10 Mailing Forms

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10 Mailing Forms

Many types of forms must be sent from person to person for approval and processing purposes. For example, it's very common for a purchase requisition form to be filled out by the requestor, sent to a supervisor for approval, and then forwarded on to the purchasing department. In large organizations, a single form might go through several levels of approval before the process is complete.

Through the use of Informed mail plug-ins, Informed Filler connects directly to various electronic mail systems, making it easy for you to send completed forms right from within the Informed Filler environment. With plug-ins, Shana can easily support new e-mail systems by simply implementing new mail plug-ins.

For details of the specific e-mail systems supported by Informed Filler, see the "Mail Plug-ins" topic in Informed Filler's on-line help system.
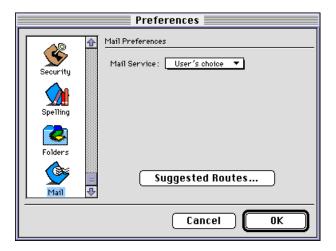
Most e-mail systems allow you to attach a file to a message so that it is included with the message when sent to the recipient. When you send a form using Informed Filler's Send command, Informed Filler automatically creates a file containing the record, or records, you want to send, then attaches the file to an e-mail message and sends it to the recipient.

The form designer can pre-configure a list of suggested routes for a form template. Suggested routes are intended to provide guidance regarding the person or place that you might send a form to. You can send a form to a suggested route, or you can manually address a form to any person or place you like.

Mail Preferences

As mentioned previously, Informed Filler can send forms using a variety of different e-mail systems. You can use Informed Filler's Preferences command to specify your preferred mail system so that you're not asked to select which one each time you send a form.

To specify your preferred mail system, choose **Preferences...** from the Edit menu. When the Preferences dialog box appears, click the Mail icon in the scrolling list. The dialog box changes to show the Mail Preferences panel.

Click the 'Mail service' drop-down list and make a selection from the available choices. The choices in the 'Mail Service' drop-down list correspond to the Informed mail plug-ins you have installed in your plug-ins folder. If you select the 'User's choice' option, you'll be asked to select a mail system each time you send a form.
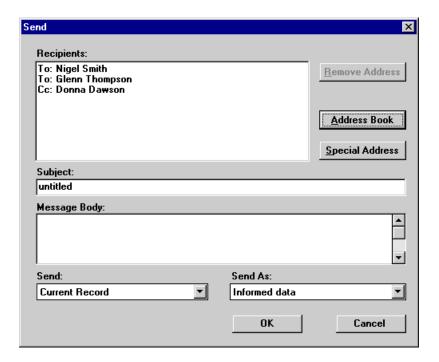
The 'Suggested Routes...' button allows you to define your own suggested routes for your form templates. See "Adding, Changing, and Removing Suggested Routes" later in this chapter for more information.

The Send Command

To mail one or more records, choose **Send...** from the File menu. If there are no suggested routes for the template you're using, your plug-ins folder contains more than one mail plug-in, and you have not previously specified your preferred mail system, you'll be asked to select a mail system to use.

Select a mail system from the 'Send using' drop-down list and click 'OK.' The subsequent Send dialog that appears and the corresponding method of selecting recipients varies depending on which mail system you use. The following example shows the Send dialog box for Microsoft Exchange.

You can select which records to send by choosing an option from the 'Send' drop-down list. If the form window is active when you choose the Send command, the options include 'Current record' and 'Collected records.' When the Record List is active, you can select from the 'Current record,' 'Entire Record List,' or 'Selected records' options.

You specify one or more recipients using the method that corresponds to the mail system you're using. You can also enter a subject and choose the format in which to send the record or records. The following table lists the data formats available in the 'Send As' drop-down list and gives a brief description of when you would use each one.

Data Formats

Data Format	Description
Informed data	Informed data is Informed's own proprietary format for storing form data. Each Informed data document is a database that contains all the data for one or more records. Use this format when mailing forms to another user who already has the appropriate template needed to view the data. This is the most common data format to use when sending forms.
Informed package	Informed package contains both the data and template for a form. Use this format if the person you are mailing the form to doesn't have the appropriate template needed to view the data.
Informed Interchange	Informed Interchange files contain the data for one or more records and are used primarily for transferring information between different applications, and different versions of Informed Filler.
Tab and comma delimited text	The delimited text file format is a standard format that's used primarily for transferring information between Informed Filler and other applications. Use the Comma or Tab delimited text formats when mailing forms to someone who needs to import the data into another application such as a spreadsheet, word processor, or another database.

The form designer can lock the data format to prevent you from accidentally choosing an incorrect setting. If the data format has been locked, you will not be able to select a different format from the 'Send as' drop-down list.
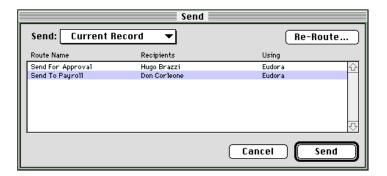
Once you've selected one or more recipients and specified the subject, the send format, and which records to send, click 'Send' or 'OK' to initiate the send process. Informed Filler creates a file containing the record, or records, you specified and attaches it to the e-mail message for transmission to the recipient. You'll see a progress dialog as sending proceeds.

Note   When Informed Filler creates the file that is attached to the e-mail message, it names the file according to the *filename.ext* format of DOS filenames. That way if the recipient of the form, or forms, uses a Windows compatible computer, the file attachment will have the correct file extension for use with Informed Filler.

Selecting a Suggested Route

If the form template you're using has one or more suggested routes defined, choosing Send displays a different dialog box.

A suggested route is a named step in the processing of a form. The route name is intended to iden-
tify the step and instruct the user as to where the form should be sent. For example, a time card
form might be filled out by an employee, sent to a manager for approval, and then forwarded to the
payroll department. To make it easy for each person in the process to know where to send the form
next, suggested routes named "Send To Approving Manager" and "Send to Payroll" could be added
to the form template. Also included with each suggested route are send parameters such as the
names of recipients and a subject for the mail message.

You specify which records to send by selecting an item from the 'Send' drop-down list.

To send to a suggested route, simply select the route, then click 'Send.' If the suggested route is
fully specified (that is, it includes one or more recipients), Informed Filler automatically sends the
record or records.

If no recipients have been specified for the suggested route, Informed Filler will display the Send
dialog box for the mail system used by the route. After you select one or more recipients, click
'Send.' When the send process completes, Informed Filler displays a dialog box asking if you'd like
to save the recipient(s) you specified with the suggested route. If you click 'Yes,' you will not have
to specify the address(es) for that particular suggested route again.

Even if the form template has one or more suggested routes, there might be instances where you
want to send the form to someone or some place else. For example, if the supervisor you normally
send forms to is away on vacation, you might want to re-route your form to his or her manager
instead. Click the 'Re-Route' button on the Send dialog box to specify a different address. Again,
the Send dialog box specific to the mail system you use appears, allowing you to address and send
your form.

Mail Cells

To aid in addressing forms and specifying various send options, the form designer can take advan-
tage of mail cells. A mail cell is a cell whose value is used to specify a send option or parameter.
For example, when you mail a form, Informed Filler looks for a cell named 'Mail Send To.' If such
a cell exists, the form is automatically addressed to the name in that cell.

Other mail cells can be used to automatically enter other parameters such as the subject, with information on the form. The following table shows the four mail cells supported in Informed.

Mail Cells

Mail Cell	Description
Mail Send To	The name of the mail recipient. The value in this cell must identify a valid user in the directory of your e-mail system.
Mail Subject	The subject of the mail message.
Mail Comment	The body of the mail message.
Mail Enclosure	The filename of the enclosure sent with the mail message.

By calculating a mail cell, the form designer can have a formula automatically check for different conditions and automatically set certain parameters accordingly. For example, if a purchase order form needs to be sent to a supervisor for approval, the form designer could calculate the 'Mail Send To' cell so that the recipient of the form is based on the value of the purchase order.
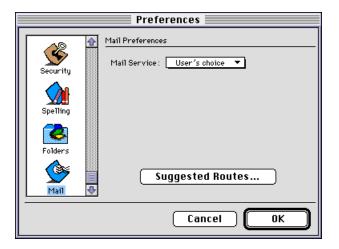
Form Tracking

If the form designer has configured the form template to automatically track forms, Informed Filler will connect to the tracking server after the send process completes. Depending on how form tracking was configured, you may be requested to enter information, such as your name and password, when this occurs.

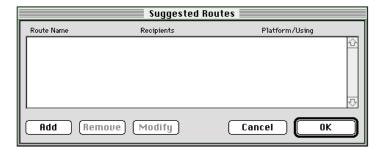For more information about form tracking, see Chapter 11, "Form Tracking."

Adding, Changing, and Removing Suggested Routes

Informed Filler allows you to define your own suggested routes for your form templates by using the Preferences command.

Choose **Preferences...** from the Edit menu. When the Preferences dialog box appears, click the Mail icon in the scrolling list. The dialog box changes to show the Mail Preferences panel.

To access the controls for defining a suggested route, click the 'Suggested Routes...' button. The Suggested Routes dialog box appears.

The Suggested Routes dialog box contains various controls for editing suggested routes, and a scrolling list showing any suggested routes that are already configured.

When you click 'Add,' the Suggested Route Details dialog box appears.

Type the name of the route in the 'Route name' text box. It is helpful if the route name describes the actual step in the routing process.

Specify the mail system to use by clicking the 'Mail system' drop-down list and making a selection from the available choices. The choices in the 'Mail system' drop-down list correspond to the Informed mail plug-ins you have installed in your plug-ins folder.

To specify a recipient, click the 'Address...' button. If you have the appropriate e-mail software installed, Informed Designer displays the Send dialog box for the selected mail system. Simply select one or more recipients by using the controls on the addressing dialog box.

While the addressing dialog box is displayed, you can also specify a subject for the form, and select the data format that the form will be sent in.

Note   If the form designer has locked the data format to be used when mailing the form, that data format will take precedence over the one you specify for a suggested route.

To edit an existing suggested route, select it in the scrolling list on the Suggested Routes dialog box, then click the 'Modify' button. The Suggested Route Detail dialog box appears, allowing you to change the specific details for the selected route.

To remove a suggested route, select it in the scrolling list, then click 'Remove.'

You can change the order of suggested routes in the scrolling list by clicking a route and dragging it either up or down with the mouse.

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