

7 Annotation

In this chapter:

- Placing, Moving, and Removing Notes 7-3
- Typing, Recording, and Playing Back Notes 7-4
- How Design Changes Can Affect Notes 7-5

7 Annotation

In addition to the information that you enter in each cell on a form, you can also include annotated notes or comments using Informed Filler's annotation features. An annotated note is usually a comment of some sort that's intended to bring something important to the reader's attention. For example, you might attach a note to an invoice to instruct the shipper to hold the order until the customer's account is paid.

Traditionally, notes have been hand written either directly on the paper form, or on small pieces of yellow paper—sometimes called 'yellow stickies'—and then stuck on the form.

The image shows a sample invoice form. At the top left, it says 'ABC Company, 12345 - 123 Street, New York, NY 56522'. To the right, there are sections for 'Sold To' and 'Ship To', both listing 'Another company' at '8823 - 199 Street, A Big Place, AB 39484'. Below these are shipping options: '5-Jul-90', '98273', 'Federal Express', and 'Net 30'. A table follows with columns for 'Part', 'Qty', 'Description', 'Price', and 'Ext'. The table contains two rows: '1-02 2 Widgets 102.20 204.40' and '2-23 1 Gadgets 45.12 45.12'. At the bottom left, the word 'INVOICE' is printed. At the bottom right, the total amount '249.52' is shown. A yellow sticky note is attached to the 'Note:' field on the left side of the form.

Informed Filler uses the 'yellow sticky' analogy to show annotated notes. You can place and position notes on any form. You can enter a textual note, or if you're using a Mac OS compatible computer, you can record a voice message. A note appears on your screen much like a small piece of yellow paper appears attached to a paper form.

The image shows a screenshot of a 'Purchase Requisition' form titled 'Purchase Req Data'. The form header includes 'World Corporation, 1 Avenue of the Americas, New York, NY 12345' and a 'PR #' of '071263'. Below the header is a table with columns for 'Employee No', 'Recipient Name', 'Mail Stop', and 'Order Date'. The data in this table is: '1055', 'Lauren Quinn', 'MS 199', and 'Sep 19, 1996'. Another table below has columns for 'Department to Charge', 'Office Name', and 'Office Number', with data: 'West Coast' and '300'. The main part of the form is a table with columns for 'Description', 'Qty', 'Price', and 'Line Total'. It contains two rows: 'C,H,E ary Set' with '1' quantity and '79.00' price, and 'B,C,S ary Set' with '1' quantity. A 'TOTAL' row shows '\$79.00'. A yellow sticky note is attached to the 'Description' column of the first row. The bottom of the window shows '1 Record' and '1 of 1'.

The familiar appearance of a note is intended to make clear the distinction between a note and the information on the form itself. An annotated note should contain auxiliary information that's asso-

ciated with the form to which it's attached. For example, unlike the order date on a purchase order form (which appears on every purchase order form), a comment such as 'Please get approval from Jane before submitting this purchase order.' applies specifically to one particular form only.

The remaining sections of this chapter describe the annotation features of Informed Filler. You'll learn how to place and position notes, and how to record and playback messages. You'll also learn how notes are affected when the design of a form is changed by the Informed Designer user. For information about importing and exporting notes, see Chapter 13, "Exchanging information."

Placing, Moving, and Removing Notes

Informed Filler allows you to place and position as many notes as you like. To place a new note, first find the record that you want to annotate and bring the form window to the front. Then choose **Place Note** from the Edit menu. A blank note appears centered in the form window.

Purchase Requisition

World Corporation
1 Avenue of the Americas
New York, NY 12345

PR # 081058

Employee No	Recipient Name	Mail Stop	Order Date
1055	Lauren Quinn	MS 199	Sep 19, 1996
Department to Charge			Office Number
Internal Security			300

Part #	Description	Qty	Price	Line Total
CHEM101	Chemistry Set	1	79.00	79.00
BC595	Brief Case	1	120.00	120.00
TOTAL				\$199.00

2 Records | 1 of 2

Each note contains controls for entering, changing, and playing back messages. For instructions on using these controls, please see "Typing, Recording, and Playing Back Notes" later in this chapter.

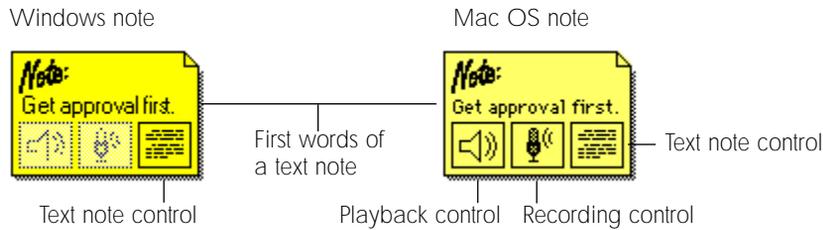
You can move a note to any position on your form by simply clicking and dragging it with the mouse. You should always position a note next to the information to which it specifically applies. For example, if you enter a note as a reminder that a customer's telephone number has changed, you should position the note next to the new number. Once you've created a note, it will automatically appear whenever you see the record in the form window.

To remove an existing note, first click it with the mouse. The note will appear black to indicate that it's selected. Then choose **Clear** from the Edit menu, or press the Delete (or Backspace) key.

By using the Cut and Paste Clipboard commands, you can move a note from one page or document to another. To transfer a note to the Clipboard, select it and choose **Cut** from the Edit menu. Informed Filler will remove the note from the form and place it on the Clipboard. Then, after changing pages, choose **Paste** from the Edit menu to transfer the note from the Clipboard back onto the different page of your form.

Typing, Recording, and Playing Back Notes

Depending on which operating system you're running Informed Filler on, different controls on notes will be available. Windows supports text notes, so only the control for viewing and editing text notes will be available. If you're using a Mac OS compatible computer, you can use controls for recording and playing back voice notes in addition to the text note control.

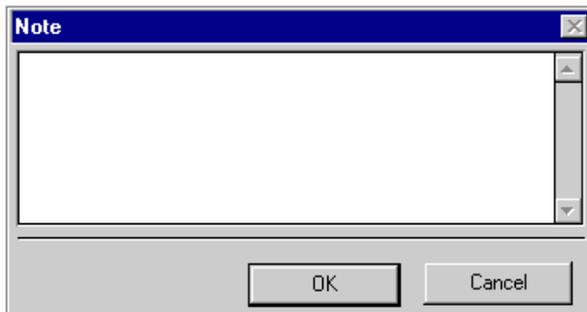


Textual Messages

Informed Filler displays the first few words of a textual note on the note itself. If the entire note doesn't fit in the space provided, you'll see only the first few words followed by an ellipsis ('...').



To enter, view, or change the text of a note, click the note's Text control. The Note dialog box appears.



A textual note can be as long as you like. If you type past the end of a line, or if you press the Enter (Windows) or Return (Mac OS) key, Informed Filler will start a new line for you. If you enter more lines than the text box can display, you can use the scroll bar to scroll the text up or down.

To dismiss the Note dialog box, click 'OK.' To cancel the changes you've made, click 'Cancel' instead.

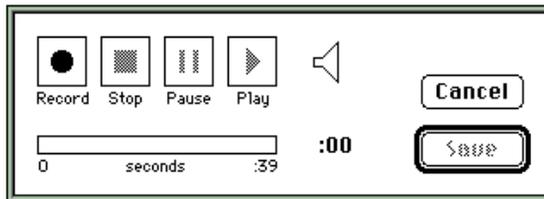
Voice messages

If you're using a Mac OS compatible computer, you can also record a voice message. Recording a voice message is much like leaving a message on a telephone answering machine. You simply speak into a microphone and Informed Filler records your message. A voice annotated note can later be played by clicking the Playback control on the note itself.

In order to use the voice annotation capabilities of Informed Filler, you must have a microphone attached to your computer before you can record a message. If you don't have the required hardware and software, the Playback and Recording controls on the note will be unavailable.



To record a voice message, click the note's Recording control. The standard sound-input dialog box appears.



To begin recording, click 'Record.' As you speak, the message length is displayed on the sound-input dialog box. When you've finished recording, click 'Save.' The recorded message is saved with the note.



You can listen to a recorded voice message by clicking the Playback control on the note. To change the message, simply record over the old message by following the instructions described above.

How Design Changes Can Affect Notes

It's quite common for the design of a form to be revised and updated from time to time by the form designer. Certain design changes can affect the data that's already stored in a data document (deleting a cell, for example). Other changes can affect notes that have been placed on the forms. For example, if a note is placed next to the right edge of a form, and the form designer reduces the form's width, the note will automatically slide back onto the page when the form is next opened with Informed Filler.

Notes are affected when a form template is changed in the following ways:

- reduce the size of the form
- remove a page from the form

If the Informed Designer user removes a page of a form template that contains notes, the notes themselves will be moved onto the work page the next time the data document is opened with Informed Filler. You can then move the note from the work page back to a numbered page. For information on how to move notes between pages, see “Placing, Moving, and Removing Notes” earlier in this chapter. For an explanation of the work page, see “The Work Page” in Chapter 3.