



Form Template Distribution and Revision

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Form Template Distribution and Revision

Once a form template is designed, it must be distributed to Informed Filler users. When a template is revised, the new revision must also be made available to Informed Filler users. This chapter describes Informed's built-in template distribution features and provides guidelines for distributing new form templates and new revisions of templates.

Overview

Distribution refers to the process of making form templates available to Informed Filler users in your organization. Informed's form distribution features give Informed Filler users all the benefits of both local and network based template storage. Templates can be stored locally without the need to be "on-line" to use them, and Informed's distribution features automatically notify the user when new versions of form templates are made available.

Distribution of a template is a four step process:

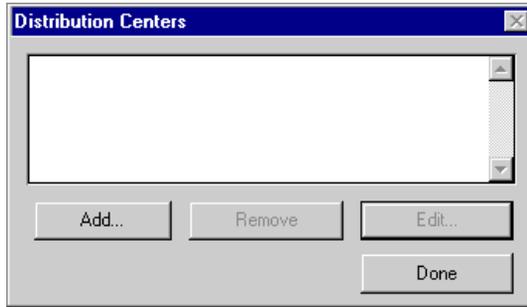
1. *Create a distribution center.* A distribution center is a folder or directory on a file server or FTP server that contains your distributed templates. For example, you could create folder called "Forms Warehouse" on a file server. The Informed Filler users would then connect to the "Forms Warehouse" distribution center to obtain new templates or revised templates which are copied into their local Template folder.
2. *Create a distribution center profile.* A distribution center profile is a file that contains information that identifies a distribution center. For example, a distribution center profile might specify an FTP server IP address, the user ID and password necessary to connect to the server, and the path at which distributed templates are stored. This profile is given to the Informed Filler users so that they can connect to the distribution center.
3. *Add your form template to the distribution center.* After creating the distribution center and the distribution center profile, you use Informed Designer's Distribution command to add your form template to the distribution center.
4. *Give the distribution center profile to the users.* Once the Informed Filler users have the distribution center profile, they can use the New Document command to navigate to the distribution center and copy the desired template to their local Template folder.

Creating a Distribution Center Profile

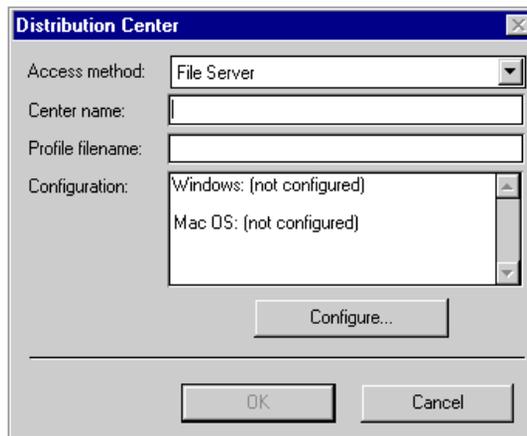
After you establish a distribution center on your file server or FTP server, you must create a distribution center profile. A distribution center profile is a file that contains information that identifies the distribution center.

You create, edit, and remove distribution center profiles using Informed Designer's Distribution Centers command. When you create a distribution center profile, the distribution center—the file server or FTP server, for example—must be available and accessible.

- Choose **Form > Configure > Distribution Centers**. The Distribution Centers dialog appears.



- Click 'Add.' The Distribution Center dialog appears.



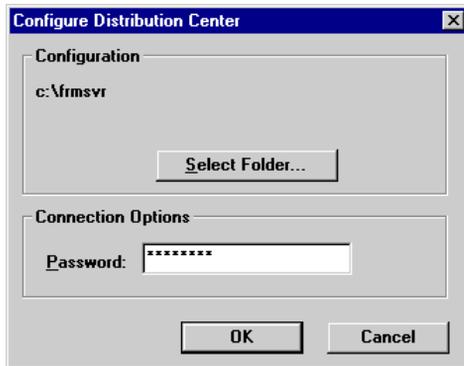
- Select the type of distribution service from the 'Access method' drop-down list. The options in this list correspond to the distribution center plug-ins available in your Plug-ins folder.
- Enter the name of the distribution center and the filename for the distribution center profile in the text boxes provided.

Note

The name you enter in the 'Center name' text box is the name the Informed Filler users will see when they look for a distribution center using the New Document command. This name can be different from the one given to the actual folder or directory that contains the forms.

- Click the ‘Configure’ button. The configuration dialog box that appears depends on the access method you’ve selected. The details specific to the different access methods are not provided here. This information can be found in the “Distribution Plug-ins” topic of Informed Designer’s on-line help.

The configuration dialog box for configuring a file server distribution center profile for the Windows platform is shown below.



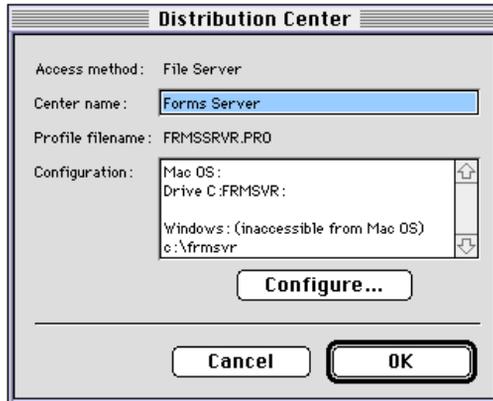
- After you’ve named and configured the distribution center profile, click ‘OK’ on the Distribution Center dialog box. Informed Designer creates the distribution center profile file and stores it in your “DISTCTRS” (Windows) or “Distribution Centers” (Mac OS) folder.
- Distribute a copy of the distribution center profile to all Informed Filler users who need to access that distribution center. The profile must be placed in the users’ DISTCTRS (Windows) or Distribution Centers (Mac OS) folder. This folder is found in the Preferences folder which is located in the Informed folder.

Distribution Center Profiles for Multiple Platforms

If you use both Windows and Mac OS compatible computers in your organization, then you might want to allow both Windows and Mac OS Informed Filler users to access distributed templates at the same distribution center(s).

Informed Designer allows you to create a single distribution center profile that works for both Windows and Mac OS users. For some access methods, the configuration details that you specify are valid for both platforms. Other access methods require that the configuration be specified once on each platform.

The Distribution Center dialog contains a scrolling list labeled “Configuration.” This list shows the details of the configuration.



If a distribution center profile for the selected access method requires platform specific configuration, you'll see separate configuration details for each platform. On the above dialog, the "File Server" access method is selected and the location of the distribution center is specified as "c:\frmsvr" for Windows users and "Drive C:FRMSVR:" for Mac OS users. If configuration is not available for one platform or the other, you'll see "(not configured)" next to the platform identifier.

Although it may be necessary to configure a distribution center profile once on each platform, the resulting profile document is still a platform neutral document. A single distribution center profile will work with Informed Designer and Informed Filler on all platforms. Informed Designer and Informed Filler will automatically use the configuration information that is appropriate for the current platform.

Editing Distribution Center Profiles

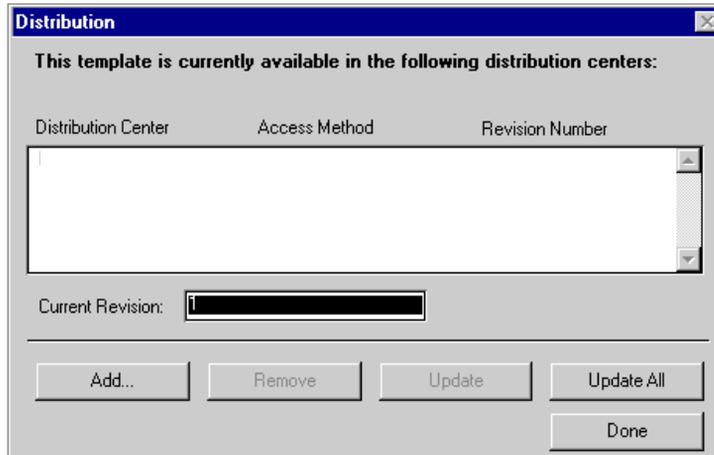
It's possible that you might need to make changes to an established distribution center. For example, you might need to move the distribution center from one file server to another. If you make changes to a distribution center, the information in the Informed Filler users' distribution center profile will no longer be valid and they will be unable to access the center. However, Informed makes it easy to edit the distribution center profile:

- Choose **Form > Configure > Distribution Centers** to display the Distribution Centers dialog.
- Select the Distribution Center name in the list and click 'Edit.'
- Make the appropriate changes on the Distribution Center dialog and then distribute the new file to the Informed Filler users.

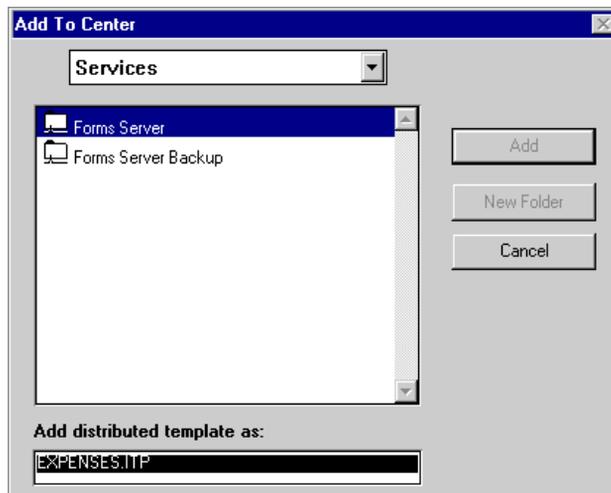
Adding a Template to a Distribution Center

To add a template to a distribution center,:

- Open the template with Informed Designer, then choose **Form > Configure > Distribution** to display the Distribution dialog.

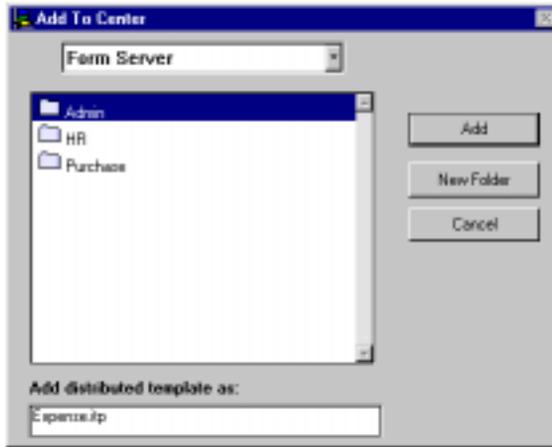


- Click the 'Add' button. The Add To Center dialog box appears.



The scrolling list on this dialog box initially lists the distribution centers that correspond to the distribution center profiles found in your DISTCTRS (Windows) or Distribution Centers (Mac OS)

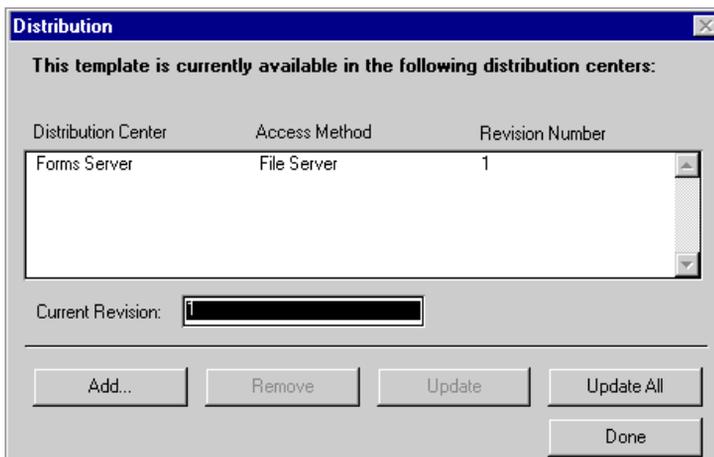
folder. To select a distribution center, click its name in the list then click the ‘Open’ button (Mac OS only), or simply double-click its name. The list changes to show the items at that distribution center.



Many types of distribution centers allow you to organize distributed templates in folders much like you can organize files on a hard disk. If the selected distribution center permits folders, you’ll see a ‘New Folder’ button on the Add To Center dialog box. You can create a new folder by clicking this button and entering a folder name.

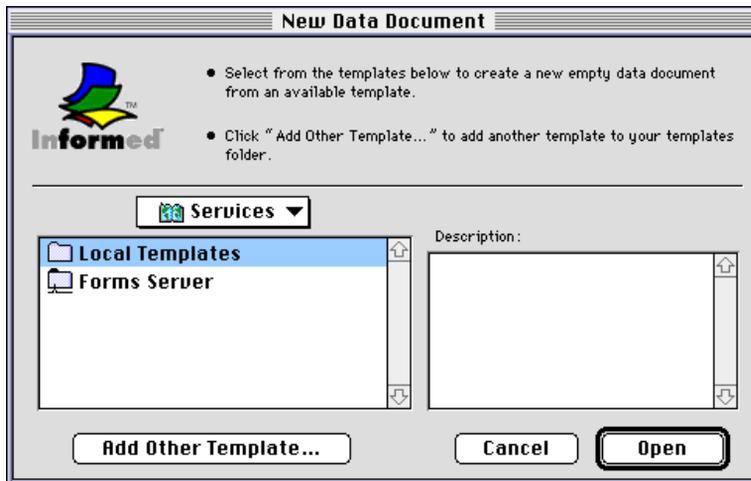
The default name of the distributed template is the template’s filename. You can change this name by typing a different name in the ‘Add distributed template as’ text box.

- Once you’ve named the distributed template and selected the folder to store it in, click the ‘Add’ button. (On Mac OS the button label is ‘Open.’ Press Tab to change the button label to ‘Add.’) Clicking ‘Add’ adds the distribution center to the template’s distribution list and creates the distributed template at the specified location.



After you add a template to a distribution center, Informed Filler users can then navigate to find the template and copy it to the place where they store all of their templates. In order to do so they must also have the distribution center profile installed in their “DISTCTRS” (Windows) or “Distribution Centers” (Mac OS) folder.

For Informed Filler users, access to distribution centers and the templates they contain is available from the New Data Document dialog box. This dialog box appears when the user chooses Informed Filler’s New Document command.



The New Data Document dialog initially shows a list of all templates in the user’s templates folder. Selecting ‘Services’ from the drop-down list reveals the distribution centers that correspond to the distribution center profiles found in the user’s “DISTCTRS” (Windows) or “Distribution Centers” (Mac OS) folder. To display the templates available at a distribution center, the user selects the center in this list and clicks ‘Open.’ Informed Filler connects to the distribution center and lists the templates available. The user selects a template and clicks ‘New’ to copy it to his or her local templates folder. The template is then available for use with Informed Filler.

Note

If you (the form designer) are also going to fill out forms with Informed Filler, we recommend that you store your original “designed” forms in a folder other than your Template folder. For example, you could create a folder called “Master Forms” to keep your original forms in, and then use Informed’s distribution features to copy the distributed forms to your local Template folder to use with Informed Filler.

Using Multiple Distribution Centers

You can add a template to more than one distribution center. You might do this in order to make a template available at primary and backup distribution centers. A particular distribution center can

act as the primary distribution center, whereas a second center can act as a backup in the case that access to the primary distribution center is interrupted.

Revision Information

Each form template has associated revision options. These options are most applicable for templates that are distributed via Informed's built-in distribution features. Choose **Revision Options** from the Form menu to display the Revision Options dialog box.

The screenshot shows the 'Revision Options' dialog box. It features a title bar with the text 'Revision Options'. The main area is divided into several sections. The first section is 'Check for a new revision', which includes a dropdown menu currently set to 'Each time the template is opened' and an unchecked checkbox labeled 'Allow user to change this setting'. Below this is a text area for a custom warning message, with the prompt 'If no distributed template can be accessed, warn the user with this message:'. The next section is 'Status', which has a dropdown menu set to 'Current' and a text area for a status message. At the bottom of the dialog are two checkboxes: 'Display status message when the user adds a new record' (unchecked) and 'Prevent users from adding new records' (unchecked). Finally, there are 'Cancel' and 'OK' buttons at the bottom right.

The setting of the 'Check for a new revision' drop-down list determines how often Informed Filler will perform a revision check to see if a new version of the template is available. If revision control is important, you might want to set the frequency to 'Each time the template is opened.' That way, a revision check will occur each time before the template is used. Other settings check only periodically.

If a revision check occurs, but Informed Filler is unable to connect to the distribution center, or an error of some type occurs while accessing the distributed template, Informed Filler will display the custom message that you specify on the Revision Options dialog box. If you leave this message blank, Informed Filler will substitute a standard message.

The status and status message of a template are intended to indicate to the Informed Filler user the current status of the template. The three statuses include: Current, Non-current, and Discontinued. Choose the status that is most appropriate for the template. You can enter a status message in the text box to provide a more descriptive indication of the template's status. The Informed Filler user can display the status and status message of a template by choosing the Revision Status command from the View menu.

The ‘Display status message when the user adds a new record’ checkbox allows you to warn the Informed Filler user of the status of a template when new record is created. This is particularly useful if a template is used only under certain conditions. The status message could remind the user of the intended uses of the template. To prevent the Informed Filler user from creating new records, select the ‘Prevent users from adding new records’ option.

Managing Template Revisions

After a form template is designed and distributed for use, it is normal to expect the template to change from time to time. There are many reasons why a template might change. For example:

- a typing mistake is found
- the size of a cell must be adjusted to allow for more information
- the company has relocated and the address on all form templates must be changed
- a tax form is being revised for a new year; some tax calculations are being changed

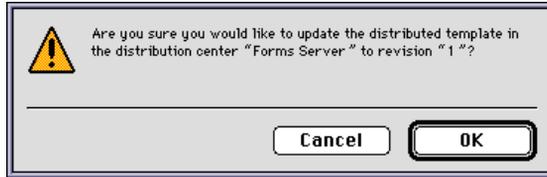
When you revise a form template, you have the option to either update the previous version with the new version (the revision number is changed but the Template ID remains the same), or introduce the new version as a completely new template (a new unique Template ID is assigned). You must use caution when updating a template with a new version because of the potential effects doing so might have on the data for any existing forms that were filled out using the previous version. For more information, please see “Revision Guidelines” later in this chapter.

Updating the Current Version of a Form

When you update an existing form template with a new version, you do so by making the required changes and then updating the distributed template at the appropriate distribution centers. That way, each Informed Filler user will be automatically notified of the new version the next time a revision check occurs. In order for Informed Filler to recognize the new version, you must change the revision number of the template on the Distribution dialog.

To update the current version of a distributed form template:

- Open the form template with Informed Designer and make the required changes.
- Choose **Form > Configure > Distribution** to display the Distribution dialog.
- Enter the new version number in the ‘Current Revision’ text box.
- The Distribution dialog lists the distribution centers at which the template is available. To update the distributed template at a distribution center, select the distribution center in the list and click ‘Update.’ You are asked to confirm the operation.



- Click 'OK' to proceed. The distributed template is replaced with the new version.
- If you want to update the template at all distribution centers listed on the Distribution dialog box, click the 'Update All' button.

The next time Informed Filler performs a revision check, the user will be notified that a new version of the template is available and he or she will have the option to update to the new version.

Replacing an Obsolete Template

Depending on the nature of the changes made to a distributed form template, it is sometimes necessary to introduce the new version as a completely different template rather than simply updating the current version.

To replace the current version of a template with a new template:

- Open the form template in Informed Designer, then choose **File > Save As** to display the Save dialog.
- Save a copy of the template.

Then, using the new copy of the template:

- Choose **Form > Configure > Distribution** to display the Distribution dialog.
- Select each distribution center in the scrolling list and click 'Remove' to remove the distribution centers from the template's distribution list. Informed Designer will ask if you also want to delete the distributed template itself. Click 'Don't Delete.'
- Click 'Done' to dismiss the Distribution dialog.
- Choose **Form > Template Information**. The Template Information dialog appears.
- Assign a new unique Template ID and revision number to the new template and click 'OK.'
- Make the necessary design changes and then save the template.
- Choose **Form > Configure > Distribution** and use the Distribution dialog to add the new template to the appropriate distribution centers; then save and close the new template. (See "Adding a Template to a Distribution Center" for details.)

Now you need to ensure that the old version is no longer used to fill out new forms:

- Open the old version of the template in Informed Designer.
- Choose **Form > Revision Options**. The Revision Options dialog appears.
- Select ‘Discontinued’ from the ‘Status’ drop-down list and check the ‘Prevent users from adding new records’ checkbox.
- Change the ‘Status message’ to indicate that the form is obsolete and click ‘OK.’ It is also helpful to include instructions on how to obtain the new form.
- Choose **Form > Configure > Distribution** to display the Distribution dialog.
- Change the revision number for the template and distribute it to the appropriate distribution centers. (See “Adding a Template to a Distribution Center” for details.)

The next time Informed Filler performs a revision check, the user will be notified that this template is obsolete and he or she must obtain the new version of the form from a distribution center.

Revision Guidelines

When you change a template, it is important that you decide carefully to introduce the new version either as an update of the previous version, or as a completely new template. This decision is based on the nature of the changes being made.

Consider the example of a travel expense form. At the beginning, version 1 of this form template is created and distributed for use by Informed Filler users. These users begin filling out forms as required. Suppose that you later realize that there’s a typing mistake in one of the cell titles on the template. You proceed to fix the mistake and, in doing so, create the second version of the template. In this situation, the new version of the template should replace the previous version. You can ask yourself the question “Would it have been appropriate for the previous version of the template to include the changes made in the new version?” If your answer is “yes”, then you probably want to update the previous version with the new version.

When you update a template with a newer version, it is important to realize that any forms that Informed Filler users have previously filled out will now be “seen” through the new template. With the example of the typing mistake, this means that a travel expense form that was filled out using the template that had the mistake will now be viewed and manipulated using a template with the correction.

In contrast, consider the example where the travel expense form is revised for a new calendar year. Suppose that the revision includes changes both to the visual appearance of the template as well as the calculations and check formulas that affect the mileage rate that is permitted for personal car usage. For the new year, employees are paid 20 cents per mile rather than 15. Also, a cell that was used to store the employee’s date of birth has been removed because it is information no longer needed on the travel expense form.

In this case it's important that the new version of the form template be introduced as a new template rather than an update of the previous version. If you were to simply update the previous version, Informed Filler users would see the forms that they filled out for the previous year through the template for the new year. The employee's birth date would be missing, and if the user happened to edit a form that was completed in the previous year, the mileage amount would recalculate according to the new year's calculations. To avoid this from happening, it would be important to introduce the new year's version as a new form template. To do so you would assign the new template a unique Template ID and use a revision number appropriate for the first version of a new template.

When deciding whether to update the previous version of a template with a new revision, or introduce the new revision as a new template, you should keep the following points in mind.

- If the changes made in the new revision change the meaning or context of the data, then you probably want to introduce a new template rather than update the previous version.
- Be cautious of templates with signature cells. If forms have been filled out and signed using a signature cell on the template, be sure to never replace the template with a new version that affects the signed data or the signature cell itself. Doing so could invalidate the existing digital signatures.

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