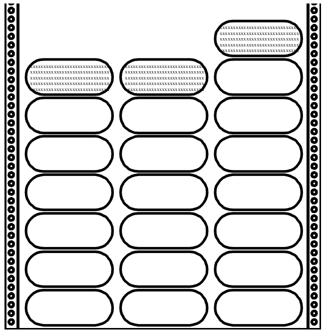
The *eForms designer* can repeat a form's drawing area across and down the printed page. This feature is useful, for example, if you want to print mailing labels on sheets like the one shown in the following figure.



When you print more than one label, Informed Desktop eForms automatically fills the sheet starting at the top left of the page and working across and down. Therefore, printing five labels would produce a sheet like the one that follows.



Desktop eForms allows you to specify the area to begin printing. This means that instead of always starting with the drawing area that's positioned at the top left corner of the page, you can choose any area as a starting point. For example, suppose that after printing five labels on a new sheet (as illustrated in the previous figure), you now want to print three more using the same sheet. You want the first address to print on the sixth label on the sheet.



If the drawing area of your form is repeated, you can enter a value in the ‘Begin printing at label position’ field on the Print dialog box.

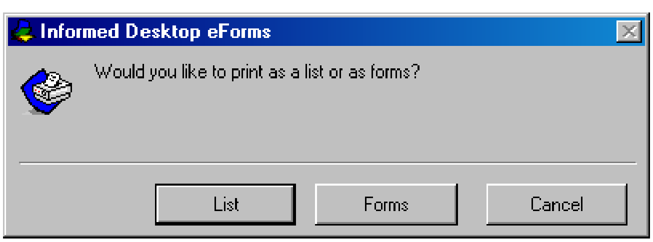

The ‘Begin printing at label position’ value determines the drawing area where the printing begins.

## Printing From the Record List

If the *Record List* window is in active, you can print the current record, all records in the collection, or only the records that are selected on the Record List. You can also print a list of the records or the individual forms.

**To print records from the Record List:**

1. Choose **Window > Show Record List** to bring the Record List to the front.
2. Choose **File > Print** to display the following dialog box.




3. Click **List** to print a list of the records. The printed list looks the same as the list that you see in the Record List window. For more information, see “Printing Records in a List” on the next page.

   Or

   Click **Forms** to print the records as individual forms. Click **Cancel** to cancel the Print command.

4. Click **OK**. The Print dialog box appears.

   With at least one record selected on the Record List, the ‘Print’ drop-down list contains the “Current record,” “Entire Record List,” and “Selected records” choices. If no records are selected on the Record List, the “Selected records” choice is unavailable.

5. Click **Print**.

   If you’re printing the records on the Record List as forms, the ‘Collate’ and ‘Begin printing at label position’ controls function the same as when you print from the form window. If you’re printing the records in a list, these controls are unavailable. See “Print Options” on page 9-5 for more information.

## Printing Records in a List

By printing the Record List in a list rather than as individual forms, you can produce summary reports similar to the one shown in the figure below.

**10/9/96** **Invoices – Record List** **Page 1**

| Invoice No | Date | Sold To | Tax | Total |
|---|---|---|---|---|
| A00-101 | 4-Oct-96 | Tom's KO Boxing | 15.19 | $232.19 |
| A00-102 | 7-Oct-96 | Farrah's Formula Cars | 35.60 | $544.20 |
| A00-103 | 12-Oct-96 | Dogs by Dave | 159.67 | $2440.67 |
| A00-104 | 30-Oct-96 | McPhee Cycle Works | 37.14 | $567.74 |
| | | | **247.60** | **$3784.80** |

Each printed sheet contains a header that shows the current date, the name of the document, and the page number. If the total width of the Record List exceeds the printable width of a page, Informed Desktop eForms automatically tiles the Record List. For information about formatting the Record List to show the information that you want, see “The Record List” on page 8-3.

10

# Mailing Forms

In this chapter:


- Setting Mail Preferences 10-2
- Mailing Forms 10-3
- Suggested Routes 10-6
- Mail Cells 10-9
- Form Tracking 10-10
- Mail Plug-ins 10-10

# 10 Mailing Forms

Many types of forms must be sent from person to person for approval and processing purposes. For example, it's common for a purchase requisition form to be filled out by the requestor, sent to a supervisor for approval, and then forwarded to the purchasing department. In large organizations, a single form might go through several levels of approval before the process is complete.

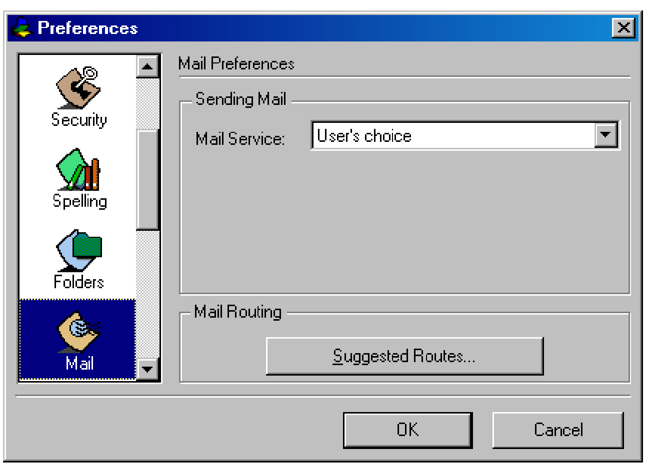
Through the use of Informed mail *plug-ins**, Informed Desktop eForms connects directly to various email systems. This makes it easy for you to send completed eforms from within the Informed Desktop eForms environment. For more information on email systems supported by Desktop eForms, see "Mail Plug-ins" on page 10-10.

## Setting Mail Preferences

Informed Desktop eForms can send forms using a variety of email systems. You can use Desktop eForms' Preferences command to specify your preferred mail system so that each time you send a form you're not asked to select one.

**To specify your preferred mail system:**

1. Choose **Edit > Preferences** (Windows and Macintosh OS 9.1 and 9.2.2) or **[Application menu] > Preferences** (Macintosh OS X v10.1.3) to display the Preferences dialog box. Then click the Mail icon. The dialog box changes to show the Mail Preferences panel.




*For definitions of *italicized* terms, please see the glossary at the back of this manual.

2. Click the ‘Mail service’ drop-down list and make a selection from the available choices. The choices in the ‘Mail Service’ drop-down list correspond to the Informed mail plug-ins that are installed in your Plug-ins *folder*. If you select “User’s choice,” you’ll be asked to select a mail system each time you send a form.

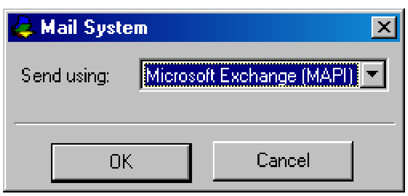
   With the *Suggested Routes* command you can define your own suggested routes for your completed forms. See “Suggested Routes” on page 10-6 for more information.

## Mailing Forms

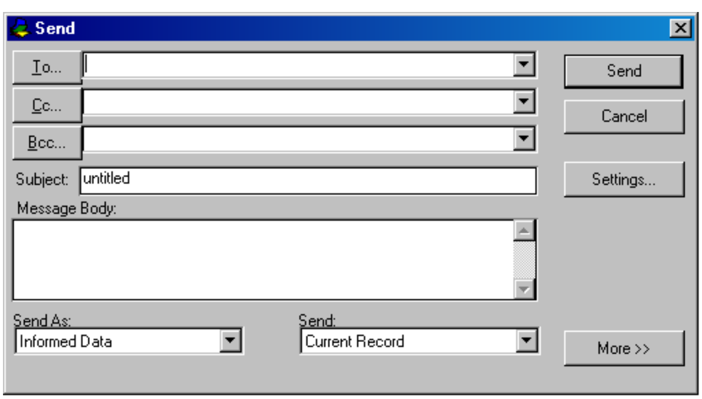
When you send a form using Informed Desktop eForms’ Send command, Desktop eForms automatically creates a file containing the *record*, or records, you want to send, then attaches the file to an email message and sends it to the recipient.

**To mail one or more records:**

1. Choose **File > Send**. If you have not previously specified your preferred mail system, you’ll be asked to select a mail system to use.




2. Select a mail system from the ‘Send using’ drop-down list and click **OK**. The Send dialog box that appears and the method of selecting recipients varies depending on which mail system you use. The following example shows the Send dialog box for SMTP-compliant mail systems.



3. Select which records you want to send by choosing an option from the ‘Send’ drop-down list. If the form window is active when you choose the Send command, the choices include “Current Record” and “Collected Records.”

   When the *Record List* is active, you can select from the “Current Record,” “Entire Record List,” or “Selected Records.”

4. Specify one or more recipients using the method that corresponds to the mail system you’re using. In the Send dialog box shown above, you would click **To** and select the appropriate recipients from the Address Book.

5. Click **OK** when you’ve finished adding the recipients.

6. In the Send dialog box, you can also enter a subject and choose the format in which to send the record or records. The following table lists the data formats available in the ‘Send As’ drop-down list and gives a brief description of when you would use each one.

| Data Format | Description |
|---|---|
| Informed data | Informed data is Informed’s proprietary format for storing form data. Each data document is a database that contains all the data for one or more records. Use this format when mailing forms to another user who already has the template needed to view the data. This is the most common data format to use when sending forms. |
| Informed package | Informed package documents contain the data and template for a form. Use this format if the person you’re mailing the form to doesn’t have the template needed to view the data. |
| Informed Interchange | Informed Interchange files contain the data for one or more records and are used primarily for transferring information between different applications and between different versions of Informed Desktop eForms. |
| Tab delimited and comma-delimited text | The delimited text file format is a standard format that’s used primarily for transferring information between Informed Desktop eForms and other applications. Use the comma-delimited or tab-delimited text formats when mailing forms to someone who needs to import the data into another application such as a spreadsheet, word processor, or another database. |

**Note** The *eForms designer* can lock the data format to prevent you from accidentally choosing an incorrect setting. If the data format has been locked, you cannot select a different format from the ‘Send as’ drop-down list.

7. Once you’ve selected one or more recipients and specified the subject, the send format, and which records to send, click **Send** or **OK** to initiate the send process.

**Note** When Informed Desktop eForms creates the file that is attached to the email message, it names the file according to the *filename.ext* format of DOS filenames. That way if the recipient of the form, or forms, uses a Windows compatible computer, the file attachment has the correct file extension for use with Informed Desktop eForms.

## Resolving Recipients

If you have entries in your address book with the same last name or first name, the Resolve Recipients dialog box appears.

**To resolve recipients in your address book:**

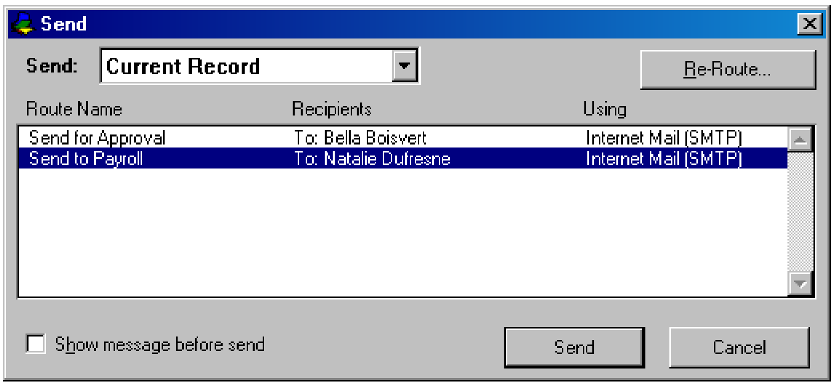
1. Choose **File > Send**.
2. To display the Select Recipients dialog box, click **To**.
3. Select a recipient from the Names list.

   Or

   Enter the name of the recipient in the 'To' field. If the name you select appears more than once in your address book and you try to send the mail, the Resolve Recipients dialog box appears.
4. Select the appropriate name from the list.
   - Click **More Names** to view your address book.
   - Click **New Entry** to add a new recipient.
   - Click **Details** to see the recipient's email address.
5. Click **OK**.

## Suggested Routes

The eForms designer can pre-configure a list of suggested routes for a *template*. Suggested routes are intended to provide guidance regarding the person or department that you might send a form to. You can send a form to a suggested route, or you can manually address a form to any person or place you like.




A suggested route is a named step in the processing of a form. The route name is intended to identify the step and instruct the user as to where the form should be sent. For example, a time card form might be filled out by an employee, sent to a manager for approval, and then forwarded to the payroll department. To make it easy for each person in the process to know where to send the form next, suggested routes named “Send To Approving Manager” and “Send to Payroll” could be added to the template. Also included with each suggested route are send parameters such as the names of recipients and a subject for the mail message.

You specify which records to send by selecting an item from the ‘Send’ drop-down list.

**To send a suggested route:**

1. Select the route; then click **Send**. If the suggested route is fully specified (that is, it includes one or more recipients), Desktop eForms automatically sends the record or records.

   If no recipients have been specified for the suggested route, Desktop eForms displays the Send dialog box for the mail system used by the route. After you select one or more recipients, click **Send**. When the send process completes, Desktop eForms displays a dialog box asking if you’d like to save the recipient(s) you specified with the suggested route. If you click **Yes**, you do not have to specify the address(es) for that particular suggested route again.

## Overriding Suggested Routes

Even if the template has one or more suggested routes, there might be instances where you want to send the form to someone else or some place else. For example, if the supervisor you usually send forms to is away on vacation, you might want to re-route your form to his or her manager instead.

**To override a list of suggested routes:**

1. Click **Re-Route** in the Send dialog box to specify a different address.
2. Click **OK** to close the Send Options dialog box. Your email program opens. Follow your usual procedures to send an email message.

**Note** The Send Options dialog box is displayed only if you are using Microsoft Outlook MAPI as your mail service. If you are not using Microsoft Outlook, the Send dialog box appears.

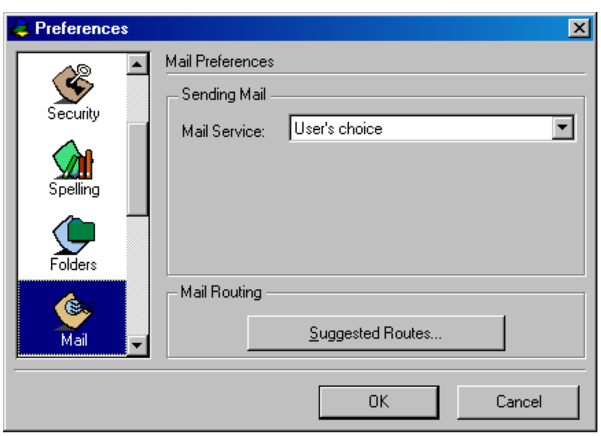
You may prefer to use the Preferences dialog box to create, modify, or remove suggested routes. See the instructions below for more information.

## Adding, Changing, and Removing Suggested Routes

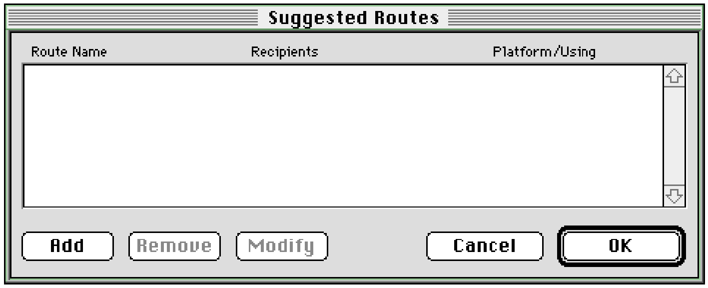
With the Preferences command, you can add, change, and remove suggested routes for sending forms.

**To display the Suggested Routes dialog box:**

1. Choose **Edit > Preferences** (Windows and Macintosh OS 9.1 and 9.2.2) or **[Application menu] > Preferences** (Macintosh OS X v10.1.3) to display the Preferences dialog box. Then click the Mail icon in the list. The dialog box changes to show the Mail Preferences panel.



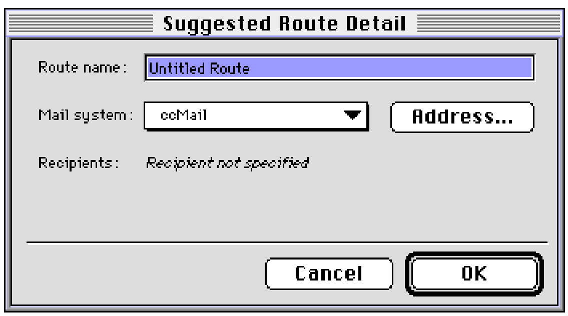
2. Click **Suggested Routes**. The Suggested Routes dialog box appears.




The Suggested Routes dialog box contains controls for editing suggested routes, and a list showing any suggested routes that are already configured.

**To add a suggested route:**

1. Click **Add**. The Suggested Route Detail dialog box appears.




2. Type the name of the route in the ‘Route name’ *field*. It’s helpful if the route name describes the step in the routing process.
3. Specify the mail system to use by clicking the ‘Mail system’ drop-down list and making a selection from the available choices. The choices in the ‘Mail system’ drop-down list correspond to the Informed mail plug-ins you have installed in your Plug-ins folder.
4. To specify a recipient, click **Address**. If you have the appropriate email software installed, Desktop eForms displays the Send dialog box for the selected mail system. Select one or more recipients with the controls on the addressing dialog box.

While the addressing dialog box is displayed, you can also specify a subject for the form, and select the data format that the form is sent in.

**Note** If the eForms designer has locked the data format to be used when mailing the form, that data format takes precedence over the one you specify for a suggested route.

**To edit an existing suggested route:**

1. Select it in the list on the Suggested Routes dialog box, then click **Modify**. The Suggested Route Detail dialog box appears, allowing you to change the specific details for the selected route.

**To remove a suggested route:**

1. Select it in the list; then click **Remove**.

You can change the order of suggested routes in the list by clicking a route and dragging it either up or down with the mouse.

## Mail Cells

To aid in addressing forms and specifying send options, the eForms designer can use mail *cells*. A mail cell is a cell whose value is used to specify a send option or parameter. For example, when you mail a form, Informed Desktop eForms looks for a cell named “Mail Send To.” If such a cell exists, the form is automatically addressed to the name in that cell.

Other mail cells can be used to automatically enter other parameters such as the subject, with information on the form. The following table shows the four mail cells supported in Informed.

| Mail Cell | Description |
|---|---|
| Mail Send To | The name of the mail recipient. The value in this cell must identify a valid user in the directory of your email system. |
| Mail Subject | The subject of the mail message. |
| Mail Comment | The body of the mail message. |
| Mail Enclosure | The filename of the enclosure sent with the mail message. |

By calculating a mail cell, the eForms designer can have a formula automatically check for different conditions and automatically set certain parameters accordingly. For example, if a purchase order form needs to be sent to a supervisor for approval, the eForms designer could calculate the “Mail Send To” cell so that the recipient of the form is based on the value of the purchase order.

# Form Tracking

If the eForms designer has configured the template to automatically track forms, Informed Desktop eForms connects to the *tracking* server after the send process completes. Depending on how form tracking was configured, you may be requested to enter information, such as your name and password.

For more information about form tracking, see Chapter 11, “Form Tracking.”

# Mail Plug-ins

Mail plug-ins allow you to send completed forms using an external email service. Informed provides plug-ins for various mail systems on the Windows and Macintosh platforms.

## Windows Mail Plug-ins

On Windows a single Informed mail plug-in can provide access to multiple email systems as shown in the following table.

| Plug-in Name | Mail Systems Supported |
|---|---|
| Mail (MAPI), Mail (Extended MAPI) | Microsoft Outlook<br>Microsoft Exchange<br>Microsoft Mail<br>GroupWise<br>Eudora Pro v3.0<br>other MAPI compliant systems |
| Mail (SMTP)** | SMTP compliant systems |

When addressing a form or specifying the recipients for a suggested route, the dialog boxes that appear are specific to the type of email system that you’re using. Each mail system provides its own method for selecting recipients, specifying a subject and choosing send options.

**Informed provides built-in support for SMTP (Simple Mail Transfer Protocol) and displays its own address book and dialog boxes for addressing mail and selecting recipients.

# Macintosh Mail Plug-ins

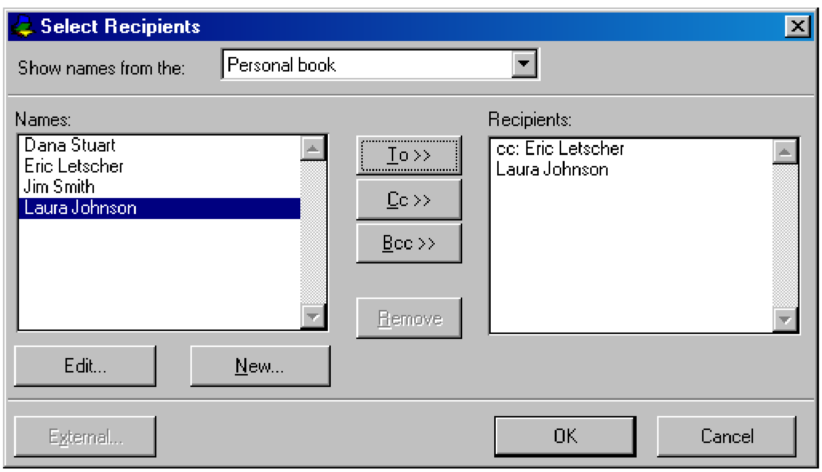
On Macintosh Informed Desktop eForms comes with the Mail (SMTP) plug-in to support SMTP compliant mail systems. Informed displays its own address book and dialog boxes for addressing mail selecting recipients. See SMTP Mail below for more information.

# SMTP Mail

The SMTP (Simple Mail Transfer Protocol) plug-in allows Informed Desktop eForms to connect directly to your organization's SMTP server for sending forms over the Internet.

## Addressing Using SMTP

When addressing mail using SMTP on Windows or Macintosh, you'll see the following dialog box:




You select a recipient from the Names list; then click **To**, **Cc**, or **Bcc** to add the person to the Recipients list.

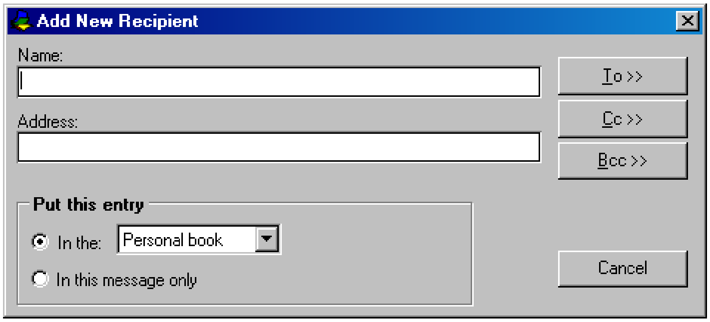
**To remove a recipient:**

1. Select the name in the Recipients list; then click **Remove**.

You can also use the Select Recipients dialog box to add new addresses to your address book.

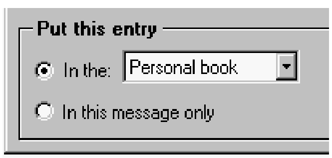
**To enter an address that is not available in the Names list:**

1. Click **New**. The Add New Recipient dialog box appears.




2. Enter the recipient's name and email address in the appropriate fields.

   You can also choose to add the new recipient to your address book or use the recipient in the current message.



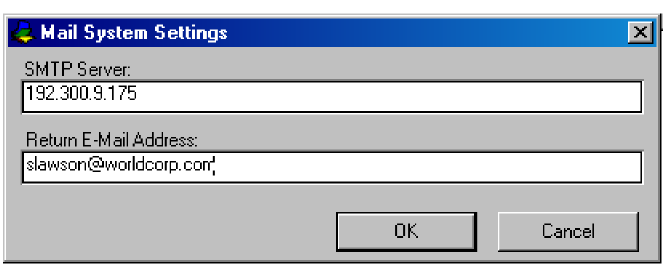

3. After entering all the recipient information, click **To**, **Cc**, or **Bcc**. The new recipient appears in the 'Recipients' list on the Select Recipients dialog box.

## Configuring the SMTP Plug-in

You must specify your SMTP server and email address before you can send forms using the SMTP plug-in.

**To configure the SMTP plug-in:**

1. Click **Settings** on the Send dialog box. Then enter the appropriate information on the Mail System Settings dialog box.




**Note** If you don't know the address of your SMTP server, contact your email administrator.

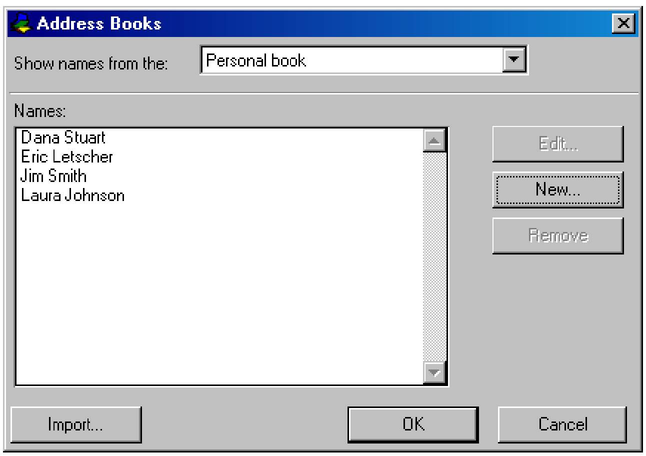
## Configuring Your SMTP Address Book

The list of addresses that you see on the SMTPMail Send dialog box can be obtained either from an internal SMTP address book that you create and maintain, or from an external address book such as the one associated with your email system client.

**To configure your address book:**

1. Choose **Edit > Preferences** (Windows and Macintosh OS 9.1 and 9.2.2) or **[Application menu] > Preferences** (Macintosh OS X v10.1.3) to display the Preferences dialog box. Then click the Mail icon in the list. The Mail Preferences panel appears.

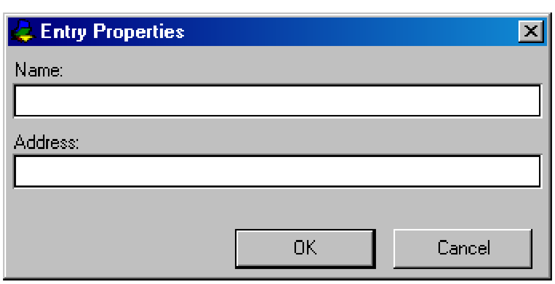
2. Select "Internet Mail (SMTP)" from the 'Mail Service' drop-down list. Then click **Address Book**. The Address Book dialog box appears.




The default setting for the SMTPMail address book is "Personal book." You maintain this address book by manually adding, removing, changing, or importing addresses.

**To add a new address:**

1. Click **New** to display the Entry Properties dialog box.




2. Type the recipient's name and address in the appropriate fields; then click **OK**.

**To remove an address:**

1. Select it in the 'Names' list on the Address Books dialog box; then click **Remove**.

**To make changes to an existing address:**

1. Select it in the 'Names' list, make the appropriate changes in the Entry Properties dialog box; then click **OK**.

If you want to add addresses that already exist in another location, click **Import**. The standard Open dialog box appears. Select a file to import; then click **OK** (Windows) or **Open** (Macintosh). The file is imported and the addresses are displayed in the internal SMTPMail address book. When you have finished adding or editing addresses, click **OK**.

**Note** The SMTP plug-in does not provide a "send later" capability. You must have a live TCP/IP connection to your SMTP server when sending forms.

# 11 Form Tracking

In this chapter:

- How it Works 11-2
- Tracking Forms 11-3
- Setting Tracking Preferences 11-3
- Displaying a Form's Tracking Status 11-4

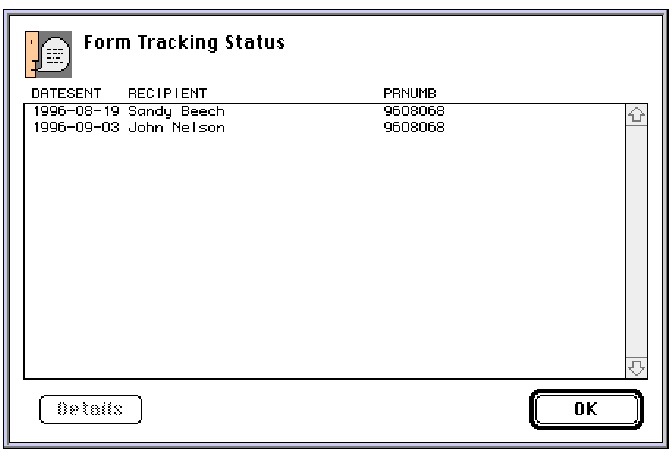
# Form Tracking

Form *tracking** provides you with a quick and easy way to find out where a form is in the routing process. After you fill out and send a form you can choose a command to see the steps that the form has traveled, and who currently has a form. Form tracking provides a quick alternative to “physically” tracing the path of a form to find its current location.

## How it Works

When you send a form to another person, the data on the form is stored in a file and attached to an email message. In order to track a form, the information detailing each step that the form travels must be stored in a central database that’s accessible by all users.

As a form is sent from person to person, the tracking status for the form is updated. Desktop eForms does this by storing information, including the sender and recipient names, the date and time that the form was sent, and attributes that identify the form, in the tracking database. When you request the tracking status of a form, Desktop eForms connects to the tracking database and retrieves the tracking details about the particular form.




**Note** If your organization uses HTTP for tracking, Informed Desktop eForms launches your web browser and displays the tracking information on a web page.

*For definitions of *italicized* terms, please see the glossary at the back of this manual.

Form tracking requires configuration using Informed Designer. Informed Desktop eForms can track forms using any database that is accessible via Informed data access *plug-ins*.

Depending on the type of tracking database you use, you might also require additional database client software. The installation and configuration of this software is a function usually performed by the *eForms designer* or database administrator.

## Tracking Forms

If a *template* is configured for form tracking, any form that you send using that template is tracked. When you send a form, Desktop eForms automatically opens or connects to the tracking database and stores the tracking information. In order to track a form, your computer must be connected to the network and the tracking database must be accessible. If you're not connected when you send a form (some email systems allow you to send a message while disconnected from the mail server), Informed Desktop eForms sends the form, but the tracking database is not updated.

The tracking of a form occurs after the send process is complete. During the tracking process, Informed Desktop eForms displays a progress dialog box.

## Setting Tracking Preferences

When a form is tracked, the name of the sender is included in the tracking status information. You can change the sender name.

To change the sender name when tracking forms:

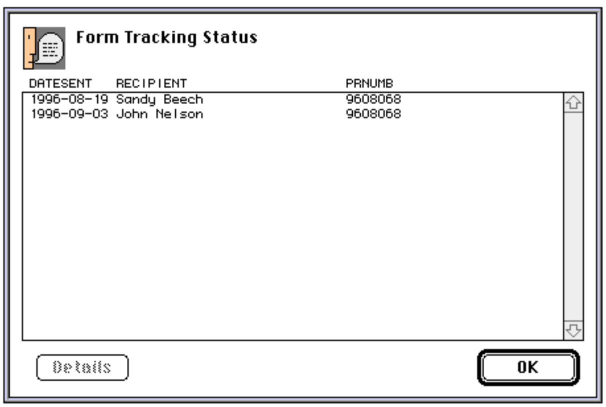
1. Choose **Edit > Preferences** (Windows and Macintosh OS 9.1 and 9.2.2) or **[Application menu] > Preferences** (Macintosh OS X v10.1.3) to display the Preferences dialog box.
2. Click the Tracking icon in the list.
3. Click **Set Preferences**.
4. In the Tracking dialog box, select the 'Replace sender name with' checkbox and type in the name you want to use to track your form.
5. Click **OK** until all the dialog boxes are closed.

## Displaying a Form's Tracking Status

The tracking status of a form refers to the information that details each step that a form has traveled. For example, suppose that Joe fills out a form, signs it, then sends it to Sandy for approval. Sandy then approves the form and sends it to John for final approval. At this point, the tracking information would detail the dates and times that the form was sent from Joe to Sandy, and then from Sandy to John. Since the last routing step shows that the form was sent from Sandy to John, we know that John has yet to approve the form and forward it for processing.

**To display the tracking status for the current record:**

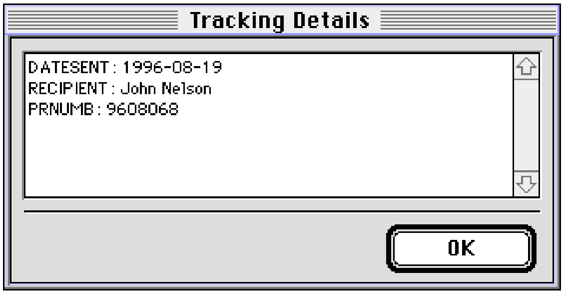
1. Choose **View > Tracking Status**. Desktop eForms connects to the tracking database and retrieves the tracking information.




If no tracking information for the *current record* is found in the tracking database, you'll see a message indicating this.

**Note** If your organization uses HTTP for tracking, Informed Desktop eForms launches your web browser and displays the tracking information on a web page.

Each row on the Tracking Status dialog box corresponds to one step that the form has traveled. Depending on how form tracking was configured, you might not see all information in the width of the list. If this occurs, you can select any row in the list and click **Details** to display all information for that row.




The Tracking Details dialog box includes the standard tracking information as well as any custom information that the eForms designer has included when configuring the form template for tracking.

As with tracking forms, you might be asked to provide connection or logon parameters necessary to connect to the tracking database when you choose the Tracking Status command. See "Tracking Forms" on page 11-3 for more information.

2. Click **OK** to close the Tracking Details and Form Tracking Status windows.

# 12 Submitting Forms

In this chapter:

- Overview 12-2
- Submitting Records 12-2

# 12 Submitting Forms

Important steps in forms processing often involve accessing data in other information systems. For example, when you fill out a form information might be ‘looked up’ in other places. When a form has been completed and approved, its data might be ‘submitted to’—or stored in—another information system.

This chapter explains how you can submit *records** using Informed Desktop eForms’ Submit command. For information about lookups, please see “Lookups” on page 3-26.

**Note** Since the *eForms designer* can customize the menus you see in Informed Desktop eForms, it’s possible that the Submit command has been removed or its name has been changed.

## Overview

With paper forms, a form is submitted by re-keying its data into an information system such as an accounting system or database. With Informed, the eForms designer can configure *templates* so that submission occurs electronically by the simple selection of a menu command or the click of a button. Electronic submission eliminates unnecessary data entry and associated errors.

Access to other information systems is available through the data access *plug-ins* installed in your Plug-ins *folder*.

Depending on the type of database or “data destination” that you submit records to, you may also require additional database client software. The installation and configuration of this software is usually performed by the eForms designer or database administrator.

## Submitting Records

The Submit command is available only if the template has been configured for form submission by the eForms designer.

**To submit a record:**

1. Choose **File > Submit**.

   If the form window is active, the Submit command submits the *current record*. If the *Record List* is active, all selected records are submitted.

*For definitions of *italicized* terms, please see the glossary at the back of this manual.

## Submitting Multiple Records

You can submit multiple records to the configured data destination when the Record List is active.

**To submit multiple records:**

1. With the Record List in front, select the records that you want to submit.


2. Choose **File > Submit**. Informed Desktop eForms submits the selected records.

   If an error occurs during the submission process, a message appears indicating this, and the Submit command is stopped. The record containing the error, along with any remaining selected records that weren't submitted, are tagged with the *tag* name "Records not submitted."

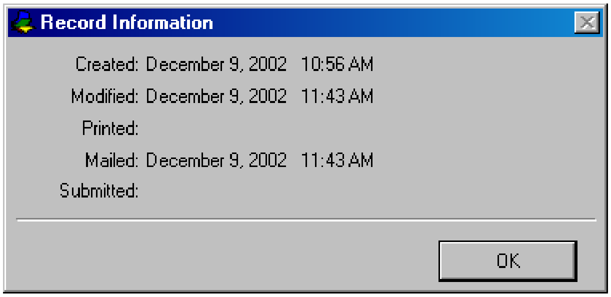
For information about *tagged records* and how to use the Record List, see "Creating Tags and Recalling Collections" on page 8-27 and "The Record List" on page 8-3.

## Successful Submit Indication

You can confirm that a record was successfully submitted by viewing the record information.

**To view record information:**

1. Choose **View > Record Information**. The Record Information dialog box appears showing the details of the record. A date and time next to the 'Submitted' label indicates that the record was submitted successfully.




2. Click **OK** to dismiss the dialog box.

## Errors When Submitting Records

When you submit a record, it's necessary that the data destination to which the template is linked be available. If Informed Desktop eForms is unable to find or connect to the data destination, you'll see an error message indicating this.

The options on the error message vary depending on the type of data destination and the specific error message. For some data destinations, the error is described and the submission is canceled. For others, options include looking for the data destination.

For some types of data destinations, errors can occur even when the data destination is found and a connection is made. If, for example, form submission is configured to insert information into a Sybase database and the required database table is not found or is unavailable, you'll see an error dialog box even though Informed Desktop eForms is able to connect to the database server.

# 13 Exchanging Information

In this chapter:


- File Formats 13-2
- Exporting Records 13-8
- Importing Records 13-11

13

# Exchanging Information

Informed Desktop eForms allows you to easily transfer information between different Informed documents, applications, and computers. You can export information to applications such as spreadsheets, accounting systems, or other databases. You can import information from other applications or computers to automatically complete forms without having to re-enter data.

Transferring information from one form or application to another is a two-step process. First, it involves storing the information in a file using a standard format that's understood by the sending and receiving applications. This step is called exporting the data. Second, after the information has been exported, any application can import it for further processing or storage.

In this chapter you'll learn about the standard file formats that Informed understands. You'll also learn how to use the Import and Export commands.

## File Formats

For purposes of exchanging information Informed Desktop eForms supports several file formats: delimited text, Informed Interchange, Informed data, dBase, FormFlow, XML File, and Informed XML data.

### Delimited Text Files

A text file is divided into lines of information. Each line contains one or more values, each separated by a delimiter character. A single value corresponds to one cell or *field** of information (for example, the invoice number on an invoice form).

Suppose that a form contains employee information consisting of the employee name, number, and salary. The figure on the next page shows an example of the contents of a text file that contains the data for three completed employee *records*.

*For definitions of *italicized* terms, please see the glossary at the back of this manual.

Cell names (merge format)

```
Name, Number, Salary
"Smith, John", "1092", 34500.00
"Thompson, Karen", "0019", 37390.00
"Dawson, Bill", "0420", 44100.00
```

Comma-delimiters

Each cell value is separated from the next with a delimiter character. An application that imports a delimited text file uses the delimiter characters to separate a single line into individual values. Desktop eForms supports the tab or comma delimiter characters.

## Quote Characters

If you select "*Tab delimited text*" or "*Comma delimited text*" when you export records you can choose whether or not to use the 'Use quotes' option. With this option, cell values can be enclosed within quotation marks. This is particularly important if a delimiter character can occur within a cell's value. For example, in the previous figure, the comma character separates the first and last parts of each name value. Since the comma is also the delimiter character, it's important that each name value be enclosed within double quote characters. If quote characters were not used, the last and first names would instead be interpreted as the Name and Number *cells*, respectively.

When you export records, Desktop eForms automatically surrounds a cell value with double-quotes if the value contains a delimiter character. When you import records, these characters are ignored. See "Exporting Records" on page 13-8 and "Importing Records" on page 13-11 for more information.

## Merge Format

If you select "Tab delimited text" or "Comma delimited text" when you export records you can choose whether or not to use the 'Merge format' option.

In the text file shown on the previous page, the first line contains the cell names of the information in the file. Many applications require that this convention be followed. The cell names are used by an application that imports the text file to automatically identify the contents and organization of the file. This characteristic of a text file is often called the *merge format*.

If you select the 'Merge format' option, Informed Desktop eForms lists each cell name on the first line of a new text file. In order to import a text file of information, some applications require that the merge format option be used.

If you intend to later import the exported data back into an *Informed data document* (using Informed Desktop eForms), you must use the merge format option when you export the records.

When you export records, cell values that contain delimiter characters are automatically enclosed in double quotes (e.g., “value”). Delimiter characters include the comma or tab characters, depending on which data format you've chosen.

## Include Notes

When you export records using the Informed Interchange data format, Informed Desktop eForms lets you choose whether or not notes are to be included with the data of each record.

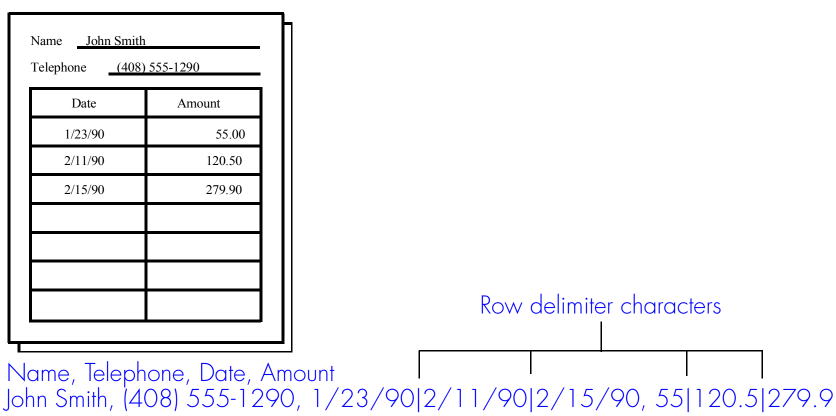
If you select the ‘Include notes’ checkbox, notes that are attached to the records being exported are also included. When you later import the records, the notes appear on the same pages and at the same positions as on the original records.

## Tables

Tables on a form contain rows and columns of data. On a form drawn with Informed Designer, each column represents one cell. A column cell can store multiple values, one for each row.

When you export a record that contains a table, Informed Desktop eForms stores the contents of the table either column-wise or row-wise. This means that the information in the table is organized either column by column or row by row. You choose which method to use by clicking a control on the Export dialog box. See “Exporting Records” on page 13-8 for more information.

If you choose to export tables by column, the rows of a column cell occur grouped together, each separated by a special row delimiter character. The ASCII code of the row delimiter character is decimal 29. The following figure illustrates how a table is exported by column.




For each column, Desktop eForms automatically combines the values of each row and separates them with the row delimiter character. When you import data, the row delimiter characters are used to divide a column into individual row values.

**Note**

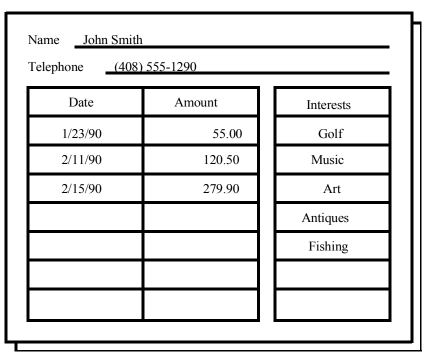
> When you export records that contain tables, if you intend to later import the information using Informed Desktop eForms, you must export tables by column and not by row. Informed Desktop eForms can't import a text file that contains table information organized by row.

When you export tables by row, Informed Desktop eForms stores the information from a table one row at a time. Each row is stored on a new line in the text file. If you include a field cell when you export a table, Informed Desktop eForms repeats the field's single value for each row of the table exported. For example, suppose that when you export the record shown in the previous figure, you choose to export tables by row instead of by column. The example below shows the text file that Informed Desktop eForms would create.

```
Name,Telephone,Date,Amount
John Smith,(408) 555-1290,1/23/90,55
John Smith,(408) 555-1290,2/11/90,120.5
John Smith,(408) 555-1290,2/15/90,279.9
```

Notice that the text file contains three lines of data, one for each row in the table. The Name and Telephone cell values are repeated on each line.

If you export a record that contains more than one table, the table with the most rows filled out determines how many rows are exported. The following example shows how a record with two tables would be exported.




```
Name,Telephone,Date,Amount,Interests
John Smith,(408) 555-1290,1/23/90,55,Golf
John Smith,(408) 555-1290,2/11/90,120.5,Music
John Smith,(408) 555-1290,2/15/90,279.9,Art
John Smith,(408) 555-1290,,,Antiques
John Smith,(408) 555-1290,,,Fishing
```

In this example, the table of interests contains more rows than the table of transactions. The text file, therefore, contains five lines of data and not three. The values of the Date and Amount column cells are left blank on the fourth and fifth lines. As always, the field cell values are repeated on each line.

The option to export tables by row is useful when you're exporting information to a relational database application or a spreadsheet. With relational databases, the information on many forms is often represented using more than one related file. If you were to store the form shown in the previous example in a relational database, you might use three files—or tables—to store the client, transaction, and interest information.

When you transfer information from a form with tables to a relational database, it might be more appropriate to export and import each table separately. As you'll learn in "Exporting Records" on page 13-8, you can choose which cells to export and their order. With this ability, and with the option to export tables by column or by row, you can more easily exchange information between Desktop eForms and other standard applications.

## Multi-line Cell Values

You can type more than one line into a text cell by pressing Enter or Return at the end of each line. Since the end of a line has a special meaning in a delimited text file (it separates records or rows of tables), an exported cell value cannot contain end-of-line or carriage return characters. Therefore, when you import and export records, Informed Desktop eForms automatically converts carriage return characters to vertical tabs (ASCII code 11). Most applications, such as word processors, interpret each vertical tab character as the end of a line.

## Limitations of the Delimited Text File Format

As its name implies, a delimited text file stores only textual information. When you export records from forms with pictures or signatures, Informed Desktop eForms automatically converts picture and signature values to text. Note, however, that only Informed Desktop eForms understands the format of pictures and signatures stored in this manner. A delimited text file containing pictures or signatures, therefore, can be imported only using Informed Desktop eForms.

A stylized text value is a value that combines different fonts, sizes, and styles (bold, underline, italic, etc.). When the form is created, the form designer decides which text cells can allow style changes. As you fill out a form, style changes are made by choosing different settings from the Style submenus. See "Entering Text" on page 3-6 for more information.

In text format, a value such as:

'This is a ***stylized*** text value,'

is stored as:

`'This is a stylized text value.'`

If it's important to preserve pictures or the style information of text, use the Informed Interchange format instead.

Chapter 7, "Annotation," explains how you can attach notes to any record. A note can be a comment or special instructions for a particular record. When you export records to a text file, all notes are ignored. You can include notes only if you use the Informed Interchange format.

## Informed Interchange Files

Informed Interchange files contain the data for one or more records and are used primarily for transferring information between different versions of Informed, or between Informed Desktop eForms and other custom applications that understand this format.

The Informed Interchange file format stores all types of information: stylized text values, pictures, signatures, and *annotation*. It does not store files that have been attached to a record using Desktop eForms' attachments feature.

## Informed Data Files

Informed data files are Informed's own proprietary format. Each Informed data file is a database that contains all the data for one or more records.

The Informed data file is not a standard format. Only Informed applications can understand and store information in this format. Although you can import files of this format, you cannot export records as Informed data files. If you're transferring information to a different (non-Informed) application, use the delimited text format instead.

## dBase Files

*dBase files* are created in database applications such as FileMaker Pro and Microsoft Access. In a database file, each item of information resides in its own field.

## FormFlow ASCII Files (Windows Only)

*FormFlow* files are created in PerForm PRO and FormFlow. Before you can import these files, they must exist in ASCII format.

## XML Files (Windows Only)

XML (Extensible Markup Language) provides a way of sharing the format and data of a document over the World Wide Web, intranets and elsewhere. When you export as XML, the resulting file contains all data, pictures, attachments, and *digital signatures* but does not include any annotations that were part of the form.

**Note** In order to import and export XML files, you must have MSXML.DLL v5.0 installed by Internet Explorer 5 SP2 or later.

## Informed XML Data Files (Windows Only)

An Informed XML data file is created when an XML form is saved in an eForms Workplace.

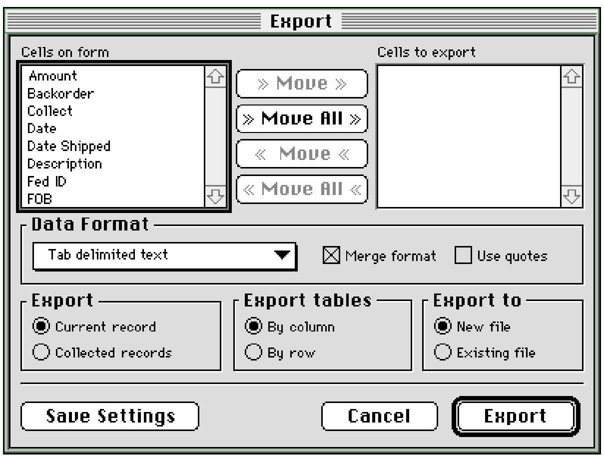
The data in this type of file can be imported into data documents.

## Exporting Records

You can export more than one record at a time.

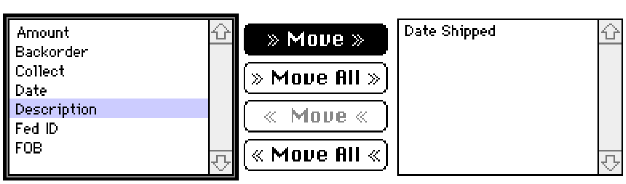
**To export one or more records:**

1. Choose **File > Export**. The Export dialog box appears.



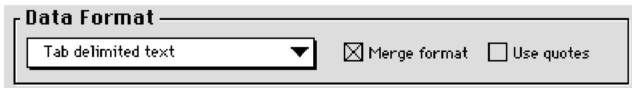

2. The Export dialog box contains two lists. The list on the left shows all cells on your form. The list on the right contains the cells that are included (and their order) when records are exported.

   This list is initially empty. You move cells from one list to the other by clicking the buttons located between the two lists.



To move a single cell from one list to the other, select the cell's name in the list then click the **Move** button that points in the appropriate direction, or double-click the cell's name. The cell is removed from the list in which it's currently contained and added to the other list. Cells in the left list are sorted alphabetically. Cells in the right list appear in the order you move them to that list. Clicking **Move All** moves all cells from one list to another.

3. Select a data format from the 'Data Format' drop-down list.




If you select "Tab delimited text" or "Comma delimited text," you can further choose whether or not to use the merge format or quotes options. If you select the 'Merge format' checkbox, Desktop eForms lists each cell name on the first line of a new text file. In order to import a text file of information, some applications require that the merge format option be used.

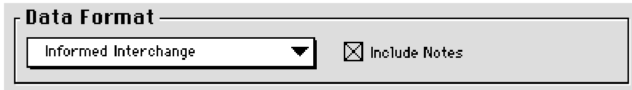
**Note** If you intend to later import the exported data back into an Informed data document (using Informed Desktop eForms), you must use the merge format option when you export the records.

When you export records, cell values that contain delimiter characters are automatically surrounded with double quotes (as in "value"). Delimiter characters include either of the comma or tab characters, depending on which data format you've chosen. If you select the 'Use quotes' option, all cell values with the exception of numbers are surrounded with double quotes. If a quoted cell value contains a double quote, that character is replaced with a single quote before the value is exported.

When using a delimited text format, any date, time, number, name, picture, and signature values export according to the formats listed in the table that follows.

| Data Type | Export Format |
|---|---|
| Date | M/D/YY |
| Time | H:MM:SS AM |
| Number | General |
| Name | All parts in full form |
| Picture | Informed-specific ASCII format |
| Signature | Informed-specific ASCII format |

If you select the "Informed Interchange" format Informed Desktop eForms lets you choose whether or not notes are to be included with the data of each record. If you select the 'Include notes' checkbox, any notes that are attached to the records being exported are also included. When you later import the records, all notes automatically appear on the same pages and at the same positions as they were on the original records.




4. Select the ‘Current record’ or ‘Collected records’ option. If the form window is in front, you can export either the *current record* or all records in the collection. If the *Record List* window is in front, you can export all records on the Record List or only those that are selected.



5. Click one of the ‘Export to’ options to specify whether you want to export into a new file or append the information to the end of an existing file.

6. If you export records from the same *template* using the same options on a regular basis, you can click **Save Settings** and Desktop eForms remembers the current settings on the Export dialog box. The next time you choose the Export command, the options automatically configure according to the last saved settings.

7. Click **Export** to begin the export process. If you’re exporting to a new file, you’ll be asked to name the file and specify where to store it. If you’re exporting to an existing file, you’ll be asked to select the file to append the information to.

**Note** When you export records to an existing file, Informed Desktop eForms doesn’t check to ensure that the information you’re exporting matches the information that already exists in the selected file. Therefore you could, for example, accidentally export invoice data to an existing file that contains information for purchase order forms. Please use caution when selecting the existing file.

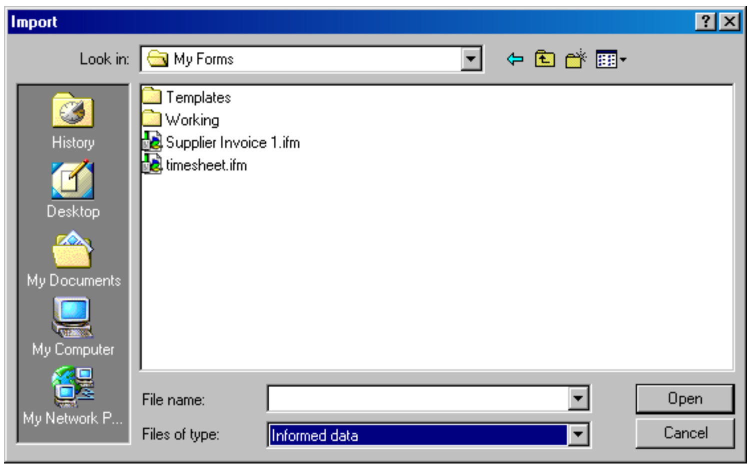
After you create a new file or select an existing file, Desktop eForms begins exporting the records. Progress information is displayed as exporting occurs.

# Importing Records

You can import various types of files into your data document.

**To import information into a data document:**

1. Choose **File > Import**. The Import dialog box for your operating system appears.




2. Select the file format that you want to import from the 'Files of type' drop-down list.

| File Type | Description |
|---|---|
| Informed data | An Informed data document created with Informed Desktop eForms. Contains only the form data for single or multiple records. |
| Delimited text | A document in which the form data is tab-delimited or comma-delimited. Used for transferring form data to Informed Desktop eForms from other applications. |
| Informed Interchange (*.iif) | An Informed Interchange document created with Informed Desktop eForms. Contains all types of form data information, including text values, signatures, pictures, and annotations. |
| dBase (*.dbf) | A database document created in an application such as FileMaker Pro or Microsoft Access. Each item of information resides in its own field. |
| FormFlow ASCII (*.fil) | A document that contains form data exported from a form that was created in PerForm PRO or FormFlow. |
| XML File (*.xml) | A document that contains data that has been marked with XML tags. May include data, pictures, attachments, and digital signatures. |

| File Type | Description |
|---|---|
| Informed XML data (*.ifx) | A document that is created when a web form is saved in an eForms Workplace. |

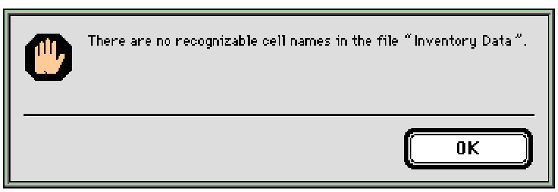
The list of files that appears shows only the files that match the selected data format.

3. Select the file you want in the list and click **Open** to import the data. If you hold the Shift or Ctrl keys you can select multiple files at one time.

**Note** As a shortcut to the Import command you can drag a file onto the form window of the data document that you want to import into.

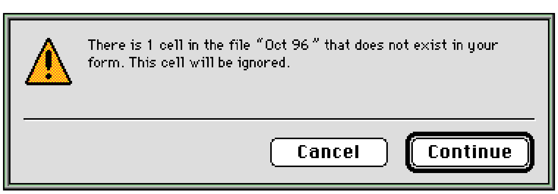
## The Import Process

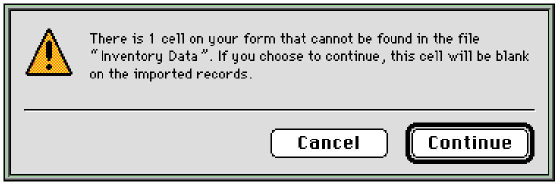
When Desktop eForms imports a file, it compares the contents of the file with the template used by the data document into which the data is being imported. By reading header information in the selected file, Informed Desktop eForms can identify and match the cells found in the file with those on the template. If no cells match, the Import command is canceled and a message is displayed.




If the above error occurs, it's likely that you've selected the wrong file to import. For example, you may have attempted to import a file containing inventory data into your purchase order form.

If at least one cell matches but there are extra or missing cells in the file being imported, you'll see one or both of the following messages.






These messages warn you that the data in the file being imported doesn't exactly match the template used by the data document that you're importing into. Either cells on your form cannot be found in the file, or cells in the file are found that don't exist on your form. Click the appropriate button to continue or cancel. If you choose to continue, any unrecognizable cells in the file being imported are ignored. Cells that appear on your form but are missing in the file are blank for the imported records.

**Note** If a cell on your form is not found in the file being imported, and that cell has a default value, the cell won't be blank for the imported records. Instead, the default value is used.

As records are imported, Informed Desktop eForms displays progress information.


You can cancel the import process by clicking **Cancel**.

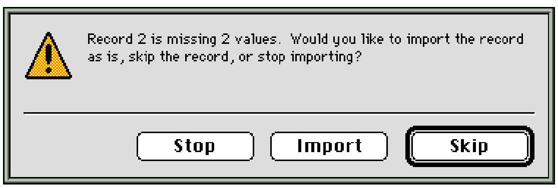
As each record is imported, Informed Desktop eForms checks to ensure that the data read matches with what is actually expected. It checks for extra or missing values, and for values that are incorrect in type. As an example, consider the comma-delimited text file shown below.

```
Name,Phone,Salary,Title,Start Date
"Smith, John","498-0938",35950,"Product Manager","3/21/89"
"Robertson, Dale","439-6628",39200
"Jones, Tom","482-7139",31990,"Senior Editor","9/17/89"
"Harrison, Karen","42-1099",42500,"Area Supervisor","3/18/88"
"Dawson, Janice","420-1029",28770,"Sales Rep.","abcdefg"
"Roy, Dan","487-3092",33290,"Analyst","1/7/90","An extra value"
```

Assume that the form into which the file is being imported contains the cells called "Name," "Phone," "Salary," "Title," and "Start Date." Also assume that these cells have the respective types name, character (with a format that accepts valid phone numbers only), number, date, and text. The following table lists the errors that Desktop eForms would recognize while importing the previous text file.

| Record | Is Correct? | |
|---|---|---|
| 1 | Yes | |
| 2 | No | Missing values for Title and Start Date |
| 3 | Yes | |
| 4 | No | Invalid value for Phone |
| 5 | No | Invalid date value for Start Date |
| 6 | No | Too many values |

This table lists three types of detectable errors: too many values, not enough values, and invalid values. In addition to these errors, Informed Desktop eForms also warns you when the number of values for a column cell exceeds the number of rows in the corresponding column on your form. In any case, when an error is detected, you'll see a message that describes the error and offers three options.




If the file being imported is an Informed Interchange file, the name of the user who originally exported or stored the record might appear on the message dialog box.

When an error is detected, you can choose to import the record anyway, skip the record and continue, or stop the import process. If you choose to import the record, any extra values are ignored. Missing or invalid values are blank on the imported records.

If any errors were detected, Desktop eForms reports the number of records imported and the number of errors detected after all forms have been imported, or after you cancel or stop the import process.

## Importing Notes

Chapter 7, "Annotation," describes how you can attach a note to any record that you fill out. As explained in "Exporting Notes" on page 13-8, Informed Desktop eForms can export notes along with the data of each record if you use the Informed Interchange data format.

When you import records from an Informed Interchange file or an Informed data file, any notes found with the records are imported as well. Desktop eForms tries to position the notes on the form according to where they were originally located. However, this position is relevant only if the data document you're importing the records into uses a template that matches the one that the notes were originally attached to. If you're transferring information between two different types of forms, the original position of each note might not be meaningful.

If a note was originally positioned on a page that doesn't exist in the template of the data document that you're importing into, instead of deleting the note, Informed Desktop eForms automatically moves it to the *work page*. For more information on the work page, please see "The Work Page" on page 3-17.

# 14 Form Template Distribution

In this chapter:


- Background 14-2
- How it Works 14-2
- Accessing Distribution Centers 14-3
- Setting Revision Check Options 14-4
- Viewing Revision Status 14-6

# 14 Form Template Distribution

Once a form is designed, it's distributed to the users who fill it out. Form distribution can be a significant cost for many organizations. Users must be notified about new *templates** and these templates must be obtained before they can be filled out. Distributing new versions of existing templates can also be expensive if templates are frequently revised.

This chapter explains the *template distribution* features that are built into Informed Designer and Informed Desktop eForms.

## Background

Informed Desktop eForms allows templates to be accessed on your computer's local drive or via a network file server. Informed Desktop eForms looks for templates in a *folder* called Templates. On Windows 98, 98SE, ME, XP Home, 2000, and XP Pro, the Templates folder is in **My Documents > My Forms**. On Windows NT, the Templates folder is in **Winnt > Profiles > [Username] > Personal > My Forms**. On Macintosh OS 9.1, 9.2.2, and X v10.1.3 the Templates folder is in **Documents > My Forms folder**. This location can be specified and changed using Informed Desktop eForms' Preferences command. For more information, please see "Changing Folder Path Locations" on page 1-9.

Storing templates locally means that you can use the templates any time, even when not connected to the network. You must copy the templates that you want to use to your local drive when the template is created and every time the template is revised.

Accessing templates from a central file server simplifies distribution. When a new template is designed, the *eForms designer* places the template in the appropriate directory or folder on the designated file server. When a template is revised, the existing template on the file server is replaced with the new one. To fill out forms distributed from a file server, you must have access to the file server.

## How it Works

With Informed's built-in distribution features, a template is distributed via *distribution centers* (distribution centers are places where distributed templates are stored). This assumes that you're storing templates locally for use with Informed Desktop eForms.The eForms designer maintains the distribution centers and the distributed templates that are available at each center.

*For definitions of *italicized* terms, please see the glossary at the back of this manual.

Informed supports different types of distribution centers. Access to a particular type of distribution center is provided through an Informed distribution plug-in. At the time this documentation was prepared, Informed Designer and Informed Desktop eForms included distribution *plug-ins* for accessing eForms Workplaces, file servers, and FTP servers.

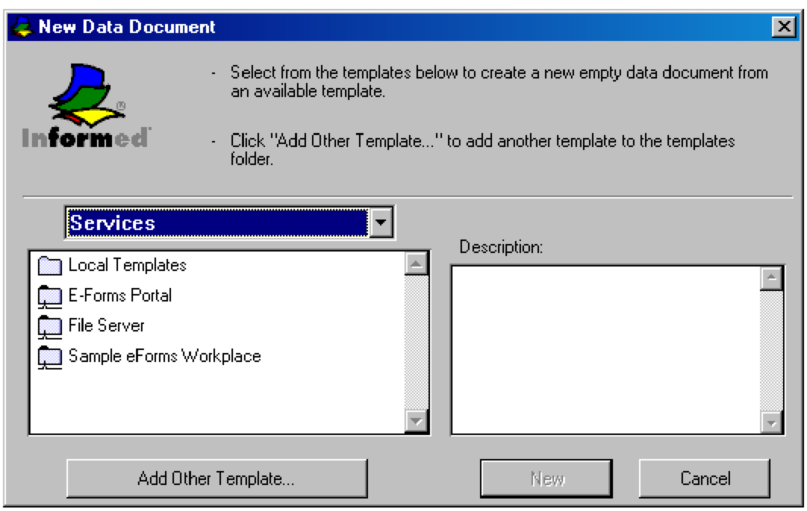
If you're downloading *Informed desktop template*s from an eForms Workplace, you do not have to get a *distribution center profile*. It's provided automatically when you download the template.

In order to access a file server or FTP server distribution center you must have the distribution center profile for the center. A distribution center profile identifies a distribution center and includes the information necessary to connect to the center.

The eForms designer creates the distribution center profiles for the distribution centers used in your organization. On Windows, the files must be installed in your Distribution Profiles folder which is in the Documents and Settings folder. On Macintosh, the files must be in the Distribution Centers folder which is in the Informed folder.

## Accessing Distribution Centers

When you choose **File > New Document**, the dialog box shows controls for accessing distribution centers and selecting distributed templates.




Choose "*Services*" from the drop-down list to reveal the distribution centers that correspond to the distribution center profiles installed on your system. The details of selecting distributed templates can be found in Chapter 2, "Document Management."

Once you've selected a distributed template, Desktop eForms copies it to your Templates folder. The template is then available for users to fill out and work with forms.

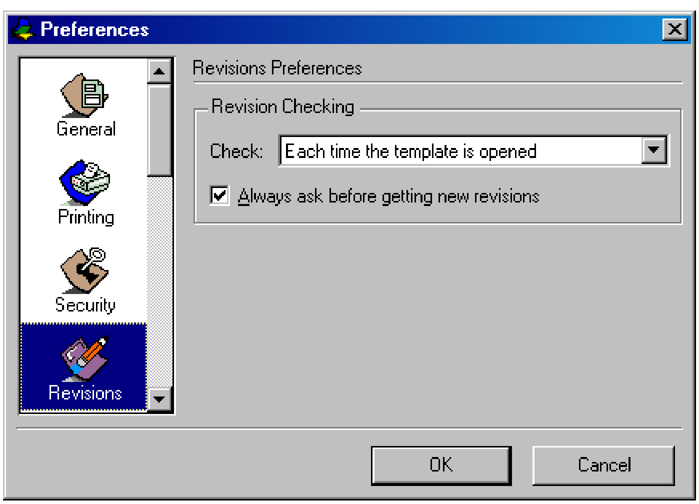
When you open a data document, Desktop eForms examines the Template ID to determine which template is required to display the form data. It then searches your Templates folder for a template with a matching Template ID. If the required template is found, it is opened with the data document. If the required template is not found, and distribution information is found in the data document, Desktop eForms connects to the distribution center and obtains the template. If the data document does not contain the distribution information needed to obtain the template, you're presented with a dialog box similar to the New Data Document dialog box. With this dialog box you can access a distribution center and select the appropriate template to use.

## Setting Revision Check Options

Included in a distributed template is a distribution list for the template. A distribution list is a list of distribution centers at which the template is available. Occasionally, Desktop eForms connects to a distribution center and checks the distributed template for a new version. The eForms designer specifies how often a revision check occurs. If the eForms designer has allowed it, you can change the setting for how often Informed Desktop eForms performs a revision check.

**To set the revision check options:**

1. Choose **Edit > Preferences** (Windows and Macintosh OS 9.1 and 9.2.2) or **[Application menu] > Preferences** (Macintosh OS X v10.1.3) to display the Preferences dialog box. Then click the Revisions icon to display the Revisions panel. The Revisions panel is available only if the template is a distributed template.




2. Select an option from the 'Check' drop-down list.

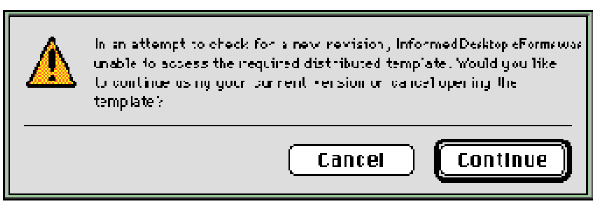
The options available include the following:

- Each time the template is opened
- Once every day
- Once every week
- Once every month
- Never

If you select the “Never” setting, Informed Desktop eForms does not check for revisions. With this setting, the only way to check for a new revision is to click **Check For New Revision** on the *Revision Status* dialog box.

**Note** The eForms designer can lock this setting so that you cannot change it.

The distribution list for a template can include more than one distribution center. The eForms designer may have made the distributed template available at multiple distribution centers so that if the operation of one center is interrupted, the distributed template can be accessed at a different center. When a revision check occurs, Informed Desktop eForms attempts to check the distributed template at the first distribution center in the list. If this distribution center is inaccessible, it tries the next center in the list, and so on, until the revision check is successful. If Informed Desktop eForms is unable to connect to any of the centers in the template’s distribution list, a message appears indicating this. The message you see might be the one that follows, or it might be a custom message specified by the eForms designer.




To skip the revision check, click **Continue**; Desktop eForms opens and uses your current version of the template. To cancel opening the template, click **Cancel**.

If a revision check occurs and Informed Desktop eForms detects that a new revision of the template is available, you’ll be notified with the message that follows.

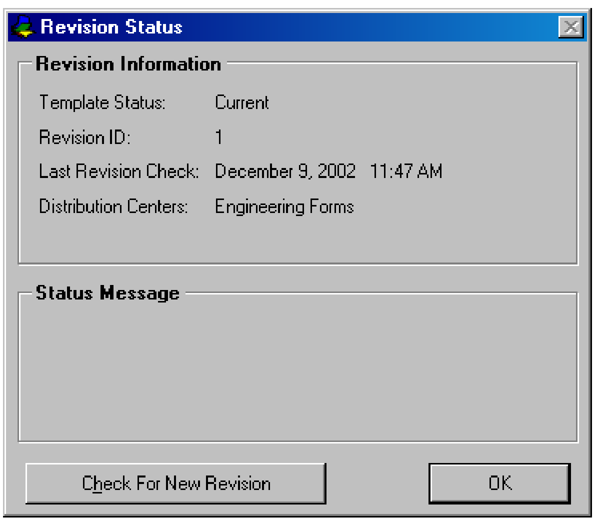
You can update your copy of the template with the new revision, ignore the new revision and continue using your current version, or cancel the operation. If you choose the Update option, Informed Desktop eForms replaces your template with the new version. If the new version includes changes that affect the information that is contained on the form, Informed Desktop eForms updates the data in the active data document to reflect these changes. For more information, see "Updating a Data Document" on page 2-19.

## Viewing Revision Status

Each template has a status and a status message. The eForms designer sets these to provide you with an indication of the intended use of the template and any associated cautions.

**To see the status and status message for the active template:**

1. Choose **View > Revision Status**. The Revision Status dialog box appears.

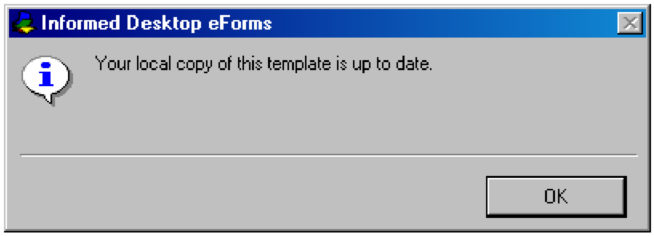



The template's status can be Current, Non-current, or Discontinued. Current implies that the template is the most up-to-date version. Non-current indicates that a newer version of the template is available, but you can still fill out forms using the non-current version. The discontinued status refers to a template that has become obsolete and should no longer be used to fill out new forms.

To remind you of a template's current status, the eForms designer may configure the template to automatically display the status and status message when you add a new *record*. The eForms designer can also prevent you from adding new records to *discontinued templates*.

**To see if a new revision of the template is available:**

1. Click **Check for New Revision**. Desktop eForms performs a revision check and advises you of the template's status.




2. Click **OK** to close the message. Then click **OK** to close the Revision Status dialog box.

**Note** If a new version of the template is available, Informed Desktop eForms advises you and asks if you want to download the new version.

# Appendix A
# Prefixes and Suffixes

# Appendix A - Prefixes and Suffixes

As described in Chapter 3, “Filling Out Forms,” Informed Desktop eForms allows you to store names using the name cell type. With the name cell type, Informed Desktop eForms always displays a name according to the cell’s format, even if you enter a name differently. For more information, see “Entering Names” on page 3-7.

In order to identify the different parts of a name, Informed Desktop eForms uses the list of prefixes and suffixes shown in the following tables.

Prefixes

| Full Prefix | Abbreviation | Full Prefix | Abbreviation |
|---|---|---|---|
| Abbot | | Congresswoman | Cong. |
| Admiral | Adm. | Corporal | Cpl. |
| Airman | Amn. | Count | |
| Ambassador | | Countess | |
| Archbishop | | Dame | |
| Archdeacon | | Doctor | Dr. |
| Army | | Duke | |
| Assemblyman | | Duchess | |
| Assemblywoman | | Excellency | |
| Assistant | | Ensign | |
| Associate | | Father | |
| Attorney | | First | |
| Baron | | Fleet | |
| Baroness | | General | Gen. |
| Baronet | | Governor | Gov. |
| Bishop | | Grade | |
| Brigadier | Brig. | Her | |
| Cadet | Cdt. | Highness | |
| Canon | | His | |
| Cantor | | Holiness | |
| Captain | Capt. | Honorable | Hon. |
| Cardinal | | Judge | |
| Chairman | | Justice | |
| Chairperson | | King | |
| Chancellor | | Knight | |
| Chaplain | | Lady | |
| Chief | | Lieutenant | Lt. |
| Colonel | Col. | Lord | |
| Commander | Comm. | M. | |
| Commodore | | Madame | |
| Congressman | Cong. | Majesty | |

Prefixes (continued)

| Full Prefix | Abbreviation | Full Prefix | Abbreviation |
|---|---|---|---|
| Major | Maj. | Rabbi | |
| Marchioness | | Rear | |
| Marquess | | Representative | Rep. |
| Mayor | | Reverend | Rev. |
| Midshipman | | Right | Rt. |
| Minister | | Royal | |
| Miss | | Seaman | |
| Mister | Mr. | Second | |
| Most | | Secretary | Sec. |
| Mother | | Senator | Sen. |
| Mrs. | | Sergeant | Sgt. |
| Ms. | | Sir | |
| Navy | | Sister | |
| Of | | Specialist | Spec. |
| Officer | | The | |
| Patriarch | | Third | |
| Pope | | Under | |
| President | Pres. | Very | |
| Prime | | Vice | V. |
| Prince | | Viscount | |
| Princess | | Viscountess | |
| Private | Pvt. | Warrant | |
| Professor | Prof. | Yeoman | |
| Queen | | | |

Suffixes

| Full Suffix | Abbreviation | Full Suffix | Abbreviation |
|---|---|---|---|
| Junior | Jr. | D.D.S. | |
| Senior | Sr. | D.V.M. | |
| Esquire | Esq. | J.M. | |
| First | I | LL.B. | |
| Second | II | M.A. | |
| Third | III | M.B.A. | |
| Fourth | IV | M.D. | |
| Fifth | V | M.Ed. | |
| B.A. | | M.S. | |
| B.Comm. | | P.Eng. | |
| B.Ed. | | Pharm. | |
| B.Sc. | | Ph.D. | |
| C.A. | | R.E.T. | |
| C.P.A. | | R.N. | |

# Appendix B
# Shortcuts

# Appendix B - Shortcuts

This section contains a list of shortcuts and convenience features. Many of these shortcuts and features are performed by pressing a single key or a combination of keys. Since some of these keys are different on Windows and Macintosh keyboards, this section is divided into two tables—one for Windows shortcuts, and one for Macintosh.

Windows Shortcuts

| Key/Feature | Description |
|---|---|
| Hold Alt key after double-clicking application icon. | Displays the Open dialog box. |
| Tab key | Tabs through cells in the predefined tab order that the eForms designer set for the form. |
| Enter key on numeric keypad or Control + Enter | Removes the focus of the cursor from the active field and accepts the record. |
| F12 key | Removes the focus of the cursor from the active field and accepts the record. |
| Click in a cell, then right-click the mouse. | Displays a Pop-up menu containing commands that correspond to the type of field clicked. |
| Double-click the Record number at the bottom of the page. | Displays the Change Record dialog box. |

Macintosh Shortcuts

| Key/Feature | Description |
|---|---|
| Hold Alt key after double-clicking application icon. | Displays the Open dialog box. |
| Tab key | Tabs through cells in the predefined tab order that the eForms designer set for the form. |
| Enter key on numeric keypad or Command + Return | Removes the focus of the cursor from the active field and accepts the record. |
| F12 key | Removes the focus of the cursor from the active field and accepts the record. |
| Option + Enter key on numeric keypad | Adjusts the text to fit the object. |

Macintosh Shortcuts (Continued)

| Key/Feature | Description |
|---|---|
| Click in a cell, then hold the Control key and click the mouse. | Displays a Pop-up menu containing commands that correspond to the type of field clicked. |
| Double-click the Record number at the bottom of the page. | Displays the Change Record dialog box. |

# Glossary

# Glossary

The following definitions are provided to help you understand the terms used in this manual.

| | |
|---|---|
| **Annotation** | A note, like a "yellow sticky" on a paper form. |
| **Attachments window** | Displays the name and size of the files that are attached to the data document. |
| **Auto-incrementing number** | A unique number on a data document or XML data document that automatically increases by a specified value. |
| **Calculated cell** | Obtains its value based on the data entered in other cells on your form. |
| **Calculation formula** | Evaluated when the value changes for any cell that participates in the formula. |
| **Cells** | The placeholders for the information that you enter data in. |
| **Check formula** | Formula that checks for errors as you fill out a form. |
| **Choice list** | Displays choices in either a drop-down list or a floating palette. |
| **Collate** | Prints each complete record individually—that is, all pages of the first record, then all pages of the second record, and so on. |
| **Collection of records** | Represents a group of records that can consist of one record, all records, or a particular set of records in your data document. By using the Find, Find All, Omit, and Omit Others commands, you can add or remove records from the collection. |
| **Comma delimited text** | Option you can choose to export cell data from a data document into a text file. |
| **Current cell** | The cell that is currently selected or active. With the exception of checkbox, pictures, and signature cells, the current cell contains either a blinking insertion point or a selected cell value. Selected checkbox, picture, and signature cells contain a bold blinking outline. |
| **Current record** | The record that you see in the form window. You can edit this record by typing in each cell. |

| | |
|---|---|
| **Current template** | A template revision status. When the user performs a revision check, Informed Desktop eForms displays a status message indicating that the template is up-to-date. |
| **Data document** | Contains only a form's data. When you fill out and save a form, the data that is entered is stored in a data document. A form's framework, intelligence, and graphic elements are derived from the template that is associated with the form. Data documents derived from Informed desktop templates are called Informed data documents. Data documents derived from Informed XML templates are called Informed XML data documents. See also *File formats*. |
| **Dbase file** | Created in database applications such as FileMaker Pro and MicrosoftAccess. In a database file, each item of information resides in its own field. |
| **Delimited text file** | When you export records that include pictures or signatures, Informed Desktop eForms converts these values to text and uses a tab or comma delimiter to separate the values. If you later want to import a record with such converted values, you must use Desktop eForms. See also *File formats*. |
| **Desktop template** | See *Informed Desktop template*. |
| **Digital Signature** | Electronic signatures that are used to authorize templates. A user ID and password are required when signing a signature cell. |
| **Discontinued template** | A template revision status. When you perform a revision check, Informed Desktop eForms displays a status message indicating that the template is still available but it's not current. |
| **Display-only cells** | Usually calculated cells that obtain their values from other cells on the form.You cannot enter information in display-only cells. |
| **Distribution center** | A folder or directory on a file server, FTP server, or Quadra Server that contains your distributed templates. |
| **Distribution center profile** | A file containing information that identifies a distribution center. For an eForms Workplace, the distribution center profile is automatically configured. |
| **eForms designer** | Creates and manages templates using Informed Designer. |

| | |
|---|---|
| **Expandable row** | Expands if you enter more data than the spacing can display. If only one row in a table contains more information than it can usually display, only that row expands. |
| **Extra Choices** | Additional choices that you can add to choice lists if this option is enabled in the template. |
| **Field** | An area in a dialog box, a data document, or an XML data document in which you enter information. Every field has a name that describes the type of information you enter. |
| **File formats** | When you mail a form or when you import or export records, you select a file format to use. Desktop eForms supports several file formats including delimited text, Informed data, Informed interchange, Informed package, and XML. |
| **Folder** | Stores templates, links, and other folders on the Blank Forms page. Folders can also be used to manage XML data documents stored on the My Forms page in the Workplace. |
| **FormFlow ASCII Files** | Created in PerForm PRO and FormFlow. Before you can import these files, they must exist in ASCII format. (Windows Only). |
| **Indexed cells** | If a cell is indexed, records can be searched for matching values. For non-indexed cells, Desktop eForms examines the cell values on every record to find matches. |
| **Informed data** | A document that is created when you save a form that is derived from an Informed template. You save data documents to your local drive. See also *Data document*. |
| **Informed Desktop template** | A template that is created by an eForms designer and saved as an .itp file. When you open a desktop template, Desktop eForms creates a data document, and a copy of the template is saved in your local Templates folder. |
| **Informed Interchange (iif)** | Contains all the data for one or more completed forms (or records), and are used primarily for transferring information between different applications and different versions of Informed. See also *File formats*. |

| | |
|---|---|
| **Informed Package (ipk)** | Saving a form as a package document combines a template and its associated data in a single file. It's used primarily when you mail a form to someone who doesn't have the corresponding template for the data file. See also *File formats*. |
| **Informed Template** | An Informed Designer file format for templates used with Desktop eForms. In the eForms Workplace, the term *Informed desktop template* is used instead. |
| **Informed XML Data (.ifx)** | An XML data document is created from an Informed XML template. To open and work with an XML data document, you must have access to an Informed Quadra eForms Workplace. When you save an XML data document, it is saved to your My Forms page in the Workplace |
| **Informed XML template (itx)** | A template that is created in Informed Designer and saved as an .itx file. When you open an XML template, you create an XML data document that you work with in a web browser window. These templates reside in an Informed Quadra eForms Workplace. |
| **Intelligence features** | Includes features such as calculations, choices, lookups, auto-incrementing numbers, submits, tracking, and tabbing. |
| **Log Off Service** | Logs off the signing service that you logged into with your user ID and password. For security reasons, you must log off your signing service if you are going to leave your computer unattended. |
| **Merge format** | This option allows Desktop eForms to export tab delimited or comma delimited text to a text file with a list of cell names on the first line and data values on the second line. |
| **Non-current template** | A revision status indicating that while a new version of the template exists in a distribution center, you may still use the non-current template that exists on your local drive. |
| **ODMA** | The Open Document Management API plug-in allows you to link Informed Desktop eForms to an ODMA-compliant document management application. |
| **Package document** | See *Informed package document*. |
| **Place note** | Displays a blank note that is centered in the form window. |

| | |
|---|---|
| **Plug-in** | Code and resource files that enable external services such as digital signatures and email systems for routing. |
| **Preferences file** | Contain information necessary for Informed Desktop eForms to find the Informed plug-ins, and the Help, Preference, and Data files folders. |
| **Quick-tab cell** | Allow you to bypass the normal tab order of a form. You can't change the Quick-tab order in Informed Desktop eForms. |
| **Record** | A single completed form. |
| **Record List** | Lists the information for multiple records in a data document within a single record list window. |
| **Revision status** | Provides revision information such as the template status, revision number, last revision check, distribution centers, and status message. |
| **Scrolling field** | A field that contains a scroll bar, and allows you to enter more data than will display in the cell area. |
| **Scrolling table** | A table that includes a scroll bar. Desktop eForms automatically adds new rows to the scrolling table when you enter more data than the table can display. |
| **Search value** | The field on the Find dialog box where you can type the value or text you're looking for. |
| **Services** | A list of distribution centers (e.g., servers) containing available templates. |
| **Signature cell** | A cell formatted for digital signing. The signing service may be pre-configured or set by the user. |
| **Signature icon** | Indicates the presence of a digital signature. When you view a signed record, the signature icon contains a question mark. This indicates that the validity of the signature is unknown. If the signature is successfully verified, you'll see a checkmark inside the signature icon. An invalid signature displays an "x" in the signature icon. |
| **Suggested routes** | Indicate which recipient(s) the form should be sent to. |

| | |
|---|---|
| **Tab delimited text** | An option you can choose to export cell data from a data document into a text file. |
| **Tab order** | Determines the order in which you move from cell to cell when you press the Tab key. |
| **Tag** | Identifies a unique collection of records for quick display. |
| **Template** | A file containing the graphic elements and intelligence features of a form. In the Workplace, there can be two types of templates: Informed XML templates and Informed desktop templates. |
| **Template distribution** | Allows you to access templates stored on servers. |
| **Template ID** | A unique name and/or number assigned to a template by the eForms designer. When a new data document opens for the first time, the template ID is embedded into the file. Each time you open the data document it searches your local drive(s) or distribution centers for the template with the matching template ID. |
| **Tracking** | Allows a user to view a record of who has sent and who has received an XML data document. |
| **Work page** | A non-printable page that may contain graphics, text, and cells. |
| **XML data document** | See *Informed XML Data document.* |
| **XML file** | A file format that provides a way of sharing the data and format of a document over the web, intranets, and elsewhere. When you export an Informed document as an XML file, the resulting file contains the data, pictures, attachments, and digital signatures, but it does not include annotations. (Windows Only). See also *File formats*. |
| **XML template** | See *Informed XML template*. |

# Index


## A

activating a record **3-2**
Add Record command **8-16**
Add To Record List command **8-6**
adding a new record **8-16**
alert dialogs **3-20**
annotation
  described **7-2**
  effects of design changes **7-5**
  exporting notes **13-6**
  importing notes **13-14**
  moving notes **7-3**
  placing notes **7-3**
  removing notes **7-4**
  text messages **7-4**
attaching files **5-4**
attachments
  deleting **5-7**
  extracting files **5-5**
  file types **5-3**
  overview **5-2**
  signing **5-7**
  window **4-4**, **5-2**
auto-save preference **2-14**
auto-shrink option **3-6**
averaging columns **8-12**

## B

boolean cells, entering **3-9**
browsing through records **8-25**

## C

calculation formula **3-19**
calculations **3-19**
CapiCom **4-19**
cell name, changing column name **8-10**
cells
  auto-incrementing **3-28**
  boolean **8-21**
  calculated **3-19**
  choice lists in **3-20**
  described **3-2**
  display only **3-5**, **3-19**
  entering **3-3**
  format of **3-5**
  help messages in **3-23**
  indexed **8-5**, **8-23**
  lookup **3-26**
  mail **10-9**
  memorizing values in **3-12**
  selected **3-3**
  signature **4-2**
  types of **3-4**
century wrap preference **3-7**
changing folder location **1-9**
changing pages **3-17**
character cells, entering **3-6**
check formulas **3-3**, **3-11**, **3-19**, **3-25**, **6-6**
checkbox
  cells **3-9**
  styles **3-9**
  values **3-10**, **8-21**
choice lists
  adding extra choices to **3-22**
  described **3-20**
  descriptive text in **3-21**
  selecting a choice **3-22**
  styles **3-20**
Clear Record command **8-17**
closing a data document **2-14**
collecting, data documents **2-19**
columns on Record List
  adding **8-5**
  changing alignment of **8-10**
  changing titles of **8-9**
  changing width of **8-9**
  removing **8-5**
  selecting **8-10**
  totalling **8-12**
comma delimited text **13-3**
commands
  Add Columns **8-5**
  Add Record **8-16**
  Add To Record List **8-6**
  Assign Next Value **3-28**
  Attach **5-4**
  Check Collected Records **6-4**
  Check Current Record **6-4**
  Check Selection **6-4**
  Clear **5-7**
  Clear Record **8-17**
  Close **2-14**
  Cut **7-4**
  Duplicate **8-17**
  Extra Choices **3-22**
  Find **8-18**
  Find All **8-22**, **8-23**, **8-27**
  Help **3-20**
  Hide Attachments **5-2**
  Hide Balloons **3-25**
  Import **13-11**
  Insert Date **3-7**
  Insert File **3-10**
  Insert Row **3-14**
  New Document **14-3**
  Omit **8-24**
  Omit Others **8-25**
  Open **2-8**
  Paste **3-4**, **7-4**
  Place Note **7-3**
  Preferences **2-7**, **6-2**
  Record **8-25**
  Remove **8-10**, **8-26**

Remove Format **8-15**
Remove Row **3-15**
Remove Tag **8-29**
Revert **8-17**
Revision Status **14-6**
Save **2-15**
Save As **2-16**
Save Format **8-14**
Send **10-3**
Set Value **3-10**, **3-19**
Show Attachments **5-2**
Show Balloons **3-25**
Show Choices **3-21**
Show Record List **8-3**
Sort **8-10**, **8-23**
Tag Records **8-27**
Verify **4-11**
Verify Template **4-8**
Configuring I-Sign (POP) and (IMAP) **4-16**
creating a new data document **2-5**
current record **8-2**

## D

data documents **2-3**
auto-save preference **2-14**
closing **2-14**
collecting **2-19**
creating new **2-5**
opening
about **2-8**
duplicate template IDs **2-12**
missing fonts **2-13**
opening recently used **2-10**
saving **2-15**
saving as TIFF **2-17**
saving as XML **2-16**
saving copies of **2-15**
data formats **10-4**
data verification **3-19**
date cells, entering **3-7**
date picker **3-7**
dBase files **13-7**
deleting attachments **5-7**
delimited text files **13-2**
limitations of **13-6**
merge format of **13-3**
multi-line values in **13-6**
delimiter character **13-2**
desktop templates **2-2**
dialogs
Attach **5-4**
Browse **1-10**
Check Spelling **6-4**
Missing Fonts **2-13**
New Data Document **2-6**, **2-12**, **2-20**, **14-3**
Note **7-4**
Preferences **2-8**
Remove Saved Format **8-15**
Remove Tag **8-29**
Revision Status **14-6**
Save As **2-16**
Save Current Format **8-14**
Send **10-3**
Set Password **2-8**
Set Value **3-10**, **3-19**
Suggested Route Detail **10-8**
Suggested Routes **10-8**
Tag Collected Records **8-27**
Template Information **2-5**
Tracking Details **11-5**
Tracking Status **11-4**
digital signatures
automatic verification **4-10**
showing signed attachments **4-4**
showing signed cells **4-3**
signature icon **4-9**
signing attachments **5-7**
signing date **4-6**
signing multiple records **4-10**
verifying **4-6**
display only cells **3-5**
distribution center profiles **14-3**
distribution centers **2-9**, **2-20**, **14-3**
Duplicate command **8-17**

## E

editing a record **8-16**
eForms Workplace, select for signing **4-18**
entering
boolean cells **3-9**
checkbox cells **3-9**
checkbox values **3-9**
date cells **3-7**
information **3-3**
number cells **3-7**
picture cells **3-9**
text cells **3-6**
time cells **3-7**
Entrust **4-18**
error checking **3-19**
exchanging information
described **13-2**
file formats **13-2**
expandable rows in tables **3-15**
export options
by column **13-4**
by row **13-5**
exporting records **13-8**
extra choices, adding **3-22**
extracting files **5-5**

# F

file formats
  dBase **13-7**
  delimited text files **13-2**
  FormFlow ASCII **13-7**
  Informed data **13-7**
  Informed Interchange **13-7**
  XML **13-7**, **13-8**
filling out forms, overview **1-6**
filling out tables **3-14**
Find Again command **8-22**
Find All command **8-22**, **8-23**, **8-27**
Find command **8-18**
find options **8-21**
finding
  all records **8-23**
  boolean values **8-21**
  dates **8-20**
  names **8-20**
  records, match options **8-19**
  records, search value **8-18**
  words **8-20**
First **8-25**
fonts
  changing **3-5**
  changing size **3-5**
  missing **2-13**
form numbers **3-28**
form template distribution
  checking for revisions **14-4**
  overview **1-4**, **14-2**
  revision status **14-6**
form tracking
  described **11-2**
  entering information **10-10**
  overview **1-7**
format of cells **3-5**
FormFlow ASCII files **13-7**
forms, entering information **3-3**

# H

help messages for cells **3-23**
Help, online **1-8**
hiding totals **8-14**
how forms are designed **1-2**

# I

importing notes **13-14**
importing records, errors **13-12**, **13-13**
indexed cells **8-23**
Informed
  application **1-7**
  data documents **2-3**
  data files **13-7**
  desktop templates **2-2**
  documents **2-2**
  folder **1-7**, **6-3**, **14-3**
  Interchange documents **2-4**
  Interchange files **13-7**
  overview **1-2**
  package documents **2-3**
  preferences **1-9**
  templates **2-2**
  XML data documents **2-3**
  XML templates **2-2**
intelligence **1-2**, **3-18**
  calculations **3-19**
  choice lists **3-20**
  data verification **3-19**
  form numbers **3-28**
  help messages **3-23**
  lookups **3-26**
Interchange documents **2-4**
Internet preferences **1-5**
invalid digital signatures **4-11**
I-Sign
  (IMAP) preferences **4-16**
  (POP) preferences **4-16**
  (Quadra) **4-17**
  configuring **4-16**
  plug-ins **4-15**
  signing with **4-16**

# L

language
  dictionaries **6-2**
  options **6-3**
Last **8-25**
Log off I-Sign (Quadra) **4-18**
lookups
  errors performing **3-27**
  multiple matches **3-26**
  overview **3-26**

# M

mail
  cells **10-9**
  preferences **10-3**
  suggested routes **10-3**
mailing
  forms **10-2**
mailing forms
  data formats **10-4**
  mail cells **10-9**
  specifying recipients **10-4**
  suggested routes **10-6**
match options **8-19**
memorizing values **3-12**
Microsoft CSP **4-19**
moving
  folders **1-9**
  notes **7-3**
multiple part pages **3-17**

## N

name cells
- entering **3-7**
- finding with wild card symbol **8-21**

new document preferences **2-6**
Next **8-25**
notes **7-2**
number cells, entering **3-7**
numbered pages **3-17**

## O

obtaining, new template **2-20**
ODMA support **2-22**
Omit command **8-24**
Omit Others command **8-25**
omitting records **8-24**
online help **1-8**
opening
- data documents **2-8**
- package documents **2-11**
- recent data documents **2-10**
- XML file **2-11**

opening a data document **2-8**
overview of Informed **1-2**

## P

package documents
- described **2-3**
- opening **2-11**

page controls **3-17**
page setup **9-2**
Page Setup command **9-2**
pages **3-17**
- changing **3-17**
- numbered **3-17**
- of a form **3-17**
- work page **3-17**

passwords
- changing **2-7**
- entering **2-9**

PDF files, save as **2-18**
pencil indicator **3-2**, **8-12**, **8-16**
picture cells
- entering **3-9**
- on the Record List **8-4**

placing notes **7-3**
plug-ins
- data access **11-2**, **12-2**
- described **1-3**
- distribution **14-3**
- I-Sign **4-15**
- mail **10-2**
- types of **1-3**

Plug-ins folder **1-3**, **1-8**
preferences
- auto-save **2-14**
- century wrap **3-7**, **3-8**
- files **1-8**
- folders **1-9**
- Internet **1-5**
- I-Sign (IMAP) **4-16**
- I-Sign (POP) **4-16**
- new document **2-6**
- printing **9-3**
- revision **14-4**
- revision checking **14-4**
- scripting **1-5**
- security **2-7**, **4-4**, **4-13**

Previous **8-25**
print options
- collate **9-5**
- described **9-5**
- repeating **9-6**

printing
- blank forms **9-5**
- collating forms **9-5**
- forms **9-2**
- from the Record List **9-7**
- labels **9-6**
- offset adjustment **9-3**
- preferences **9-3**
- print options **9-5**
- records in a list **9-8**
- repeating forms **9-6**
- tiling forms **9-4**

## Q

quick-tabs **3-13**
quote characters **13-3**

## R

Record Information **8-29**, **12-3**
Record List **8-3**
- adding columns **8-5**
- changing column alignment **8-10**
- changing column titles **8-9**
- changing column width **8-9**
- contents of **8-4**
- current record indicator **8-11**
- formats **8-14**
- indexed cells on **8-5**
- picture cells on **8-4**
- printing from **9-7**
- removing columns **8-5**
- removing formats **8-15**
- saving formats **8-14**
- selecting records **8-10**
- showing and hiding **8-3**
- showing totals **8-14**
- table cells on **8-4**
- totalling columns **8-12**

Record List window **1-6**, **4-10**, **6-6**, **8-3**, **12-3**
record management **8-2**

records
- accepting **3-3**
- activating **3-2**
- adding new **8-16**
- adding to tagged collection **8-28**
- browsing through **8-25**
- clearing **8-17**
- collection of **8-2**
- current **8-2**
- duplicating **8-17**
- editing **8-16**
- entering information **3-3**
- finding all **8-23**
- information boxes **8-3**
- omitting **8-24**
- recalling tagged collections **8-28**
- Record List **8-3**
- removing **8-26**
- removing tags **8-29**
- reverting **8-17**
- selecting on Record List **8-10**
- setting values for multiple **3-10**
- sorting **8-23**
- submitting **12-2**
- submitting multiple **12-3**
- tagging **8-27**
- tags **3-11**

Remove command **8-10**, **8-26**
Remove Format command **8-15**
Remove Tag command **8-29**
removing
- notes **7-3**
- records **8-26**
- tags **8-29**

Revert command **8-17**
reverting a record **8-17**
revision
- number **2-5**
- preferences **14-4**
- status **14-6**

## S

Save Format command **8-14**
saving
- as PDF **2-18**
- as TIFF **2-17**
- as XML **2-16**
- copies of data documents **2-15**
- data documents **2-15**

scripting preferences **1-5**
scrolling
- fields **3-11**
- tables **3-15**

security preferences **2-7**, **4-4**, **4-13**
selecting columns **8-10**
Send command **10-3**
send options
- collected records **10-4**
- current record **10-3**
- entire Record List **10-4**
- selected records **10-4**

Setting **1-5**
Show Record List command **8-3**
signature cells **4-2**
signing
- attachments **5-7**
- forms **4-6**
- select a Workplace for **4-18**
- with I-Sign (Quadra) **4-17**

Sort command **8-10**, **8-23**
sorting records **8-23**
spell checking
- from the Record List **6-6**
- invalidating a check formula **6-6**
- language dictionaries **6-2**
- language options **6-3**
- overview **6-2**
- questionable words **6-5**
- setting preferences **6-2**

spelling
- folder **6-3**
- preferences **6-2**

Submit command **12-2**
submitting forms
- errors performing **12-4**
- overview **12-2**
- successful submission indicator **12-3**

suggested routes
- described **10-6**

## T

tab delimited text **13-3**
tab order **3-13**
tables
- expandable rows in **3-15**
- exporting **13-4**
- filling out **3-14**
- inserting and removing rows **3-14**
- scrolling **3-15**

Tag Records command **8-27**
tagged records **12-3**
tagging records **8-27**
template authorization preferences **4-13**
template deployment **14-2**
template ID
- described **2-5**
- duplicate **2-12**
- used by data document **2-9**, **14-4**

template information
- revision number **2-5**
- template name **2-5**

templates
- checking for revisions of **14-4**
- described **1-2**, **2-2**
- location of **14-2**
- obtaining new
  - from eForms Workplace **2-21**

using Desktop eForms **2-20**
verifying **4-11**
Templates folder **1-6**, **2-4**, **2-9**, **14-2**
text cells, entering **3-6**
text messages **7-4**
The **1-5**
TIFF files, save as **2-17**
tiling **9-4**
time cells, entering **3-7**
times **8-20**
tracking forms
displaying tracking status **11-4**
performing **11-3**
types of cells **3-4**
typing notes **7-4**


## U


using
buttons **3-16**
digital signatures **4-2**


## V


verifying
digital signatures **4-6**
templates **4-11**


## W


where everything goes **1-7**
work page **3-17**, **7-5**


## X


XML data documents **2-3**
XML files
data **13-8**
exporting **13-7**
opening **2-11**
save as **2-16**
XML templates **2-2**


## Y


yellow sticky (see annotation) **7-2**