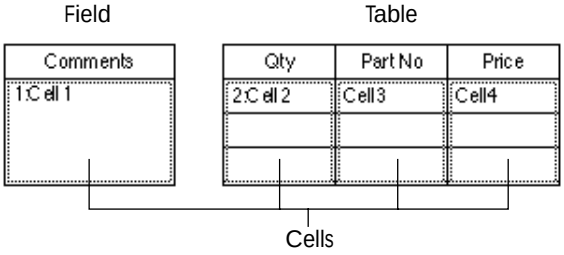
Cells

This section teaches you how to configure the cells on your template for electronic data entry. You'll also learn about the Cell palette—a convenient feature that provides quick access to Informed Designer's cell settings. By the end of this section, you'll know how to perform to the following tasks:

- show and hide the Cell palette
- set the name, type, and format of a cell
- set data entry options for cells
- create a help message
- add scroll bars to fields.

Overview

When you draw a form template with Informed Designer, you use the Field and Table tools to create the blanks where information is typed. These "blanks" are called cells.



When a template is used with Informed Filler, the user fills out the form by entering information such as a name, number, date, or time into each cell. As the form designer, you have a great deal of control over the type of information each cell will hold, as well as how that information will be displayed.

Each cell has its own individual attributes including a cell name, a cell type, and various formatting options. You configure these attributes using Informed Designer's Cell and Format commands.

Naming a Cell

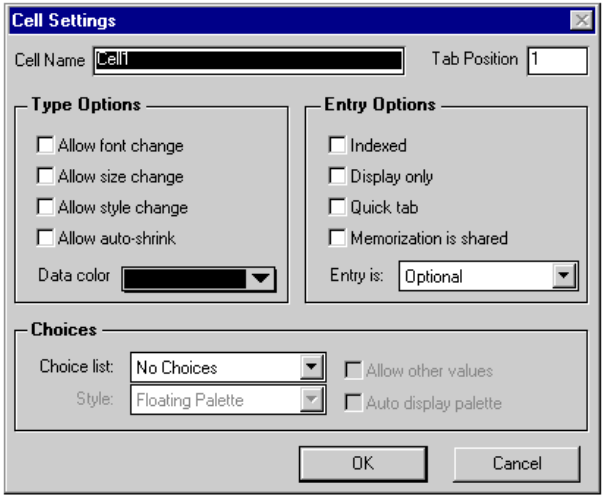
Informed Designer automatically names cells according to the sequence in which the cells are drawn. For example, the first cell you draw is named “Cell1.” The next cell you draw is named “Cell2” and so on.

You can give a cell a descriptive name to make it easier to find when adding intelligence to the form. For example, a cell named “Total” is much easier to recognize than a cell named “Cell25.”

Note Naming a cell is NOT the same as changing the text in the title area of the field. The field title is intended to be a visual clue to show the user what to enter in a particular field. The cell name is used to identify the cell in calculation formulas.

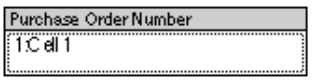
In this exercise you’ll use both the Cell command and the Cell palette to assign descriptive names to the cells on your template.

- Select the **Purchase Order Number** field by clicking it once with the Pointer tool.
- Choose **Cell...** from the Settings menu or click the Cell button on the Cell palette to display the Cell Settings dialog box.

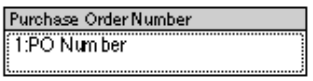


- Type **PO Number** in the ‘Cell Name’ text box, then click ‘OK.’ The cell section of the **Purchase Order Number** field now shows the new cell name.

Original cell name



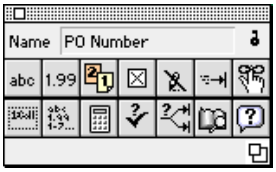
New cell name



Naming Cells with the Cell Palette

If you have to rename a number of cells, the Cell palette provides a quick alternative to using the Cell command.

- Choose **Cell Palette** from the Show submenu under the Layout menu.
- The Cell palette appears, showing the name of the currently selected cell.



- Select the **Supplier Name and Address** field by clicking it with the Pointer tool.
- Press F2 (Windows) or Command-Tab (Mac OS) to activate the Cell palette's 'Name' text box.

- Type **Supplier** in the 'Name' text box, then press F2 (Windows) or Command-Tab (Mac OS).

Pressing F2 or Command-Tab performs three actions:

- updates the cell name on the template
- selects the next cell in the tab order* (Cell3)
- automatically activates the 'Name' text box again.

*The tab order is the order that the Informed Filler user tabs from one cell to the next when a form is filled out. See "Tab Order" on page 10-1 for more information.

- Type **Bill To** in the 'Name' text box, then press F2/Command-Tab to select Cell4.
- Repeat this procedure to rename the cells as shown in the following table. Do NOT press F2/ Command-Tab after changing the name of Cell9.

Cell Names

Original Name	New Name
Cell4	Ship To
Cell5	Ship Via
Cell6	Instructions
Cell7	Signature
Cell8	Date
Cell9	Total

Because of the current tab order of your form, pressing F2/Command-Tab after renaming Cell9 would take you to the Purchase Details table. The F2/Command-Tab feature is not available for table cells, so you'll skip the table cells for the moment and rename all other cells first.

- Select the **Yes** checkbox field with the Pointer tool, then press F2/Command-Tab to activate the 'Name' text box on the Cell palette.
- Type **Yes**, then press F2/Command-Tab to select Cell15.
- Rename the cells as shown in the following table. Do NOT press F2/Command-Tab after changing the name of Cell16.

Cell Names (continued)

Original Name	New Name
Cell15	No
Cell16	Phone

Use the Pointer tool and the Cell command to rename the table cells on your template.

- Click the table once to select the entire object.
- Click again in the **Qty** column to select its cell section (Cell10).
- Choose **Cell...** from the Settings menu to display the Cell Settings dialog box.
- Type **Qty** in the 'Cell Name' text box, then click 'OK.'
- Repeat this procedure to rename the remaining table cells as follows:

Table Cell Names

Original Name	New Name
Cell11	Description
Cell12	Unit Cost
Cell13	Extended

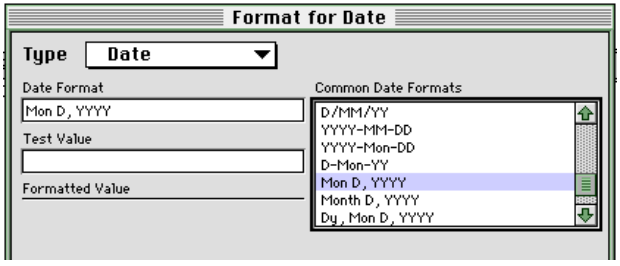
Setting the Cell Type

Informed Designer allows you to set a cell's type so that it matches the kind of information that the cell is intended to hold. For example, if a cell is intended to hold a number value, then its type should be Number. Setting a cell's type ensures that only entries of the correct type will be allowed.

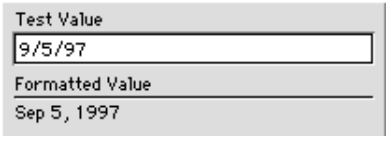
In addition to setting a cell's type, you can also control the way that the information in the cell is displayed by specifying a particular format. For example, you can set the format of a Number cell so that entries are always displayed with a currency symbol and two decimal places.

In this exercise, you'll use the Format command to set the cell type and formatting options for each cell on your template.

- Select the **Date** cell with the Pointer tool.
- Choose **Format...** from the Settings menu or click the Format button on the Cell palette.
- Select 'Date' from the 'Type' drop-down list, then double-click the 'Mon D, YYYY' format in the 'Common Date Formats' scrolling list.



- Test the date format by typing **9/5/97** in the 'Test Value' text box. The 'Formatted Value' shows how the date will look when displayed on your form.



- Click 'OK' to return to the drawing window.

Formatting Multiple Cells

When several cells have the same type and format you can format them all together. To do this, hold down the Shift key and select the desired cells with the Pointer tool, then choose the Format command. The changes you make on the Format dialog box will affect all the selected cells.

- Set the type for each cell as shown in the table below. Select and format multiple cells whenever possible.

Cell Types and Formats

Cell Name	Cell Type	Format/Display Options
PO Number	Number	General
Qty	Number	General
Signature*	Text (default)	None (default)
Phone	Boolean	On/Off
Yes	Boolean	On/Off
No	Boolean	On/Off
Unit Cost	Number	#,##0.00
Extended	Number	#,##0.00
Total	Number	#,##0.00

Note Whenever you create a new field, the cell type is automatically set to 'Text' with no formatting. Any cells not listed in the above table use this default type and format. You do not need to change their settings.

* The Signature cell can be configured to hold a digital signature by setting its cell type to 'Signature.' However, Informed's support for digital signature technology is an advanced feature and is not covered in this tutorial. For detailed information about Signature cells and using digital signatures, see Chapter 2 of your *Informed Designer Forms Automation* manual.

Type Options

In addition to the formatting options available on the Format dialog box, you can also use a cell's type settings to control the way data is displayed. Like field title sections, cells have font, font size, type style, and alignment attributes that can be set individually.

Note When changing the type settings for a cell, make sure that you select only the cell section and not the entire field object, otherwise, your changes will also affect the field title section.

- Select the **PO Number** cell by clicking it twice with the Pointer tool. A "shimmering" border inside the cell section indicates that it is selected.
- Use the Type command or the Font, Size, and Style submenus to set the cell's type attributes to **Times**, **18 point**, **Bold**, **Center-aligned** (vertical and horizontal).

Use the same technique set the type attributes for each cell shown in the table below. Remember to select the only the cell section, not the entire field, when you set these type attributes.

Cell Name	Font	Font Size	Alignment
Supplier	Times	12 point	Left (horizontal), Top (vertical)
Bill To	Times	12 point	Left (horizontal), Top (vertical)
Ship To	Times	12 point	Left (horizontal), Top (vertical)
Ship Via	Times	12 point	Left (horizontal), Top (vertical)
Yes	Times	12 point	Center (horizontal and vertical)
No	Times	12 point	Center (horizontal and vertical)
Phone	Times	12 point	Center (horizontal and vertical)
Instructions	Times	12 point	Left (horizontal), Top (vertical)
Qty	Times	12 point	Center (horizontal and vertical)
Description	Times	12 point	Left (horizontal), Center (vertical)
Unit Cost	Times	12 point	Right (horizontal), Center (vertical)
Extended	Times	12 point	Right (horizontal), Center (vertical)
Signature	Times	12 point	Left (horizontal), Top (vertical)
Date	Times	12 point	Left (horizontal), Top (vertical)
Total	Times	12 point	Right (horizontal), Center (vertical)

Setting Data Entry Options

On a paper form, problems sometimes occur when the person filling out the form forgets to fill in crucial parts of the form. Informed Designer provides data entry controls to avoid these problems on your template.

You can specify a cell's entry status to be optional, recommended, or required. In this exercise, you'll set the data entry status for the **Ship Via** cell.

- Select the **Ship Via** cell by clicking it twice with the Pointer tool.
- Choose **Cell...** from the Settings menu to display the Cell Settings dialog box.
- Select 'Required' from the 'Entry is' drop-down list.

- Click 'OK.'

Note When designing forms for your organization, exercise caution before using the 'Required' entry setting for any cells on your template. This setting ensures that a form cannot be processed until the 'Required' cells are filled out, but this might not always be appropriate. For example, do the users fill out the entire form at one sitting? If not, and you have included 'Required' fields, they will not be able to save their work over night.

Creating a Help Message

Help messages can be very beneficial for Informed Filler users who are using a form for the first time. For example, users might not be familiar with certain terminology on the form and might require some clarification.

In the last exercise, you set the data entry status of the **Ship Via** cell to 'Required.' Leaving that cell blank will prompt Informed Filler to display a warning message. It's possible that a new user might not understand what type of value they should enter in the **Ship Via** cell, so in this exercise, you'll create a help message for that cell.

- If it's not already selected, select the **Ship Via** cell with the Pointer tool.
- Choose **Help Message...** from the Settings menu or click the 'Help Message' button on the Cell palette to display the Help Message dialog box.

- Type the following help message in the text box on the Help Message dialog box:

  This field contains a choice list. Click the 'Arrow' indicator in the field title section and select an entry from the available choices.

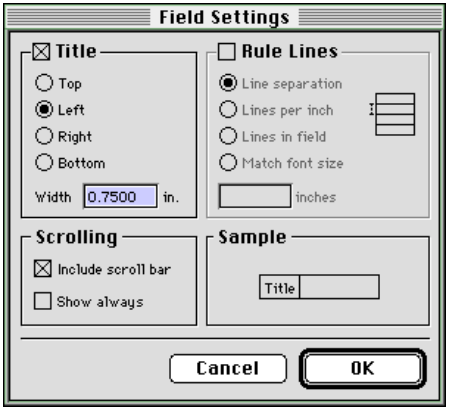
- Click 'OK' to return to the drawing window.

Adding a Scroll Bar

To make sure the Informed Filler user has enough room to enter information in a cell, you can add scroll bars to your fields and tables. This allows the user to enter more data than will fit in the visible area of the cell section.

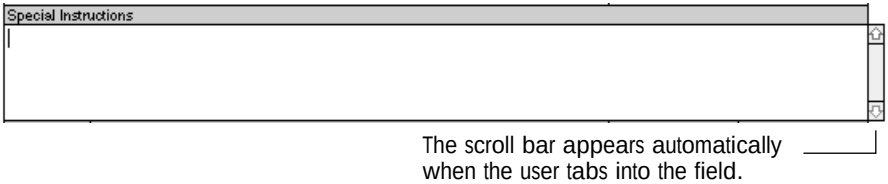
In this exercise, you'll add a scroll bar to the **Instructions** field on your template.

- Select the **Instructions** field by clicking it with the Pointer tool.
- Choose **Field...** from the Settings menu to display the Field Settings dialog box.



- Click the 'Include scroll bar' option.
- Make sure the 'Show always' option is turned off.
- Click 'OK.'

When the Informed Filler user fills out the purchase order and tabs into the **Instructions** field, the scroll bar will appear at the right edge of the field.



When a field is scrollable, the Informed Filler user can enter more data than will fit in the visible area of the cell section. When a table is scrollable, Informed Filler automatically adds new rows to the table as the user enters more data than the table can display.

Making Table Rows Expandable

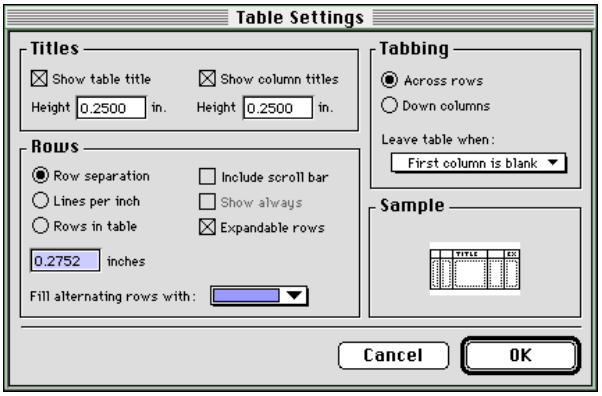
In addition to adding scroll bars, you can also make table rows expand automatically to accept additional data. With the 'Expandable rows' option turned on, the Informed Filler user can enter more data than the chosen row spacing can display. As data is entered, the selected row expands automatically to accept the extra information.

Qty	Description	Item No.
1	Boot Polish	BP100
1	Recipe for Disaster Cook Book	RD1313
2	Fishing Line	FL222

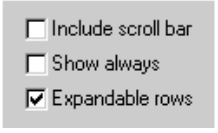
The row containing extra data expands, while the other rows retain their original spacing.

In this exercise, you'll turn on the 'Expandable rows' option for the table.

- Select the table by clicking it once with the Pointer tool.
- Choose **Table...** from the Settings menu to display the Table Settings dialog box.



- Click the 'Expandable rows' option, then click 'OK.'



- Choose **Save** from the File menu to save the changes to your form.

Note If all the rows in a table already contain data, Informed Filler will not allow the user to expand any rows in the table, since doing so would cause the last row of the table to disappear.

This is the end of the session.