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Using Informed Number Server

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As discussed in “Auto-incrementing Numbers” in Chapter 1 of this manual, there are several ways that you can generate unique identification numbers such as invoice numbers, time sheet numbers, and purchase order numbers. You can configure an auto-incrementing cell to get its next available number from the form template itself, from an Apple event aware application (Mac OS only), or from an external database or data source accessible through Informed’s data access plug-ins.

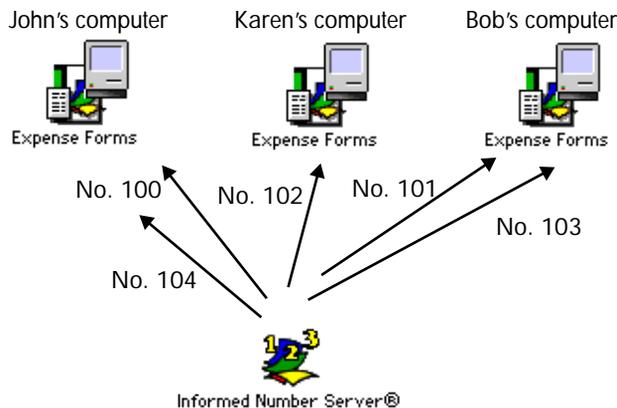
One of the Apple event aware applications that you can link an auto-incrementing cell to is Informed Number Server (included with Informed Designer). An *Apple event aware* application is one that can send and receive messages using the Apple event capability of the Mac OS.

This chapter deals specifically with how to configure Informed Number Server for use with forms filled out with Informed Filler. For information on how to link forms to Informed Number Server, see “Auto-incrementing Numbers” in Chapter 1 of this manual.

Overview

Form numbers, such as invoice numbers and expense authorization numbers, are important because they ensure that all forms are uniquely identified. This is helpful for auditing purposes.

Informed Number Server has been designed to automate the assignment of form numbers to multiple users. Since all forms of a particular type obtain new form numbers from the same Informed Number Server application, numbers are assigned consecutively and duplicates are avoided.



Note

In order to use the Informed Number Server application, all users must have System 7 or later installed on their computers.

Informed Number Server requires that one Mac OS computer act as a server. This can be any computer that's connected to the network of users filling out forms. It can be a computer that acts as a dedicated server for other applications such as electronic mail or file sharing, or it can be a user's computer. The Mac OS computer acting as a server must have program linking turned on.

Once you've installed Informed Number Server, as the administrator you'll configure the application for each of the form templates that you intend to administer form numbers to. For example, if people fill out invoices and purchase orders, you'll create two form numbers, one for each type of form. The form number cells are then linked to Informed Number Server using Informed Designer.

Configuring Informed Number Server

Like most server type applications, Informed Number Server requires an administrator to configure the server for use on the network. This is a simple process that involves specifying which form numbers Informed Number Server will assign and their starting values.

Like networks and file servers, configuration and maintenance of Informed Number Server should be the responsibility of an administrator. This person will configure Informed Number Server and ensure its correct operation. An administration password ensures that only the administrator has the ability to change the configuration. Once Informed Number Server has been configured, the application will run virtually maintenance-free. You may, however, want to change its configuration from time to time.

Registering Informed Number Server

When you run Informed Number Server for the first time, you'll be asked to enter your name and the name of your organization (if applicable).

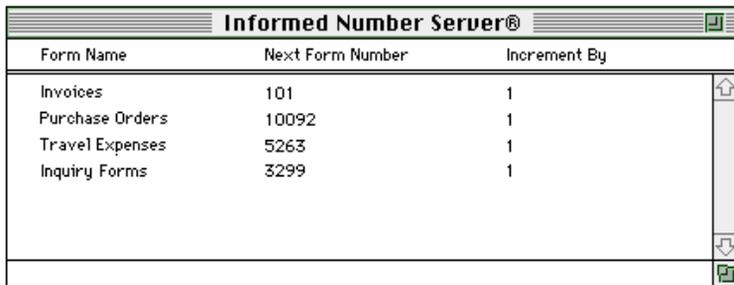


The image shows a registration dialog box for Informed Number Server. It features a small icon with the numbers 1, 2, and 3 in the top left corner. The text reads: "Please personalize your copy of Informed Number Server®." Below this, there are two input fields. The first is labeled "Name:" and contains the text "John Smith". The second is labeled "Company:" and contains the text "ABC Company". At the bottom of the dialog, there are two buttons: "Cancel" and "OK".

Once you've registered Informed Number Server, you'll see the two names on the welcome screen and the About dialog box.

The Informed Number Server Window

When you run Informed Number Server, a window appears showing the current configuration. Each entry in the list corresponds to a form number. The name of the form, the next available form number value, and the increment value are shown.



Form Name	Next Form Number	Increment By
Invoices	101	1
Purchase Orders	10092	1
Travel Expenses	5263	1
Inquiry Forms	3299	1

As you add, change, and remove form numbers, the information in this window changes. Like most Mac OS windows, you can move or resize the window by clicking and dragging its title bar or size box, respectively.

Number Server Data

When you run Informed Number Server for the first time, it automatically creates a file called 'Number Server Data' and stores it in the 'Preferences' folder inside the 'System Folder' on the computer's hard disk. This file contains Informed Number Server's configuration information.

Note

If you move Informed Number Server to a different computer, be sure to move the 'Number Server Data' file as well, and place it in the Preferences folder inside the System folder of the new Mac OS computer.

Administration Capabilities

Before you can add, change, or remove form numbers, you must enable the administration capabilities of Informed Number Server. In order to do so you must know the administration password. If the password is blank, Informed Number Server will automatically invoke the administration capabilities when you start the application.

To enable or disable the administration capabilities, choose either **Enable Administration** or **Disable Administration**, respectively, from the File menu. If the administration password is not blank, you'll be asked to enter it when you choose the Enable Administration command.



With the administration capabilities enabled, commands are available to quit Informed Number Server, change the administration password, and add, change, and remove form numbers.

Changing the Administration Password

When you start Informed Number Server for the first time, the administration password will be blank. With administration capabilities enabled, you can change the password by choosing **Change Password...** from the File menu. If the current administration password is not blank, you'll be asked to enter it first.



You are then asked to enter the new password in a dialog box similar to the one shown above. If you'd like to clear the password, simply leave it blank.

Once you've successfully changed the password, a message will appear for confirmation.

Adding, Changing, and Removing Form Numbers

With administration capabilities enabled, commands in the Entry menu are available for adding, changing, and removing form numbers.

To add a new form number to the configuration, choose **New...** from the Entry menu. A dialog box appears requesting that you enter the form name, the next available form number value, and the increment value. The increment value determines the value that the form number is advanced by each time a number is assigned. A value of 1 is most common.

The image shows a dialog box titled "New Entry". It contains three text input fields. The first field is labeled "Form Name" and contains the text "Invoices". The second field is labeled "Next Form Number" and contains the text "101". The third field is labeled "Increment By" and contains the text "1". At the bottom of the dialog, there are two buttons: "Cancel" and "OK".

From time to time you may want to change the configuration of an existing form number. To do so, click the form number in the list on the Number Server window, then choose **Change...** from the Entry menu. A dialog box appears allowing you to change the next available number and the increment value.

To remove a form number, select it in the list on Informed Number Server window, then choose the Remove command from the Entry menu. You will be asked for confirmation before the form number is permanently removed.

Important Precautions

Once you've configured Informed Number Server, cells on form templates can be linked to the application using Informed Designer. For information on how to link cells to Informed Number Server, see "Auto-incrementing Numbers" in Chapter 1, "Adding Intelligence to Your Forms." After you link a form and distribute it for use with Informed Filler, it's important that you do not change:

- the name of the Informed Number Server application
- the name of the Mac OS computer that's running the Informed Number Server application
- the form numbers as specified in Informed Number Server's configuration

Informed Filler uses these names to find the Number Server application and obtain the correct form number each time a new form is filled out (or when the user explicitly requests a new number). If you change any of the above names, an error will occur when Informed Filler requests a new number. Information about possible errors and how to recover from them can be found in your *Informed Filler User's Manual*.

Quitting the Number Server Application

Like most applications, you quit Informed Number Server by choosing **Quit** from the File menu. However, before you can quit, you must enable administration capabilities. See "Administration Capabilities" earlier in this chapter for more information.