



Introduction

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With the advancement of computer technology and forms software, electronic forms offer an efficient, intelligent, and secure alternative to the traditional paper based forms systems used in many organizations. Shana Corporation offers the complete cross-platform electronic forms solution for each step in the paper forms process—from the design stage to “fill, sign, and send.”

Informed Designer and Informed Filler together provide everything you need to design, distribute, fill, route, approve, submit, and track electronic forms.

Informed Designer

Informed Designer gives you flexible tools to draw professional quality forms quickly and easily. With advanced drawing tools, powerful graphics manipulation commands, and precision control, you have all you need to produce appealing, picture perfect forms on your computer. Since forms are stored electronically, you now have more freedom to change your forms as your needs change.

If you want to design paper forms to be filled out by hand or with a typewriter, then Informed Designer is all you need. You can design forms for in-house printing, or you can prepare camera-ready artwork for your commercial printer.

When you're ready to move from paper forms to an electronic forms solution, Informed Designer provides all the features you need to design intelligent form templates, ready to be filled out electronically with Informed Filler. Use Informed Designer's powerful tools and functions to make your forms automatically calculate, format, lookup, and check information for the person using Informed Filler. You can also configure forms for electronic signing by using digital signatures.

Although Informed Filler is required to fill out and save forms electronically, you can test your forms using Informed Designer's Test mode. This allows you to make sure that your formatting, calculations, and other intelligent features work properly without having to switch to a different application.

The Informed Designer Manual Set

The Informed Designer manual set is designed to provide you with a complete reference to the features and capabilities of Informed Designer. The manuals combine text and graphics to thoroughly document every aspect of the software. In addition to your Informed Designer Forms Automation manual, the set also contains the following:

- The *Informed Designer Getting Started Guide* provides you with information on installing and registering Informed Designer, and also describes the minimum hardware and software configurations required to use the Informed Designer application.

- The *Informed Designer Tutorial* leads you through the step by step creation of an electronic purchase order form. You'll learn how to draw a form template using Informed Designer's drawing tools, and how to add basic intelligence to your form using data formatting, calculations, choice lists, help messages, and more.
- The *Informed Designer Design and Graphics* manual provides a complete reference to Informed Designer's design and graphics features. Instructions are given for every step in the form design process, including preparing the drawing area of the template, using the drawing tools, adding graphics, and printing. You also learn how to mail form templates using an electronic mail system.

About This Manual

This manual includes a complete reference to Informed Designer's forms automation features. General topics are organized in the following chapters:

- Chapter 1, "Adding Intelligence To Your Forms," describes Informed Designer's data handling capabilities. You'll learn how to add "intelligent" features to your form templates.
- Chapter 2, "Using Digital Signatures," explains Informed's digital signature capabilities, and describes how to configure a template for electronic signing.
- Chapter 3, "Customizing Menus," provides information on how to configure a form's menus to create a simpler and more familiar environment for the Informed Filler user. You'll also learn about the different menu item types and their uses.
- Chapter 4, "Using Buttons," describes Informed Designer's Button tool and how it can be used to draw and configure buttons on a form to perform specific actions
- Chapter 5, "Routing," explains how to configure suggested routes for your templates to aid the Informed Filler user in addressing and mailing completed forms.
- Chapter 6, "Form Tracking," introduces Informed's form tracking feature and explains how to configure forms for tracking throughout your organization.
- Chapter 7, "Authorizing Templates," explains how to protect the integrity of electronic forms by authorizing templates for use in your organization.
- Chapter 8, "Form Template Distribution and Revision," describes Informed's built-in template distribution features and provides guidelines for distributing both new form templates and new revisions of templates.
- Chapter 9, "Using Formulas," teaches you how to create formulas and describes how they are used to calculate and check information, and provide dynamic tabbing on a form.
- Chapter 10, "Using Functions," describes each of Informed's powerful functions and how they help you create sophisticated formulas.

- Chapter 11, “Using Informed Number Server,” teaches you how to configure Informed Number Server for use with templates filled out with Informed Filler.
- Chapter 12, “Scripting,” provides an overview of Informed’s scripting capabilities and describes in detail how you can customize forms using JavaScript. You’ll learn how to use Informed Designer’s Scripts command to attach scripts to templates so that they can be configured to run when the Informed Filler user invokes certain actions.
- Chapter 13, “Informed 4D Externals,” explains how to configure lookups and form submission with any 4th DIMENSION database.
- Chapter 14, “FormFlow Conversion” describes how you can convert documents created by Delrina’s PerForm PRO and FormFlow 1.x applications into Informed form templates. A section on how to “clean up” the converted forms is also included.

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 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, listing the main sections in that chapter. The example below shows the table of contents for Chapter 5, “Routing.”

- Suggested Routes 5-3
- Suggested Routes for Multiple Platforms 5-3
- Adding, Changing, and Removing Suggested Routes 5-4
- Controlling the Data Format 5-8
- Using Mail Cells 5-9

Inside each chapter, the main topics are highlighted in a gray bar like the one at the beginning of this section, making 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.

Notes

Throughout this manual, you’ll see paragraphs of text highlighted in gray boxes with the label “Note” in the left margin. These notes contain important information such as warnings, reminders, and specific conditions to be aware of. The example below shows a typical note.

Note

Important information about Informed Designer appears in highlighted gray boxes like this one.

Commands and Control Names

When specific instructions on how to perform a certain task are given in this manual, commands are shown in a different typeface from the rest of the text. The name of the menu where the command is found is also given in each instance. For example, when learning how to use Informed Designer's Cell palette, you'll read the following text:

“You can show the Cell palette by choosing **Cell Palette** from the Show submenu under Layout. To hide the Cell palette, click its close box or choose **Cell Palette** again.”

The names of controls such as buttons and settings on dialog boxes are always shown in single quotes. For lengthy control names, this helps to differentiate the control name from the text that surrounds it. For example:

“When setting preferences for Informed Designer's spell checking feature, you can select the ‘Always provide alternative spellings’ checkbox.”

Cross-platform Issues

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

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

When a specific feature of Informed Designer is only applicable to one platform (Windows or Mac OS), an icon depicting either the Windows or Mac OS platform is displayed in the left margin next to the description of the feature as shown below.



The Windows Metafile format is not supported on the Mac OS.

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