3 Customizing Menus

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3 Customizing Menus

The flexible nature of Informed's features makes it suitable for designing forms that automate both general as well as very specific processes. To help make a form more "custom suited" to a particular purpose, Informed Designer allows you to customize the menus that are presented to the Informed Filler user. By customizing menus you can:

- remove menus and commands that are not important or relevant to your form template
- use terminology that is specific to the process for which a template is designed
- add commands that perform custom tasks

Customizing menus can provide a simpler and more familiar environment for the form filling user. This can result in higher productivity and fewer errors. In this chapter you'll learn how to use Informed Designer's Menus command to configure the menu bar, the individual menus, and the items that are contained in each menu. You'll also learn about the different menu item types and their uses.

The Menu Bar

The menu bar consists of one or more—usually several—menus aligned horizontally from left to right. Each menu contains one or more menu items, usually grouped by function. Each new template created with Informed Designer is automatically assigned a standard menu configuration.

To customize the menu bar, choose **Menus...** from the Configure submenu under Form. The Menus dialog box appears.
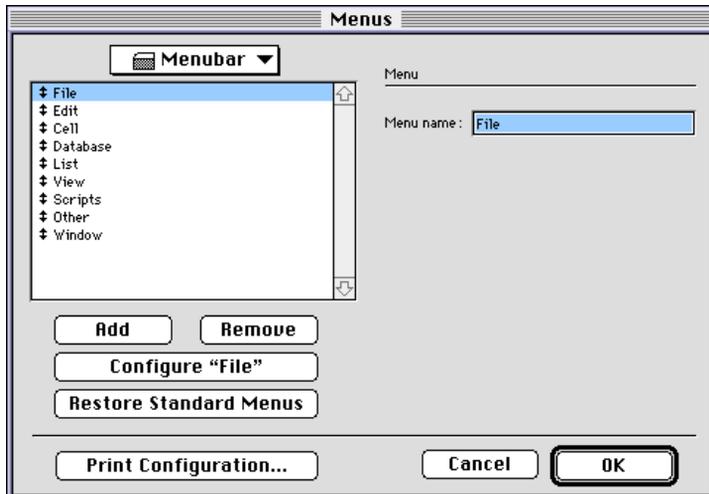
Initially, the scrolling list shows the menus in the menu bar. The top-to-bottom ordering of the menus represents the left-to-right positioning of each one in the menu bar. You can change the position of a menu by selecting it in the list and dragging it up or down. You can change a menu's name by selecting it in the list and typing its new name in the 'Menu name' text box.

To add a new menu, click 'Add.' The new menu is added immediately below the currently selected menu, or at the top of the list if no menu is selected. To remove a menu, select it in the list, then click 'Remove.'

At any time while configuring menus, you can revert to the standard Informed Filler menus by clicking the 'Restore Standard Menus' button.

Configuring a Menu

Configuring a menu involves adding and removing menu items and specifying the action that each item performs. To configure a menu, first select it in the scrolling list, then click 'Configure,' or simply double-click the menu name in the list. The scrolling list changes to display the menu items for the selected menu, and the drop-down list above shows the title of that menu. To change the list back to the menu bar, select 'Menu bar' from the drop-down list.
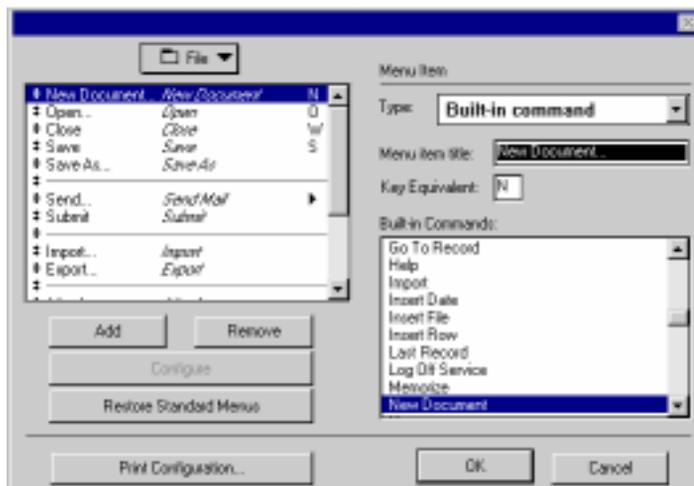
Like menus in the menu bar, you can change the position of a menu item by selecting the item in the list and dragging it up or down. To add a new menu item, click 'Add.' A new menu item is added immediately below the currently selected item, or at the top of the list if no menu item is selected. To remove a menu item, select it in the list, and click 'Remove.'

Note   A menu with no menu items will not appear to the Informed Filler user.

Menu Item Types

Each menu item is of a particular type. Menu item types include:

- Built-in command
- Script
- Plug-in command
- Submenu
- Document names
- Script names
- Record tags
- Record list formats
- Plug-in command names
- Font
- Size
- Type style
- Separator line

To configure a menu item's type, select the menu item in the scrolling list and select a type from the 'Type' drop-down list. Menu items that are built-in commands, scripts, or plug-in commands can be renamed by typing a new name in the 'Item title' text box.

You can also assign key equivalents to any built-in command, script, or plug-in command. Simply type the key in the 'Key equivalent' text box. A key equivalent is invoked by pressing the assigned key while holding down the Ctrl key (Windows) or the Command key (Mac OS).

| **Note** | The letters "x," "U," "t," "C," and "P" are reserved for standard Windows commands (Exit, Undo, Cut, Copy, and Paste). |

In addition to an assigned key equivalent, the Informed Filler user can choose a menu item using the standard Windows keyboard interface. This involves pressing the Alt key, then typing the letter that appears underlined in the menu or menu item's title. Although Informed Filler will automatically decide which letters are underlined in the menu and menu item titles, you can specify which letter yourself by preceding it with the ampersand character (&). For example, to underline the "D" in "New Document...," type the title as "New &Document..."

Built-in Commands

Built-in commands correspond to the commands and settings that are built into Informed Filler. They include the commands and settings that are associated with the menu items of Informed Filler's standard menu configuration. All available built-in commands are listed in the 'Built-in Commands:' scrolling list. To select a built-in command, simply click its name in the list.
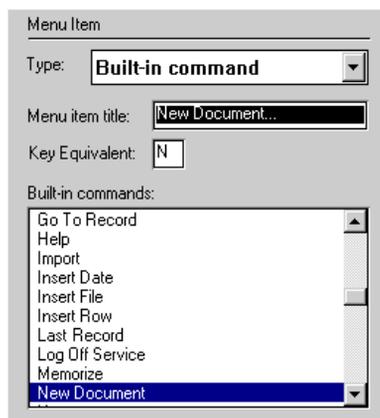
Certain built-in commands can not have custom menu item titles. They include: Show Attachments, Show Record List, and Show Signed Cells. This is because Informed Filler automatically changes the command name depending on context. For example, if the Attachments window is active, the Show Attachments command changes to Hide Attachments.
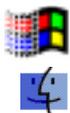
Both Windows and Mac OS have standard conventions for naming the command that quits an application. On Windows the command is Exit. On Mac OS the command is Quit. Like commands such as Show Attachments, you cannot change the name of this command. Informed Filler will automatically use the correct command name according to the platform used.

The Mac OS command "Show Clipboard" is not a standard command for Windows applications. A menu item that is configured to invoke this built-in command will not appear in Informed Filler on Windows.

For a brief description of the built-in commands, see Appendix B.

Scripts

A Script menu item is an item that invokes an attached JavaScript or AppleScript script. A script is attached to a template using the Scripts command in the Configure submenu of Informed Designer's Form menu. For more information, see Chapter 12, "Scripting."

Note   You can also configure a menu to include a menu item for each script that is attached to the template without having to configuring each individual item. See "Script Names" for more information.

Since AppleScript is a Mac OS scripting system, AppleScript scripts do not function on computers running Windows. For Windows users, Informed Filler does not show any menu items that are configured to invoke AppleScript scripts.

If AppleScript is not active, Informed Filler will show the menu item, but it will be unavailable.

Plug-in Commands

Some of Informed Filler's features are made available by installing Informed plug-ins. Certain plug-ins have commands associated with them. In order to configure a menu item to invoke a plug-in command, you must have the plug-in installed in your plug-ins folder. When you select the Plug-in Command menu item type, the scrolling list below lists all commands, if any, associated with the plug-ins currently installed in your plug-ins folder. Select the command that you want to invoke by clicking it in the list.

If the Informed Filler user does not have the plug-in to which a menu item corresponds installed, the menu item will still appear; however, it will be unavailable.

Note You can also configure a menu to automatically include a menu item for each plug-in command so that you do not have to configure each command individually. See "Plug-in Command Names" for more information.

Submenus

Submenus (also called *hierarchical* menus or *cascading* menus) are menus that are accessed through a single menu item of a parent menu. Submenus are most often used for settings like Font, Type Style, and Size.

You name a submenu by selecting it in the scrolling list and typing its name in the highlighted text box.

To configure the menu items of a submenu, select the submenu in the list and click 'Configure,' or simply double-click the submenu in list. The left list changes to show the submenu's menu items, and the submenu's title appears above the list.
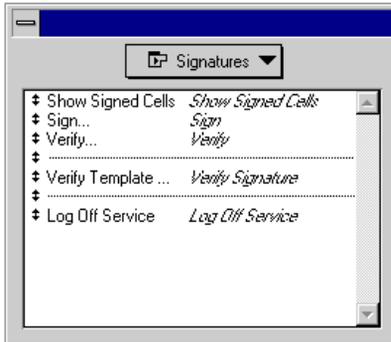
By using the various controls on the Menus dialog box, the menu items in a submenu can be config-ured just like those in a regular menu. To reveal the items for a different menu or submenu, use the drop-down list to display the desired menu in the scrolling list, then double-click it.

Font, Size, and Type Style

The Font, Size, and Type Style menu item types allow you to include the menu items that they rep-resent in your menu configuration. Rather than configuring individual menu items for each of the different fonts, sizes, and type styles (especially since each Informed Filler user can have different fonts in their system), these menu items act as placeholders for the respective groups of menu items.

Although these menu item types appear as single menu items on the Menus dialog box, the Informed Filler user will see the individual menu items that they represent. Below is an example configuration that places the Type Style and Font menu items in a menu titled "Font" with a separa-tor line between them.
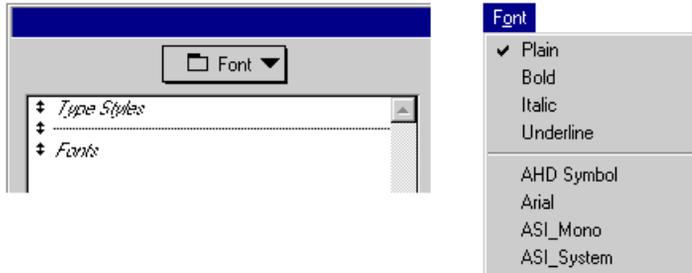
Document Names

Most applications allow you to open more than one document at once and select from among them by choosing their names from a menu, often titled "Windows." As you open and close documents, the Windows menu changes to reflect those that are currently open. The Document Names menu item type represents the names of documents currently open in Informed Filler.
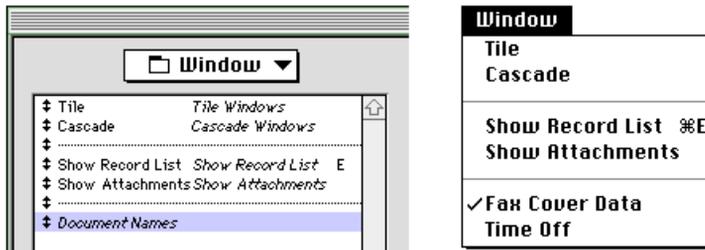
Script Names

As explained in Chapter 12, "Scripting," you can attach JavaScript or AppleScript scripts to templates so that they're accessible to the Informed Filler user. "Scripts," earlier in this chapter, explains how you can configure a menu item to invoke a particular script.

The Script Names menu item type allows you to include the names of all attached scripts in your menu configuration without having to configure each script individually. Informed Filler's standard menu configuration includes the script names as the only items under the menu title "Scripts."

Note   This placeholder will only show scripts not specifically configured elsewhere.

Record Tags

Chapter 8 of your *Informed Filler User's Manual* explains how the Informed Filler user can tag a collection of records so that the records can be easily retrieved at a later time. Each record tag is named by the Informed Filler user.

The Record Tags menu item type represents the names of the record tags that the Informed Filler user has defined for the active document. The Informed Filler user restores the collection of records to a set of tagged records by choosing the named record tag from a menu. The standard Informed Filler menus include a menu item of this type in the Tags submenu under the Database menu.


Record List Formats

Chapter 8 of your *Informed Filler User's Manual* describes the Record List and how it can be used to display multiple records in a list. The Informed Filler user can customize and name multiple different formats for the Record List. For example, one record list format might show detailed information whereas another might show only summary information.

The Record List Formats menu item type represents the names of the Record List formats that the Informed Filler user has defined. The standard Informed Filler menus include a menu item of this type in the Formats submenu under the List menu.
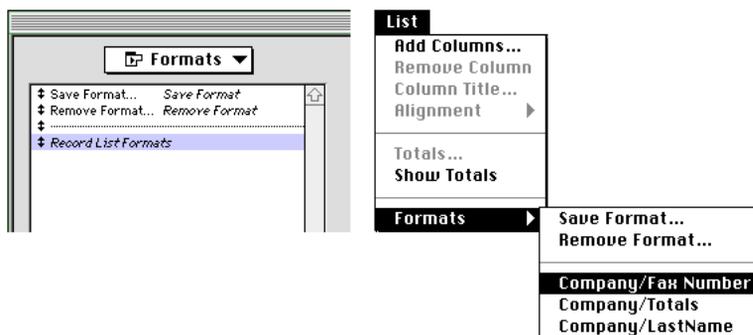
Plug-in Command Names

As explained earlier in "Plug-in Commands," a command that's associated with an Informed plug-in can be included in the menu configuration of a template. The Plug-in Command Names menu item type represents the names of all plug-in commands for the Informed plug-ins installed on the Informed Filler user's computer. The standard Informed Filler menus include a single menu item of this type in the Other menu.
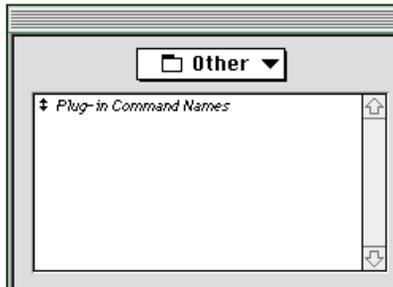
The advantage of using the Plug-in Command Names menu item type is that templates do not have to be configured specifically for each different plug-in command. If you expect that different Informed Filler users will have different plug-ins installed, then using the Plug-in Command Names menu item type means that you could still have only one version of the template. Each Informed Filler user would see only those plug-in commands that are associated with the plug-ins installed on his or her computer.

If you would rather position different plug-in commands at different places in the Informed Filler menu bar, then configure each command individually using the Plug-in Commands menu item type.

Note   This placeholder will only show plug-in commands not specifically configured elsewhere.

Separator Line

Most menus include separator lines to group commands by type. Grouping commands improves the readability of a menu; use the Separator Line menu item type for this purpose.

Help Menus

Informed Filler provides on-line help for both the Windows and Mac OS platforms. The commands associated with on-line help, however, are not configured as part of a template's menu configuration.

On Windows, Informed Filler will automatically append a menu titled "Help" to the end of the menu bar. This menu contains the commands for displaying the on-line help. On Mac OS, these

commands are available in the standard Guide menu that appears near the right side of the menu bar. For detailed information about Informed Filler's on-line help features, see your *Informed Filler Getting Started Guide*.

Printing the Menu Configuration

At any time during the menu customization process, you can print your menu configuration. To print your menu configuration, choose **Menus...** to display the Menus dialog box, then click 'Print Configuration' The page setup used to print the menu configuration (page size, orientation, and so on) is the same as that of the template itself.