

Attachments

In this chapter:

- The Attachments Window 5-2
- Windows and Mac OS File Types 5-3
- Attaching Files 5-4
- Extracting Files 5-5
- Deleting Attachments 5-7
- Attachments and Digital Signatures 5-7



Attachments

Forms are often associated with other information. For example, an engineering change request form may pertain to a set of engineering design documents. Likewise, many expense forms have associated receipts for the expenses claimed.

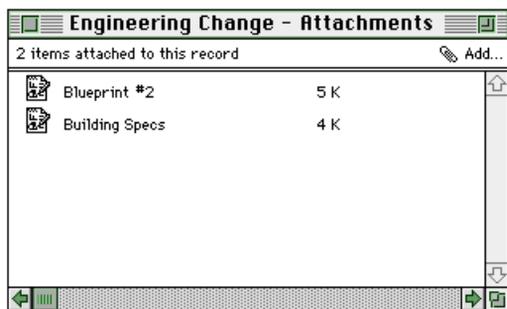
With paper forms, associated documents or information are often attached to a form using a paper clip. Informed Filler provides this same capability by allowing you to attach electronic documents to electronic forms. Any file, regardless of its size or content, can be attached to a record. Although not visible on the form itself, 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, if any, 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



Just 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 itself. Instead, attached files can be seen in the Attachments window.



To show the Attachments window, choose **Show Attachments** from the View menu, or click the paper clip indicator on the form window. To close the Attachments window, choose **Hide Attachments** from the View menu, or click the window's close box.

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

Windows and Mac OS File Types

Since Windows and Mac OS are two different operating systems, it is normal to expect differences in the way that files are stored with each one. Although these details are not important to the typical computer user, it is useful to understand certain differences as they relate to Informed Filler's 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 the Mac OS, 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 the Mac OS. This code is normally not visible to the user. A text file on the Mac OS has a file type of "TEXT."

If you attach a file to a record on one platform (Windows or Mac OS), and then mail the record to a user of the other platform (Mac OS or Windows), Informed Filler has to know which file type to use when the file is extracted. For example, if a Windows user attaches a text file (that is, a file with the ".TXT" DOS extension) to a record, when a Mac OS user extracts the file, Informed Filler must know to use the "TEXT" file type.

Whenever a file is attached or extracted on the Mac OS, Informed Filler 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 Mac OS file type. If a Mac OS 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 Mac OS file types is built into Informed Filler. In addition to this list, the Mac OS 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	Mac OS File Type
.TXT	SimpleText	Text document (TEXT)
.IFM	Informed Filler™	Form data document (IDoc)

For detailed information about PC Exchange, please see your Macintosh *Getting Started Guide*.

Attaching Files

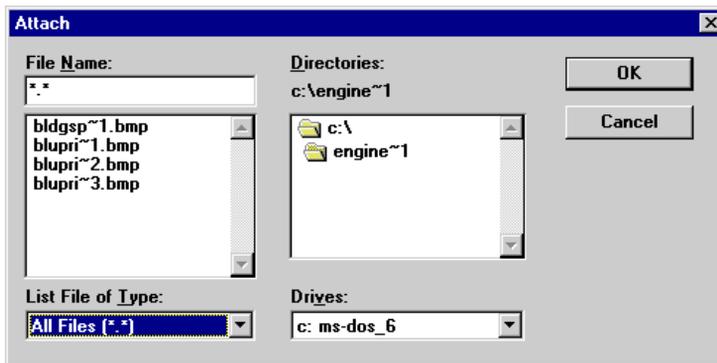
There are two ways to attach files to a record. You can drag files onto the paper clip or the Attachments window, or you can use the Attach command.

To attach a file by dragging, click on the file's icon, and hold the mouse button down. Drag the file onto the paper clip or the Attachments window until a highlighted frame appears, then release the mouse button. To drag and attach multiple files at once, select them all, then drag the them onto the paper clip or Attachments window.

Alternatively, you can use Informed Filler's Attach command to attach a file.

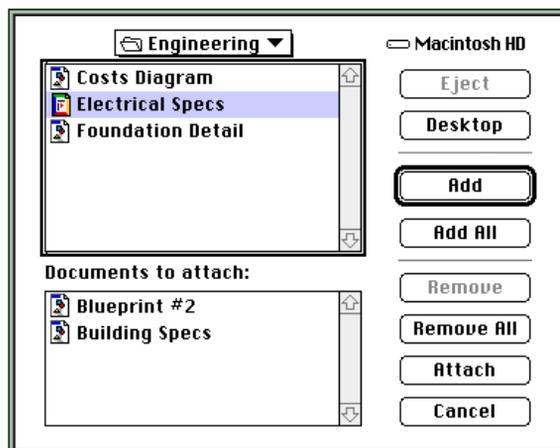
To use the Attach command, choose **Attach...** from the File menu or click 'Add...' on the Attachments window. A dialog box appears allowing you to select a file to attach.

If your computer uses Windows, you'll see this dialog box:



To select a file to attach, click it in the 'File Name' scrolling list, then click 'OK.' To change your selection, simply click a different file. To cancel the Attachment command and dismiss the dialog box, click 'Cancel.'

If you're using a Mac OS, you'll see one of two dialog boxes when you choose the Attach command. If your computer has System 7.0 or later, you'll see a dialog box that allows you to select more than one file to attach.



To select a file to attach, click it in the upper scrolling list and click 'Add,' or simply double-click the file. The name of the selected file appears in the lower scrolling list. To add all the files in the current folder, click 'Add All.' To remove an item from the list of those to attach, click the file in the lower scrolling list and click 'Remove,' or simply double-click the file. To remove all the files that you've selected, click 'Remove All.' Once you've made your selection, click 'Attach' to attach the files or click 'Cancel' to cancel the Attachments command and dismiss the dialog.

If your computer has system software earlier than version 7.0, the Attach dialog box that you'll see only allows you to select and attach one file at a time.

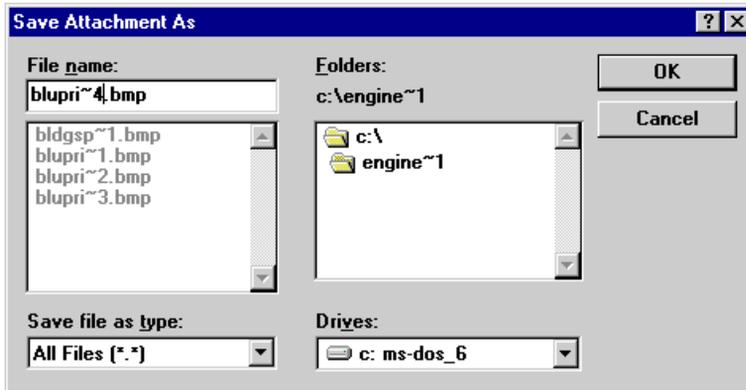
Extracting Files

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 hard drive.

Like attaching files, there are two different methods with which you can extract files. If you're using a computer with System 7.5 or later, you can simply drag an attached file from the Attachments window to a place on your hard drive. You can select and drag more than one item at the same time. If an item with the same name as the file you are extracting already exists at the location you drag to, you'll be asked if you'd like to replace the file or cancel the action.

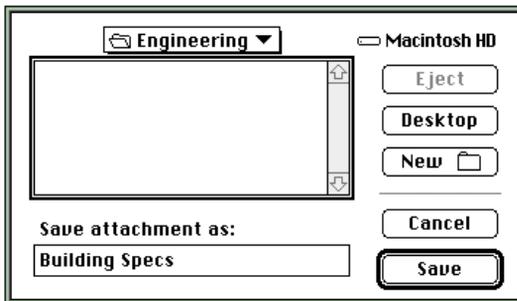
The Extract command provides an alternate method of extracting a file. This is the only method available if your computer uses Windows, or a version of the Mac OS earlier than 7.5. To extract a file using this method, select the file in the Attachments window and choose **Extract...** from the File menu. As a shortcut to the Extract command, you can double-click the item in the Attachments window.

If your computer uses Windows, you'll see this dialog box:



Select the location that you want to save the attached file and click 'OK.' To cancel the Extract command and dismiss the dialog, click 'Cancel.'

If you're using the Mac OS, you'll see the standard Save dialog box.



Select the folder that you want to save the attached file into and click 'Save.' To cancel the Extract command and dismiss the dialog, click 'Cancel.'

If a file with the same name as a file being extracted already exists at the location you specify, you'll be warned and asked if you would like to replace the existing file or cancel the Extract command.

You can extract multiple files at once by first selecting each of them in the Attachments window before choosing the Extract command. For each of the selected files, you'll see either of the dialog boxes shown above allowing you to specify the name and location of each file separately.

Deleting Attachments

To delete an attachment, click it in the Attachments window, then choose **Clear** under the Edit menu, or press the Delete key.

If you're running a Mac OS computer with System 7.5 or later installed, you can also delete an attachment by selecting it in the Attachments window and dragging it to the Trash.

Attachments and Digital Signatures

The designer of the templates you use can include signature cells for signing purposes. Chapter 4, "Using Digital Signatures," explains how you can sign records and verify digital signatures.

A signature cell can sign all cells on a form or only certain cells. Furthermore, the form 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.

Informed Filler allows you to see which cells are signed and whether or not attachments are signed by a particular signature cell. As explained in Chapter 4, you can select the Show Signed Cells command from the Signatures submenu under Informed Filler's Edit menu to see this information. Informed Filler frames each cell that is signed by the selected signature cell with a red box.

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. This is to indicate that if you sign the record in that signature cell, all of the currently attached files will be 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. Informed Filler knows which attachments a signature has signed and prevents you from deleting them.

5-8 : Attachments
: