



Overview

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Overview

Like many software products, Informed Designer and Informed Filler consist of different components, including applications, documents, preference files, and special files and folders that serve special purposes. The organization of these components is flexible, allowing for custom configurations to better suit your specific needs.

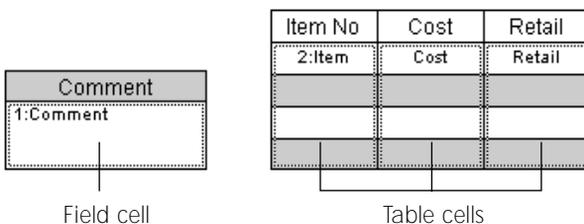
This chapter describes the different components of Informed Designer and Informed Filler. Even though Informed Filler comes with its own manual set, an overview of its use is included here to make you are aware of issues that can help you better plan the design and deployment of electronic forms in your organization.

Designing a Form Template



The design of a form is called a form template. A form template is created using Informed Designer and stored in a form template document. You draw a form template much like you would using other graphics applications: by typing text and drawing graphical objects—like lines, boxes, and shaded areas—using a variety of drawing tools. You can use Informed Designer’s built-in spell checking features to check the spelling of the text on your template.

Included on Informed Designer’s tool palette are the Field tool and Table tool. Like other drawing tools, these tools draw objects that have a visual appearance. However, they also contain cells. A cell is the part of a field or table that accepts information—that is, the areas on a blank form in which information is entered.



To aid the Informed Filler user when entering information, cells can be configured to use a variety of “intelligent” features. These include automatic formatting, calculations, error checking, lookups, choice lists, on-line help, and other features that make it faster and more accurate to enter information.

The design of a form template also involves linking the template to other services or systems used in your organization. For example, you might link a template to an Oracle database so that completed forms can be electronically “submitted,” therefore eliminating the need to rekey the form information into other systems. The use of other services such as electronic mail for sending forms, and security services for signing forms with digital signatures can also be configured.

In addition to the appearance of the form template itself, and its “intelligence” features and links to other systems, you can also customize the menus that the Informed Filler user sees. By customizing menus, you can add custom menu commands with names that are more meaningful to the user. For example, you might change the “Add Record” command to “Add New Order” for a purchase order form. You can also simplify Informed Filler for the user by removing menu commands that are not relevant given the particular use of a form template. The electronic form begins looking more like a custom application rather than a custom form.

For forms that carry sensitive information, Informed provides many security features. First, you can protect any form template by assigning it a password. This prevents any other Informed Designer user from opening your templates and changing their appearance or logic. In addition, Informed Designer provides commands to authorize and verify templates using sophisticated public key encryption services. By authorizing a template, you are affixing your electronic stamp of approval to indicate that the template is valid for use within your organization. The Informed Filler user can verify a template at any time to check its authenticity.

Informed Plug-ins



Many of the services that Informed 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 form template (with Informed Designer) or completed form (with Informed Filler) using a particular e-mail system, you must have the Informed mail plug-in for that e-mail system installed. Informed Designer and Informed Filler come with a variety of plug-ins for accessing e-mail systems, databases, signing services, and other services.

The table below lists the different types of plug-ins that Informed Designer and Informed Filler can take advantage of. Most plug-ins are used by Informed Designer for configuration purposes and by Informed Filler for providing the features themselves.

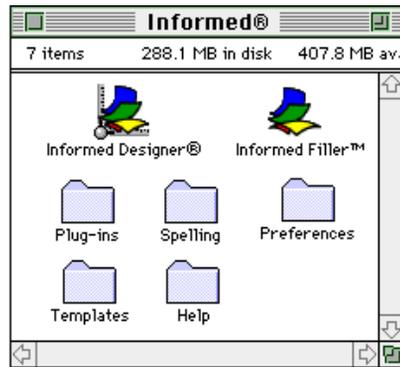
Informed Plug-ins

Plug-in Type	Uses
Template translation	Convert a form template to a different format.
Mail	Send form templates or completed forms using electronic mail.
Data access	Look up information from a database or data source. Submit completed forms to a database or data destination. Obtain unique form numbers from a database or data source. Track forms with a database or data source.
Signing	Authorize and verify form templates using Informed Designer. Sign and verify completed forms using Informed Filler.
Data translation	Import, export, or mail form data in a particular data format.

Informed Plug-ins (continued)

Plug-in Type	Uses
Distribution	Distribute form 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.” The plug-ins folder must be located in your Informed folder.



By using plug-ins, Shana can more easily support new types of services as they become available. For example, if a new electronic mail system were developed, Shana could easily enable the mailing of form templates and completed forms using that mail system by simply developing a new mail plug-in.

Distributing Form Templates



Once you've designed a form template, you need to make it available to the Informed Filler users in your organization. The way you do this depends on many things, including the size of your organization, the details of your networking environment, and the mobility of Informed Filler users.

In order to fill out a form of a particular type, Informed Filler must have access to the appropriate form template. There are two basic models for the distribution and storage of form templates. Form templates can be stored in a distributed manner—that is, distributed to, and stored locally on each Informed Filler user's computer, or they can be stored centrally on a file server and shared among all Informed Filler users.

If you distribute your form templates to each Informed Filler user's computer, these users have the freedom to take their computers anywhere and still have access to the templates they need. A network connection is not necessary to access templates. Furthermore, each time a user accesses a template, it is not at the expense of network bandwidth.

Centralized storage of form templates has converse advantages. Although access to templates requires a network connection, the distribution of a new revision of a template requires only that you replace the single template on the network file server. All Informed Filler users are instantly up to date since they all share the same form template. If form templates are stored locally on each Informed Filler user's computer, the distribution of a new revision requires that each user obtain the new version.

If you do not have the networking infrastructure or an available file server on which to make form templates available, or if many of the Informed Filler users in your organization are mobile users (that is, they are often disconnected from your network), you might consider storing form templates locally on each Informed Filler user's computer. That way, users will have access to the templates they need anytime, anywhere. If, on the other hand, your Informed Filler users have persistent access to a network file server, you might consider storing your templates there instead.

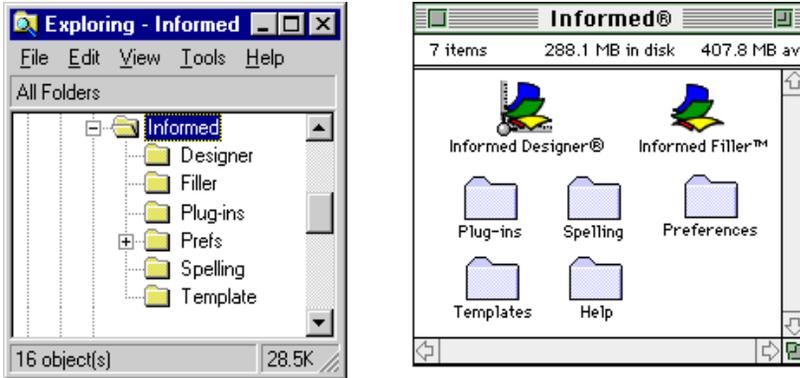
If you distribute your templates to each Informed Filler user's computer, you can rely on Informed's built-in forms distribution features to automate the distribution of new templates and revisions of existing templates. With Informed Designer, you configure one or more distribution centers. A "distribution center" is a place where you make your form templates available. A distribution center can be a file server or an FTP server. Since distribution centers are accessed via Informed distribution plug-ins, other types of distribution centers might be supported after this documentation is published.

Once you've configured a distribution center and added your templates there, Informed Filler users can then access the distribution center and obtain any template. From then on, Informed Filler will automatically check periodically for the user to see if a new revision of the template is available. When you need to change a template, you do so using Informed Designer and then update the distributed templates available at any of the distribution centers. Informed Filler users are automatically notified and the new revision replaces the previous version.

The Templates Folder

Regardless of whether Informed Filler users access templates on a shared file server or locally on their own computers, Informed Filler needs to know where the templates are located.

Templates are located in the templates folder. On Windows, this folder is named "TEMPLATE." On Mac OS, the folder is named "Templates." Regardless of platform, the templates folder, by default, is located in the Informed folder.



Informed Filler users can change the location of the templates folder using the Preferences command. This preference is also accessible using Informed Designer. For information about moving the templates folder, see “Moving Folders” later in this chapter.

In addition to the templates themselves, information about templates is stored in separate template preferences files. These files contain information that is personal to the Informed Filler user. For example, Informed Filler allows the user to list the information of multiple forms—or records—in a list format by displaying the Record List window.

Invoices - Record List		
Invoice No	Date	Sold To
00101	6/29/96	John's Blue Sky Shop
00102	6/29/96	Clark Gas Supplies
00103	7/14/96	Malkin's Bed & Breakfast
00104	7/29/96	Nigel's Books & Beer
00105	7/29/96	Strudel by Joan
5 Records		1 Selected

The Informed Filler user can change which information is included on the Record List and its order and format according to specific needs and personal preferences. Each different Informed Filler user might want to format the Record List differently.

Since templates can be shared among many Informed Filler users, it is important that personal preferences, like the format of the Record List, be stored separate from the template itself. For this reason, Informed Filler maintains a separate preferences file for each template.

Template preferences files are stored in a folder named “TMPLPRFS” (Windows) or “Template Preferences” (Mac OS). This folder is found along with other items in another folder named “PREFS” (Windows) or “Preferences” (Mac OS). Like the templates folder, the default location for the preferences folder (that is, the folder that contains the template preferences folder) is inside the Informed folder.

The preferences folder contains other items in addition to the template preferences folder. The Informed Filler user can store the preferences folder at its default location or at any other location. For information about the other items found in the preferences folder, see “Where Everything Goes” later in this chapter. For information about moving the preferences folder, see “Moving Folders.”

Filling Out Forms



While using Informed Designer, you can store form template documents anywhere you like. However, when you distribute templates to Informed Filler users, they must be stored in the templates folder. To the Informed Filler user, form templates are like hidden files that need not be manipulated directly. Instead, Informed Filler automatically locates and opens templates when needed as the user fills out new forms and opens previously filled out forms.

The information entered to fill out a form is stored in a form data document. When the user requests a new data document, Informed Filler presents a list of available templates to choose from. The user selects a template and is presented with a blank form, ready for filling. A form 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 is easiest to store one record in each data document. For users who fill out many forms, storing all records for a particular type of form in one data document allows the user to take advantage of Informed Filler’s powerful database features.

While filling out forms, the Informed Filler user benefits from the powerful data entry and “intelligence” features that you configure while designing the form template. Features like automatic formatting, calculations, error checking, lookups, choice lists, and on-line help make it faster and more accurate to enter information.

The entire processing of a form is automated using Informed Filler, from the initiation of a new form, to the approval and submission of the completed form. After entering information, the user signs the form electronically using a digital signature. A digital signature provides a means of later verifying the identity of the person who signed the form and the integrity of the signed data.

If approval of the form is necessary, the user sends the completed form to the appropriate person or place using electronic mail. The process of entering and signing information, sending the form to other people, and, if necessary, approving the form continues, until the form is complete and approved. The completed form is then submitted electronically or printed.

The flexible nature of Informed makes it ideal for automating both simple and complex forms processes. With the ability to easily exchange information between different forms and different applications, you can design a comprehensive “forms system” that combines and integrates many different types of forms and different applications.

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 the Informed Filler user to find out where a particular form is in the routing process.

Whenever the user sends a form, Informed Filler connects to a central tracking database and records information, including the sender and recipient names, 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 that the form was sent. You can customize a form template to track other information as well.

At any time, the user can request the tracking status for any completed form. Informed Filler connects to the tracking database and retrieves the tracking information for the particular form. This information is displayed in a dialog box for the user to view.

Informed Filler can track forms using a variety of databases. That way you can take advantage of the existing database services that are already available in your organization. However, if an appropriate database is not available and you use Mac OS compatible computers in your organization, you can use Informed Tracker, the form tracking server that comes with Informed Designer.

Form Numbering



Many forms require unique identification for tracking and audit purposes. For example, invoices contain invoice numbers and purchase orders contain PO numbers.

The assignment of form numbers must be controlled to ensure that two different forms do not contain the same number. Informed provides a special feature for this purpose. Any cell can be configured to generate a new number at the user's request, or automatically whenever a new blank form is created. Form numbers can be obtained from within the form template itself, or from another database or data source.

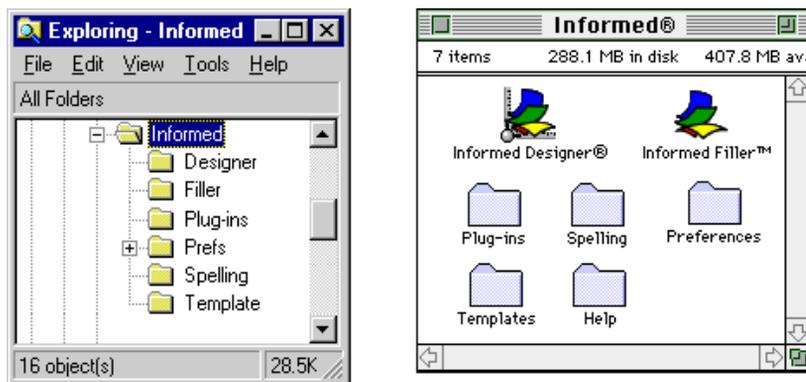
Like form tracking, lookups, and form submission, Informed Filler can access a variety of databases for purposes of generating form numbers. If the appropriate database services are already available in your organization, you might take advantage of these services for form number generation.

If the Informed Filler users in your organization use Mac OS compatible computers, you can also link form number cells to Informed Number Server, a Mac OS application designed specifically for generating form numbers. Informed Number Server is included with Informed Designer. Informed

Filler uses Apple events, the IAC (Inter-Application Communications) capabilities of the Mac OS to communicate with Informed Number Server.

Where Everything Goes

When you install Informed Designer or Informed Filler, you are asked to specify a location for the “Informed” folder. The Informed folder contains the Informed Designer and Informed Filler applications, as well as other important components. The contents of the Informed folder following installation is pictured below.



The Informed folder is a special folder. It contains certain items that are required in order for Informed Designer and Informed Filler to work properly. 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 “Moving Folders” later in this chapter.

Applications

On Windows, the Informed Designer and Informed Filler applications are each comprised of the executable files (“DESIGNER.EXE” and “FILLER.EXE”) and other associated files. These files are found in the “DESIGNER” and “FILLER” folders. On the Mac OS, these applications are single files and are named “Informed Designer®” and “Informed Filler™”.

The DESIGNER and FILLER folders (Windows) and Informed Designer® and Informed Filler™ applications (Mac OS) can be moved to any location you like. You can store the applications locally on your computer, or you can access them from a file server or applications server.

Plug-ins

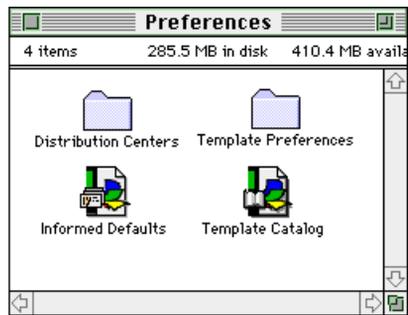
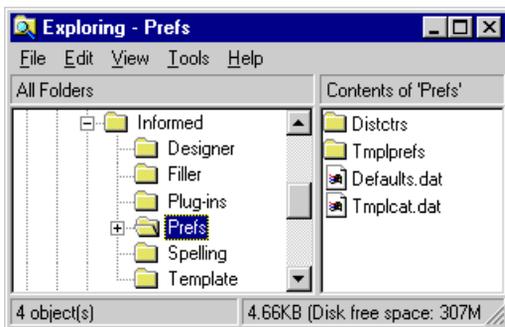
The plug-ins folder contains Informed plug-ins and associated files. Informed plug-ins provide access to external services such as electronic mail systems and databases. The plug-ins folder must be located inside your Informed folder. See “Informed Plug-ins” earlier in this chapter for more information about plug-ins.

Templates Folder

The templates folder (“TEMPLATE” on Windows, “Templates” on Mac OS) contains the templates available for use with Informed Filler. The location of the templates folder can be changed using Informed Designer or Informed Filler’s Preferences command. For more information, see “The Templates Folder” earlier in this chapter.

Preferences Folder

The preferences folder (“PREFS” on Windows, “Preferences” on Mac OS) contains the items pictured below.



The template catalog (“TMPLCAT.DAT” on Windows, “Template Catalog” on Mac OS) is a file that is maintained by Informed Filler. It contains a list of all of the templates contained in the templates folder. Informed Filler uses the template catalog to quickly find the appropriate template when the user opens a data or package document.

The template preferences folder (“TMPLPRFS” on Windows, “Template Preferences” on Mac OS) contains template preferences files. Template preferences files are maintained by Informed Filler. Each file contains user-specific preferences for the template of the same name. The purpose of template preferences is described earlier in “The Templates Folder.”

The Informed defaults file (“DEFAULTS.DAT” on Windows, “Informed Defaults” on Mac OS) is also maintained by Informed Filler. Like template preferences files, the Informed defaults file contains user-specific information that is associated with one or more templates. As explained in Chapter 3, “Filling Out Forms”, of your *Informed Filler User’s Manual*, the Informed Filler user can

memorize a cell value so that the value is automatically entered each time a new blank form is created. The memorized value is stored in the Informed defaults file.

The distribution centers folder (“DISTCTRS” on Windows, “Distribution Centers” on Mac OS) contains the distribution center profiles needed to access the distribution centers in your organization. You create distribution center profiles using Informed Designer. For detailed information about distribution center profiles and Informed’s built-in forms distribution capabilities, please see Chapter 8, “Form Template Distribution and Revision,” in your *Informed Designer Forms Automation* manual.

The preferences folder can be located anywhere you like. For information about moving the preferences folder to a different location, please see “Moving Folders” later in this chapter.

On-line Help

If you choose to install on-line help, installation will include the necessary help files. On Windows, the help files are installed in the DESIGNER and FILLER folders. On Mac OS, you’ll find a folder named “Help” inside the Informed folder. The help files must remain in these locations.

Spell Checking

If you choose to install Informed Designer’s spell checking option, you’ll see a folder named “Spelling” in your Informed folder. The spelling folder contains the spell checking dictionary and related files. The spelling folder must remain in the Informed folder.

Informed Preferences

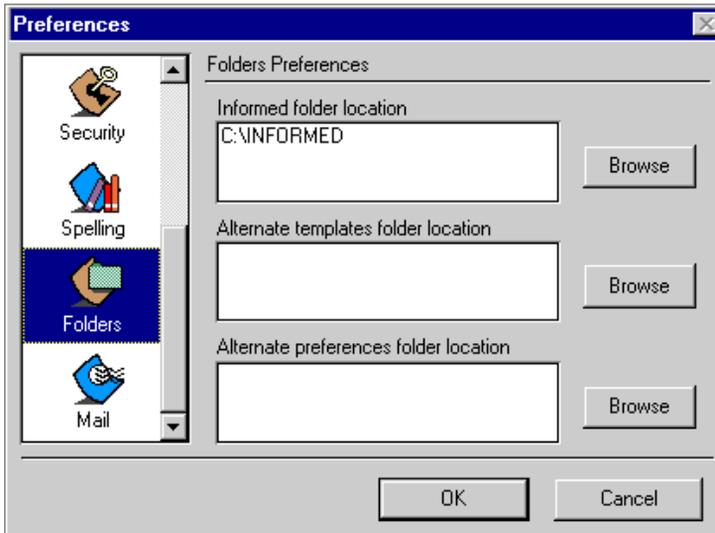
In addition to the items installed in the Informed folder, installation will also place a preferences file among your system related files. On Windows, this file is named “INFORMED.INI” and is found in your Windows folder. On the Mac OS, the file is named “Informed Preferences” and is found in your system’s Preferences folder.

The Informed preferences file contains information necessary for Informed Designer and Informed Filler to find items such as the Informed folder, the templates folder, and the preferences folder. Other preferences associated with either application are also stored in the Informed preferences file.

Moving Folders

When you install Informed Designer or Informed Filler, the Informed preferences file is automatically updated with the locations of your Informed folder, templates folder, and preferences folder. When you run the Informed Designer or Informed Filler applications, they read these locations from your Informed preferences file in order to locate the appropriate files.

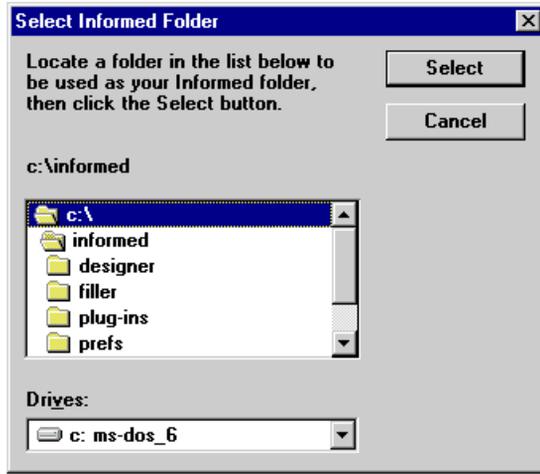
You can move the Informed folder, templates folder, or preferences folder to any location. However, when doing so, you must specify the new location using Informed Designer or Informed Filler's Preferences command. Choose **Preferences...** from the Edit menu and click the Folders icon to display the Folders preferences panel.



The location of the Informed folder is specified in the 'Informed folder location' text box. The location of the templates folder and preferences folder is assumed to be inside the Informed folder unless otherwise specified in the 'Alternate templates folder location' and 'Alternate preferences folder location' text boxes. That is, if these text boxes are blank, Informed Filler will look for these folders inside the Informed folder. If you want to move either of these folders to a different location, enter the new location in the corresponding text box.

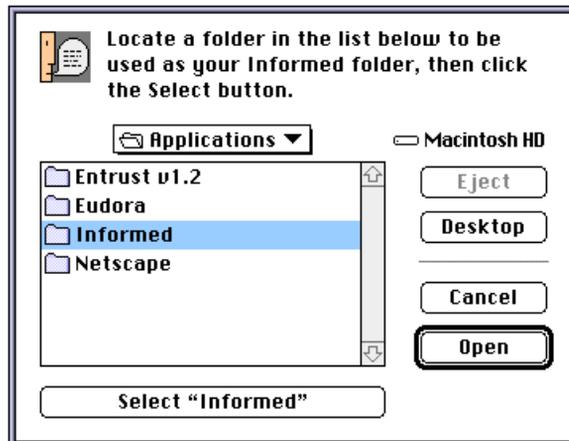
You can enter a new location by typing in a text box or by clicking the adjacent 'Browse' button. Clicking 'Browse' displays a dialog box allowing you to navigate through the different folders or directories of any available volumes to select the desired location.

If you're using a Windows compatible computer, clicking 'Browse' displays the following dialog box:



Select a folder in the scrolling list, then click ‘Select.’

If you’re using a Mac OS compatible computer, you’ll see the dialog box shown below.



Locate a folder in the scrolling list, then click the ‘Select’ button.

While using Informed Designer or Informed Filler, if any of the Informed, templates, or preferences folders cannot be found at their expected locations, you’ll see a dialog message indicating so.



You can look for the missing folder or cancel the operation. If you click 'Look,' a dialog box appears allowing selection of the folder in its new location. This dialog box is the same one that appears when you click any of the 'Browse' buttons on the Preferences dialog box (see earlier).

Designing for Multiple Platforms

Informed Designer and Informed Filler are designed for seamless inter-operation across the Windows and Mac OS platforms. Both the design of form templates, and, most importantly, the distribution, filling, routing, approving, submitting, and tracking of forms can occur on either platform. Forms can be filled on Windows and Mac OS computers regardless of the platform that was used to design the form template.

Informed Designer and Informed Filler create and manipulate documents of different types. Informed Designer creates form template documents whereas Informed Filler creates form data and package documents. These different types of documents are platform neutral. This means that if a document is created using Informed Designer or Informed Filler on one platform, that same document can be transferred to the other platform and opened directly. No translation is necessary, nor is it necessary to have two versions of a form template, one for each platform.

Since Windows and Mac OS are two different operating systems, the details of how certain features and capabilities work may differ. These differences, in some cases, result in special considerations or guidelines that should be followed when designing form templates for use on both platforms. The remaining sections of this chapter detail these guidelines. If you intend to design form templates for use on both Windows and Mac OS computers, you should read these sections.

File and Folder Names

One of the biggest differences between the Windows and Mac OS operating systems is the format of file and folder names. (The term "folder" is used in place of the DOS term "directory.")

For Windows version 3.11 and earlier, a filename is made up of a name and an extension. A folder consists of a name only. A file or folder name cannot exceed eight characters. The extension is up to three character long and often identifies the type of file or document. On the Mac OS, a filename can be up to 31 characters long and a file's type is not specified as part of the filename itself.

This difference in file and folder naming conventions means that special files and folders are named differently on the different platforms. For example, the Informed preferences folder is named “PREFS” on Windows and “Preferences” on the Mac OS.

If you save and name a new template document using a Mac OS computer, and you intend to distribute that template to both Mac OS and Windows users, be sure to name the file according to the Windows file naming conventions. That is, use the format filename.ext where filename is the name of the template (and should not exceed eight characters in length), and ext is “TTP,” the file extension for template documents.

Fonts and Type Styles

Different computers can have different fonts installed. When drawing a form template, be sure to use only those fonts that are installed on all Informed Filler users’ computer’s, both Windows and Mac OS. Furthermore, use fonts that are named exactly the same on both platforms, and whenever possible, use TrueType fonts or fonts that are based on the same font technology on both platforms.

Even when you use a font that’s available on both platforms, you may occasionally notice slight differences in the size and spacing of text. These slight differences can cause text to wrap differently on the two platforms.

Text can wrap differently between...

Mac OS...

Reason for Sales Trip

...and Windows

Reason for Sales Trip

To minimize word wrap differences, you should try to leave some space between the end of the text and the right edge of the object.

Mac OS

Reason for Sales Trip

Windows

Reason for Sales Trip

Leaving enough space between the end of the text and the right edge of the object eliminates the wrap difference.

After drawing a form template, and before distributing it to Informed Filler users, you should view it on both platforms to check for font consistency.

Informed Designer allows you to modify the appearance of text by selecting different type styles such as bold, underline, and italic. Certain type styles are available only on the Mac OS. They include: outline, shadow, condensed, and extended. If you draw text with one of these styles using Informed Designer on the Mac OS, the unsupported style will be ignored when the text is displayed by Informed Designer or Informed Filler on a Windows computer.

Importing Graphics

To include graphics created with other applications on your templates, Informed Designer allows you to import graphics using its Import command. Informed Designer can read graphics in files of the following formats:

- Windows bitmap
- Windows metafile
- Macintosh PICT
- Encapsulated Postscript (EPS)

All formats with the exception of Windows metafile can be imported using Informed Designer on either platform. Windows metafile can be imported, viewed, and printed only on Windows computers. If your templates will be used by Informed Filler users with Mac OS computers, you should not import graphics in the Windows metafile format. Use a different format instead.

Links to Other Systems

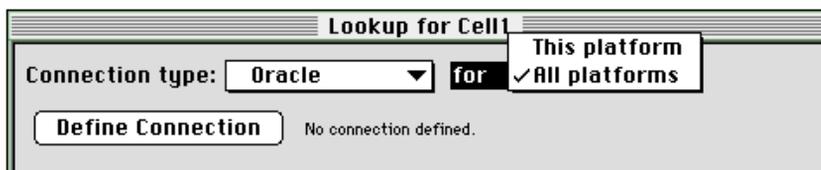
Many of Informed's capabilities rely on services provided by the operating system or other products or systems. The use of these capabilities often requires configuration using Informed Designer.

The following capabilities rely on external services:

- lookups to other databases or data sources
- form submission to other databases or data destinations
- obtaining form numbers from other databases or data sources
- form tracking with other databases or data sources
- authorizing templates and signing forms with digital signatures
- suggested routes for sending forms with electronic mail
- distribution of form templates via different types of distribution centers

Most of these services are available on both the Windows and Mac OS platforms. However, the details of accessing a service from each of the platforms might be different. For example, suppose that you're linking a lookup to an Oracle database. For Mac OS users, you might be accessing the Oracle database using the Mac OS Oracle client software (SQL*NET), whereas on Windows you might be using ODBC instead. The specific parameters needed to connect to the database, therefore, might be different depending on which platform the Informed Filler user is using.

Informed Designer automatically knows when a feature requires separate configuration on each platform. The Lookup dialog box, for example, contains a drop-down list with the items 'This platform' and 'All platforms.'



For each different type of database or data source that you can link to, Informed Designer knows if the configuration details are the same or different for the two platforms. If they're the same, the 'All platforms' option will be available and the lookup you configure on one platform will function on both.

If the configuration details are different for each platform, 'This platform' will be the only choice available in the drop-down list. For accessing these types of databases, you have to configure the lookup on one platform, then move the form template to the other platform and repeat the configuration. Informed Designer stores the configuration for both platforms. Informed Filler uses the configuration that corresponds to the user's platform.

Although certain features require that configuration be done twice, once on each platform, the resulting form template document is still a platform neutral document. That is, a single version of the template will work with Informed Filler on both platforms. Informed Filler automatically uses the configuration information that's appropriate for the user's platform.

Scripting

Informed currently provides support for the JavaScript and AppleScript scripting languages. Chapter 12 of your *Informed Designer Forms Automation* manual provides an overview of Informed's scripting capabilities and describes how to attach scripts to your form templates.

