

2 Manipulating Documents

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Manipulating Documents

This chapter presents information about Informed documents and how they are manipulated. You'll learn about Informed document types and password security, as well as how to create, open, close, and save form template documents.

Informed Documents

The term *document* refers to a file that contains information. An Informed document is a file that contains information about a form. There are four types of Informed documents: form template documents, form data documents, package documents, and interchange documents.

Form Template Documents (.ITP)



A form template document contains a form template. A form template is the layout or framework of a form that you create using Informed Designer. It contains all the intelligent features of the form as well as its graphic elements. The Informed Filler user fills out a form by entering values in the cells on the template. In order to use a template with Informed Filler, the user must place the template in his or her templates folder.

Form Data Documents (.IFM)



A form data document contains only a form's data. When the Informed Filler user fills out forms, the information entered is stored in a form data document. A single form data document can store one or more completed forms. Each completed form is stored as a record. Each form data document also contains a template ID. The template ID identifies which template is needed to display and manipulate the form data.

Package Documents (.IPK)



A package document combines a form template and its associated data. It is created using Informed Filler and is used primarily when a user mails a form to someone who doesn't have the corresponding template. When the Informed Filler user opens a package using Informed Filler's Open command, the data document and template (if needed) are extracted. If the user's templates folder does not already contain the template, the one extracted from the package is copied there and opened. The data document is opened as an untitled document that can later be saved in a new file.

Interchange Documents (.IIF)

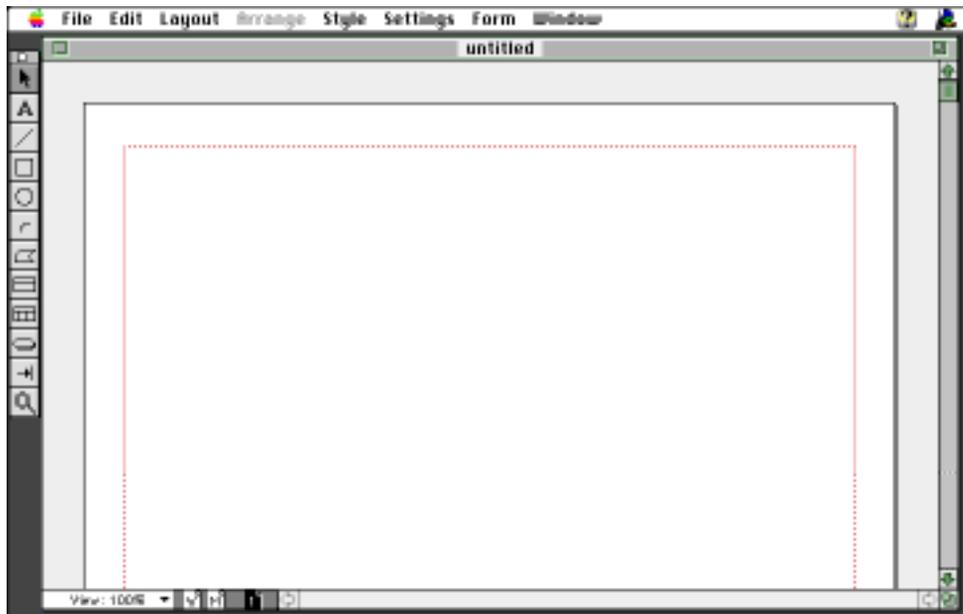


Informed Interchange documents contain all the data for one or more completed forms (or *records*), and are used primarily for transferring information between different applications, and different versions of Informed. They are created and read using Informed Filler, and store all types of information including stylized text values, pictures, signatures, and annotations.

Creating a New Template

The New command creates a new form template.

To create a new template, choose **New** from the File menu. A new untitled window appears.



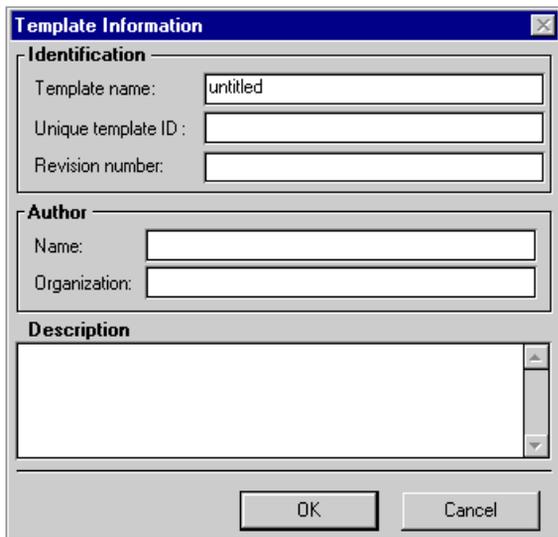
You can create as many documents—or open as many existing ones—as you like. You are only limited by the amount of available RAM (random access memory) in your computer.

Each new document is assigned a set of default settings. These defaults refer to the current settings of the object tools; that is, they determine what new objects will look like. For example, the default font for the text tool is Arial (Windows) or Helvetica (Mac OS). Similarly, the line tool has a default width of one point. See Appendix A for a complete list of default settings.

Template Information

Since templates and data documents are separate files, there needs to be a way to identify which template is used for a particular data document. Informed Designer's Template Information command allows you to enter information that identifies a particular template. This information includes a template name, template ID, and revision number.

To enter or view template information, choose **Template Information...** from the Form menu. The Template Information dialog box appears.



The image shows a 'Template Information' dialog box. It has a title bar with the text 'Template Information' and a close button. The dialog is divided into three main sections: 'Identification', 'Author', and 'Description'. The 'Identification' section contains three text boxes: 'Template name' (with the text 'untitled'), 'Unique template ID', and 'Revision number'. The 'Author' section contains two text boxes: 'Name' and 'Organization'. The 'Description' section contains a large text area with a vertical scrollbar. At the bottom of the dialog are two buttons: 'OK' and 'Cancel'.

Type a name for the template in the 'Template name' text box. The name that you enter can be more descriptive than the filename of the template. This can be helpful for templates that are stored and accessed using Windows computers where file names are limited to a length of eight characters.

The Unique template ID provides a means of linking form data documents to form template documents. When the Informed Filler user creates a new data document, in addition to the form data itself, the template ID of the template used is also stored in the data document. When Informed Filler opens a data document, the template ID is used to identify and locate the correct template to use.

To enter a template ID, type a value in the 'Unique template ID' text box. It is recommended that you assign a meaningful ID. For example, if you create an expense form template for claiming expenses in US dollars, you might assign a template ID of 'Exp-USD-96,' whereas a template for claiming Canadian dollar expenses might be assigned 'Exp-CDN-96.' If you don't specify a template ID, Informed Designer assigns a random number for you the first time you save the template.

The revision number further identifies the template. If you don't enter a value in the 'Revision number' text box, Informed Designer assigns the revision number "1" when you save the template for the first time.

Note

The template ID and Revision number provide a means of coordinating the distribution of new templates and new revisions of existing templates using Informed's built-in forms distribution capabilities. For details on these capabilities and the importance of the template ID and revision number, see Chapter 8 of your *Informed Designer Forms Automation* manual.

The Author section of the Template Information dialog box contains two text boxes: 'Name' and 'Organization.' You can use these text boxes to store information that identifies the designer of the form template.

Note

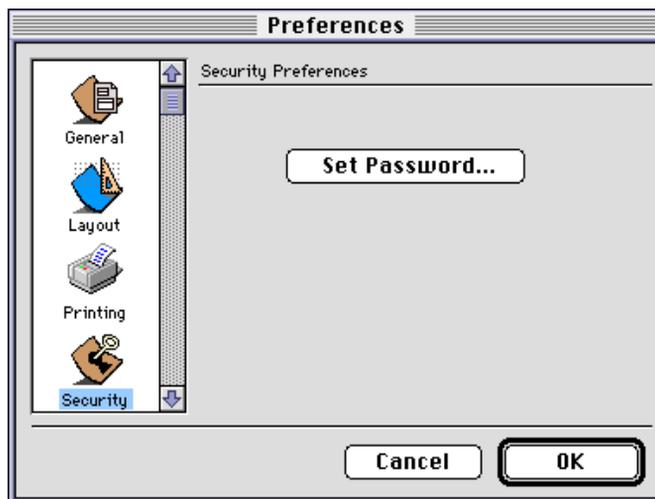
Chapter 7 of your *Informed Designer Forms Automation* manual explains how you can authorize and verify templates to ensure their authenticity. It is important to note that entering your name in the Author section of the Template Information dialog box is not the same as authorizing a template by using the Authorize command.

You can also enter a brief description of the template in the 'Description' text box. Entering a description of the template can be helpful to both the Informed Filler user and other form designers who might have to revise the template in the future.

Changing the Password

As a security measure, you can use passwords to prevent other users from opening and changing templates with Informed Designer. If a template has a non-blank password, you'll be prompted to enter it when you attempt to open the template using Informed Designer's Open command (see "Opening a Template" later in this chapter).

To change the password for a template choose **Preferences...** from the Edit menu. When the Preferences dialog box appears, click the Security icon in the scrolling list. The dialog box changes to show the Security preferences panel.



Click the 'Set Password' button to display the Set Password dialog box.



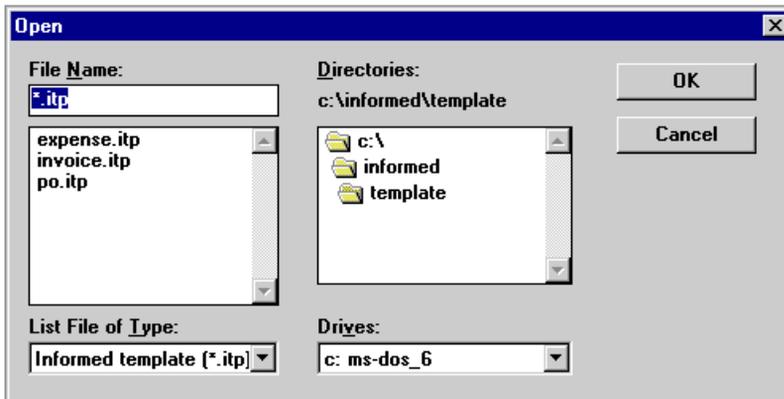
If you haven't entered a password before, only the 'New password' and 'Confirm password' text boxes are available. If a password already exists, the 'Old password' text box is also available.

If a password already exists, you must enter that password in the 'Old password' text box. Type your new password in the 'New password' text box, then press Tab. The insertion point moves to the 'Confirm password' text box. Type the password again, then click 'OK.' Informed Designer will display a message confirming that you have successfully changed the password.

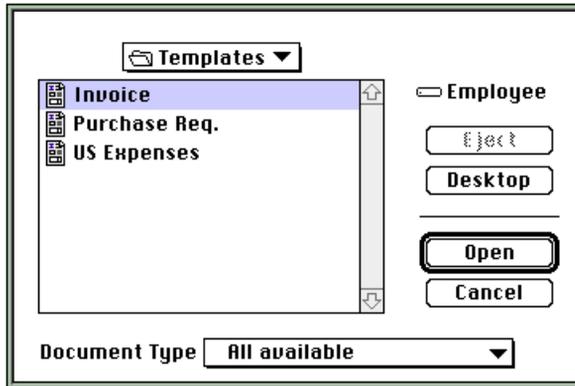
Opening a Template

The Open command opens an existing template.

To open a template, choose **Open...** from the File menu. If you're using a Windows compatible computer, you'll see the standard Windows Open dialog box.



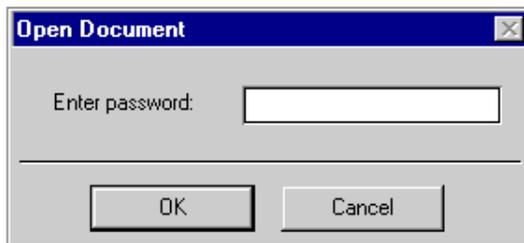
If you're using a Mac OS compatible computer, you'll see the standard Mac OS Open dialog box.



Select a template to open, then click ‘Open.’

Note You can make the Open dialog box appear automatically when you run Informed Designer by holding down the Alt (Windows) or Option (Mac OS) key after double-clicking the application icon.

If the template you’ve selected has a non-blank password, you’ll be asked to enter it.



Informed Designer will not open the template until the correct password has been entered.

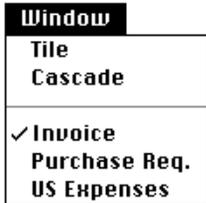
Note Passwords are case sensitive. This means that upper and lower case letters are considered to be different. Be sure to check whether or not your Caps Lock key is pressed.

For information about how to change your password, see “Changing the Password” earlier in this chapter.

While the template is opening, Informed Designer displays progress information at the lower-left corner of the drawing window.



After a template is opened, its name appears in Informed Designer's Window menu.

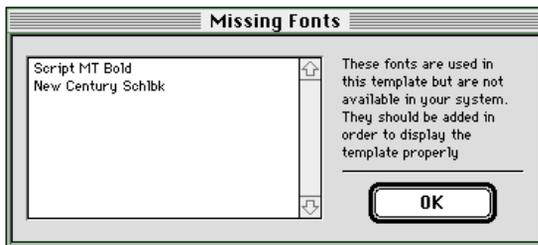


A checkmark appears next to the name of the active template. To make another template the active template, simply click its window, or choose its name from the Window menu.

Missing Fonts

When you open a template, Informed Designer checks to make sure that the fonts used on the template are available in your system. Different systems on different computers can have different fonts installed. If you draw a template on one computer, then transfer it to different computer, that computer might not have the fonts that you originally used to draw the template.

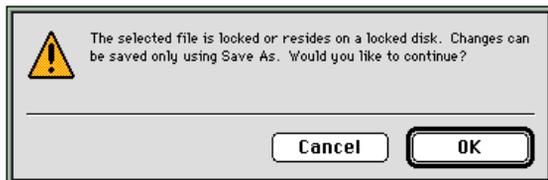
If Informed Designer detects that at least one font is missing from your system, you'll see the following dialog box.



Any text that uses one of the listed fonts will display using a font that's available in your system.

Opening a Locked Template

If the template you choose to open is locked, or resides on a locked disk, Informed Designer will warn you.



If you continue, the template will be opened as usual. However, you won't be able to save any changes (the Save command will always be disabled). To save any subsequent changes made to the template, choose **Save As...** from the File menu to save the template in a new file.

Opening a Template in Use

A template document that is presently in use cannot be opened. Most commonly, if a template is already in use, you've probably already opened it yourself in Informed Designer or Informed Filler. If you try to open a template already in use, you'll see a dialog indicating so.

You cannot open a template that resides on a file server and is being used by another user. If you attempt to do so, a dialog appears giving you the options of waiting until the template is available for use, or of canceling the Open command.

Closing a Template

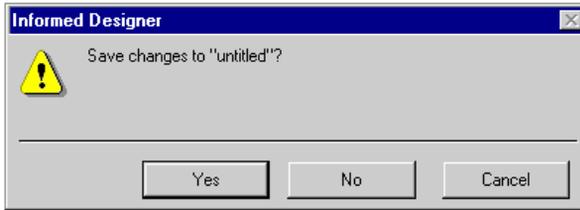
The Close command closes the currently active template document—that is, the document that corresponds to the front-most drawing window on your screen.

To close the currently active template, choose **Close** from the File menu, or click the window's close box. Depending on the kind of document that you're working with and the work that has been done, one of the following situations will arise.

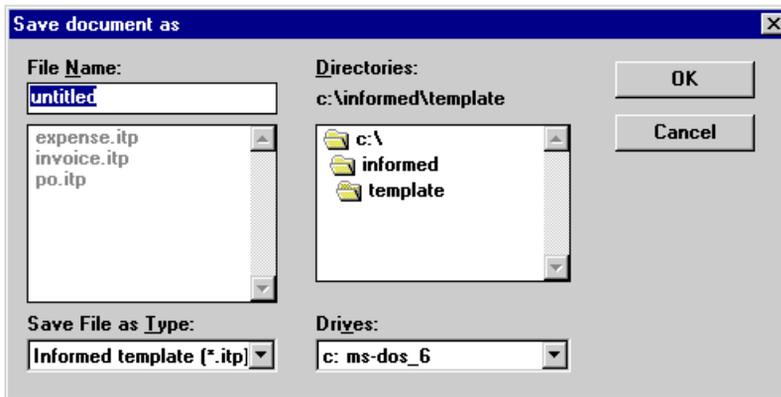
Closing a New Template

If you're closing a new template that has not been edited, the document is closed immediately.

If you're closing a new template to which changes have been made, Informed Designer will warn you to save the changes:

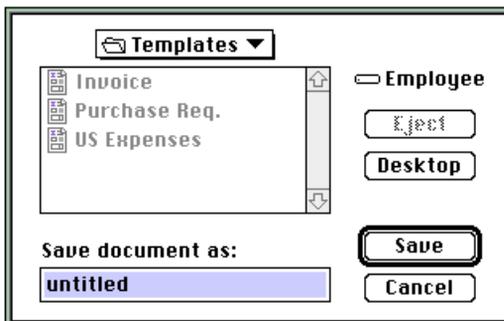


If you're using a Mac OS compatible computer, the button names on this dialog box will be different. Instead of 'Yes', you'll see 'Save', and instead of 'No', you'll see 'Don't Save.' Clicking the 'Yes'/'Save' button displays the Save dialog box. If you're using a Windows compatible computer, you'll see the standard Windows Save dialog box.



Type the name of the new template and select the location to store it, then click 'OK.'

If you're using a Mac OS compatible computer, you'll see the standard Mac OS Save dialog box.



Type the name of the new template and select the location to store it, then click 'Save.' Clicking 'Cancel' instead cancels the Close command and your template document remains open.

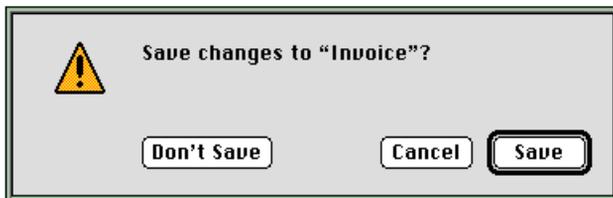
If a document with the name you specify already exists at the selected location, Informed Designer will warn you with options to replace the existing document or cancel the Close command.

Clicking ‘No’/‘Don’t Save’ closes the template without saving any of the work you’ve done. Clicking ‘Cancel’ cancels the Close command and your template remains open.

Closing an Existing Template

When you close an existing template (that is, a document that was previously opened), Informed Designer first checks to see if you’ve made changes to the template. If your template has not changed since you last opened it, then it’s closed immediately without warning.

However, if you’ve made changes to the template, you’ll be asked if you want to save the changes.



If you’re using a Windows compatible computer, the button names on this dialog box will be different. Instead of ‘Save’, you’ll see ‘Yes’, and instead of ‘Don’t Save’, you’ll see ‘No.’ Click ‘Yes’/‘Save’ to save the changes and close the template. Click ‘No’/‘Don’t Save’ to discard the changes and close the template. Click ‘Cancel’ to cancel the Close command and continue editing your template.

Saving a Template

The Save command saves the currently active template—that is, the document that corresponds to the front-most drawing window on your screen. This command is available only when changes have been made to the currently active template.

To save a template, select **Save** from the File menu. If the template corresponds to an existing document (that is, it has been saved at least once before), it will be saved without warning.

If you’re saving a new template for the first time, you’ll be asked to name the template and specify the location to store it. Depending on which operating system you’re using, you’ll see either the standard Windows Save dialog box or the standard Mac OS Save dialog box (see “Closing a New Template” earlier).

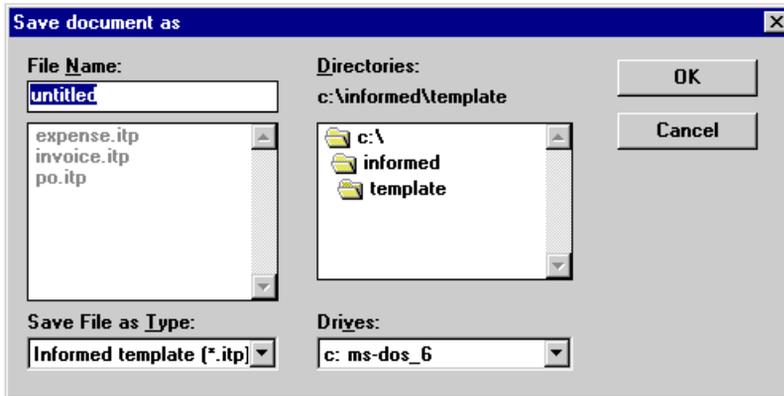
Type the name of the new template and select the location to store it, then click 'OK' or 'Save.' Clicking 'Cancel' instead cancels the Save command.

If a document with the name you specify already exists at the selected location, Informed Designer will warn you with options to replace the existing document or cancel the Save command.

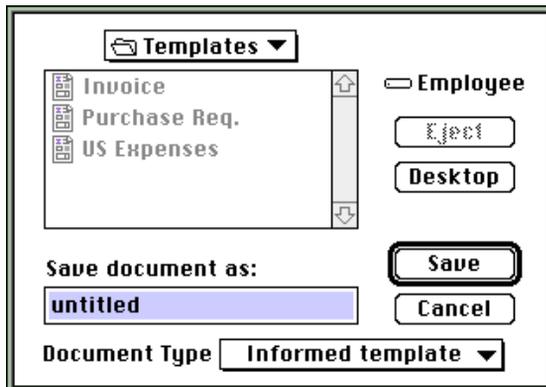
Saving Copies of a Template

Use the Save As command to save a copy of a template with a different name, or at a different location.

Choose **Save As...** from the File menu. If you're using a Windows compatible computer, you'll see the standard Windows Save dialog box.



If you're using a Mac OS compatible computer, you'll see the following dialog box.



The same options apply as when saving a new document. After saving the new template document, Informed Designer will automatically close the original template. The new document will remain open for editing.

Template translation plug-ins allow you to save a template in different formats. If you have any template translation plug-ins installed in your plug-ins folder, you'll see those options in the 'Document Type' drop-down list.

