



## Manipulating Records

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## Manipulating Records

Informed Filler allows you to store and manipulate completed forms using its built-in database. You can enter new forms or change existing forms. You can find, duplicate, remove, print, sort, and total forms as well.

Chapter 3 explains how to fill out a form. In this chapter you'll learn more about storing and retrieving completed forms or *records*. To enter, find, change, duplicate, and remove records, you'll use commands that are found in the Database menu.

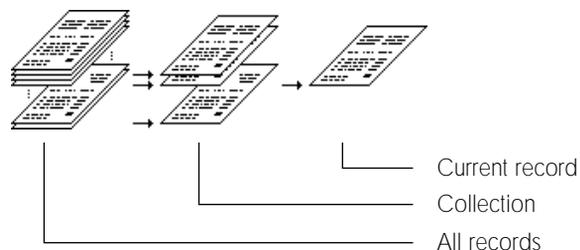
You'll also learn about the Record List, a powerful tool for listing and manipulating multiple records. The List menu contains commands that let you to set up and customize the Record List to suit your own personal preferences. For information about printing forms, please see Chapter 9.

### Collection of Records

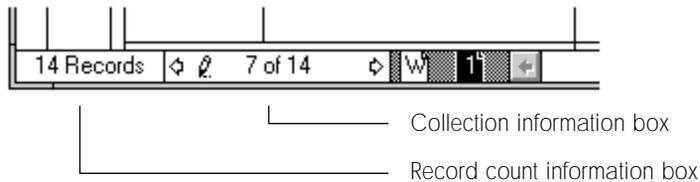
As explained in Chapter 1, "Overview" (see "Filling Out Forms"), the information that you enter to fill out forms is stored in form data documents. Each form data document contains a database that can store the information for one or more completed forms. The set of information (such as name, address, phone number) that you enter to complete a single form is called a record.

The record that you see in the form window is called the *current record*. This is the record that you can edit by typing in each cell.

The current record is always a member of the current *collection* of records. The collection represents a group of records that can consist of one record, all records, or a particular set of records in your data document. By using the Find, Find All, Omit, and Omit Others commands, you can add particular records to, or remove them from the collection. Certain commands like Print and Send allow you to select the current record or those records in the collection. And as you'll learn later in this chapter, the Record List displays a list of the collected records. The figure below illustrates all records, the collected records, and the current record.



Positioned at the lower left corner of the document window are two information boxes. They show you the number of records in the data document, the number of records in the collection, and which record in the collection is the current record.



The '7' in the collection information box identifies the current record. It means you're looking at the seventh record in the collection. The '14' indicates the number of records in the collection. You can use the Record List, or the Next, Previous, First, and Last commands to browse through the records in the collection. For more information, see "The Record List" and "Browsing Through Records" later in this chapter.

## The Record List

When you open a form data document, the form window automatically appears displaying the contents of the form. In this window, you fill out and edit records. The form window, however, is not always suitable for browsing through different completed forms since you can see only one record at a time.

To work with more than one record, Informed Filler provides the Record List window. The Record List window displays records in a list, making it easy to see the information of multiple records at a glance. The following figure shows a typical Record List window.

Invoices - Record List		
Invoice No	Date	Sold To
00101	6/29/96	John's Blue Sky Shop
00102	6/29/96	Clark Gas Supplies
00103	7/14/96	Malkin's Bed & Breakfast
00104	7/29/96	Nigel's Books & Beer
00105	7/29/96	Strudel by Joan
5 Records		1 Selected

The Record List window is a standard window. Informed Filler automatically names it by appending '- Record List' to the name of your data document. You can move the Record List to any position on your screen by clicking and dragging the window's title area. To view a different area of the Record List, click the appropriate scroll bar controls.

To show the Record List, choose **Show Record List** from the Window menu. While the Record List window is the front-most window, this command changes to **Hide Record List**. Choose **Hide Record List** or click the window's close box to hide the Record List window.

The Record List window can be customized to suit your own personal preferences. You can choose which columns appear on the Record List and in what order they appear. You can sort any column or calculate a column's total or average. You can also save different Record List formats so you can easily switch between your most common formats (see "Saving Record List Formats" for more information). You can even print the Record List to produce summary reports of your records. For information on printing the Record List, see Chapter 9, "Printing Forms."

## Contents of the Record List

Information on the Record List is divided into rows and columns. Each row represents one record. Each column corresponds to one cell on the form. You can choose which columns appear on the Record List and their order and alignment (see "Adding and Removing Columns").

The Record List always displays only those records in the collection (see "Collection of Records" earlier in this chapter). As you use commands that affect the collected records, the contents of the Record List will change accordingly. For example, suppose that you use the Find command to find all invoices with a total amount greater than \$500. After searching, Informed Filler will replace the contents of the collection—and therefore the Record List as well—with those records found. The information box near the lower left corner of the window indicates how many records are on the Record List.

Although Informed Filler allows you to show picture cells on the Record List, the actual pictures themselves do not appear. Instead, if a picture exists for a particular record, an 'X' will show on the corresponding row on the Record List. Therefore, at a glance you can easily see which records have pictures and which don't.

Item Number	Description	Picture	Retail
A00-001	Cat Trap	X	\$79.00
A00-002	Shark Repellant	X	\$28.00
A00-003	Boot Polish		\$2.50
A00-004	Ear Plugs	X	\$15.00

4 Records      1 Selected

You can show both field cells and table cells in the Record List window. A field cell has one value, whereas a table cell can have multiple values, one for each row in the table. To indicate that a column represents a table cell, Informed Filler draws a small table icon next to the column heading on the Record List.

Invoices - Record List			
Date	Customer	Item Number	Total
1/23/96	Owen's Meat Mart	A00-001	\$79.00
1/22/96	Eisner's Safety Boots	A00-003	\$300.00
1/23/96	Bob's Scuba Shop	A00-002	\$56.00
1/23/96	Dani's Tech Support	A00-004	\$30.00

4 Records      1 Selected

Even though a table cell can have more than one value, only the value found on the first row of the table appears on the Record List. In the previous illustration, each row represents one invoice. The values in the Item Number column correspond to the values found on the first rows of the Item Number column on the different completed invoices. To see the remaining rows of the table, view the record in the form window.

The form designer can choose to index a cell so that searching with Informed Filler is faster. (See “Indexed cells” later in this chapter.) For indexed cells that are displayed on the Record List, you’ll see a small magnifying glass symbol near the right edge of the column title.

Inventory - Record List			
Item Number	Description	Picture	Retail
A00-001	Cat Trap		\$79.00
A00-002	Shark Repellant		\$28.00
A00-003	Boot Polish		\$2.50
A00-004	Ear Plugs		\$15.00

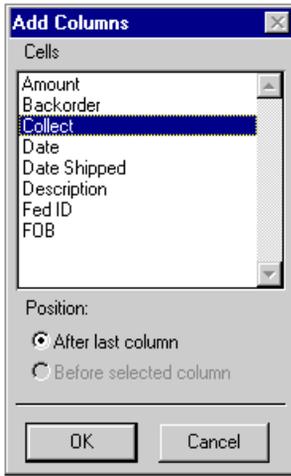
4 Records      1 Selected

You cannot change which cells are indexed with Informed Filler.

## Adding and Removing Columns

Informed Filler allows you to choose which columns appear on the Record List. Initially, the Record List contains columns for up to 10 cells on the form; indexed cells first, then the remaining cells by tab order. You can add or remove columns, and you can change the alignment or width of any column.

You show a column on the Record List by using either of the Add Columns or Add to Record List commands. The Add Columns command lets you pick which columns to add from a list of cell names. To use this command, first show the Record List window, then choose **Add Columns...** from the List menu. The Add Columns dialog box appears.



The scrolling list contains the names of all cells on your form. Click to select the cell that you want to add to the Record List. If you want to add more than one column, select each cell while holding down the Control (Windows) or Command (Mac OS) key. Pressing Shift while clicking selects the range of cells starting with the first cell currently selected and ending with the one you click.

You can position the selected cell (or cells) either at the end of the Record List after the last column, or between two existing columns. To position at the end of the Record List, select the 'After last column' option on the Add Columns dialog box. To position between two existing columns, select the column on the Record List immediately following the desired position before you choose the Add Columns command. Then select the 'Before selected column' option. (You select a column by clicking its heading; see "Selecting Records and Columns" for more information.)

Like Add Columns, the Add to Record List command adds a new column to the Record List. However, instead of choosing a cell from a list of cell names, you select a cell on the form window. This command is more convenient if you don't know how the cells on your form have been named.

To use the Add to Record List command, first choose the cell that you want to add by selecting it on the form window, then choose **Add to Record List** from the Cell menu. Informed Filler will add the selected cell to the end of the Record List.

Click to select a cell on the form window...

...then choose Add to Record List.

Employee No	Recipient
305	
101	
352	
108	
79	
100	

Employee No	Recipient
305	Will DeBeest
101	Warren Peace
352	Hugh Betcha
108	Mary Hancock
79	Beth Westurn
100	Marty Gras

You can show as many columns on the Record List as you like. You can even show the same column more than once. If the total width of all columns exceeds the width of the Record List window, use the scroll bar along the bottom edge of the window to scroll the columns in either direction.

To remove a column from the Record List, select it by clicking its heading, then choose **Remove Column** from the List menu. The column will no longer appear on the Record List.

**Note** Removing a column from the Record List does not remove data from the database of records.

Select the column to remove...

Invoices - Record List			
Date	Customer	Item Number	Total
9/23/96	Owen's Meat Mart	A00-001	\$79.00
9/22/96	Eisner's Safety Boots	A00-003	\$300.00
9/23/96	Bob's Scuba Shop	A00-002	\$56.00
9/23/96	Dani's Tech Support	A00-004	\$30.00

4 Records    0 Selected

...then choose Remove Column.

Invoices - Record List		
Date	Item Number	Total
9/23/96	A00-001	\$79.00
9/22/96	A00-003	\$300.00
9/23/96	A00-002	\$56.00
9/23/96	A00-004	\$30.00

4 Records    0 Selected

The remaining columns on the Record List will automatically move to occupy the original position of the column removed.

## Changing a Column's Position

Informed Filler allows you to set the positions of the column's on the Record List. To move a column from one position to another, first remove the column, then add it again using the Add Columns command and the 'Before selected column' option.

As a shortcut, you can click and drag a column's heading to the left or right while holding down the Alt (Windows) or Option (Mac OS) key. When you release the mouse button, the column is placed in the new position.

Click and drag while holding down the Alt/Option key...

Purchase Req Data - Record List			
Employee No	Recipient	Order Date	D
79	Beth Western	Sep 20, 1996	
305	Will DeBeest	Sep 20, 1996	
101	Warren Peace	Sep 20, 1996	
352	Hugh Betcha	Sep 20, 1996	
108	Mary Hancock	Sep 20, 1996	
100	Marty Gras	Sep 20, 1996	

10 Records    0 Selected

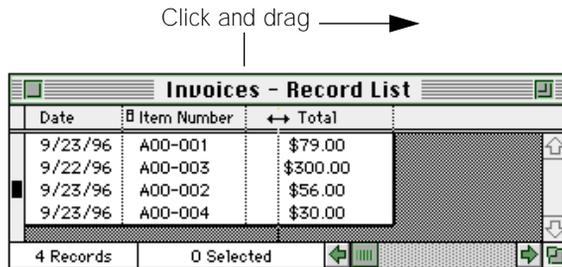
...the column moves to a new position when you release the mouse button.

Purchase Req Data - Record List			
Recipient	Employee No	Order Date	D
Beth Western	79	Sep 20, 1996	
Will DeBeest	305	Sep 20, 1996	
Warren Peace	101	Sep 20, 1996	
Hugh Betcha	352	Sep 20, 1996	
Mary Hancock	108	Sep 20, 1996	
Marty Gras	100	Sep 20, 1996	

10 Records    0 Selected

## Changing a Column's Width

When you add a new column to the Record List, Informed Filler automatically sets its width to approximately one inch. You can change the width of any column by dragging the right edge of its heading.

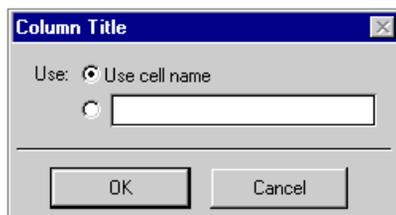


When you drag a column divider, only the size of the column on the left changes. The columns on the right, if any, move with the position of the column divider. If you hold the Control (Windows) or Command (Mac OS) key down while dragging a column divider, instead of moving the columns on the right, Informed Filler will change the widths of both adjacent columns.

## Changing a Column's Title

You can change the title of any column on the Record List from its original cell name to any custom name you like.

To change a column's title, first select the column on the Record List by clicking its heading, then choose **Column Title...** from the List menu. The Column Title dialog box appears:



To change the name, simply type in the new name.



When you have entered the name, click ‘OK.’ The new name replaces the cell name on the Record List. If you want to revert and use the cell name, click the ‘cell name’ radio button, then click ‘OK.’

## Changing a Column's Alignment

You can change the alignment of each column on the Record List to improve the readability of the records. For example, it's common to align the right sides of numbers in a column so that the decimal points line up. Or maybe you want to center a column of dates. Each column on the Record List can be left, center, or right aligned.

Invoice No	Date	Total
00101	6-Jul-90	\$348.50
00102	22-Jul-90	\$247.25
00103	26-Aug-90	\$289.00
00104	29-Aug-90	\$90.00
00105	5-Sep-90	\$232.25
00106	11-Sep-90	\$302.50

To change a column's alignment, select the column by clicking its heading, then choose a setting from the Alignment submenu under List. To change the alignment of multiple columns, select them all at the same time before choosing the new setting.

## Selecting Records and Columns

You can select information on the Record List by clicking rows or columns. Many of the commands described later in this chapter can apply to information that is selected on the Record List. For example, you can remove a record by selecting it on the Record List, then choosing **Remove** from the Database menu. Or you can sort a column by selecting it and choosing **Sort....**

Clicking a row selects the corresponding record, whereas clicking a column's heading selects the entire column. You can't select a row and a column at the same time.

Amount	Date	Description
25	6/09/96	Picture Frames
10	7/09/96	Teddy Bears
5	10/09/96	Flower Vases
20	09/09/96	Music Boxes

4 Records | 1 Selected

Amount	Date	Description
25	6/09/96	Picture Frames
10	7/09/96	Teddy Bears
5	10/09/96	Flower Vases
20	09/09/96	Music Boxes

4 Records | 0 Selected

When you click to select a row or column, Informed Filler will automatically deselect all others that are currently selected. Pressing the Control (Windows)/Command (Mac OS) or Shift keys while clicking allows you to select more than one row or column at the same time. You could, for example, select five records and then print them using the Print command. If you hold down the Control/Command key, Informed Filler will select the corresponding row or column in addition to those currently selected. If you press the Shift key instead, all columns or rows between the first one currently selected and the one clicked on (inclusive) are selected.

#### Note

The small rectangular region to the left of the column headings on the Record List window has a special purpose. As a shortcut, clicking it deselects all rows and columns on the Record List.

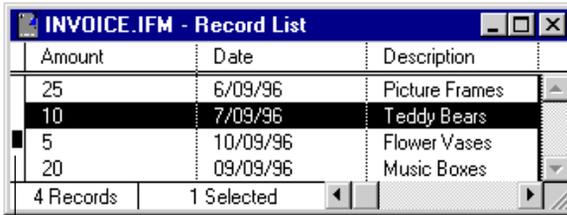
You can also use the Select All command under the Edit menu to select all records on the Record List.

As you select and deselect records on the Record List, the rightmost information box along the bottom edge of the window changes to display the current number of selected records.

## The Current Record Indicator

As defined earlier in this chapter (see “Collection of Records”), the current record is the one that appears in the form window. When you browse through the collected records using commands such as Next, Previous, First, and Last, the current record changes to reveal each different record in the form window.

On the Record List window, the current record is identified by a small rectangular icon along the window’s left edge.



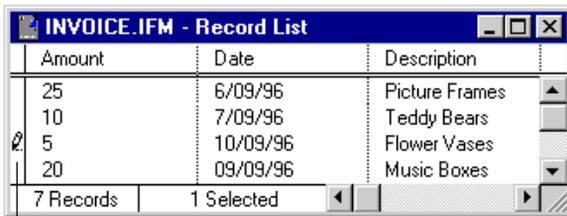
Amount	Date	Description
25	6/09/96	Picture Frames
10	7/09/96	Teddy Bears
5	10/09/96	Flower Vases
20	09/09/96	Music Boxes

4 Records | 1 Selected

— Current record indicator

With the Record List window active, you can change the current record by clicking in the current record indicator area next to the desired record. You can also change the current record by double-clicking a different row on the Record List. However, in addition to changing the current record, double-clicking will also bring the form window to the front.

While you edit the current record on the form window, if that record is visible on the Record List, Informed Filler shows a pencil icon in place of the current record indicator.



Amount	Date	Description
25	6/09/96	Picture Frames
10	7/09/96	Teddy Bears
5	10/09/96	Flower Vases
20	09/09/96	Music Boxes

7 Records | 1 Selected

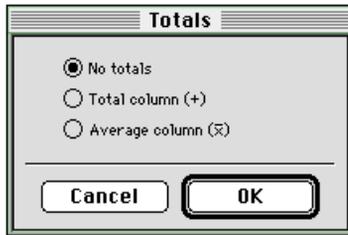
— Pencil indicates that the current record is being edited.

As you change the record by typing in each cell, the corresponding columns on the Record List are not updated. Informed Filler updates the contents of the Record List only when you accept the record by pressing Enter.

## Totalling or Averaging a Column

Informed Filler can calculate the total or average of any column on the Record List. This feature is useful for summarizing the information in a collected set of records. For example, after finding all overdue invoices, you could total the amount due column to obtain the total amount overdue.

The Totals command lets you turn totalling or averaging on or off for each of the selected columns on the Record List. Select the desired column or columns, then choose **Totals...** from the List menu.



The Totals dialog box shows the current setting of the selected columns (totalled, averaged, or no totals). If you've selected two or more columns that are configured differently, the Totals dialog box will show no setting. Choose a setting then click 'OK.' Informed Filler will calculate the results and display them below the last record on the Record List. Each value appears bold and aligned according to the column's alignment.

Date	Item Number	Total +
9/23/96	A00-001	\$79.00
9/22/96	A00-003	\$300.00
9/23/96	A00-002	\$56.00
9/23/96	A00-004	\$30.00
		<b>\$465.00</b>

4 Records    0 Selected

To indicate that a column is totalled or averaged, Informed Filler draws a small symbol to the right of the column's heading. Totalled columns have a plus sign, whereas averaged columns have an 'X' with a bar over it (the statistical symbol for *average*).

While totals are calculated, progress information is displayed on the totals line itself. The amount of time required to calculate the results depends on the number of records on the Record List. Note though, that Informed Filler lets you do other work at the same time. You could, for example, edit a record while a column is totalled.

Although you can total or average any column on the Record List, the resulting value will be informative only if the column contains numeric, boolean, or checkbox values. If a column represents a non-number cell, Informed Filler will attempt to convert each cell value to a numeric equivalent as the total or average is calculated. The resulting total will be the sum of those values that look like numbers.

For boolean values and checkboxes, the values Yes, True, On, and a checked checkbox become 1, whereas the values No, False, Off, and an unchecked checkbox become 0. Therefore, you can count the number of Yes, On, True, or checked check box values in a column by totalling the column.

**Note**

When you total or average a column that represents a table cell (for example, the quantity sold cell on tabular invoice), the resulting total or average is calculated based on all values on all rows of the records on the Record List. It's therefore possible, and often likely, that a total or average won't match the values above it on the Record List. This is because the Record List shows only those values found on the first row of each record on the Record List. See "Contents of the Record List" earlier in this chapter for more information.

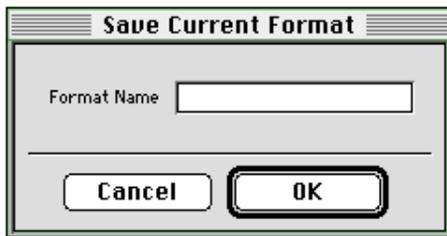
## Showing and Hiding the Totals Line

When you total or average a column, Informed Filler automatically shows the totals line on the Record List. If you want, you can manually show and hide the totals line using the Show/Hide Totals command under the List menu. You might, for example, want to temporarily hide the totals when you print the Record List.

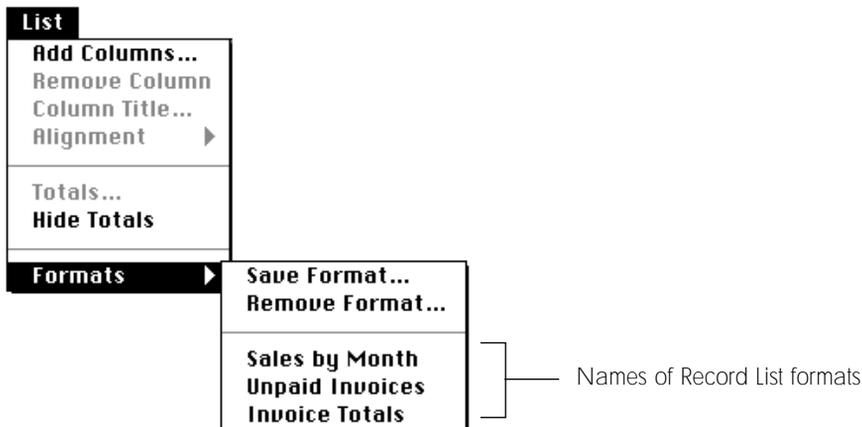
## Saving Record List Formats

As described earlier, you can customize the Record List by choosing which columns appear in it and what position they occupy. You can also change the names and widths of columns, and calculate totals or averages for any column. The configuration of columns that you specify is called a Record List format. These formats are useful if you need to print different summary reports from the Record List. Rather than configuring a special format each time you want to display the Record List in a particular way, Informed Filler allows you to save your custom formats so that you can instantly switch the Record List to the format you want.

After configuring the Record List, you can save your format by choosing **Save Format...** from the Formats submenu under the List menu. The Save Current Format dialog box appears.



Enter the name of your Record List format in the text box and click 'OK.' Informed Filler saves the current Record List format and displays the format name in the Formats submenu.

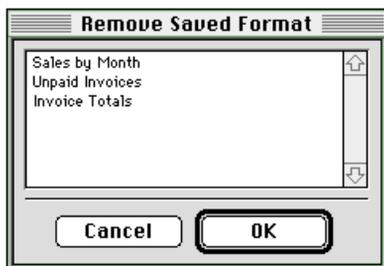


To switch from one format to another, simply choose the format name from the Formats submenu and Informed Filler will display the Record List in the appropriate format.

## Removing a Record List Format

If you no longer require a Record List format, you can remove it from the Formats submenu by using the Remove Format command.

To remove one or more Record List formats, choose **Remove Format...** from the Formats submenu. The Remove Saved Format dialog box appears.



Select the formats that you want to remove and click 'OK.' Informed Filler removes the selected formats from the Formats submenu.

## Adding a New Record

When you create a new untitled data document using the New Document command under the File menu, Informed Filler automatically adds a new blank record ready for filling.

If you want to add a new record to an existing data document, choose **Add Record** from the Database menu. Informed Filler will create a new blank record, fill in any default values and auto-incrementing cells, then select the first cell on the form. The new record is added after the last record in your data document. It also becomes the last record in the collection.

While the new record is active you can enter information to complete the form. A small pencil in the collection information box indicates that the record is active. For complete instructions on how to fill out a form, please see Chapter 3, “Filling Out Forms.”

When you finish filling out the new form, press the Enter key on the numeric keypad. Pressing Enter indicates to Informed Filler that you’ve finished entering information and that the record should be accepted.

## Editing an Existing Record

To edit an existing record, first find the record using either the Find command or the various browsing commands (see “Finding Records and Browsing Through Records”). With the form window in front, activate the record by pressing Tab or clicking to select a cell. While the record is active, you can move from cell to cell and enter or change information. A small pencil in the collection information box indicates that the record is active.

When you’re finished editing the record, press the Enter key on the numeric keypad, or Ctrl/Return (Windows), or Cmd/Return (Mac OS) to accept the record. For complete instructions on how to fill out or edit a record, please see Chapter 3, “Filling Out Forms.”

## Reverting a Record

From time to time you might make unintentional changes to a record’s information. Informed Filler makes it easy to cancel any changes that you’ve made to a record.

The Revert command reverts the current record to its most recent version—that is, the version prior to last activating the record. If you revert a newly created record, Informed Filler will clear the record to its blank state and fill in any default values.

To revert the current record, choose **Revert** from the Database menu. Informed Filler will request your confirmation.

## Clearing a Record

To erase the information on a new or existing record, use the Clear Record command. If the form window is in front, Clear Record will clear the current record. If the Record List window is in front, the single selected record will be cleared instead. You can't select and clear multiple records on the Record List at the same time. If two or more records are selected, the Clear Record command will be unavailable.

Like the Add Record command, Clear Record automatically fills in the default cell values after clearing the record. The form window is then activated for editing.

**Note** The Clear Record command doesn't clear any attachments, or the values of auto-incrementing cells.

To clear the current record or the selected record on the Record List, choose **Clear Record** from the Database menu. Informed Filler requests your confirmation before completing the operation.

## Duplicating a Record

Often you'll want to duplicate an existing record to avoid retyping the same information. For example, you may want to enter two invoices for the same customer. Rather than retyping the same customer information, simply enter and duplicate the first invoice then make the necessary changes to complete the duplicate record.

To duplicate a record, choose **Duplicate** from the Database menu. If the form window is in front, Informed Filler will duplicate the current record. If the Record List window is in front, the single selected record will be duplicated instead. You can't select and duplicate multiple records on the Record List at the same time.

## Finding Records

Use the Find command to find and display specific records in your data document. You find records by providing information—called *search criterion*—that identifies the records that you're looking for. You can find a single record or you can find all records that match your search criterion.

Informed Filler lets you find on any cell with the exception of pictures and signatures. To find records, choose **Find...** from the Database menu. The Find dialog box appears.

Click to select a cell...

**Purchases**

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

Employee No	Recipient Name
65	Francis Drake
Department to Charge	Office Name

...or a column...

**Purchase Req Data - Record**

Employee No	Recipient	Order Date
100	Marty Hancock	Sep 20, 1999
100	Marty Gras	Sep 20, 1999
99	Niles Rivers	Sep 24, 1999
47	Martin Matthias	Sep 24, 1999
65	Francis Drake	Sep 24, 1999
117	Pam Irvin	Sep 24, 1999
10 Records	0 Selected	

...then choose the Find command.

**Find**

In "Recipient", find what:

Niles

Match option: starts with

Find option: look through all records

Cancel Find

The Find dialog box contains a text box where you type the value you're looking for. This value is called the *search value*. The scrolling list contains the names of all cells on the form. Select the cell that you want Informed Filler to search in. If you're unsure of the name of the cell that you want to search in, simply click the cell on the form window while the Find dialog box is displayed and that cell will be automatically selected in the scrolling list.

#### Note

If you select a cell on the form or a column on the Record List before choosing the Find command, Informed Filler will automatically select the corresponding cell on the Find dialog box.

You can have Informed Filler find exact matches, partial matches, or a range of values by selecting an appropriate match option. These options are described later in this chapter. See "Match Options."

Your choice of find option determines which records Informed Filler will look through, and the action taken when records are found. For example, you might want to look through all records and replace the collection with those found. Or maybe you'll combine the records found with those already in the collection. For more information, please see "Find Options" later in this chapter.

After you enter the search value and choose the match and find options, click 'Find' to begin searching. As Informed Filler searches, the information box on the window in front displays progress information. If no records match, you'll see a message indicating that no records were

found. If at least one match is found, Informed Filler will act according to your choice of find option (see “Find Options”).

## Match Options

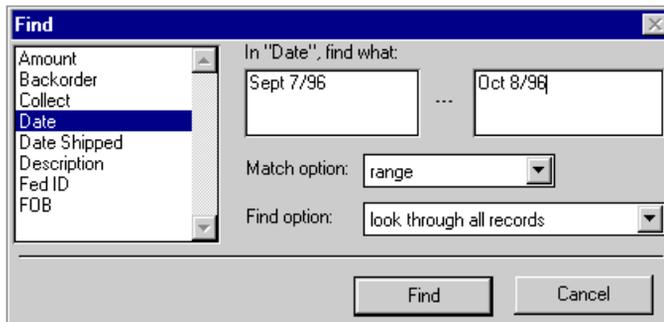
Match options allow you to find exact matches, partial matches, or ranges of values. For example, instead of searching for an exact telephone number, you might want to find all numbers that contain the area code ‘408.’ Or maybe you want to find all invoices with a total amount greater than or equal to \$500.

The ‘Match option:’ drop-down list offers ten different matching options. The following table lists each option with a brief description.

### Match Options

Option	Description
starts with	finds values that start with the text search value
ends with	finds values that end with the text search value
contains	finds values that contain the text search value
is equal to	finds values that match the search value exactly
is not equal to	finds values that do not match the search value exactly
is greater than	finds values that are greater than the search value
is greater than or equal to	finds values that are greater than or equal to the search value
is less than	finds values that are less than the search value
is less than or equal to	finds values that are less than or equal to the search value
range	finds values that are within a range of values

All match options with the exception of ‘range’ accept a single search value. When you select ‘range,’ the Find dialog box changes to allow for two search values.

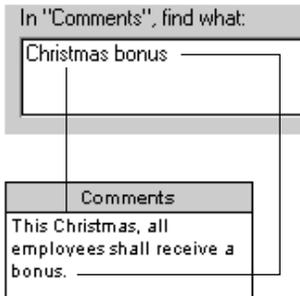


With the ‘range’ option selected, Informed Filler will find all values that lie between and including the two search values. The second search value must be greater than the first. With the settings in

the previous dialog box figure, Informed Filler will find all dates greater than or equal to Sept 7, 1996, and less than or equal to Oct 8, 1996.

## Finding Words

When you find records by searching in a text cell, Informed Filler will try to match the search value with each individual word in the cells that are examined. For example, if you search for the value 'Christmas bonus' in the comment cell on your forms, Informed Filler will find all records with comments that contain both words (regardless of position and order).



If you use match options such as 'starts with' or 'ends with,' the option is applied as each word of a cell is examined.

## Finding Dates and Times

When you enter a date or time search value, you can type the value in any format you like. You can type a complete value or only certain parts of a value. If you enter a partial value, Informed Filler will ignore the parts that are missing. For example, suppose that you want to find all sales slips that were entered in May of 1996. You could either use the 'range' match option and enter 'May 1, 1996' as the first search value and 'May 31, 1996' as the second, or you could use the 'equals' match option and enter 'May 1996' as the single search value.

## Finding Names

As explained in "Entering Names" (see Chapter 3), a name value consists of up to five different parts: the prefix, first name, middle name, last name, and suffix. Multiple prefixes, middle names, and suffixes are allowed. A name value displays on your form according to the format of the cell in which it's stored.

When you type a name search value, you can enter all parts or only certain parts of the name. Like dates and times, if you leave out a name part, Informed Filler will ignore that part when it compares name values. For example, you could enter the search value 'Smith' to find all names with a last name 'Smith,' whereas the search value 'John Smith' would find all names with a first name 'John,' and a last name 'Smith.'

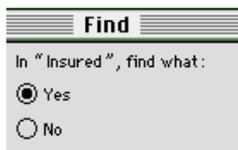
If you type a name that consists of only one part, Informed Filler will interpret that part as the last name. If you type more than one part, the order of each part is used to interpret the name. If a comma appears next to the first part, that part is assumed to be the last name. A list of known prefixes and suffixes is used to help properly identify each name part. This list can be found in Appendix A.

If you want to find all names that have a particular first name, you must enter the wild card symbol (\*) as the last name when you type the search value. This is because, as explained above, if you type the first name alone, Informed Filler will assume that it's the last name. By typing the first name followed by the wild card symbol, the name parts will be interpreted properly. For example, to find all names where the first name is 'John,' enter the search value 'John \*' (note that there's a space between 'John' and '\*'). The wild card symbol tells Informed Filler to ignore the last name when comparing name values. To enter the wild card symbol, type the asterisk key.

If you use an inequality match option ('is less than,' 'is less than or equal to,' 'is greater than or equal to,' or 'is greater than'), Informed Filler will compare the parts of two names in the following order: last name, first name, middle name, prefix, then suffix. When a name part in the search value is found that doesn't equal the corresponding part in the comparison value, the match option determines whether or not the name matches the search value.

## Finding Boolean and Checkbox Values

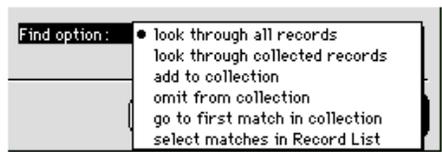
Boolean and checkbox cells can take on one of two different values. When you find records using a boolean or checkbox cell, Informed Filler displays the two possible values on the Find dialog box. For example, if a boolean cell has the Yes/No format style, the Find dialog box will look like this:



Rather than typing a search value, simply select the value by clicking either of the two choices. The only match option available is 'equals.'

## Find Options

The 'Find options:' drop-down list contains six different find options. These options let you choose what happens when Informed Filler finds the records you're searching for.



Often you'll want to collect records that match different search criteria. For example, you might want to find and print all invoices that you entered today along with those that are overdue. Or maybe you want to print the purchase orders that were filled this week with the exception of those being shipped outside of North America. By using different find options and commands such as Omit and Omit Others, you can easily collect the specific records that you're interested in.

If you'd like to find all records that match a particular search value, choose the 'look through all records' option. Informed Filler will search through all records and replace the collection with those found.

The second option, 'look through collected records,' is useful if you want to find records that match more than one criteria. For example, suppose that you want to find all invoices for customers in New York that have a total charge greater than \$500. First look through all records to find the invoices for customers in New York. Then search through those records—that is, the collected records—to find only those with a total charge greater than \$500.

The 'add to collection' option is useful if you want to combine other records with those currently in the collection. For example, you might want to find and print all invoices for customers in both New York and Boston. First use the 'look through all records' option to find the invoices for customers in New York. Then find the invoices for customers in Boston using the 'add to collection' option. Informed Filler would add the records found to the collection. The collection would therefore contain all invoices for customers in New York and customers in Boston.

The 'omit from collection' option allows you to remove records from the collection. After performing the command, Informed Filler will display the number of records that were found and omitted from the collection.

Since the collection must always contain at least one record, Informed Filler will automatically perform the Find All command if you attempt to omit all records. The Find All command simply places all records in the collection (see "Finding All Records"). Informed Filler will warn you before performing the command.

Unlike the first four find options, the 'go to first match in collection' option does not change the contents of the collection. Instead, it simply searches for and reveals the first record in the collection that matches the search value. This option is useful if you want to browse through a set of collected records. Let's say that you've found all invoices for customers in New York, and now you want to find the first one for John Smith without disturbing the collection. Rather than using commands such as Next, Previous, First, and Last to view each record individually, you could use the Find command and the 'go to first match in collection' find option. Informed Filler finds the first record that matches and makes it the current record. If the Record List window is frontmost, you'll see the record selected.

If the Record List window is frontmost when you choose the Find command, the 'selected matches on Record List' find option will be available. With this option selected, Informed Filler will select the records that match on the Record List.

After using the Find command with the 'go to first match in collection' find option, you can reveal the next record that matches by choosing **Find Again** from the Database menu. This command repeats the find starting with the record immediately following the current record.

## Indexed cells

When a form is created with Informed Designer, the designer can choose which cells have indexes. An index is a pre-sorted list of cell values that Informed Filler maintains automatically as you add, remove, and change records. Although you never *see* an index, you can certainly notice its effect when you use the Find command to find records.

If a cell is indexed, Informed Filler can quickly search through thousands of records to find a matching value. Depending on the speed of your computer and the number of records in your data document, searching can be as fast as one or two seconds. If a cell is not indexed, each record must be examined individually to find those that match the search value. Searching can take considerably longer if a cell is not indexed.

## Finding All Records

Various commands allow you to browse through the records in your data document. You can use commands such as Next, Previous, First, and Last to view and edit each individual record in the collection. The records in the collection also appear listed on the Record List.

The Find All command places all records in the collection, allowing you to list or browse through all records in your data document.

## Sorting Records

With the exception of picture cells and signature cells, Informed Filler lets you sort any cell on your form. To sort the records in the collection, first select the cell that you want to sort by either clicking it on the form window or selecting its column on the Record List. Then choose **Sort...** from the Database menu. The Sort dialog box appears.



You can sort a cell in either ascending or descending order. Select your choice, then click ‘OK.’ Informed Filler displays progress information as sorting occurs.

Once the sorting process has started, you can cancel the Sort command by clicking ‘Cancel’ on the progress dialog box. If you cancel sorting, the order of the records in the collection will remain unchanged.

To sort records by two or more cells, simply sort each cell individually, starting with the least significant cell and ending with the most significant cell. For example, suppose that the Record List contains the Sold To and Total cells of an invoice form. To obtain a list of invoices sorted alphabetically by the value in Sold To, and by the Total within each Sold To value, sort the Total cell first, then the Sold To cell.

### Note

The sorted order of records in the collection is not preserved as you add and change records, or when you close the data document. You can, however, tag the collected records using commands in Informed Filler’s Tags submenu. See “Tagging Records” later in this chapter for more information.

A certain amount of memory is required to sort a cell. If Informed Filler can’t obtain the required memory, you’ll see a message indicating so.

## Omitting Records

In addition to the ‘Omit from collection’ option of the Find command, Informed Filler provides two commands for omitting records from the collection.

With the form window in front, the Omit command omits the current record—that is, the one that’s visible in the window. The next record in the collection becomes the current record. If there’s no next record, the previous record is made current instead. To omit more than one record, select each record on the Record List, then choose **Omit** from the Database menu. The following figure shows the Record List window before and after omitting the selected records.

Purchase Req Data		Purchase Req Data	
Employee No	Recipient	Employee No	Recipient
79	Beth Westurn	79	Beth Westurn
305	Will DeBeest	99	Niles Rivers
99	Niles Rivers	65	Francis Drake
65	Francis Drake		
117	Pam Irvin		
5 Records   2 Selected		3 Records   0 Selected	

Since the collection must always contain at least one record, Informed Filler won’t let you omit the last record. If there’s only one record in the collection, or if you’ve selected all records on the Record List, the Omit command will be unavailable.

The Omit Others command also omits records from the collection. If the form window is in front, all records except the current record are omitted. If the Record List window is in front, Omit Others omits all records that are not selected.

If the collection contains only one record, or if either all records or no records are selected on the Record List, the Omit Others command will be unavailable.

## Browsing Through Records

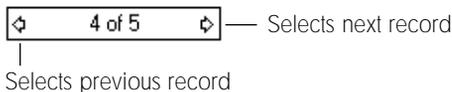
The Go To submenu under the Database menu contains five commands for browsing through the collection of records. They are: Record, Next, Previous, First, and Last. The Record command allows you to move to a specific record in the collection. When you choose **Record...**, Informed Filler displays the Change Record dialog box.



Type the number of the record that you want to go to, then click 'OK.' The number that you type must be within '1' and the number of records in the collection. The record that you specified becomes the current record and is displayed in the form window. As a shortcut to choosing the Record command, you can double-click the record information box to display the Change Record dialog box.

The Next and Previous commands move you one record forward or backward respectively. The First and Last commands move you to the first or last records in the collection.

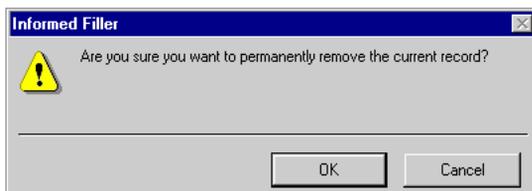
You can also browse through collected records by clicking either arrow in the collection information box.



Clicking the right or left arrow performs the Next or Previous command, respectively. If the current record is the first one in the collection, the left arrow disappears. The right arrow disappears if the current record is the last one in the collection.

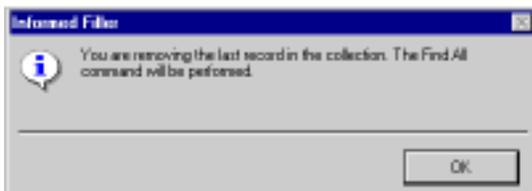
## Removing Records

The Remove command permanently removes records from your data document. You can remove the current record, or you can remove selected records on the Record List. If the form window is in front, the Remove command removes the current record only. If you want to remove more than one record, select each of them on the Record List, then choose **Remove** from the Database menu. In any case, you'll be warned before the command is performed.



To continue, click 'OK.' To cancel the Remove command, click 'Cancel' instead. If you hold down the Alt (Windows) or Option (Mac OS) key while choosing the Remove command, the current record is removed without your confirmation.

After removing the current record, the next record in the collection will become the current record. If there's no next record, the previous record will be made current instead. If you remove the last remaining record in the collection, Informed Filler will automatically perform the Find All command and display the following message:



Click 'OK' to continue. All remaining records in the data document will be placed in the collection. See "Finding All Records" for more information about the Find All command.

## Tagging Records

Informed Filler's Tag feature provides an easy way for you to identify unique collections of records so that they can be quickly recalled and viewed. For example, if you were processing a batch of expense forms and found that some of the expenses needed clarification before they could be paid, you could mark those particular records with a tag such as "Clarify before processing." You could then process all the other expense forms first, and easily recall the collection of tagged records later by choosing the tag name from a list.

To tag a collection of records, find the records, then choose **Tag Records...** from the Tags submenu under the Database menu. The Tag Collected Records dialog box appears.



Type the name of the tag in the text box and click 'OK.' Your entire current collection will be tagged, and the name of the tag will be displayed in the Tags submenu.



In certain cases, Informed Filler will automatically tag a collection of records for you. For example, if you submit a batch of records to your company database, and an error occurs that prevents some of the records from being accepted, Informed Filler will mark those records with a tag such as "Records not submitted" and insert the tag name in the Tags submenu.

To recall a tagged collection of records, simply choose the tag name from the Tags submenu. Informed Filler returns the records associated with that tag as the current collection.

### Note

Recalling a tagged collection is not the same as performing a find. For example, if you found 25 invoices over \$100, and then tagged that collection as "Invoices over \$100," the tag only applies to those particular records. If you add another 20 invoices over \$100 to your data document and then choose the "Invoices over \$100" tag, Informed Filler will reveal only the original 25.

## Adding Records to a Tagged Collection

Often, you might want to include additional records in a tagged collection. Suppose that you've processed all the expense forms for the month and tagged the collected records as "Expenses 09/96." At the last minute, the VP of Sales and Marketing submits one that had been forgotten. After processing the extra form, you'll want to include that record in your "Expenses 09/96" collection.

To add records to an existing tagged collection, do a find that will return the tagged records as well as the records that you want to add, then choose **Tag Records...** from the Tags submenu under Database. Type the original tag name in the text box and click 'OK.' You'll see a message asking you to confirm if you want to replace the original tag with the new one (the original collection plus the new records).

## Removing a Tag

If you no longer require a particular tag, you can remove it by choosing **Remove Tag...** from the Tags submenu. The Remove Tag dialog box appears.



Select the name of the tag that you want to remove and click 'OK.'

### Note

When you remove a tag, you're only removing a reference to that collection of records, not the records themselves.