

3 Filling Out Forms

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3 Filling Out Forms

Forms contain areas where you enter information. These areas are called cells. The form designer creates and names each cell using the Informed Designer application. The form designer also specifies the type of information that you can store in each cell, as well as the desired formatting options. Calculations, choices, lookups, and other intelligent features are also added to a form using Informed Designer.

This chapter describes how to fill out a form. You'll learn about entering information and about using the variety of intelligent 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.

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 figure shows two screenshots of a form window. The left window shows an inactive form, and the right window shows the same form with the record activated. The active form has a small circle in the collection information box and the 'Sold To' cell is highlighted.

World Corporation 1 Avenue of the Americas New York, NY 12345	
Employee No	Recipient Name
1055	Lauren Qt
Department to Charge	
Internal Security	
Part #	Descr
C H E M 1 0 1	Chemistry Set
B C 5 9 5 1	Brief Case
22 Records 1 of 2	

The small pencil in the collection information box (see “Collection of Records” in Chapter 8) indicates visually that the record is active. Notice that the Sold To cell is selected and ready to accept information. The form on the left is inactive and therefore has no current cell.

When you open an existing form data document, or when you retrieve a record using the find or browsing commands (see Chapter 8), the current record will be initially inactive. To activate the current record, you can do either of the following:

- Press the Tab key. When you press Tab, Informed Filler activates the current record and selects the first cell on the current page.
- Click any cell. Using the mouse, position the pointer over any cell, then press the mouse button. Informed Filler 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 "Entering Information" and "Tab Order" later in this chapter 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 Control-Enter. If your Mac OS computer does not have an Enter key, you can press Command-Return.

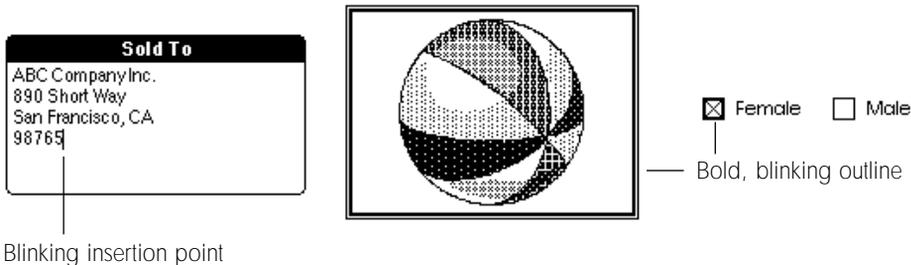
Note

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

As you'll learn later in this chapter, the form 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 Filler checks for errors in order to prevent accepting an invalid record. If an error is detected, a beep will sound and the record will remain active with the invalid cell value selected. Correct the mistake, then press the Enter key once again to accept the record.

Entering Information

To fill out a form you enter information into each cell on the form. You can move between cells by pressing keys such as Tab or Shift-Tab, or by clicking a particular 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 will contain either a blinking insertion point or a selected cell value. Selected checkbox, picture, and signature cells contain a bold, blinking outline.



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

- typing
- pasting the Clipboard contents (choose **Paste** from the Edit menu)
- selecting a choice from a choices palette or drop-down list (for certain cells)

For information about using choice lists, see “Intelligent Features” later in this chapter.

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

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

Cell Types

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

When you enter information into a cell, the value you type or paste 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 Filler will beep and select the value when you attempt to accept the record or tab to a different cell.

Associated with each cell type are a variety of formatting options that make it easier to enter information. Rather than typing formatted values, Informed Filler 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. Informed Filler would automatically convert a typed value, such as '1500,' to the formatted value '\$1,500.00.'

Font, Size, and Type Style

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

To change the font, size, or type style, select the value in a cell and choose a new setting from the submenus under the Cell menu. Which submenus are available depends on which options the form designer has allowed. For example, if you are only allowed to change the font and type style, the Size submenu will be unavailable.



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

Display Only Cells

The form designer can prevent you from entering information into any cell by making the cell display only. Display only cells are usually calculated cells that obtain their values from other cells on the form. While tabbing from cell to cell, Informed Filler will skip past any display only cells. You are still permitted, however, to select a display only cell by clicking it with the pointer. To indicate that a cell is a display only cell, a line will appear through the pencil symbol in the collection information box when the cell is selected.

INVOICE		Subtotal	4903.28
		Discount	98.07
		TOTAL	4805.21

35 Records 3 of 15

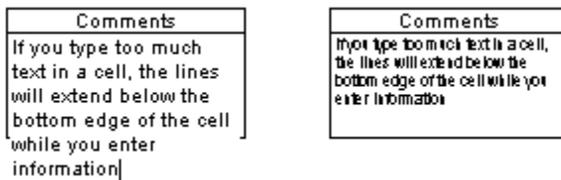
While a display only cell is selected, Informed Filler will beep each time you try to enter or change the cell's value. After three attempts, an alert message will notify you that the current cell is a display only cell.

Entering Text

The text cell type is used for cells that hold textual 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 Filler will automatically shrink the type size of the information so that it fits entirely in the cell area.



Entering Character Values

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

When you enter a value into a character cell, Informed Filler will verify 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, Informed Filler will beep and select the value when you try to move to a different cell or accept the record. A message will appear picturing the required format.

Entering Numbers

The number cell type stores numbers in a variety of formats. Informed Filler automatically formats any 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 (such as Mister or Professor), a first name, a middle name, a last name, and a suffix (such as 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, Informed Filler 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, then suffix. If you type a comma after the first part, Informed Filler will interpret that part as the last name.

To help identify the parts of a name that you type, Informed Filler 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 Filler 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, 1996,' you can type 'jan 1 96' or '1 1 96.' Informed Filler interprets what you type and formats the date or time value according to the particular formatting options of the cell.

Since today's date is often a common entry for a date cell, Informed Filler offers a command that types the current date for you. To enter the current date, select the cell that you want to type in, then choose **Insert Date** from the Edit menu. Informed Filler enters today's date in the correct format.

Entering Boolean Values

A boolean cell can have one of two values. Depending on the format of a boolean cell, the cell's value will display as Yes or No, True or False, or On or Off.

Informed Filler ensures that you enter only values that are appropriate for that format. If you type only part of a value, Informed Filler converts it to its full form. For example, to enter 'No' into a Yes/No style boolean cell, you need only type the letter 'n.' Informed Filler converts the value to 'No' for you.

Entering Checkbox Values

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

<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No
<input checked="" type="checkbox"/> True	<input type="checkbox"/> False
<input checked="" type="checkbox"/> On	<input type="checkbox"/> Off
<input checked="" type="checkbox"/> Male	<input type="checkbox"/> Female
<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No
<input checked="" type="checkbox"/> On	<input type="checkbox"/> Off
<input checked="" type="radio"/> Up	<input type="radio"/> Down
<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No

Rather than typing a value into a checkbox, simply click the cell with the pointer or press any key. The cell's value will toggle between checked and unchecked.

Entering Pictures

You can enter a picture into a picture cell by using the Insert File command (see “Reading Information From a File”) or by pasting from the Clipboard. If you are using a Mac OS compatible computer with system software 7.5 or later, you can also enter a picture by using the drag and drop method. Informed Filler stores pictures in Windows Bitmap (.BMP), Windows Metafile (.WMF), Macintosh PICT (.PCT), and Encapsulated PostScript (.EPS).



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

Reading Information From a File

Another way to fill in 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.

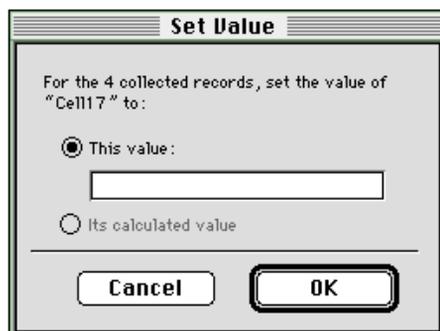
To insert a file, select the cell, then choose **Insert File...** from the Cell menu. For picture cells only, pressing the Enter (Windows) or Return (Mac OS) key is a shortcut for selecting the Insert File command. The standard Open dialog appears, allowing you to select a file. For text cells, the selected text file will be 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

From time to time 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

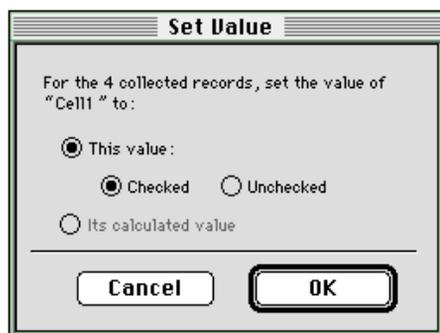
'Paid' on each record individually, you can set the value of the cell for all ten records at once with the Set Value command.

To set the value of a cell on multiple records, 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, "Manipulating Records" for details about the collection of records and using the Record List). With the Record List displayed, select the column that contains the cell you want to change, and choose **Set Value...** from the Cell menu. The Set Value dialog box appears.



With the 'This value' option selected, enter the new value in the text box and click 'OK.' The value of the cell is changed for each selected record. If you are setting the value for many records, Informed Filler displays a progress dialog.

If you want to change the value for a checkbox cell, the Set Value dialog box will look like this:



Instead of typing a value, simply click 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 will not be available. You can only use the 'Its calculated value' option. Please see "Calculations" for more details.

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 will be unavailable.

You can also use the Set Value command to reset the value of a calculated cell. For details, see “Calculations” later in this chapter.

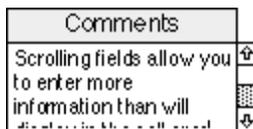
Errors When Using the Set Value Command

As you’ll learn in “Data Verification” later in this chapter, the form designer can create a check formula for any cell so that Informed Filler 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, Informed Filler leaves those records unchanged and tags them with the tag name “Set Value Errors.” For information on tagging records, see “Tagging Records” in Chapter 8.

Scrolling Fields

The form designer can include a scroll bar with any field on the 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 form designer has chosen, the scroll bar on a scrolling field might be visible at all times, or only when you select or tab into that cell.

When a record that contains scrolling fields is filled out and printed, Informed Filler 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 Filler will print 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 will only contain the data in the scrolling field; all other fields will 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 Filler's 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, select the value in the cell, then choose **Memorize** from the Cell menu. The value you are memorizing appears as part of the Memorize command in the Cell menu. For example, if you fill in the value "Lynn Gweenie" in the 'Name' cell on your form, the Memorize command displays as **Memorize "Lynn Gweenie"** when the cell is selected. After choosing the Memorize command, the name "Lynn Gweenie" will be automatically filled in when you add a new record to your data document.

Often different types of forms will contain some common information. For example, both purchase requisition and travel expense forms contain cells for employee information. For a particular employee, this information is the same on every record, both for purchase requisitions and travel expense forms. If the form 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 form 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, simply memorize a blank value.

Tab Order

Each form has a predefined *tab order*. The tab order determines the order in which you move from cell to cell each time you press the Tab key. The form designer sets up the tab order using Informed Designer. You can't change a form's tab order using Informed Filler. The following figure illustrates tab order.

ABC Company 12233-44 Ave. New York, NY 98765 INVOICE	Sold To ①		Ship To ②	
	Date ③	Terms ④	PO Number ⑤	Ship Via ⑥
	Qty ⑦	No. ⑧	Description ⑨	Price ⑩
Signature _____			Subtotal ⑪ Total ⑫	

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

When you fill out a form, pressing the Tab key moves you from one cell to the next in the tab order. Pressing the Shift-Tab key moves you in the reverse direction. If your form contains more than one page, Informed Filler will automatically change pages when you move from a cell on one page to a cell on another.

For cells that cannot have more than one line, pressing Enter (Windows) or Return (Mac OS) 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 (Mac OS) moves you to the next *Quick-Tab* cell in tab order. Pressing Shift-F2 (Windows) or Command-Shift-Tab (Mac OS) moves you to the previous Quick-Tab cell instead. Like the tab order of a form, you can't change the Quick-Tab cells using Informed Filler. Quick-Tab cells are specified using Informed Designer.

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

The form designer might also have configured conditional tabs for certain cells on the form. A conditional tab moves you 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 form designer might configure conditional tabs for 'Local' and 'Out of Town' checkboxes on a travel expense form. If you select the 'Local' checkbox and then tab from that cell, you might 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 consists of 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 information in each cell. The direction that you tab in a table—either across the rows or down the columns—is configured by the form designer.

The form designer also specifies when tabbing will leave a table. Normally, if you are tabbing across the rows, tabbing leaves the table when you tab through one empty row. However, the form 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

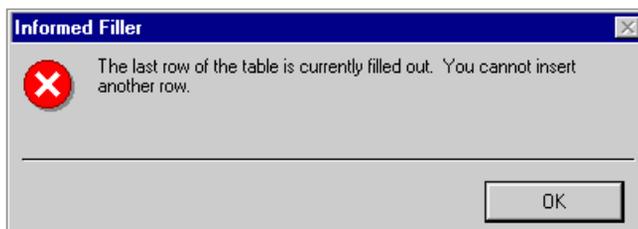
Occasionally you may want to insert or remove a row in a table that already contains information. Informed Filler provides the Insert Row and Remove Row commands specifically for this purpose. As an example, consider the table of information shown in the following figure.

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

Suppose that you want to add a new row between items A0-032 and A0-007. Simply select any cell in the row containing item A0-007, then choose **Insert Row** from the Edit menu. Informed Filler will move 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, Informed Filler won't let you insert a new row. Instead, you'll see this message:



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

To use the Remove Row command, select any cell in the row that you want to remove and choose **Remove Row** from the Edit menu. Informed Filler moves the information in all remaining rows up by one row.

Expandable Rows in Tables

If the form 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 normally display, only that row will expand. The other rows will 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, Informed Filler will 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 form 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 Filler 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.

Part No	Description
VC-120	Video Cassette
MP-1000	Microphone
NVG-250	Night Vision Glasses
BT-40	Black Turtleneck

Part No	Description
NVG-250	Night Vision Glasses
BT-40	Black Turtleneck
WC-10	Wire Cutters
M-P120	Map

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

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

When a form that contains scrolling tables is filled out and printed, Informed Filler 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 Filler will print 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 will only contain the data in the scrolling table; all other fields will print blank.

Using Buttons

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

ft Certificates ▼	6	15.00	90.00
		TOTAL	\$390.00

 Approving Signature	<input type="button" value="Mail"/>
-----------------------------------------------------------------------------------------------------------------	-------------------------------------

Clicking this button mails the form by invoking Informed Filler's Send command.

Clicking a button will often perform a command just as though you choose the command from a menu. For example, the mail button on the form above provides an alternative method for selecting Informed Filler's Send command. Other buttons might select settings or perform custom actions as specified by the form 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 will be 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. The numbered pages contain the form's actual design. For example, the first and second pages of a two page form are the numbered pages. A form can have a maximum of 99 numbered pages, and each page can have as many as 99 parts.

The number of pages and the number of parts per page is determined during the design process using Informed Designer. You can't change these attributes of a form using Informed Filler.

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 instructions on how to print the work page, please see "Printing the Work Page" in Chapter 9.

There are two common uses of the work page.

- As a place to put instructions or information that's useful while filling out a form. For example, suppose there are special instructions for distributing a form after it has been filled out. You might find these instructions on the work page.
- As a place to put cells that should not print with the rest of the form. You may need to enter or calculate cells that don't appear on the form (but are required by other calculated cells). For example, you might find the employee wage rates for a check form on the work page.

When you fill out a form, the work page functions like any other numbered page. You can Tab to cells on the work page and change their values. When you print the form, the work page doesn't print.

Changing Pages

As you fill out a form, Informed Filler 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 controls located along the bottom of the document window to change pages.

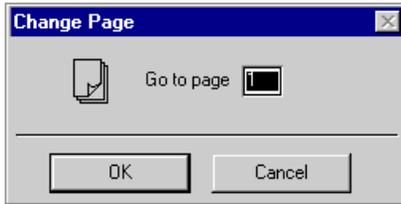


The control labelled 'W' represents the work page. The rightmost control represents the current numbered page of your form. When the numbered page control is selected, the number inside it corresponds to the current numbered page in the document window.

Using the page controls, you can change pages in either of two ways.

- Click either arrow next to the numbered page control to change pages in that direction. If you click and hold either arrow, Informed Filler will continue changing pages in that direction until you release the mouse button. If you're on page 1, the left arrow disappears. If you're on the last numbered page of the form, the right arrow disappears.

- Double-click the numbered page control. The Change Page dialog box appears.



Type the number of the page that you wish to change to, then click 'OK.' Informed Filler moves directly to the requested page.

After changing pages, the number shown in the page control will change to reflect the current page.

To change to the work page, simply click the work page control. Clicking the numbered page control changes back to the numbered pages of the form.

Intelligent Features

Informed's data intelligence features make it easy to fill out forms quickly and accurately. With Informed Filler, forms can automatically format, calculate, look up, and verify data so that you don't have to. The following figure shows a completed form with various intelligent features identified.

The image shows a completed invoice form with several callouts pointing to specific features:

- Auto-incrementing numbers:** Points to the 'Invoice #' field, which contains the value '552'.
- Default to today's date:** Points to the 'Date' field, which contains '9/14/96'.
- Lookup in another form or data source:** Points to the 'Part' column in the item table, which contains values '872' and '231'.
- Calculate cells:** Points to the 'Ext.' column in the item table and the 'Shipping Total' field at the bottom right.
- Offer a list of choices:** Points to the 'Ship By' field, which contains 'UPS'.

The invoice form includes the following data:

ABC Company 12345 - 123 St New York, NY 15243		Sold To Mr. Smith 8273 Long Way San Francisco, CA 27363		Ship To Mr. Smith 27364 Short Way San Francisco, CA 82734	
Invoice # 552		Date	Terms	PO No.	Ship By
		9/14/96	Cash		UPS
Qty	Part	Description	Price	Ext.	
2	872	Gadgets	79.23	158.46	
12	231	Widgets	771.10	9,253.20	
				Shipping	8.00
				Total	\$9,419.66

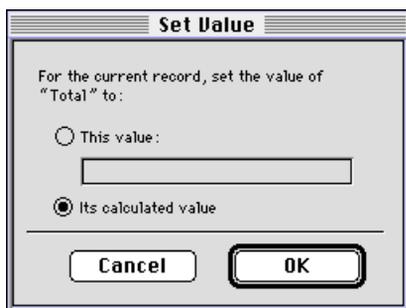
As explained in “Informed Documents” (see Chapter 2), the template of a form consists of both the graphical appearance of the form as well as its intelligent features. The form designer sets up the intelligence of a template using Informed Designer.

The remaining sections in this chapter explain how to use the intelligent features of a form.

Calculations

Informed Filler 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 whenever the value of any cell that participates in the formula changes. For example, suppose that a cell called ‘Extension’ is calculated as ‘Quantity * Price.’ Whenever you type a different value in either of the ‘Quantity’ or ‘Price’ cells, Informed Filler automatically calculates and displays the new value of ‘Extension.’

As explained in “Display Only Cells” earlier in this chapter, the form 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 like any other cell. For example, if you have an invoice with a calculated cell called ‘Discount,’ on occasion you might want to give a customer more than the calculated discount. If the cell is non-display only, you can manually override the calculated value by typing a different value. To change the cell back to its calculated value, simply select the cell on the form or the column on the Record List and choose **Set Value...** from the Cell menu.

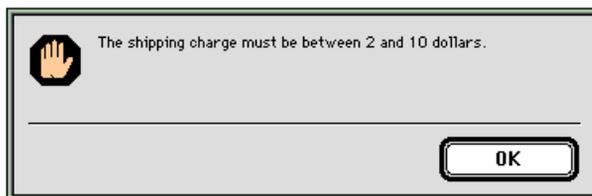


When the Set Value dialog box appears, click the ‘Its calculated value’ radio button, then click ‘OK.’

Data Verification

The form designer can enter error checking rules for any cell so that Informed Filler will automatically check for mistakes as you fill out a form. Each time you enter a cell value, Informed Filler 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. In any case, you'll hear a beep when you try to select a different cell or accept the record. Some check formulas will even present an alert dialog box with a message. Others will add a message to the cell's help dialog (see "Help Messages for Cells"). The following figure shows an alert dialog box.



Once an error has been reported, Informed Filler will allow you to move to a different cell even without first correcting the mistake. However, you can't accept, mail, or print a record until all errors have been corrected. If you try to do so, a beep will sound and the record will remain active with the incorrect value selected. An alert dialog box may appear with a message describing the mistake you've made.

Note

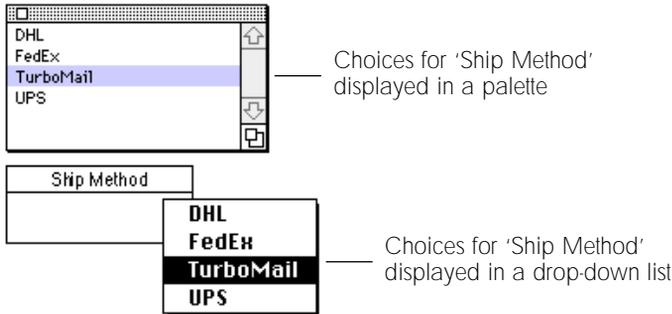
If you're unaware of how to correct an error, you can always revert or remove the record. For more information, see Chapter 8, "Manipulating Records."

Whenever an alert dialog box appears, Informed Filler will automatically add the message to the cell's help dialog box. This allows you to later view the alert message by selecting the cell then choosing **Help...** from the Cell menu. See "Help Messages for Cells" later in this chapter for more information.

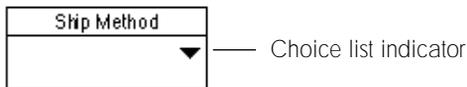
Choice Lists

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

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



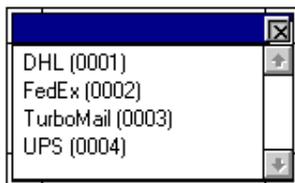
If the choices for a cell are configured to display in a drop-down list, you'll see an arrow on the right side of the cell's title section, indicating the presence of a choice list.



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

Depending on how the form designer has set up the form, choices in a palette will display automatically when you tab into the cell, or you may have to choose **Show Choices** from the View menu. If you show the palette by choosing the Show Choices command, the palette will remain visible until you close it manually by choosing **Hide Choices** or by clicking the palette's close box. If the palette is set to display automatically, Informed Filler will also hide the palette for you automatically when you select a different cell or accept the record.

The form 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,' will appear 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, simply click the arrow indicator on the cell's title section and drag the mouse until the choice you want is highlighted. When you release the mouse button, 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 choices palette or a drop-down list is to type the first few characters of the value. As you type characters, Informed Filler 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

Sales Person Choices
Brown, Tom
Dawson, Greg
Dickens, Sharon
Johnson, Cindy
Murphy, Karen
Smith, John
Young, Kevin

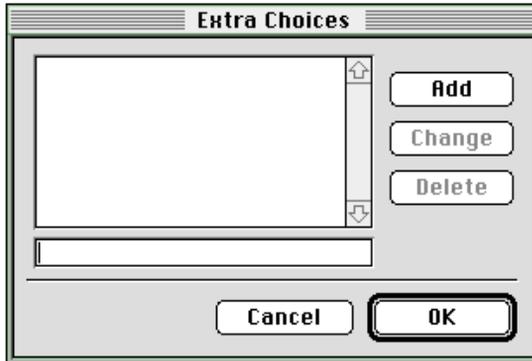
Typing the letter 'D' would select 'Dawson, Greg,' the first choice that starts with that letter. Typing 'Da' would also select 'Dawson, Greg.' However, typing 'Di' would select 'Dickens, Sharon' instead. In each case, Informed Filler automatically copies the entry into the cell as the selection is made.

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 selected choice and move to the next cell. If you press Tab without selecting a choice, Informed Filler leaves the cell blank and moves to the next cell.

Editing a Cell's Choices

Although you can't edit or remove the original choices in a choice list, the form designer can allow you to add extra items to the list of choices for any cell. If adding extra choices to a cell's choice list is allowed, the Extra Choices command under the Cell menu will be available when the cell is selected. To add more choices to a choice list, choose **Extra Choices...** from the Cell menu. The Edit Choices dialog box appears.



The Edit Choices dialog box contains controls for adding, removing, and changing extra choices. To add a new choice, type the entry in the text box below the scrolling 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.

To change or remove an extra choice, first select the choice by clicking it in the scrolling list; the selected choice appears in the text box. 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 into that cell, the choice list will show your extra choices as well as the original choices.

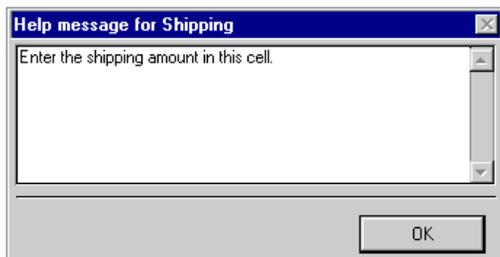
Note

When you add extra choices, they are only available for the cell that you added them in. In other words, the extra choices will not appear in other cells, even if they use the same choice list.

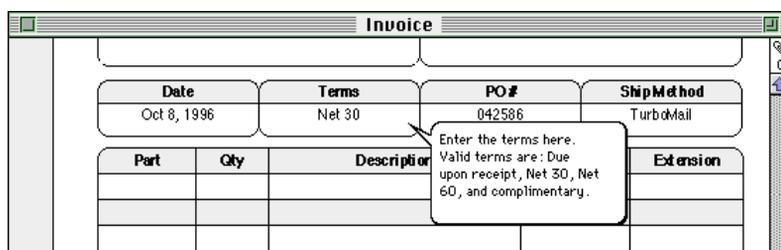
Help Messages for Cells

Each cell on a form can display a custom help message created by the form designer. The help message contains useful information or special instructions on filling in the cell. Help messages are displayed on the Help dialog. If you're using a computer with Mac OS System 7 (or later), they also appear in help balloons.

To display the help dialog, first select the cell, then choose **Help...** from the Cell menu, or press Control-? (Windows) or Command-? (Mac OS). The Help Message dialog box appears:



On the Mac OS, to display the Balloon help, choose **Show Balloons** from the Help menu and point at the cell of interest. A balloon appears showing the cell's help message:

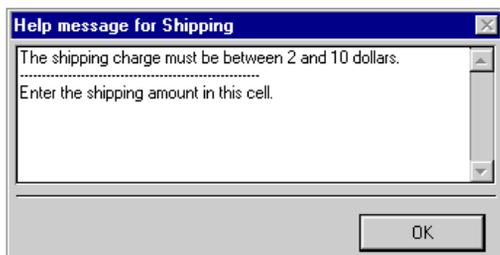


To turn off the Balloon help, choose **Hide Balloons** from the Help menu.

Check Formulas and the Help Dialog

As discussed in “Data Verification,” a cell’s check formula can append a message to the help message. You might, therefore, see a different message on the help dialog depending on the value of the current cell.

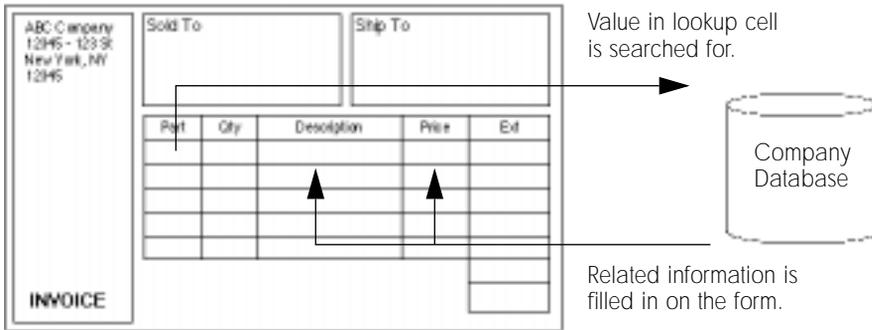
When a check formula uses an alert or help message, the message is added to the cell’s custom help message. The check formula message is separated from the cell’s help message by a dashed line on the Help dialog.



The check formula message will remain part of the help message until you change the cell’s value.

Lookups

The form designer can configure forms to look up information so that you don't have to. Entering a part number on an invoice form, for example, 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 in which you enter information that's looked up is called the *lookup cell*. In the figure above, the part number cell is the lookup cell.

Informed Filler 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 Filler looks up information is called the lookup source. Lookups are configured by the form designer.

Informed Designer and Informed Filler include built-in support for looking up into form data documents, or information available through Mac OS applications that support Apple events or AppleScript. 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 whenever 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, when the lookup is performed. This depends on the particular lookup source and how the connection is configured. The form designer can include the necessary connection information in the form template itself or leave it blank.

For example, for lookups that query an Oracle database, if the form designer did not include a user ID and password in the form template, you'll see the Oracle connection dialog box when the lookup is triggered.



Database Login For "Oracle"

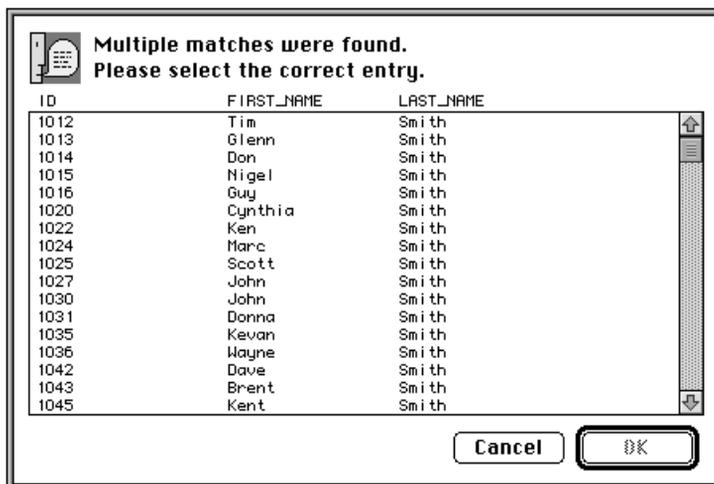
User ID: gWhittaker

Password: ●●●●●●

Cancel OK

The exact appearance of the connection dialog box varies slightly depending on the type of lookup source.

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 so. If multiple matches are found, you might see a dialog box requesting that you select a single match.



Multiple matches were found.
Please select the correct entry.

ID	FIRST_NAME	LAST_NAME
1012	Tim	Smith
1013	Glenn	Smith
1014	Don	Smith
1015	Nigel	Smith
1016	Guy	Smith
1020	Cynthia	Smith
1022	Ken	Smith
1024	Marc	Smith
1025	Scott	Smith
1027	John	Smith
1030	John	Smith
1031	Donna	Smith
1035	Kevan	Smith
1036	Wayne	Smith
1042	Dave	Smith
1043	Brent	Smith
1045	Kent	Smith

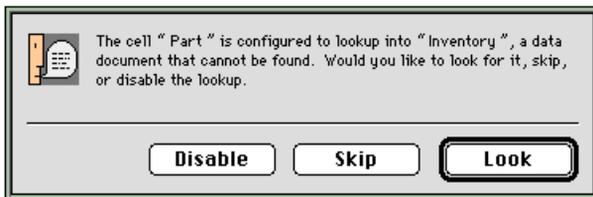
Cancel OK

If this happens, select the desired match then click 'OK.' To cancel the lookup, click 'Cancel' instead.

Lookup Errors

When you trigger a lookup, it is necessary that the lookup source be available to perform the lookup. If Informed Filler is unable to find or connect to the lookup source, you'll see an error message indicating so.

Depending on the type of lookup source, the specific error message and the options available will 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 form data document and Informed Filler cannot find the document, clicking 'Look' on this dialog box allows you to browse any available volumes to locate the document. Clicking 'Skip' ignores the lookup that time only. This means that the error message will appear 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.' Clicking 'Retry' attempts to perform the lookup again.

Form Numbers

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 form designer can configure a cell that contains the form number to be an auto-incrementing cell—that is, a cell that's automatically assigned a value upon request or when a new record is added to the data document.

Form numbers can be obtained from a variety of sources. For instance, the next available number might be stored in the form template itself, 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 when the form number is requested. This depends on the particular form number source and how the connection is configured. The form designer can include the necessary connection information in the form template itself or leave it blank.

For example, for cells that obtain a value from an Oracle database, if the form designer did not include a user ID and password in the form template, you'll see the Oracle connection dialog box when the auto-increment is triggered.



The exact appearance of the connection dialog box varies slightly depending on the type of form number source.

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 an Oracle 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 **Assign Next Value** from the Cell menu (with the form number cell selected). Informed Filler obtains the next available value from the Oracle database, and fills in the cell on your form.

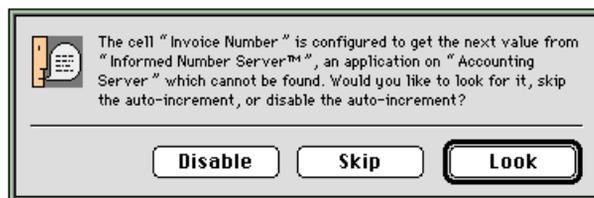
The Assign Next Value command is also used for cells that are configured to auto-increment manually (that is, only when you request a value). To manually obtain the next available value for a cell, first select the cell, then choose **Assign Next Value** from the Cell menu.

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 **Assign Next Value** from the Cell menu. Informed Filler 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, "Manipulating Records."

Form Number Errors

When a form number is requested, it is necessary that the source of the form number be available to generate the next available value. If Informed Filler is unable to find or connect to the form number source, you'll see an error message indicating so.

Depending on the type of form number source, the specific error message and the options available will vary. For some form number sources, the error is described and the auto-increment is canceled. For others, options include skipping the auto-increment and looking for the form number source.



Clicking 'Look' allows you to try and locate the form number source. For example, if the form number source is another application and Informed Filler cannot find the application, clicking 'Look' on this dialog box allows you to browse any available volumes to locate the application. Clicking 'Skip' ignores the auto-increment that time only. This means that the error message will appear the next time a form number is requested. The 'Disable' option ignores the auto-increment until the data document is closed and later opened again. For some form number sources, the 'Look' option is not available. Instead, you'll see a button labeled 'Retry.' Clicking 'Retry' attempts to perform the auto-increment again.

