

5 Routing

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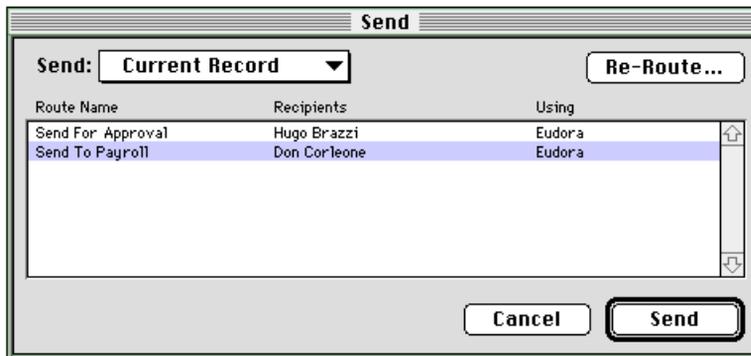
5 Routing

Chapter 12 of your *Informed Designer Design and Graphics* manual explains how you can use electronic mail to mail a form template to another person. This chapter explains how you can configure a template to aid the Informed Filler user in addressing and mailing completed forms.

Many types of forms must be sent from person to person for approval and processing purposes. For example, it's very common for a purchase requisition form to be filled out by the requestor, sent to a supervisor for approval, and then forwarded onto the purchasing department. In large organizations, a single form might go through several levels of approval before the process is complete.

To aid the Informed Filler user in selecting the appropriate person or place to send a form to, you can add one or more suggested routes to a template. You can also specify the data format to use when sending forms so that the Informed Filler user doesn't choose an incorrect format by mistake.

When sending a completed form, the Informed Filler user can simply select the appropriate suggested route according to his or her role in the processing of the form. The user also has the option to re-route the form to a different person or place.



Without a list of suggested routes, the user is expected to know where the form must be sent.

Like mailing templates, mailing completed forms with Informed Filler relies on Informed mail plug-ins and the associated e-mail software being installed. If you intend to specify suggested routes, complete with e-mail addresses for recipients, you need to have the appropriate Informed mail plug-in and the e-mail software installed on your computer. Mail plug-ins must be installed in your plug-ins folder.

For details regarding the e-mail systems supported by Informed, see the "Mail Plug-ins" topic in Informed Designer's on-line help.

Suggested Routes

A suggested route consists of a route name and one or more recipients. The route name alone can provide helpful information to the Informed Filler user if it describes the step. For example, if the user has never filled out a particular type of form before, they might not know where to send it. If you give the suggested route an obvious name such as “Send to Payroll Services,” the user can quickly see where the form should be sent after it’s filled out.

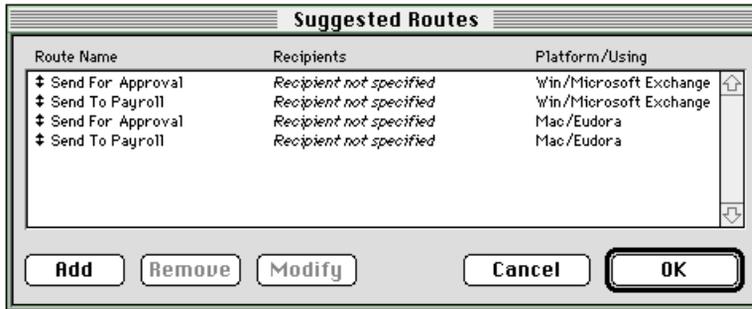
If the recipient of a suggested route is the same for all users, you can specify the recipient too, so the Informed Filler user doesn’t have to. However, it’s common that you, as the designer, cannot specify the recipient for a suggested route because the recipient is different for different people. For example, suppose five users who work in different departments of an organization have to fill out time cards for each week. Even though the suggested route for the form might be named “Send to Approving Manager,” the users would send their completed time cards to different managers. For these routes, you would leave the recipient unspecified. The Informed Filler user can specify the recipient for the suggested route the first time and, if requested, Informed Filler will remember the recipient’s name for subsequent sends.

Suggested Routes for Multiple Platforms

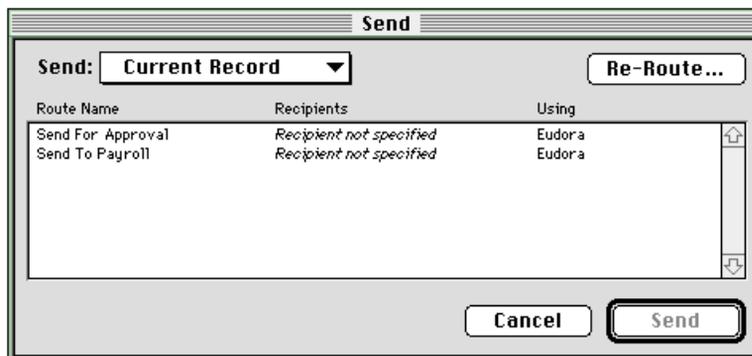
Adding a suggested route to a form template that will be used on multiple platforms requires special consideration. With Informed Designer’s Routing command, you can only define suggested routes for the e-mail systems and mail plug-ins installed on your computer. Likewise, a suggested route is available to the Informed Filler user only if he or she uses the e-mail system and platform for which the recipients of the route have been specified.

If you want to define a suggested route and make it available to Informed Filler users on both Windows and Mac OS computers, you must add the route two times using Informed Designer’s Routing command, once on a Windows computer, and once on a Mac OS computer. To do this, open the template on the platform of your choice (Windows or Mac OS), add the suggested route, and then save the template. Next, open the same template on the other platform (Mac OS or Windows) and add the route again. Adding a suggested route multiple times is also necessary if different Informed Filler users of the same platform use different e-mail systems. For detailed instructions on how to add a suggested route, see “Adding, Changing, and Removing Suggested Routes” later in this chapter.

Informed Designer’s Suggested Routes dialog box displays all suggested routes for the template, regardless of platform and e-mail system used for addressing. The platform and e-mail system are indicated under the “Platform/Using” column.



Informed Filler shows only the suggested routes that are addressed using the e-mail systems and mail plug-ins available on the user's platform.



Adding, Changing, and Removing Suggested Routes

When you set up a suggested route for a form, you can specify details such as the route name, which e-mail system to use, who the recipient is, and which format the form will be sent in. Some of these details, such as the recipient and the data format, can be specified by the Informed Filler user when the form is mailed. By specifying these details in the suggested route whenever possible, you eliminate that task for the Informed Filler user, making it easier for the person to mail the completed form.

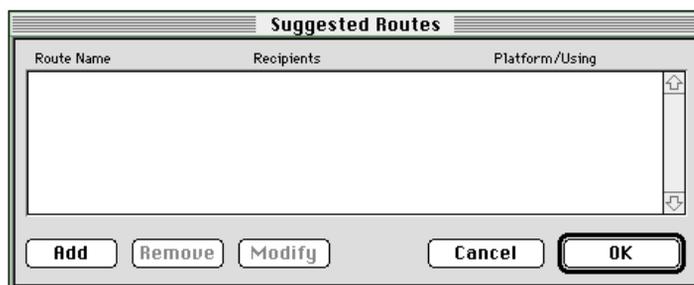
The following table shows the various parts that make up a suggested route and gives a description of each one.

Details of a Suggested Route

Detail	Description
route name	The name that you give to a particular step in the routing process. By making the route name descriptive of the step, you make it easy for the user to see where the form should be sent.
e-mail system	The e-mail system used to route the form. The options available correspond to the Informed mail plug-ins that you have installed in your plug-ins folder.
recipient(s)	If appropriate, you can specify the address of the individual(s) the form should be sent to. This detail is optional since you might not know the name of each person in the routing process, and the recipients may differ depending on who is sending the form. You can only edit the recipients for suggested routes that use the e-mail systems and mail plug-ins installed on your computer.
data format	As an option, you can specify the data format that the form will be sent in. The formats available are: Informed data, Informed package, Informed Interchange, Comma delimited text, and Tab delimited text. Other formats may be available through Informed plug-ins.
subject	You can also specify the subject of the mail message so that the Informed Filler user doesn't have to.

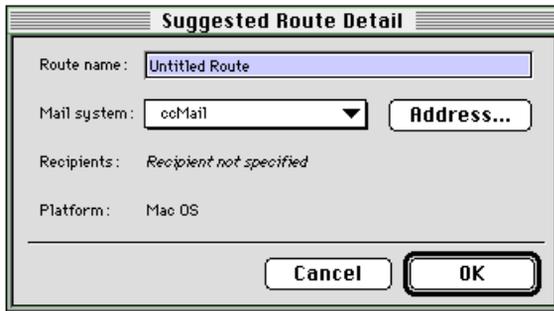
You use Informed Designer's Routing command to add, change, or remove suggested routes on your form template.

Choose **Routing...** from the Configure submenu under Form. The Suggested Route dialog box appears.



The Suggested Routes dialog box contains various controls for editing suggested routes, and a scrolling list showing all suggested routes configured for the template. If you haven't previously configured any suggested routes, the scrolling list will be blank.

When you click 'Add,' the Suggested Route Details dialog box appears.



The image shows a dialog box titled "Suggested Route Detail". It has a light gray background and a standard Mac OS window border. The title bar is dark gray with the text "Suggested Route Detail" in white. The dialog contains the following elements:

- Route name:** A text input field containing "Untitled Route".
- Mail system:** A dropdown menu currently showing "ccMail". To its right is a button labeled "Address...".
- Recipients:** A text field containing the text "Recipient not specified".
- Platform:** A text field containing "Mac OS".
- Buttons:** At the bottom, there are two buttons: "Cancel" on the left and "OK" on the right. The "OK" button is highlighted with a darker border.

Type the name of the suggested route in the 'Route name' text box. As mentioned previously, it is helpful to the Informed Filler user if the route name describes the actual step in the routing process.

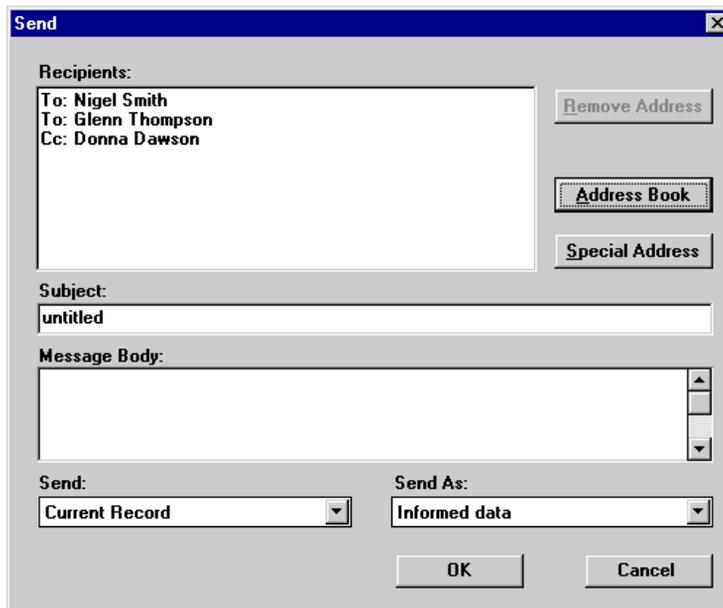
Specify the mail system to use by clicking the 'Mail system' drop-down list and making a selection from the available choices. The choices in the 'Mail system' drop-down list correspond to the Informed mail plug-ins you have installed in your plug-ins folder.

Note

You don't have to be using a particular e-mail system to specify that system for the suggested route. For example, if you are using Microsoft Mail, you can still specify cc:Mail as the e-mail system for a suggested route, as long as the cc:Mail plug-in is installed in your plug-ins folder. However, in order to specify the recipients for a suggested route, you must have the e-mail system installed on your computer.

For details regarding the e-mail systems supported by Informed, see the "Mail Plug-ins" topic in Informed Designer's on-line help.

To specify a recipient, click the 'Address...' button. If you have the appropriate e-mail software installed, Informed Designer displays the addressing dialog box for that mail system. Select one or more recipients by using the controls on this dialog box. Below is the dialog box you'll see when addressing a suggested route for Microsoft Exchange on Windows.



The 'Send' dialog box is shown with the following fields and buttons:

- Recipients:** A text area containing 'To: Nigel Smith', 'To: Glenn Thompson', and 'Cc: Donna Dawson'. To the right are buttons for 'Remove Address', 'Address Book', and 'Special Address'.
- Subject:** A text field containing 'untitled'.
- Message Body:** A large empty text area with vertical scroll bars.
- Send:** A dropdown menu currently set to 'Current Record'.
- Send As:** A dropdown menu currently set to 'Informed data'.
- Buttons for 'OK' and 'Cancel' are at the bottom.

While the addressing dialog box is displayed, you can specify a subject for the form, and you can also select the data format that the form will be sent in.

Note

If you've already selected a data format for mailing using the 'Always mail data as' mail preference, that data format will take precedence over the one you specify for a suggested route. For more information, see "Controlling the Data Format" later in this chapter.

To edit an existing suggested route, select it in the scrolling list on the Suggested Routes dialog box, then click the 'Modify' button. The Suggested Route Detail dialog box appears, allowing you to change the specific details for the selected route. If you try to modify a suggested route that's been configured for a platform other than the one you're working on, you are not able to change mail systems or address the route.



The 'Suggested Route' dialog box displays the following information:

- Route Name:** Send For Approval
- Mail System:** Microsoft Exchange
- Recipients:** Recipient not specified
- Platform:** Windows

Buttons for 'Cancel' and 'OK' are located at the bottom.

To remove a suggested route, select it in the scrolling list on the Suggested Routes dialog, then click the 'Remove' button.

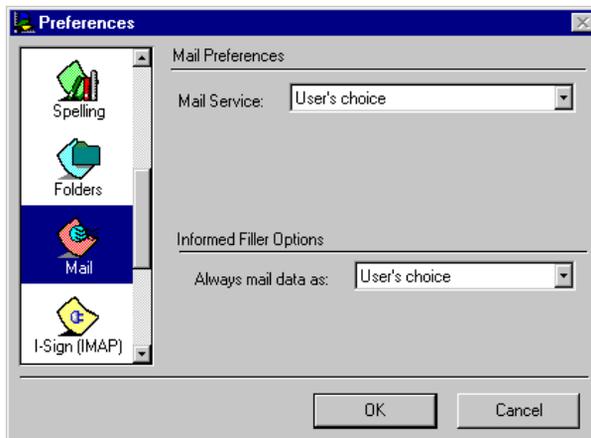
You can change the order of suggested routes in the scrolling list by clicking a route and dragging it either up or down with the mouse.

Controlling the Data Format

When an Informed Filler user mails a completed form, it's important that the form be sent in an appropriate data format. For example, the Informed package format contains both the form data and the form template. If a user sends a form in this format to someone who already has the template, the user is sending unnecessary information. Depending on the architecture and environment on which your Informed solution is based, it might be necessary that Informed Filler users send forms using a particular data format, Informed data, for example.

Informed Designer's 'Always mail data as' mail preference allows you to control the data format used when a completed form is mailed by the Informed Filler user.

To specify this format, choose **Preferences...** from the Edit menu and click the Mail icon in the scrolling list. The dialog box changes to show the Mail Preferences panel.



Click the 'Always mail data as' drop-down list and make a selection from the available choices.

The format you select using the 'Always mail data as' preference overrides any formats that the Informed Filler user selects when mailing, as well as any formats specified for a suggested route.

Selecting the 'User's choice' option allows Informed Filler users to mail completed forms in the format of their choice.

Using Mail Cells

A mail cell is a cell on the form template whose value is used to specify a parameter when the Informed Filler user mails a form. For example, when the user mails a form, Informed Filler looks for a cell named 'Mail Send To.' If such a cell exists, the form is automatically addressed to the recipient named in that cell. By using mail cells on your template, forms can be dynamically routed to different users based on different conditions.

The following table shows the four mail cells that can be used to set send parameters when the Informed Filler user mails a form.

Mail Cells

Mail Cell	Description
Mail Send To	The name of the recipient. The value in this cell must identify a valid user for the e-mail system used by the Informed Filler user.
Mail Subject	The subject of the mail message.
Mail Comment	The body of the mail message.
Mail Enclosure	The filename of the enclosure that is attached to the mail message.

By calculating a mail cell, you can have a formula automatically check for different conditions and automatically set certain parameters accordingly. For example, if a purchase order form needs to be sent to a supervisor for approval, you could calculate the 'Mail Send To' cell so that the recipient of the form is based on the value of the purchase order. The formula below demonstrates this calculation.

```
If POTotal > 500 Then
    Return "Lauren Quinn"
Else
    Return "Bob Johnson"
End
```

Based on this calculation, any purchase orders over 500 dollars would automatically be addressed to Lauren Quinn. All purchase orders less than or equal to 500 dollars would go to Bob Johnson.

