

14 Form Template Distribution

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Form Template Distribution

Once a form is designed, it is distributed to the Informed Filler users who fill it out. Forms distribution can be a significant cost for many organizations. Users must be notified of new form templates and these templates must be obtained before they can be filled out. The distribution of new versions of existing form templates can be even more costly due to the frequency with which templates are revised.

This chapter explains the form template distribution features that are built into Informed Designer and Informed Filler.

Background

Informed Filler allows form templates to be accessed either locally on your computer's hard disk, or via a network file server. The location that Informed Filler looks for templates is, by default, in a folder named "TEMPLATE" (Windows) or "Templates" (Mac OS) located in your Informed folder. This location can be specified and changed using Informed Filler's Preferences command. For more information, please see "Moving Folders" in Chapter 1 of this manual.

Storing templates locally means that you can use the templates any time, even while disconnected from the network. Storing templates locally, however, means that you must copy the templates that you want to use to your hard disk both when the template is first created, and each time the template is revised.

Accessing form templates from a central file server simplifies distribution. When a new template is designed, the forms 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, however, you must have access to the file server.

How it Works

When using Informed's built-in distribution features, the distribution of a form template is done via one or more distribution centers and assumes that you are storing templates locally for use with Informed Filler. A distribution center is a place where distributed form templates are stored. The forms designer maintains the distribution centers and the distributed templates that are available at each center.

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 Filler included distribution plug-ins for accessing file

servers and FTP servers. By using plug-ins, Shana can easily support a new type of distribution center by simply developing a new distribution plug-in.

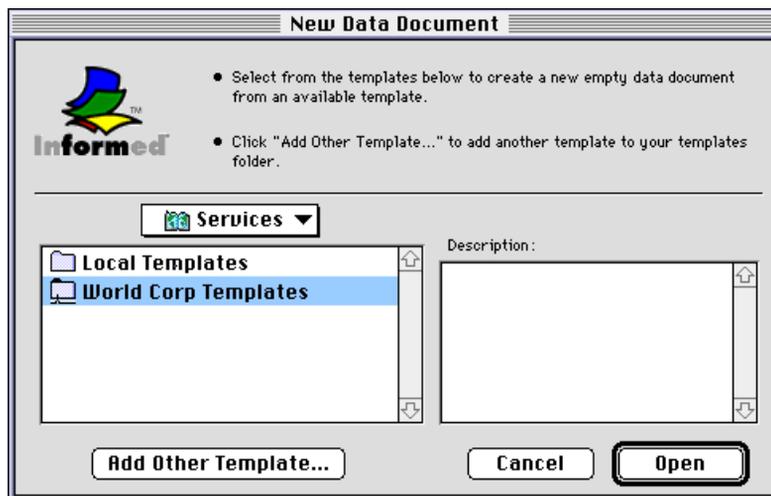
For information that is specific to the particular distribution plug-ins supported by Informed Filler, please see the document “FILLPLG.PDF” (Windows) or “Informed Filler Plug-ins” (Mac OS). This document is installed automatically when you install Informed Filler and is viewed using Acrobat Reader (also included with Informed Filler).

In order to access a particular distribution center, you must have a 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 forms designer creates the distribution center profiles for the distribution centers used in your organization. These files must be installed in your “DISTCTRS” (Windows) or “Distribution Centers” (Mac OS) folder. This folder is found in your “PREFS” (Windows) or “Preferences” (Mac OS) folder which, by default, is located in your Informed folder.

Accessing Distribution Centers

Informed Filler makes it easy to access distribution centers to obtain new form templates. When you choose the New Document command from the File menu, the dialog box that appears provides controls for accessing distribution centers and selecting distributed form templates.



Choosing ‘Services’ from the drop-down list reveals the distribution centers that correspond to the distribution center profiles that are installed in your distribution centers folder. The details of selecting distributed templates can be found in Chapter 2, “Manipulating Documents”.

Once you've selected a distributed template, Informed Filler will copy it to your templates folder. The template is then available for use to fill out and manipulate forms.

As also described in Chapter 2, "Manipulating Documents," when you open a form data document, Informed Filler examines the Template ID inside the document to determine which template is required to view and manipulate the form data. It then searches in your templates folder for a template with a matching Template ID. If the required template is found, it is automatically opened along with the data document. If the required template is not found, and distribution information is found in the data document, Informed Filler will automatically connect to the distribution center and obtain the template. If the data document does not contain the distribution information needed to obtain the template, you are 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 form template to use.

Checking for Revisions

Included in a distributed form template is a distribution list for the template. A distribution list is a list of distribution centers at which the template is available. From time to time, Informed Filler will automatically connect to a distribution center and check the distributed template to see if a new version is available. The forms designer specifies how often a revision check occurs. If permitted by the form designer, you can change this setting with Informed Filler's Preferences command. Choose **Preferences...** from the Edit menu and click the Revisions icon to display the Revisions panel. The Revisions panel is available only if the form template is a distributed template.



The settings available in the ‘Automatically check for a new revision’ drop-down list include:

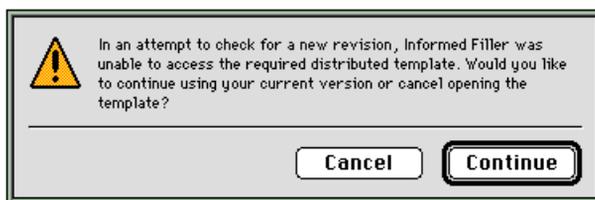
- Each time the template is opened
- Once every day
- Once every week
- Once every month
- Never

If you select the ‘Never’ setting, Informed Filler will not do automatic revision checking. With this setting, the only way to check for a new revision is to click the ‘Check For Revision Now’ button on the Preferences dialog box.

Note

The form designer can lock this setting so that you cannot change it. If the setting is locked, you will not be able to choose a different setting.

The distribution list for a template can include more than one distribution center. The forms designer may have made the distributed template available at multiple distribution centers so that if operation of one center is interrupted, the distributed template can be accessed at a different center. When a revision check occurs, Informed Filler will attempt to check the distributed template at the first distribution center in the list. If this distribution center is inaccessible, it will try the next center in the list, and so on, until the revision check is successful. If Informed Filler is unable to connect to any of the centers in the template’s distribution list, a message will appear indicating so. The message you see might be the one shown below, or it might be a custom message specified by the form designer.



To skip the revision check, click ‘Continue.’ Informed Filler will open and use your current version of the template. To cancel opening the template, click ‘Cancel’ instead.

If a revision check occurs and Informed Filler detects that a new revision of the template is available (that is, the revision number of the distributed template at the distribution center is different from that of the template in your templates folder), you’ll be notified with a message.

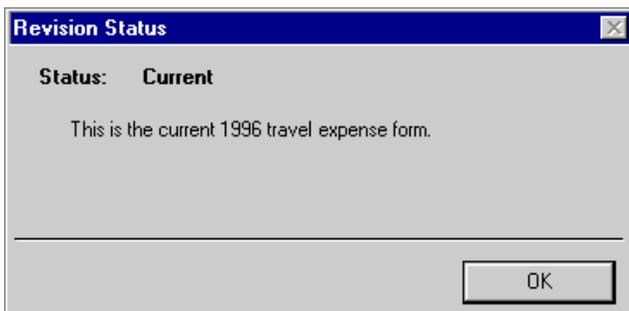


Your options are to update your copy of the template with the new revision, ignore the new revision and continue using your current version, or cancel the operation. Click the button of your choice.

If you choose the Update option, Informed Filler replaces your template with the new version. If the new version includes changes that affect the information that is contained on the form, Informed Filler will update the data in the active data document to reflect these changes. For more information, see “Updating a Data Document” in Chapter 2, “Manipulating Documents.”

Revision Status

Each form template has a status and a status message. The forms 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, choose **Revision Status...** from the View menu.



The template’s status can be one of: Current, Non-current, or Discontinued. Each status has an implied meaning. Current implies that the template is the most up-to-date version. Non-current is intended to imply that a newer version of the template is available, but you can still fill out forms using the non-current version. The discontinued status implies that the template has become obsolete and should no longer be used to fill out new forms.

To remind you of a template’s current status, the forms designer may configure the template to automatically display the status and status message whenever you request to add a new record. Furthermore, for discontinued templates, the forms designer can prevent you from adding new records.