11 Form Tracking

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11 Form Tracking

Many forms are routed from person to person for approval purposes. Chapter 10, "Mailing Forms," explains how you can mail a completed form to another person using your electronic mail system. This chapter describes Informed Filler's form tracking features.

The purpose of form tracking is to provide you with a quick and easy way to find out where a form is in the routing process. After filling out a form and sending it to the next step, you can choose a single command to see any subsequent steps that the form has travelled, and on whose desk the form currently sits. Form tracking provides a quick alternative to "physically" tracing the path of a form to find its current location.

How it Works

When you send a form to another person, the data of the form is stored in a file and attached to an electronic mail message. The message, along with the attached form data, is sent to the recipient using one of the supported e-mail systems. The recipient receives the "original" form whereas you retain a "copy." The recipient views the form, perhaps filling in more data, and sends the form to the next step in the routing process.

In order to track a form, the information detailing each step that the form travels must be stored in a central database that is accessible by all Informed Filler users. That way any sender of a form can retrieve the details regarding the other people to whom the form has been sent.

As a form is sent from person to person, the tracking status for the form is updated. Informed Filler does this by storing information, including the sender and recipient names, the date and time that the form was sent, and attributes that identify the form, in the tracking database. When you request the tracking status of a form, Informed Filler connects to the tracking database and retrieves the tracking details pertaining to the particular form.
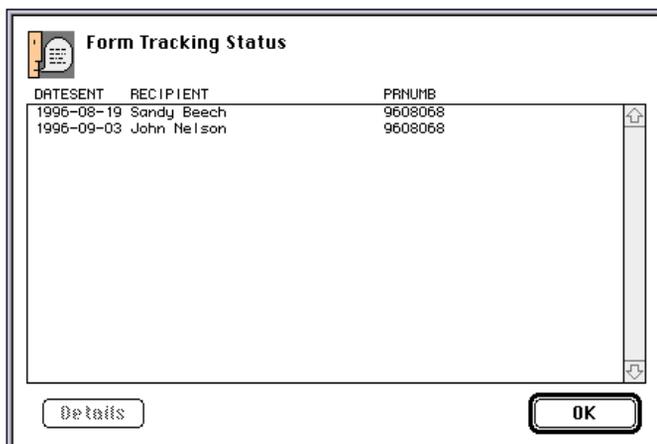
Form tracking requires configuration using Informed Designer. Informed Filler can track forms using any database that is accessible via Informed data access plug-ins. These include Oracle, Sybase, and others using ODBC and DAL. Other data access plug-ins that support form tracking might be available after this documentation is published.

In order for form tracking to work, you must have the data access plug-in with which form tracking is configured installed in your plug-ins folder. For example, if the form designer has configured form tracking to store the tracking information in an Oracle database, you must have the Oracle data access plug-in installed in your plug-ins folder. You must also have the Tracking plug-in installed. These plug-ins are installed automatically when you install Informed Filler.

Depending on the type of tracking database you use, you might also require additional database client software. The installation and configuration of this software is a function normally performed by the form designer or database administrator.

Tracking Forms

If a template is configured for form tracking, any form that you send using that template will be tracked. When you send a form, Informed Filler will automatically open or connect to the tracking database and store the tracking information. In order to track a form, your computer must be connected to the network and the tracking database must be accessible. If you are not connected when you send a form (some e-mail systems allow you to send a message while disconnected from the mail server), Informed Filler will send the form, but the tracking database will not be updated.

The tracking of a form occurs after the send process has completed. During the tracking process, Informed Filler displays a progress dialog box.

```
┌─────────────────────────────────┐
│  Tracking form...               │
└─────────────────────────────────┘
```

Depending on how form tracking was configured for the template you are using, you might be asked to enter information necessary to connect to the tracking database. The specific dialog box that you see and the particular parameters that you are asked to enter vary depending on the type of database being used for tracking purposes. Below is the dialog box you might see if tracking is linked to a Sybase database.

```
┌─────────────────────────────────────────────┐
│ Database Login For "Sybase"                 │
│                                             │
│  User ID      │ gWhittaker              │   │
│  Password     │ ••••••••                │   │
│                                             │
│              ( Cancel )    (   OK   )       │
└─────────────────────────────────────────────┘
```

If you are unable to enter the information requested, please request help from the form designer or database administrator.

Displaying a Form's Tracking Status

The tracking status of a form refers to the information that details each step that a form has travelled. For example, suppose that Joe fills out a form, signs it, then sends it to Sandy for approval. Sandy then approves the form and sends it to John for final approval. At this point, the tracking information would detail the dates and times that the form was sent from Joe to Sandy, and then from Sandy to John. Since the last routing step shows that the form was sent from Sandy to John, we know that John has yet to approve the form and forward it for processing.

To display the tracking status for the current record, choose **Tracking Status...** from the View menu. Informed Filler will connect to the tracking database and retrieve the tracking information.

If no tracking information for the current record is found in the tracking database, you'll see a message indicating so.

Each row on the Tracking Status dialog box corresponds to one step that the form has travelled. Depending on how form tracking was configured, you might not see all information in the width of the scrolling list. If this occurs, you can select any row in the scrolling list and click the 'Details' button to display all information for that row.

The Tracking Details dialog box includes the standard tracking information as well as any custom information that the form designer has included when configuring the form template for tracking.

As with tracking forms, you might be asked to provide connection or logon parameters necessary to connect to the tracking database when you choose the Tracking Status command. See "Tracking Forms" earlier for more information.

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