2 Manipulating Documents

In this chapter:

2 Manipulating Documents

This chapter presents information about Informed documents and how they are manipulated. You'll learn about Informed document types and password security, as well as how to create, open, close, and save data documents.

Informed Documents

The term *document* refers to a file that contains information. An Informed document is a file that contains information about a form. There are four types of Informed documents: form template documents, form data documents, package documents, and interchange documents.

Form Template Documents (.ITP)

A form template document contains a form template. A form template is the layout or framework of a form that's created using Informed Designer. It contains all the intelligent features of the form as well as its graphic elements. You fill out a form by entering values in the blanks—or cells— on the template. In order to use templates with Informed Filler, you must place them in a folder named "Template" (Windows) or "Templates" (Mac OS) in your Informed folder. See Chapter 1, "Overview" for more information.

Form Data Documents (.IFM)

A form data document contains only a form's data. When you fill out forms with Informed Filler, the information entered is stored in a form data document. You can store one completed form—or record—in each data document, or you can store many records in a single data document and take advantage of Informed Filler's built-in database capabilities. To open and manipulate a data document, you must have the appropriate template in your templates folder. A data document is the most common format to use when sending forms to other users.

Package Documents (.IPK)

A package document combines a form template and its associated data in a single file. It is created using Informed Filler and is used primarily when you mail a form to someone who doesn't have the corresponding template. When Informed Filler opens a package, the data document and template (if needed) are extracted. If your templates folder does not already contain the template, the one extracted from the package is copied there and opened. The data document is opened into an untitled form window.

Informed Interchange Documents (.IIF)

Informed Interchange documents contain all the data for one or more completed forms (or *records*), and are used primarily for transferring information between different applications, and different

versions of Informed. They are created and read using Informed Filler, and store all types of information including stylized text values, pictures, signatures, and annotations.

Other Interchange Documents

In addition to the Informed Interchange documents, Informed Filler can import and export form data stored in other standard formats, including tab-delimited and comma-delimited text. These formats are used primarily for transferring form data between Informed Filler and other applications.

The Templates Folder

Although you don't create and manipulate form template documents like you do form data documents, template documents are necessary to the use of Informed Filler. Whenever you create a new data document, you're asked to select a template to use. When you open a data document (that is, a document that contains only form data), Informed Filler automatically locates and opens the appropriate template document.

For these reasons, it is necessary that Informed Filler know where to find the templates that you use. By default, Informed Filler finds your templates in a folder named "Template" (Windows) or "Templates" (Mac OS) located in your Informed folder. You can change this location using Informed Filler's Preferences command. For information about moving your templates folder, see "Moving Folders" in Chapter 1, "Overview."

Template Information

Whenever you create a new data document or open an existing data document, the appropriate template is opened and used as a means to present and manipulate the form data. Detailed information about the current template is available by choosing **Template Information...** from the View menu. The Template Information dialog box appears.

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║ ▬▬▬▬▬▬ Template Information ▬▬▬▬▬▬        ║
║ ┌─ Identification ──────────────────────┐  ║
║ │ Template name :     Travel Itinerary  │  ║
║ │ Unique template ID :  TI9/96          │  ║
║ │ Revision number :     1               │  ║
║ │ ┌─ Author ──────────────────────────┐ │  ║
║ │ │ Name :     Tom Szabo              │ │  ║
║ │ │ Organization : Szabo's Kingston Tours │  ║
║ │ └───────────────────────────────────┘ │  ║
║ │ Description                           │  ║
║ │ ┌─────────────────────────────┐ ⇧   │  ║
║ │ │                             │     │  ║
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The 'Template name' might offer a more descriptive title compared to the filename of the template document. 'Unique template ID' and 'Revision number' are intended to identify the template and its version. Since templates and data documents are separate files, the template ID is stored with each data document so that Informed Filler can automatically identify and open the appropriate template when a data document is opened.

The Name and Organization information identify the person who created the form template. The form designer can also provide a brief description of the template.

Licensing Options

Unlike many software products, Shana offers flexible options for licensing Informed Filler. You can license Informed Filler for use will all types of forms, or form designers can license individual form templates for use with the free version of Informed Filler. Information about licensing and registering Informed Filler can be found in your *Informed Filler Getting Started Guide*.

Depending on the licensing details of your copy of Informed Filler and the form templates you use, you may be restricted to use only certain form templates. If you attempt to use the free version of Informed Filler with a template not licensed for this use, you'll see a message indicating so.

Creating a New Data Document

The data for the forms that you fill out is stored in data documents (see "Informed Documents" earlier in this chapter for a detailed description of data documents). To create a new untitled data document, choose **New Document…** from the File menu. The New Data Document dialog box appears.
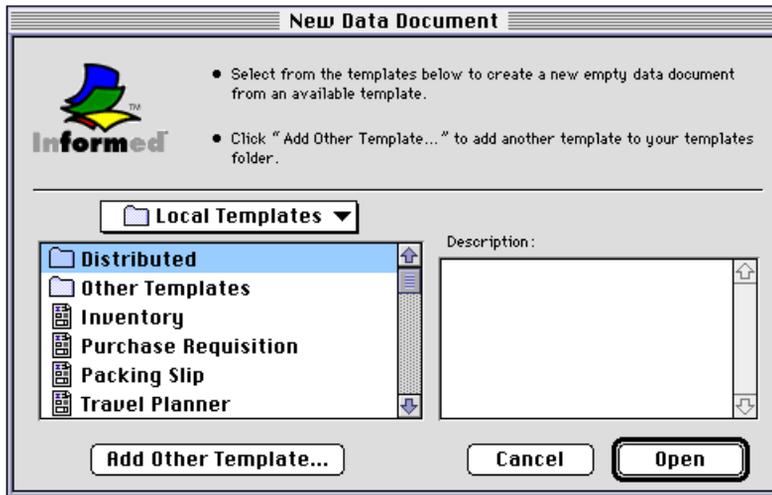
The New Data Document dialog box shows a list of all templates in your templates folder. To select a template, click it in the scrolling list, then click 'New,' or simply double-click it in the list. The templates can be organized hierarchically in folders within the templates folder. To open a folder, select it in the list and click 'Open' or simply double-click the folder.

To select a template that is not in your templates folder, click 'Add Other Template.' The standard Open dialog appears, allowing you to select a template anywhere on any accessible volumes or disks. Informed Filler then copies and places the selected template in your templates folder.

You can also access distribution centers to obtain new templates using controls on the New Data Document dialog. For more information, see "Obtaining a New Template" later in this chapter.

Once you've located the template you would like to use, select it and click 'New.' A new untitled data document for that template is created and displayed in a form window. A blank record is added and any cells configured with default or calculated values are filled in automatically.

Changing the Password

Each data document can have a password. Passwords allow you to protect your data documents by preventing other users from opening and changing them with Informed Filler. If a data document has a non-blank password, you will be prompted to enter it when you attempt to open the document using Informed Filler's Open command (see "Opening a Data Document").

You can change the password for a data document using Informed Filler's Preferences command.

Choose **Preferences...** from the Edit menu. When the Preferences dialog box appears, click the Security icon in the scrolling list. The dialog box changes to show the Security preferences panel.
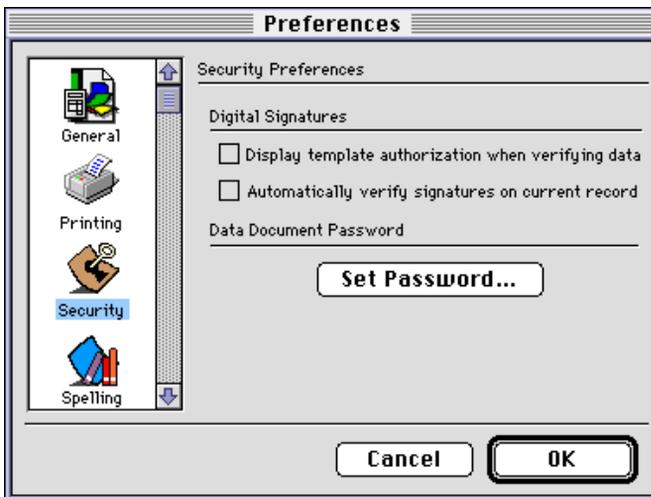
Click the 'Set Password' button. The Set Password dialog box appears.

If you haven't entered a password before, only the 'New password' and 'Confirm password' text boxes are available. If a password already exists, the 'Old password' text box is also available.

If no password exists, type your new password in the 'New password' text box, then press Tab. The insertion point moves to the 'Confirm password' text box. Type the password again, then click 'OK.' Informed Filler will display a message confirming that you have successfully changed the password.

If a password already exists, you must enter that password in the 'Old password' text box before entering the new password.

Opening a Data Document

To open a data document, choose **Open…** from the File menu. The standard Open dialog appears, allowing you to select a data document to open. If you're using a Windows compatible computer, you'll see a dialog box similar to the one below.
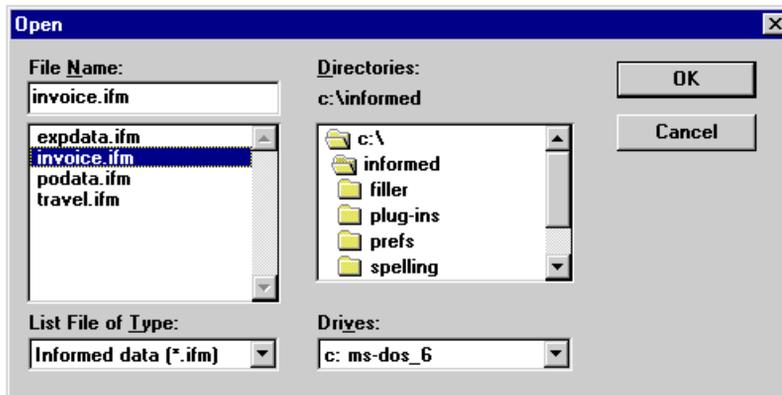
Select a data document, then click 'OK.'

If you're using a Mac OS compatible computer, you'll see a dialog box similar to the one shown below.
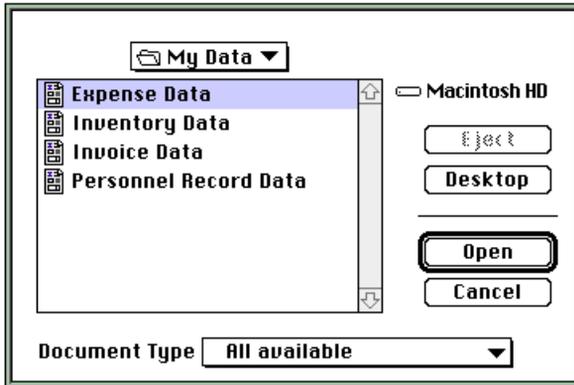
Select a data document, then click 'Open.'

If the data document has a password, you'll be asked to enter it.

Informed Filler will not open the data document unless the correct password has been entered.

Note   Passwords are case sensitive. This means that upper and lower case letters are considered to be different. Be sure that the Caps Lock key on your keyboard is not on when you enter your password.

For information about changing your password, see "Changing the Password" earlier in this chapter.

When you open a data document, Informed Filler first examines the document's Template ID. The Template ID identifies which template is needed for displaying and manipulating the contents of the data document. Informed Filler looks in your templates folder for a template with the same Template ID as that in the data document. If found, the data document is opened along with the template and displayed in a form window.

If your templates folder does not contain the needed template, Informed Filler might attempt to obtain one automatically from a distribution center in your organization. Chapter 14, "Form Template Distribution," describes Informed Filler's built-in forms distribution features. If the form designer has made the needed template available in one or more distribution centers, and if the dis-

tribution information is available in the data document that you're attempting to open, Informed Filler will display this message:
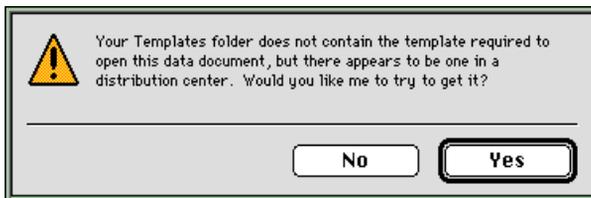
This message indicates that the template you need is available from an accessible distribution center. If you click 'OK,' Informed Filler will place a copy of the template in your templates folder, then continue to open it along with the data document.

If your templates folder does not contain the needed template, and the template is not available from a distribution center, you'll see a message asking if you'd like to look for the template yourself.
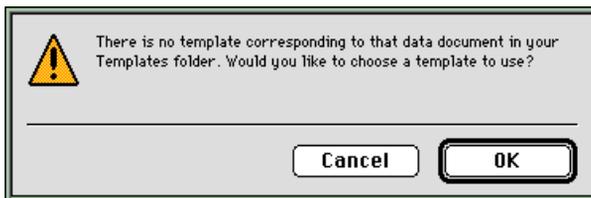

If you have the appropriate template located at a different place on your hard disk, you can locate and select it by clicking 'OK' on the message dialog. To cancel the Open command, click 'Cancel' instead.

You locate and select a template using the standard Windows or Mac OS Open dialog box. When you select the correct template, Informed Filler copies it to your templates folder and then opens it along with the data document.

Opening a Locked Data Document

If you choose to open a locked data document, or a data document that resides on a locked disk or volume, Informed Filler will warn you.
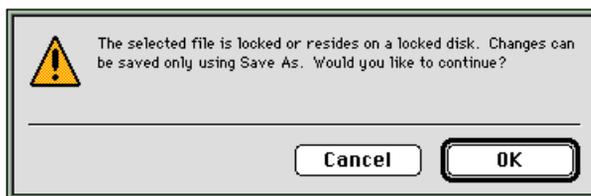
If you continue, the data document will be opened as usual. However, you won't be able to save any changes made. To save any changes, use the Save As command to save the data document, along with any changes made, into a new file. For more information about the Save As command, see "Saving Copies of a Data Document" later in this chapter.

Opening a Data Document in Use

You cannot open a data document that is already open for use by another user or application. If you attempt to do so, a warning message will appear.
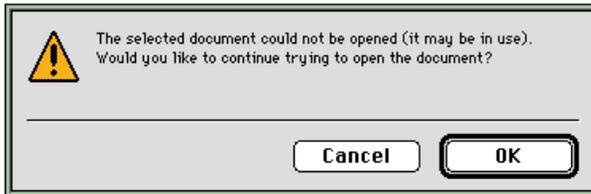
If you click 'OK,' another dialog box appears telling you that Informed Filler is waiting for the data document to become available. When the document becomes available, Informed Filler will open it automatically. To cancel the Open command instead, click 'Cancel.'

Opening a Package

As explained earlier (see "Informed Documents"), a package document contains both a form data document and a form template document together in a single file. The purpose of package documents is to be able to save, mail, or transfer completed forms—or records—along with the appropriate form template in a single document.

If a person sends you a form using e-mail, and is unsure whether or not you have the required form template, he or she might send you a package document instead of a data document. That way you will be able to open the form even if you don't have the required template.

When you open a package document, Informed Filler automatically extracts the form data and, if necessary, form template document. If your templates folder already contains a template with a Template ID that matches the one in the data document in the package, then that template is used. That is, the template in the package document is not extracted. If your templates folder does not contain the necessary template, Informed Filler will extract the template from the package, copy it to your templates folder, then open it along with the data document.

Unlike data documents, when Informed Filler opens a package document, it does not open the document in place. That is, once you've opened the package and made changes to the data, saving your changes will not update the original data document in the package. Instead, Informed Filler will

save the data in a new data document, just as though you were saving a new untitled data document. You'll be asked to name the data document and specify its location the way you normally do.

Duplicate Template IDs

It is important that each of the templates in your templates folder have a unique template ID. If two templates have the same template ID, Informed Filler will not know which template to use when you open a data document or package with the same template ID.

If Informed Filler detects two or more templates with the same template ID, it will select and use one of them and mark the others as duplicates. Once a duplicate template has been marked, it will appear with a small warning sign on Informed Filler's New Data Document dialog box.
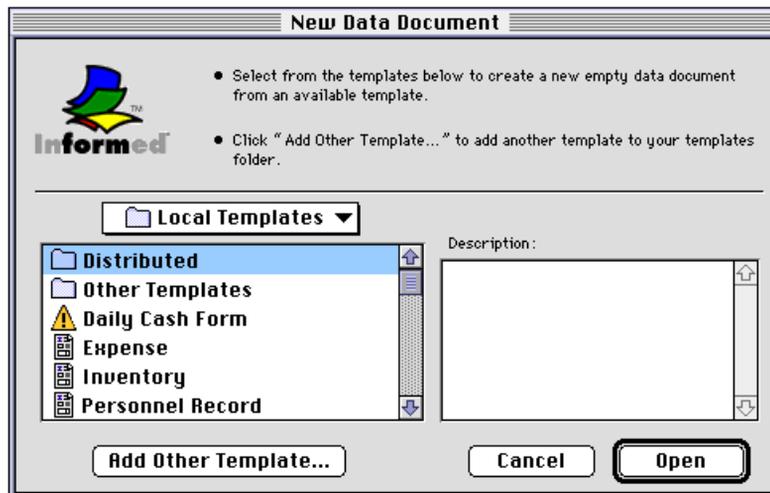

The warning sign is an indication that you should resolve the duplicate templates. That is, you should choose the template that you want to use and remove the duplicates.

Missing Fonts

When you open a template (as a result of opening a form data or package document, or creating a new data document), Informed Filler checks to make sure that the fonts used on the template are available in your system. Different systems on different computers can have different fonts installed. If a template is drawn on one computer, then transferred to different computer, that computer might not have the fonts that were originally used to draw the template.

If Informed Filler detects that at least one font is missing from your system, you'll see the following dialog box.
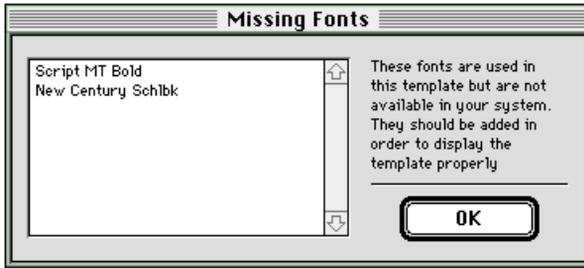
Any text that uses an unavailable font will display using a font that's available in your system.

Closing a Data Document

The Close command closes the currently active data document—that is, the document which corresponds to the front-most form window on your screen.

To close the currently active data document, choose **Close** from the File menu, or click the window's close box. Depending on the kind of document that you're working with, and the work that has been done, one of the following situations will arise.

Closing a New Data Document

If you're closing a new data document that has not been changed, the document is closed immediately. If you're closing a new document to which changes have been made, Informed Filler will warn you to save the changes.
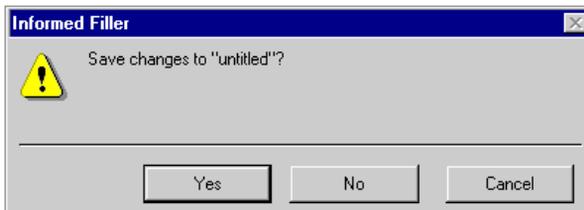

If you're using a Mac OS compatible computer, the button names on this dialog box will be different. Instead of 'Yes', you'll see 'Save', and instead of 'No', you'll see 'Don't Save.' Clicking the 'Yes'/'Save' button displays the Save dialog box. If you're using a Windows compatible computer, you'll see the standard Windows Save dialog box.
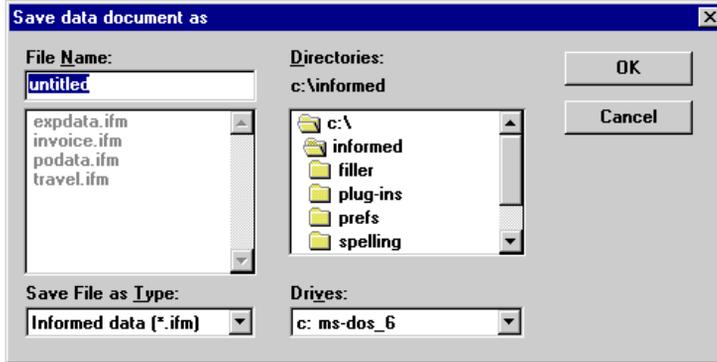
Type the name of the new data document and select a location to store it, then click 'OK.'

If you're using a Mac OS compatible computer, you'll see the standard Mac OS Save dialog box.
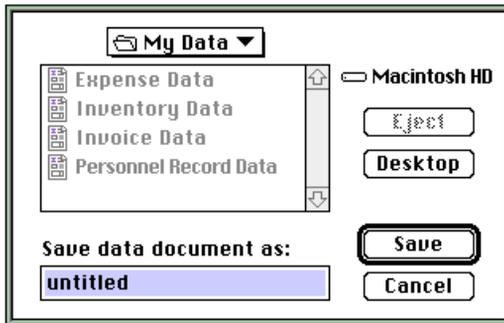
Type the name of the new data document and select the location to store it, then click 'Save.' Clicking 'Cancel' instead cancels the Close command and leaves your data document open.

If a document with the name you specify already exists at the selected location, Informed Filler will warn you with options to replace the existing document or to cancel.

Clicking 'No'/'Don't Save' closes the data document without saving any of the work you've done. Clicking 'Cancel' cancels the Close command and leaves your data document open for editing.

Closing an Existing Data Document

When you close an existing data document (that is, a document that was previously opened), Informed Filler first checks to see if you've made changes to the document. If your data document has not changed since you last opened it, then it's closed immediately without warning.

If you've made changes to the document, you'll be asked if you want to save the changes.

If you're using a Windows compatible computer, the button names on this dialog box will be different. Instead of 'Save', you'll see 'Yes', and instead of 'Don't Save', you'll see 'No.' Click 'Yes'/ 'Save' to save the changes and close the data document. Click 'No'/'Don't Save' to discard the changes and close the document. Click 'Cancel' to cancel the Close command and continue editing your document.

Saving a Data Document

The Save command saves the currently active data document—that is, the document that corresponds to the front-most form window on your screen. This command is available only when changes have been made to the currently active data document.

To save a data document, choose **Save** from the File menu. If the data document corresponds to an existing document (that is, it has been saved at least once before), it will be saved without warning.
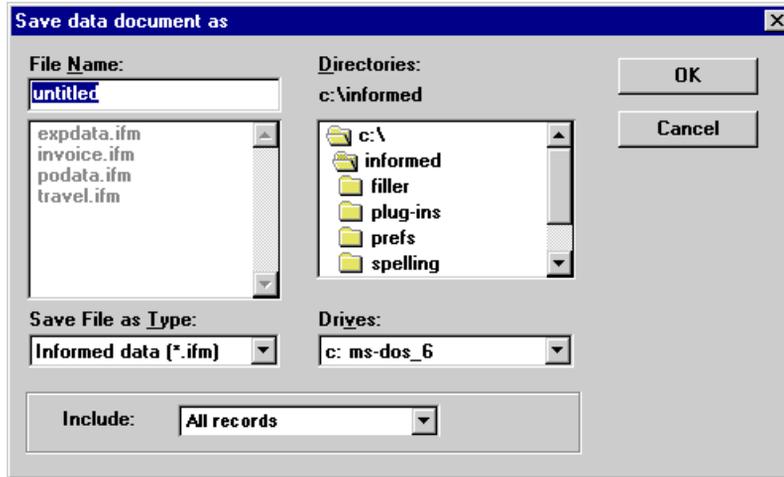
If you're saving a new data document for the first time, you'll be asked to name the document and specify the location to store it. Depending on which operating system you're using, you'll see either the standard Windows Save dialog box or the standard Mac OS Save dialog box.

Type the name of the new data document and select the location to store it, then click 'OK.' Clicking 'Cancel' instead cancels the Save command.

Saving Copies of a Data Document

Use the Save As command to save a copy of a data document with a different name, or at a different location. You can also use the Save As command to create a package document containing both the active data document and its accompanying template.

Choose **Save As...** from the File menu. If you're using a Windows compatible computer, you'll see the standard Windows Save dialog box.

If you're using a Mac OS compatible computer, you'll see the following dialog box.
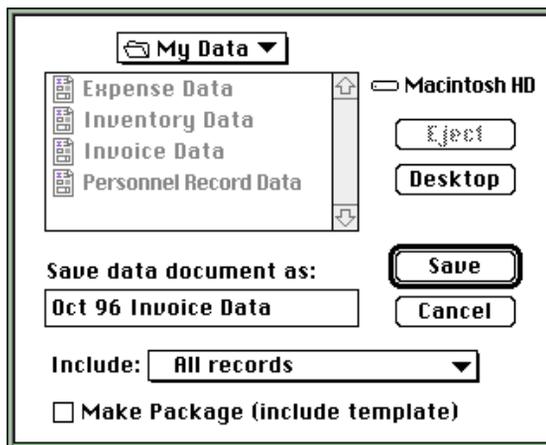
When saving a new data document using the Save As command, you can choose to include the current record only, the currently collected records, or all records. Make your selection from the 'Include' drop-down list.

You can save a new data document or a new package document. If you're using a Windows compatible computer, you make your choice from the 'Save File as Type' drop-down list. If you're using a Mac OS compatible computer, leave the 'Make package (include template)' option unchecked to save a data document. If you check the 'Make package (include template)' option, Informed Filler will create a package document instead.

After saving a new data document, Informed Filler will leave the new document open for editing and close the original document. If you save a new package document, however, the original data document will remain open instead.

Collecting Data Documents

If you're responsible for approving forms, you'll likely receive forms one at a time from other people for approval purposes. If you want to retain a copy of these forms, you might want to collect them into a single data document. That way you can sort the forms, list them on the Record List, and use Informed Filler's other database features.

Informed Filler allows you to import the data from one data document into another. You can do this using Informed Filler's Import command. If you use a Mac OS compatible computer, you can drag a data document onto the form window that corresponds to the data document you want to collect into. For detailed information about Informed Filler's Import command, see "Importing Records" in Chapter 13, "Exchanging Information."

Updating a Data Document

As explained earlier (see "Opening a Data Document" and "Opening a Package"), Informed Filler automatically locates and opens the appropriate form template when you open a data document. Whenever Informed Filler opens a form template (as a result of opening a data or package document), it automatically checks to make sure that the data matches the template.

If the template has changed since the last time you opened the data or package document, or if you've received a data or package document from someone else who has a different version of the template, Informed Filler might notice differences between the data and the template. For example, the template might contain a new cell for which there is no data in the data document. Or maybe a cell's type has changed.

If differences are detected, Informed Filler will update the data to match the template. The time that is takes to update the data depends on the particular differences and the number of records in the data document. You'll see a progress dialog box during the update process.

Obtaining a New Template

Chapter 14, "Form Template Distribution," describes Informed's built-in forms distribution features. After designing a new form template, the form designer can make the template available at one or more distribution centers. Different types of distribution centers are supported, including file servers and FTP servers.

Obtaining a new template from a distribution center is an easy process. As explained earlier in "Opening a Data Document," it can be as simple as clicking 'Yes' on a message dialog. Informed Filler does the rest for you.

The most common method of obtaining a new distributed template is by means of Informed Filler's New Data Document dialog box. This dialog box appears when you choose the New Document command from Informed Filler's File menu.
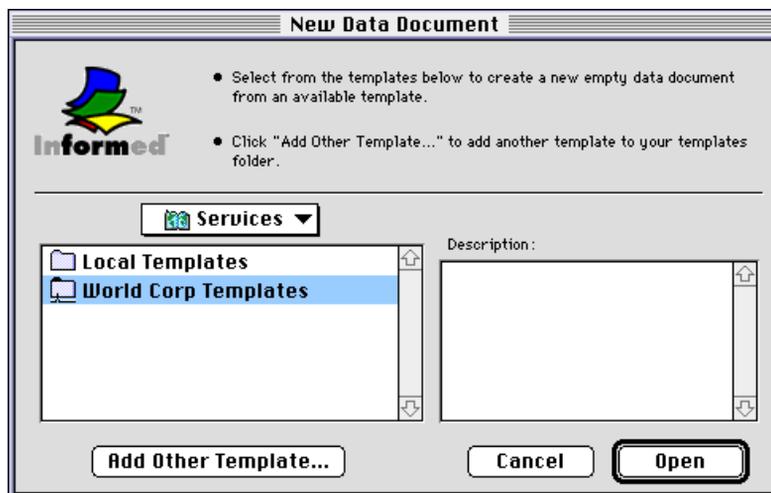
When you choose the New Document command, Informed Filler, by default, shows you the templates that are found in your templates folder. The last item in the drop-down list above the scrolling list is 'Services.' When you select this item, the list changes to show the distribution centers that correspond to the distribution center profiles found in your distribution centers folder (named "DISTCTRS" on Windows, "Distribution Centers" on the Mac OS). A distribution center profile is a file containing the information necessary to identify and connect to a distribution center. See Chapter 14 for more information about distribution center profiles.

To display the templates available at a particular distribution center, select its name in the list then click 'Open.' The scrolling list changes to show the available templates. Templates might be organized in folders. To open a folder, select it in the list and click 'Open,' or simply double-click the folder itself. Once you've located the template that you want, select it in the list then click 'New.' Informed Filler copies the distributed template to your templates folder and opens it, creating a new untitled data document.

Once you've obtained a new template from a distribution center, Informed Filler will automatically notify you when a new version of the template is available. For detailed information about how revision checking works, and the various commands and preferences associated with template distribution, please see Chapter 14, "Form Template Distribution."