1 Overview

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1 Overview

Like many software products, Informed Filler consists of different components, including an application, documents, preference files, and special files and folders that serve unique purposes. The organization of these components is flexible, allowing for custom configurations to better suit your specific needs.

This chapter describes the different components of Informed Filler and how they are organized. Depending on how forms are designed and administered in your organization, some of the information here might be unnecessary for your use of Informed Filler. Regardless, understanding the information in this chapter can be of benefit to any Informed Filler user.

How Forms are Designed

The design of a form is called a form template. A form template is created using Informed Designer and stored in a form template document. The form designer creates a form template by typing text and drawing graphical objects—like fields and tables—using a variety of drawing tools.

In addition to the graphical appearance of a form, a form template also contains cells. Cells are the placeholders for the information that you enter to fill out a form. To aid you when entering information, the form designer can configure cells to use a variety of "intelligent" features. These include automatic formatting, calculations, error checking, lookups, choice lists, on-line help, and other features that make it faster and more accurate to enter information.

The design of a form template also involves linking the template to other services or systems used in your organization. For example, a template might be linked to an Oracle database so that you can "submit" completed forms electronically, therefore eliminating the need to rekey the form information into other systems. The use of other services such as electronic mail for sending forms, and security services for signing forms with digital signatures is also available.

In addition to customizing a form itself, the form designer can also customize the commands and menus available in Informed Filler's menus. That way, custom commands that are specific to the processing of the form can be added, and unnecessary commands can be removed. The electronic form begins looking more like a custom application rather than a custom form.

Note   Since the form designer can customize the menus that you see, any of the menu commands that are described in this manual can be named differently, positioned in a different menu, or even hidden altogether.

Informed Plug-ins

Many of the services that Informed Filler can link to are accessed via Informed plug-ins. An Informed plug-in is a file that contains the code that interacts with a particular service. For example, in order to mail a completed form using a particular e-mail system, you must have the Informed mail plug-in for that e-mail system installed. Informed Filler comes with a variety of plug-ins for accessing e-mail systems, databases, signing services, and other information services.

The table below lists the different types of plug-ins that Informed Filler can take advantage of.

Informed Plug-ins

Plug-in Type	
Mail	Send form templates or completed forms using electronic mail.
Data access	Look up information from a database or data source. Submit completed forms to a database or data source. Obtain unique form numbers from a database or data source. Track forms with a database or data source.
Signing	Authorize and verify form templates using Informed Designer. Sign and verify completed forms.
Data translation	Import, export, or mail form data in a particular data format.
Distribution	Distribute form templates via a particular type of distribution center.
Spelling	Check the spelling of text on your template or the text entered on a completed form using an alternate spell checking system.

Informed plug-ins must be installed in a folder named "Plug-ins." The plug-ins folder must be located in your Informed folder.
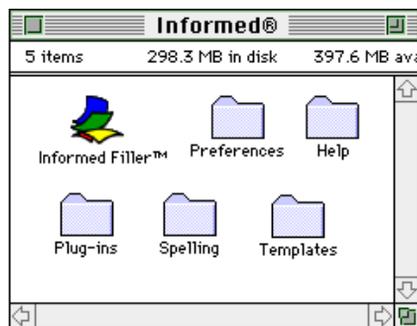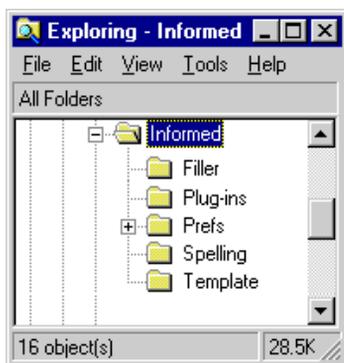
By using plug-ins, Shana can more easily support new types of services as they become available. For example, if a new electronic mail system were developed, Shana could easily enable the mailing of form templates and completed forms using that mail system by simply developing a new mail plug-in.

Distribution of Form Templates

In order to fill out a form of a particular type, Informed Filler must have access to the appropriate form template. There are two basic models for the distribution and storage of form templates. Form templates can be stored in a distributed manner—that is, stored locally on your computer, or they can be stored centrally on a file server and shared among all Informed Filler users.

If you store your form templates locally on your computer, you have the freedom to take your computers anywhere and still have access to the templates you need. A network connection is not necessary to access templates. Furthermore, each time you access a template, it is not at the expense of network bandwidth.

Centralized storage of form templates has converse advantages. Although access to templates requires a network connection, the distribution of a new revision of a template requires only that the form designer replace a single template on the network file server with the new version. You and all other Informed Filler users are instantly up to date since you all share the same template. If form templates are stored locally on your computer, the distribution of a new revision requires that you obtain the new version.

The method with which Informed Filler users access form templates is often determined by the form designer (and possibly involves the input of a network administrator). Many factors, including the size of your organization, your network configuration, and the mobility of all users must be taken into account.

To aid in the distribution of form template, Informed Designer and Informed Filler come with built-in forms distribution features. These features automate the distribution of new templates and revisions of existing templates. With proper configuration by the form designer, you can access templates at one or more distribution centers. A distribution center can be a file server or an FTP server. Since distribution centers are accessed via Informed distribution plug-ins, other types of distribution centers might be supported after this documentation is published.

Once you've obtained a template from a distribution center, Informed Filler will automatically check periodically to see if a new revision of the template is available. If a new revision is available, you are automatically notified when you open or create a data document, and the new revision replaces the previous version.

The Templates Folder

Regardless of whether you access templates on a shared file server or locally on your own computer, Informed Filler needs to know where the templates are located.

Templates are located in the templates folder. On Windows, this folder is named "TEMPLATE." On the Mac OS, the folder is named "Templates." Regardless of platform, the templates folder, by default, is located in your Informed folder.
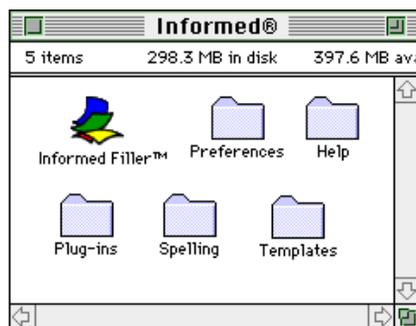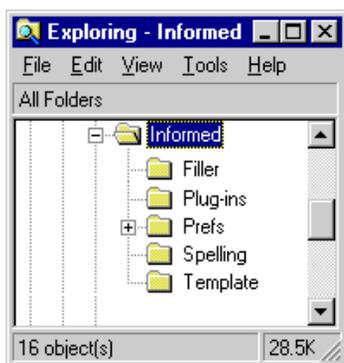
You can change the location of the templates folder using Informed Filler's Preferences command. For information about moving your templates folder, see "Moving Folders," later in this chapter.

In addition to the templates themselves, information about templates is stored in separate template preferences files. These files contain information about your personal preferences. For example, Informed Filler allows you to list the information of multiple forms—or records—in a list format by displaying the Record List window.

You can change which information is included on the Record List and its order and format according to your specific needs and personal preferences. Each different Informed Filler user might want to format the Record List differently.

Since you can share templates among many Informed Filler users, it is important that personal preferences, like the format of the Record List, be stored separate from the template itself. For this reason, Informed Filler maintains a separate preferences file for each template.

Template preferences files are stored in a folder named "TMPLPRFS" (Windows) or "Template Preferences" (Mac OS). This folder is found along with other items in another folder named "PREFS" (Windows) or "Preferences" (Mac OS). Like the templates folder, the default location for the preferences folder (that is, the folder that contains the template preferences folder) is inside the Informed folder.

The preferences folder contains other items in addition to the template preferences folder. The Informed Filler user can store the preferences folder at its default location or at any other location. For information about the other items found in the preferences folder, see "Where Everything Goes" later in this chapter. For information about moving the preferences folder, see "Moving Folders."

Filling Out Forms

To the Informed Filler user, form templates are like hidden files that need not be manipulated directly. Instead, Informed Filler automatically locates and opens templates when needed as you fill out new forms and open previously filled out forms.

When you request a new document, Informed Filler presents a list of available templates to choose from. You select a template and a blank form appears, ready for filling. The information you enter to fill out a form is stored in a form data document. A form data document can store the information for one completed form, or many completed forms. A single completed form is called a record. For casual users who fill out very few forms, it is easiest to store one record in each data document. If you fill out many forms, storing all records for a particular type of form in one data document allows you to take advantage of Informed Filler's powerful database features.

While filling out forms, you benefit from the powerful data entry and "intelligence" features that have been configured by the form designer. Features like automatic formatting, calculations, error checking, lookups, choice lists, and on-line help make it faster and more accurate to enter information.

The entire processing of a form is automated using Informed Filler, from the initiation of a new form, to the approval and submission of the completed form. After entering information, you can sign the form electronically using a digital signature. A digital signature provides a means of later verifying the identity of the person who signed the form and the integrity of the signed data.

If approval of the form is necessary, you can send the completed form to the appropriate person or place using electronic mail. The process of entering and signing information, sending the form to other people, and, if necessary, approving the form continues until the form is complete and approved. The completed form is then submitted electronically or printed.

The flexible nature of Informed makes it ideal for automating both simple and complex forms processes. With the ability to easily exchange information between different forms and different applications, the form designer can design a comprehensive "forms system" that combines and integrates many different types of forms and different applications. Each contributes a particular feature or capability to the solution.

Form Tracking

For many types of forms, processing involves routing the form from person to person for approval purposes. Informed's built-in form tracking capabilities make it easy for you to find out where a particular form is in the routing process.

Whenever you send a form, Informed Filler connects to a central tracking database and records information, including your name and the name of the recipient, the form identification numbers (that is, the type of form and a unique number, such as an invoice number or purchase order number), and the date and time that the form was sent. Other information can be tracked as well.

At any time, you can request the tracking status for any completed form. Informed Filler connects to the tracking database and retrieves the tracking information for the particular form. This information is displayed in a dialog box for your view.

Where Everything Goes

When you install Informed Filler, you are asked to specify a location for the "Informed" folder. The Informed folder contains the Informed Filler application, as well as other important components. The contents of the Informed folder following installation are pictured below.
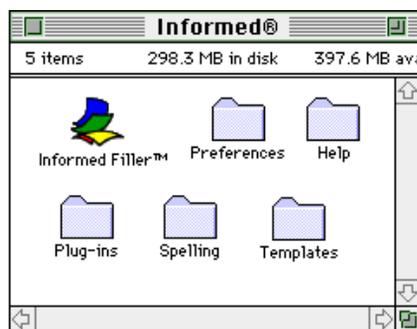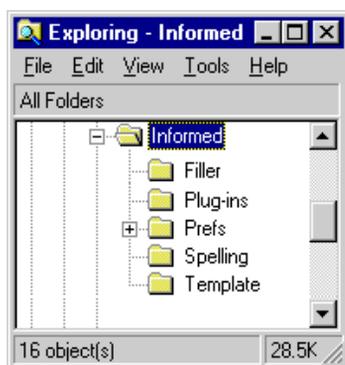
The Informed folder is a special folder. It contains certain items that are required in order for Informed Filler to work properly. Some of the items in the Informed folder can be moved to different locations. The following sections describe the purpose of each item and the possible storage

locations. For information about moving the Informed folder to a different location, please see "Moving Folders" later in this chapter.

Applications

On Windows, the Informed Filler application is comprised of the executable file ("FILLER.EXE") and other associated files. These files are found in the folder named "FILLER". On the Mac OS, the application is a single file and is named "Informed Filler™".

The FILLER folder (Windows) and Informed Filler™ application (Mac OS) can be moved to any location you like. You can store the application locally on your computer, or you can access it from a file server or applications server.

Plug-ins

The plug-ins folder contains Informed plug-ins and associated files. Informed plug-ins provide access to external services such as electronic mail systems and databases. The plug-ins folder must be located inside your Informed folder. See "Informed Plug-ins" earlier in this chapter for more information about plug-ins.

Templates Folder

The templates folder ("TEMPLATE" on Windows, "Templates" on Mac OS) contains the templates available for use with Informed Filler. The location of the templates folder can be changed using Informed Filler's Preferences command. For more information, see "The Templates Folder" earlier in this chapter.

Preferences Folder

The preferences folder ("PREFS" on Windows, "Preferences" on Mac OS) contains the items pictured below.
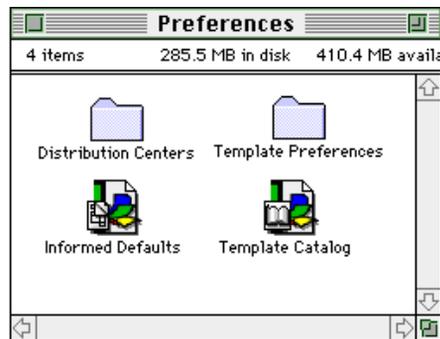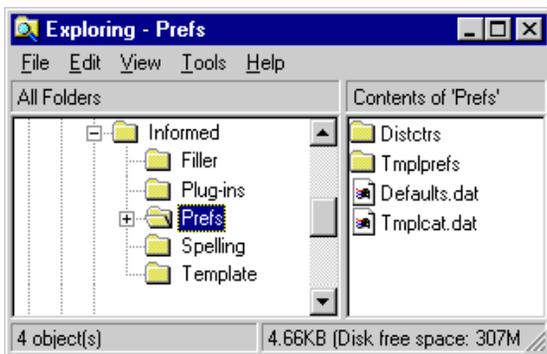
The template catalog ("TMPLCAT.DAT" on Windows, "Template Catalog" on Mac OS) is a file that is maintained by Informed Filler. It contains a list of all of the templates contained in the templates folder. Informed Filler uses the template catalog to quickly find the correct template when the user opens a data or package document.

The template preferences folder ("TMPLPRFS" on Windows, "Template Preferences" on Mac OS) contains template preferences files. Template preferences files are maintained by Informed Filler. Each file contains user-specific preferences for the template of the same name. The purpose of template preferences is described earlier in "The Templates Folder."

The Informed defaults file ("DEFAULTS.DAT" on Windows, "Informed Defaults" on Mac OS) is also maintained by Informed Filler. Like template preferences files, the Informed defaults file contains user-specific information that is associated with one or more templates. As explained in Chapter 3, "Filling Out Forms," of this manual, you can memorize a cell value so that the value is automatically entered each time you create a new blank form. The memorized value is stored in the Informed defaults file.

The distribution centers folder ("DISTCTRS" on Windows, "Distribution Centers" on Mac OS) contains the distribution center profiles needed to access the distribution centers in your organization. These files are created using Informed Designer. For detailed information about distribution center profiles and Informed's built-in forms distribution capabilities, please see Chapter 14, "Form Template Distribution."

Although it is not recommended, you can move the preferences folder to a different location. For more information, please see "Moving Folders" later in this chapter.

On-line Help

If you choose to install on-line help, installation will include the necessary help files. On Windows, the help files are installed in the FILLER folder. On Mac OS, you'll find a folder named "Help" inside the Informed folder. The help files must remain in these locations.

Spell Checking

If you choose to install Informed's spell checking option, you'll see a folder named "Spelling" in your Informed folder. The spelling folder contains the spell checking dictionaries and related files. The spelling folder must remain in the Informed folder.

Informed Preferences

In addition to the items installed in the Informed folder, installation will also place a preferences file among your system related files. On Windows, this file is named "INFORMED.INI" and is found in your Windows folder. On the Mac OS, the file is named "Informed Preferences" and is found in your system's Preferences folder.

The Informed preferences file contains information necessary for Informed Filler to find items such as the Informed folder, the templates folder, and the preferences folder. Other preferences associated with Informed Filler are also stored in the Informed preferences file.

Moving Folders

When you install Informed Filler, the Informed preferences file is automatically updated with the locations of your Informed folder, templates folder, and preferences folder. When you run Informed Filler, it reads these locations from your Informed preferences file in order to locate the appropriate files.

You can move the Informed folder, templates folder, or preferences folder to any location. However, when doing so, you must specify the new location using Informed Filler's Preferences command. Choose **Preferences...** from the Edit menu and click the Folders icon to display the Folders preferences panel.
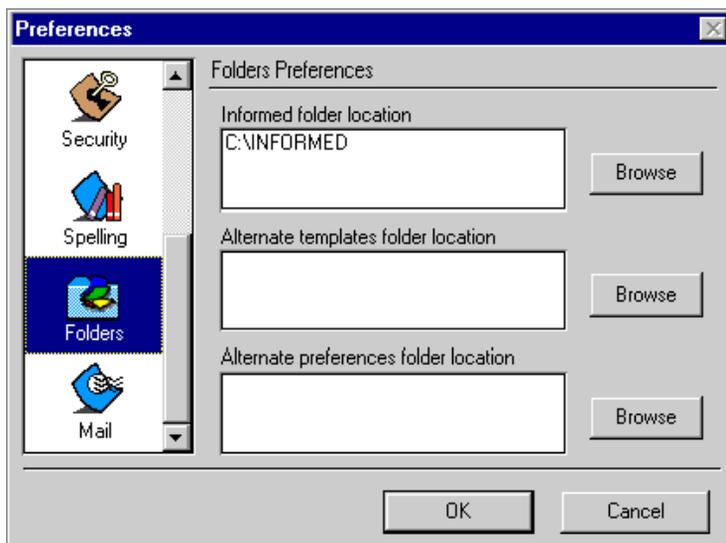
The location of the Informed folder is specified in the 'Informed folder location' text box. The location of the templates folder and preferences folder is assumed to be inside the Informed folder unless otherwise specified in the 'Alternate templates folder location' and 'Alternate preferences folder location' text boxes. That is, if these text boxes are blank, Informed Filler will look for these

folders inside the Informed folder. If you want to move either of these folders to a different location, enter the new location in the corresponding text box.

You can enter a new location by typing in a text box or by clicking the adjacent 'Browse' button. Clicking 'Browse' displays a dialog box allowing you to navigate through the different folders or directories of any available volumes to select the desired location.

If you're using a Windows compatible computer, clicking 'Browse' displays the following dialog box:
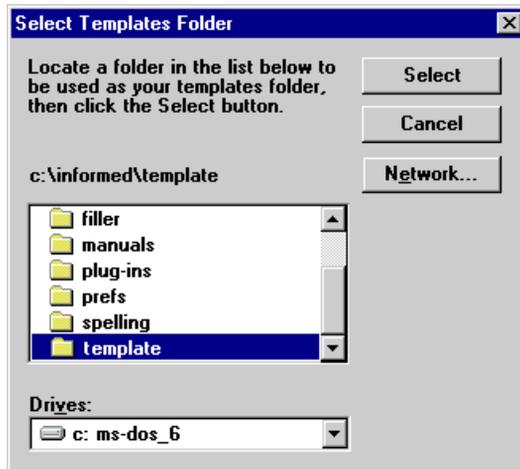
Select a folder in the scrolling list, then click 'Select.'

If you're using a Mac OS compatible computer, you'll see the dialog box shown below.
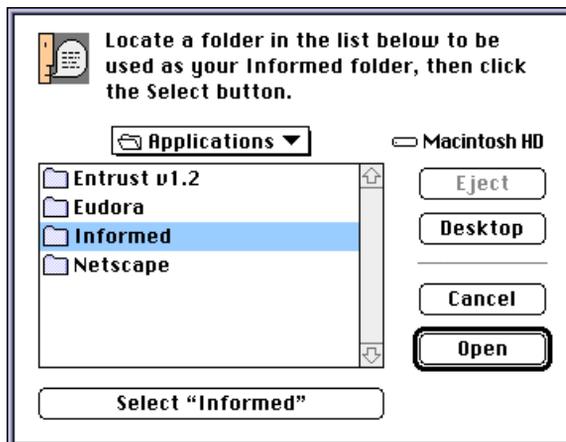
Locate a folder in the scrolling list, the click the 'Select' button.

Note   Changing the location of a folder using Informed Filler's Preferences command does not auto-
matically move the contents of the folder to the new location. You must do this yourself.

While using Informed Filler, if any of the Informed, templates, or preferences folders cannot be
found at their expected locations, you will see a dialog message indicating so.

You can look for the missing folder or cancel the operation. If you click 'Locate,' a dialog box
appears allowing you to select the folder in its new location. This dialog box is the same one that
appears when you click any of the 'Browse' buttons on the Preferences dialog box (see earlier).

Starting Informed Filler

You start Informed Filler the way you do any application. On a Windows compatible computer, you
double-click or run the executable "FILLER.EXE." On a Mac OS compatible computer, you dou-
ble-click the "Informed Filler®" application icon.

After seeing Informed Filler's welcome screen briefly, you'll be prompted to either select a tem-
plate with which to create a new data document, or select a data document to open. Which action
depends on the setting of your startup preference. To change this setting, choose Preferences... from
Informed Filler's Edit menu. The Preferences dialog box appears.
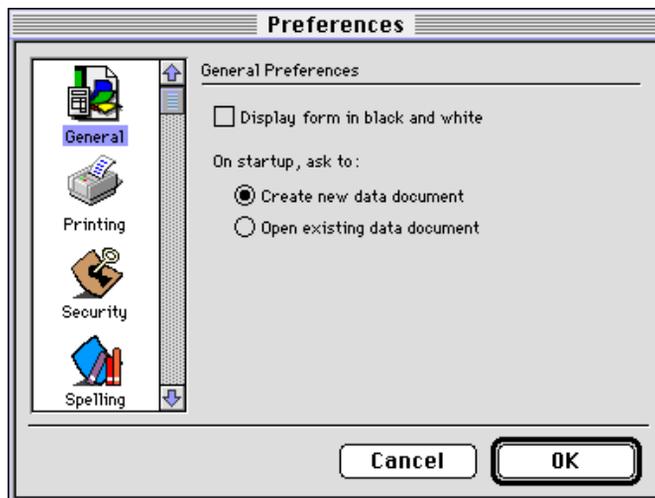
Choose your setting then click 'OK.' To cancel the Preferences command, click 'Cancel' instead. If you change the preference, the new setting will take effect the next time you start up Informed Filler.

The Form Window

Each data document that you create or open appears on your screen in a form window. The form itself appears in the content region of the window. The form window also contains various parts and controls, some of which are standard and appear on most windows. Others are specific to Informed Filler.

Document name

Attachments information

Scroll bars

Page controls

Collection information box

Record information box
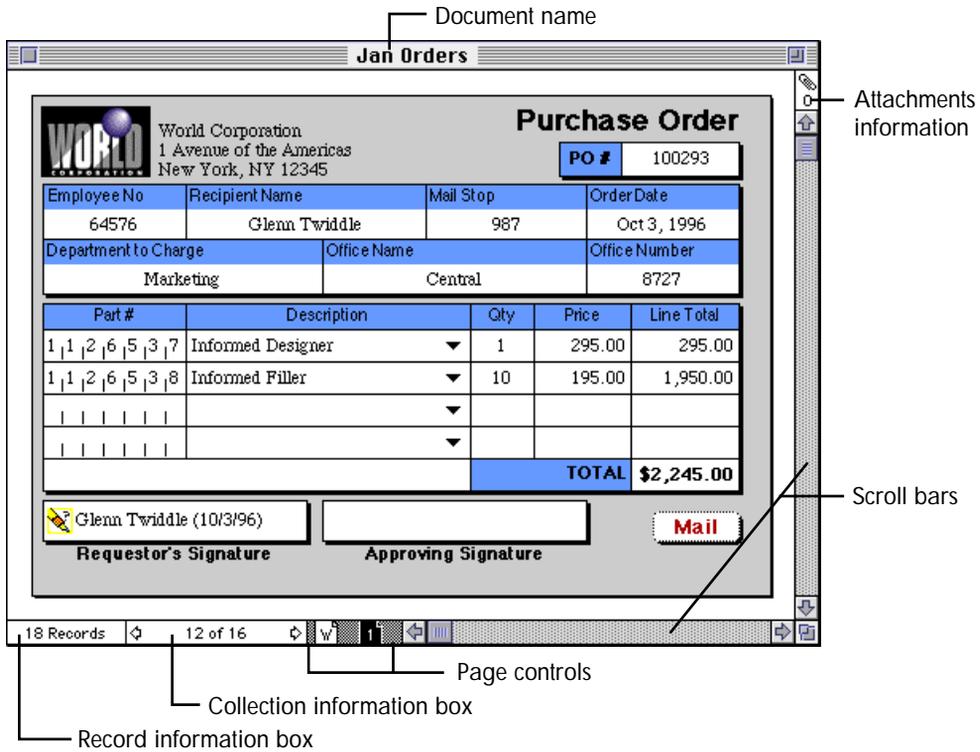
If you're using a Mac OS compatible computer, you can further increase the scrolling speed of forms in Informed Filler by taking advantage of any available memory.

The amount of memory required for fast scrolling depends on the dimensions of your form and the monitor setting of your computer. The larger the form and the more grays or colors your monitor is displaying, the more memory you will need. You can, however, minimize the amount of memory required for fast scrolling by selecting a display preference. To do so, choose the **Preferences…** command from the Edit menu to display the Preferences dialog box.
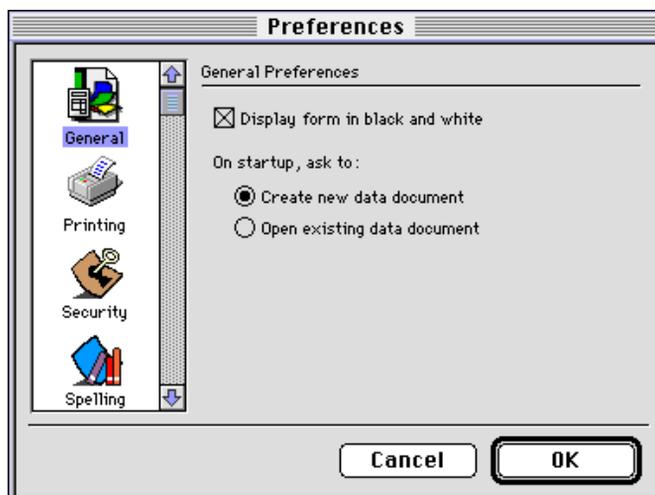
Select the 'Display form in black and white' option. With this option selected, your form will display in black and white, regardless of your monitor setting and the number of colors used on the form. If you do not experience fast scrolling with this preference turned off, you might try turning it on to see the effect. If your monitor setting is set to 'Black & White', selecting this preference will have no effect on the memory required for fast scrolling.

The amount of memory available for fast scrolling depends on the number and size of documents you have open, and the amount of memory you've allocated to Informed Filler. You can change this setting using your computer's Get Info command.