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Submitting Forms

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Important steps in forms processing often involve accessing data in other information systems. When you fill out a form, for example, information might be 'looked up' in other places. When a form has been completed and approved, its data might be 'submitted to'—or stored in—some other information system.

This chapter explains how you can submit records using Informed Filler's Submit command. For information about lookups, please see "Lookups" in Chapter 3, "Filling Out Forms."

Note   Since the form designer can customize the menus you see in Informed Filler, it's possible that the Submit command has been removed or its name changed.

Overview

With paper forms, a form is submitted by re-keying its data into an information system such as an accounting system or database. With Informed, the form designer can configure form templates so that submission occurs electronically by the simple selection of a menu command or the click of a button. Electronic submission eliminates unnecessary data entry and associated errors.

An information system can range anywhere from a small database running locally on your computer, to a high capacity, high performance SQL database running on a mainframe. The form designer configures form submission in a manner that's appropriate for each type of form.

Data access standards provide standard protocols with which client applications and information systems can interact. Informed Filler includes built-in support for submitting records to information systems accessible through applications that support Apple events and AppleScript. These methods are available only on Mac OS compatible computers. Access to other information systems, such as SQL databases and desktop database formats, is available when you install Informed data access plug-ins. Data access plug-ins must be installed in your Informed plug-ins folder.

Depending on the type of database or "data destination" that you submit records to, you may 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.

The Submit Command

Choosing the Submit command submits one or more records. The Submit command is available only if the form template has been configured for form submission by the form designer. If the form window is active, the Submit command submits the current record. If the Record List is active, all

selected records are submitted. For more information about submitting multiple records, see "Submitting Multiple Records" later in this chapter.

When Informed Filler submits a record, it first connects to the data destination for which form submission is configured. You might be prompted to enter some information, such as your name and a password, when a record is submitted. This depends on the particular type of data destination and how the connection is configured. The form designer can include the necessary connection information in the form template itself or leave it blank.

For example, for a template configured to submit to an Oracle database, if the form designer did not include a user ID and password in the template, you'll see the Oracle connection dialog box when Informed Filler submits a record.

The exact appearance of the connection dialog box varies depending on the particular type of data destination that the template is linked to.

When a data destination receives a submitted record, it might reply with a message indicating that the record was successfully accepted, or it might report an error. This, again, depends on the type of data destination and the details of how form submission is configured.

Submitting Multiple Records

As mentioned previously, Informed Filler allows you to submit multiple records to the configured data destination when the Record List is active.

With the Record List in front, select the records that you want to submit, then choose **Submit** from the File menu. Informed Filler submits the selected records. If an error occurs during the submission process, a message appears indicating so, and the Submit command is halted. The record con-

taining the error, along with any remaining selected records that weren't submitted, are tagged with the tag name "Records not submitted."

For information about tagged records and how to use the Record List, see "Tagging Records" and "The Record List" in Chapter 8, "Manipulating Records."

Errors When Submitting Records

When you submit a record, it is necessary that the data destination to which the template is linked be available. If Informed Filler is unable to find or connect to the data destination, you'll see an error message indicating so.

Depending on the type of data destination, the specific error message and the options available will vary. For some data destinations, the error is described and the submission is canceled. For others, options include looking for the data destination.
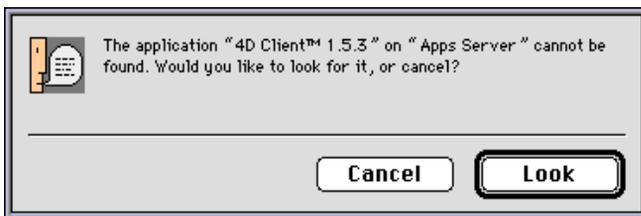
Clicking 'Look' allows you to try to locate the data destination. For example, if the data destination is an Apple event aware application and Informed Filler cannot find the application, clicking 'Look' on this dialog box allows you to browse any available Mac OS compatible computers to locate the application.

For some types of data destinations, errors can occur even when the data destination is found and a connection is made. If, for example, form submission is configured to insert information into a Sybase database and the required database table is not found or is unavailable, you'll see an error dialog even though Informed Filler is able to connect to the database server.