

Informed Filler®

Getting Started

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*Please note that after January 25, 1999, our area code (403) will change to (780).





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Welcome to Informed Filler

Welcome to Informed Filler by Shana Corporation. Informed Filler is sophisticated yet easy to use forms management software that allows you to fill out, route, approve, and submit forms electronically.

About This Guide

Whether you're using Informed Filler for the first time or upgrading from a previous version, this guide contains important information that you should read. General topics are organized in the following chapters:

- Chapter 1, "Installing Informed Filler" explains each step of the installation process from the system requirements to installing and registering Informed Filler. You'll also learn about the various installation options that come with Informed Filler, and how to use on-line help.
- Chapter 2, "Converting from 1.x" provides guidelines for converting your forms successfully from earlier versions of Informed and taking advantage of the powerful features and benefits of the new version.

In addition to this Informed Filler Getting Started Guide, the set also contains the *Informed Filler User's Manual* which gives you comprehensive, wide-ranging coverage of Informed Filler's powerful yet easy to use forms management features.

1

Installing Informed Filler

In this chapter:

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1

Installing Informed Filler

Informed offers seamless cross-platform inter-operability between Windows and Mac OS. This chapter gives detailed instructions on how to install the Informed Filler application and associated files on both Windows and Mac OS compatible computers.

What Comes with Informed Filler

Informed Filler ships on a CD-ROM that contains the Windows and Mac OS versions. Depending on the specifics of your order, you might also receive your Informed software on floppy disks.

Note

The CD-ROM contains several third party applications that are needed to view on-line manuals and the “Spotlight on Informed” multimedia presentation. These third party applications are not available in the floppy disk version.

Here’s what comes with Informed Filler:

For Windows:

- Informed Filler application and related files
- Spotlight on Informed (CD-ROM only) - an interactive multimedia tour of Shana Corporation and the entire Informed product line, including information on pricing, how to order, and how to contact Shana.

For Mac OS:

- Informed Filler application and related files
- Informed Tracker Client
- Spotlight on Informed (CD-ROM only) - an interactive multimedia tour of Shana Corporation and the entire Informed product line, including information on pricing, how to order, and how to contact Shana.

Along with the CD-ROM or floppy disks, your Informed Filler package also contains:

- Informed Filler manual set
- license certificate
- registration card and registration number labels
- pre-registration card (if software is pre-registered)

The CD-ROM also includes Informed Designer and a folder named “Internet” (Windows) or “Informed Filler™ for Internet” (Mac OS). If you’ve purchased Informed Designer, installation instructions can be found in your *Informed Designer Getting Started Guide*. Your peel-off registration number labels will include an Informed Designer registration number. If you’ve purchased only Informed Filler, do not install Informed Designer.

System Requirements

To use Informed Filler, you’ll need a form template created with Informed Designer, and the following hardware and software:

Windows 3.1x (16-bit)

- 386 or better
- hard drive with at least 9MB of free disk space
- Windows 3.1 or later (including 3.11)

Windows 95, Windows NT and Windows 98 (32-bit)

- 486 or better
- hard drive with at least 9MB of free disk space
- Windows 95/Windows NT 3.51 or later/Windows 98

Mac OS on 68K Macintosh

- Mac SE/30 (68030 processor) or better with 2.5MB of free RAM for the application
- hard drive with at least 7MB of free disk space
- System 7.0 or later (some features require AppleScript™)

Mac OS on PowerPC Macintosh

- PowerPC Macintosh (or compatible) with 2.5MB of free RAM for the application
- hard drive with at least 7MB of free disk space
- System 7.1 or later (some features require AppleScript™)

The form designer can link your form templates to different types of systems such as other databases, signing services, and e-mail systems.

Some external systems have additional system requirements. For example, to perform a data lookup to an Oracle database, the SQL*Net client software must be installed on your computer. For the system requirements of the systems that your forms are linked to, see the system’s accompanying documentation.

Installing Informed Filler

Installation of Informed Filler is done with easy to use installer applications that you'll find on both the CD-ROM and floppy disk versions.

While the installation process itself differs slightly between Windows and Mac OS, the installation options are the same, regardless of whether you're installing from CD or disks, on Windows or Mac OS.

Installing on Windows

The following sections explain the procedures for installing Informed Filler on Windows 95, Windows NT, and Windows 3.11.

Note

It is recommended that you exit all Windows programs before running the installer.

Windows 95 and Windows NT

To start the installation process on Windows 95 or Windows NT:

1. Insert the CD or the disk labelled "Informed Filler Disk 1" into your drive.
 - Select the Start button.
 - Select Run.
 - For installation from CD, enter "E:\FILLER\SETUP.EXE" in the text box, then click 'OK.' If your CD-ROM drive uses a different drive letter, enter it in place of "E."
 - For installation from floppy disks, enter "A:\SETUP.EXE" in the text box, then click 'OK.' If your floppy disk drive uses a different drive letter, enter it in place of "A."
2. The Setup program leads you through the installation process. Follow the instructions on the screen.

Windows 3.11

To start the installation on Windows 3.11:

1. Insert the CD or the disk labelled "Informed Filler Disk 1" into your drive.

- In the Program Manager, select Run from the File menu.
 - For installation from CD, enter “E:\FILLER\SETUP.EXE” in the text box, then click ‘OK.’ If your CD-ROM drive uses a different drive letter, enter it in place of “E.”
 - For installation from floppy disks, enter “A:\SETUP.EXE” in the text box, then click ‘OK.’ If your floppy disk drive uses a different drive letter, enter it in place of “A.”
2. The Setup program leads you through the installation process. Follow the instructions on the screen.

During the installation, you may be prompted to select preferences such as your preferred mail system and which language dictionary you would like to use for spell checking. If you are installing from floppy disks, you’ll be asked to insert disks as the installation proceeds.

After installation, a dialog appears informing you that installation was successful. If you have installed all the items you need, click ‘Quit’ to quit the installer. If you wish to install more items, click ‘Continue’ and repeat the installation process to install the desired items.

Installing on Mac OS

To start the installation process on Mac OS:

1. Insert the CD or the disk labelled “Informed Filler Disk 1” into your drive, then double-click the “Informed Filler Installer” icon to start the installation process. This item is found in the folder named “Informed Filler.”
2. The Setup program leads you through the installation process. Follow the instructions on the screen.

The installer allows you to specify either “easy” or “custom” installation. You select either of these options from the drop-down list at the top of the main installer window.

Easy Install

- The default method of installation is the Easy install. If you select this method, the installer application automatically installs the following items:
 - Informed Filler application appropriate for the computer you’re installing on
 - all Informed plug-ins
 - spell checking
 - on-line help

If you’re an advanced user or network administrator and wish to change the installation configuration, choose the ‘Custom Install’ option instead.

Custom Install

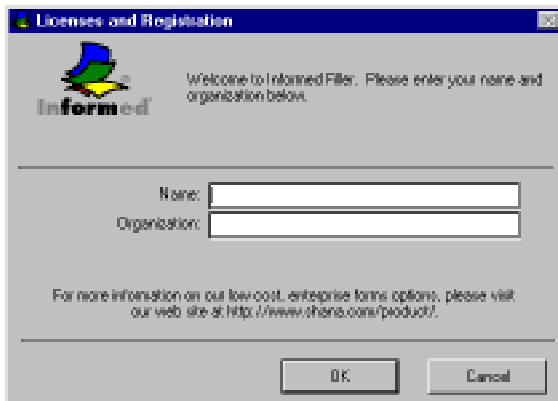
- When you choose the 'Custom Install' option, the installer window changes to display installation options for you to select.
- Select an item by clicking its checkbox. Some items have additional options that you can view by clicking the triangles to the left of the item names. You can obtain information about each option by clicking its corresponding 'information' button to the right.

During the installation, you may be prompted to select preferences such as your preferred mail system and which language dictionary you would like to use for spell checking. If you are installing from floppy disks, you'll be asked to insert disks as the installation proceeds.

After installation, a dialog appears informing you that installation was successful. If you have installed all the items you need and wish to quit the installer, click 'Quit.' To install more items, click 'Continue' and repeat the installation process to install the desired items.

Registering Informed Filler

When you run Informed Filler for the first time, you'll see the Registration screen.



- Enter your name in the 'Name' text box.
- Enter your organization name in the 'Organization' text box (optional).
- Click 'OK.' The Informed Filler License Agreement appears. If you accept the terms of the agreement, click 'Agree.'

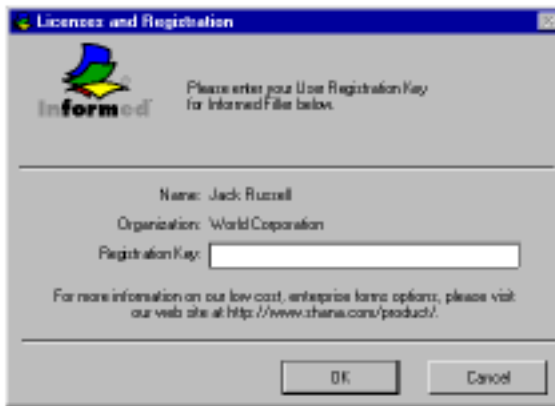
At this point, your copy of Informed Filler can be used to fill out any form that's been registered with a Form Registration Key and no further registration is necessary. If you want the ability to fill out both registered AND unregistered forms, you must register your copy of Informed Filler with a User Registration Key.

If your software package includes a User Registration Key for Informed Filler, follow the instructions below to complete the registration process.

Note

Your Informed Filler User Registration Key can be found on the stickers included in your Informed Filler package.

- Choose **Register** from the Help (Windows) or Apple (Mac OS) menu. Another registration screen appears.



- Enter your User Registration Key in the 'Registration Key' text box, then click 'OK.'

Registering with Shana

If you purchased Informed Filler direct from Shana, your software is already pre-registered and you'll receive all the benefits of being a registered user. If you received Informed Filler from another source, please take a moment to contact us and register your software. As a registered Informed Filler owner, you're eligible for:

- technical support
- software updates (from our web site)
- special upgrade pricing
- news about products and promotions (if you subscribe to our e-mail list)

To register with Shana, you can call us toll free at 1-800-386-7244, or fill out the registration card that's included in your Informed Filler package and mail or fax it in to us.

Using On-line Help

In addition to your Informed Filler manual set, reference information and instructions are available through Informed Filler's on-line help feature. If you choose to install on-line help, installation will include the necessary help files. Help files are installed in a folder named "Help" inside the Informed folder. The help files must remain in this location.

The commands you use to access on-line help are found under the Help menu (Windows) or the Guide menu (Mac OS).



Choosing **Contents** displays the on-line help Contents screen.



The Contents screen contains a set of control buttons to help you navigate through the files, and shows a list of the help topics available for you to view. Simply click on a topic to display its corresponding information.

As you click the hypertext links to view different information, the help system remembers the previous help topic. To go back to the previous topic, click 'Back.' To go back to the contents page, click 'Contents.'

Choose **Contacting Shana** to display helpful information about how to get in touch with Shana's support department. This information includes directions to our home page on the internet, our e-mail address, our phone and fax numbers, and our mailing address. You'll also find out what information you should have ready for us when you contact Shana.

Choosing **About Help** displays an on-line help document that provides detailed instructions on how to use on-line help.

Contacting Support

Shana Corporation has made every effort to make Informed Filler as easy and straight-forward to use as possible. However, there are times when a feature or function does not seem to perform as it is meant to. Don't despair! Technical Support is available.

Note

Please note that technical support is available only to registered users of Informed.

If you have not already faxed, e-mailed, or mailed your registration form to us, please have the following information ready (or include it with your fax/e-mail) when you contact Technical Support for the first time:

- full name
- company name (if there is one)
- full address, including office/apt. number, street, city, state/province, country, and zip/postal code
- phone and fax numbers
- e-mail address (if available)

Also, whenever contacting Technical Support, please make sure you have (or include) the following information about your computer and software:

- serial number of the Informed product you are using (this can always be found by selecting the 'About Informed Filler...' command under the Help (Windows) or Apple (Mac OS) menu when the application is the active
- type and version of the operating system your computer is using (Win95, Win3.11, Macintosh System 7.5, and so on)

- type of computer you are using (486-100, Macintosh Quadra 610, and so on)
- a clear and concise understanding of the problem you are having. Nothing is harder to diagnose and fix than a question like “My form doesn’t look right!” Please have all of the details of your question understood, such as the commands you are using and the desired task that you are seeking to accomplish. If possible, please be sitting in front of your computer so that the support technician can talk you through the solution.

Before you phone Shana Corporation’s Support Team...

RTM (Read The Manuals)

We know that at times it is a chore to search through the documentation, trying to understand something that is relevant to your needs, but most of the time, the answer you need is in the manuals. Be sure you are consulting the correct manuals for the application you are using.

Check the indices to see if you are looking in all the right places. If you still can’t find the answer you are looking for...

Check our Home Page on the Internet

We are constantly upgrading and adding to our web-based technical support services. Point your browser (URL) location to **<http://www.shana.com/services/support/>**. Here you will find many sub-sections covering things like functions and calculations, e-mail enabling, tips and tricks, and many examples of how to set up common forms and settings. As well, there are many forms and examples you can download and try out yourself.

Send us an E-mail

You can e-mail us directly at **support@shana.com**. Upon receipt of your e-mail support question, we will reply with a message indicating the support technician assigned to your question, as well as a Support Call Number, which you can use to reference your call in the future. The amount of time it will take our support technicians to satisfactorily answer your question will vary with the number of calls in progress at any one time, so please be patient with us if it seems to be taking a long time to get back to you. If your question concerns a particular form you are working on, please include the form as an attachment or enclosure to your e-mail message. This will allow us to actually refer to your form as we are working on the problem. Please note that all forms/information received by support is automatically considered private and confidential.

Fax us Your Form and Question

You can fax us your form and associated question any time of the day or night at ***(403) 437-4381**. Please make sure to indicate on your fax that it is intended for Technical Support. Again,

you will be contacted on receipt of your fax by either phone or fax, with an indication of the Support Technician assigned to your question, as well as a Support Call Number. Again, please note that all forms/information received by support is automatically considered private and confidential.

*After January 25, 1999, our (403) area code will change to (780).

Mail (or Courier) us your Form/Problem

Yes, we still do receive snail-mail. If you have no other means of contacting us, please feel free to drop us a letter. Please mail to:

**Shana Corporation
Technical Support
9744-45th Avenue
Edmonton, AB Canada
T6E 5C5**

Please include all the pertinent information about your computer, operating system, and software involved. If your question or problem relates to a specific form you have created, please be sure to include the form on a diskette.

Phone Us!

Picking up the phone and actually calling us is the most expensive means (both in terms of the phone call itself and the support credits required) of contacting Technical Support. We encourage you to try and use one or all of the above methods before you place a phone call to us. Technical support can be reached at ***(403) 433-3690, ext. 242**. Technical Support is available during the hours of 8:30 am - 5:00 pm, Monday to Friday, Mountain Standard Time. Before you call us, please make sure you have registered your software by one of the above methods.

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If the lines are busy when you call, please leave us a message on our voice mail system, with your serial number, return phone number, and a brief description of the problem. We will call you back ASAP. Calls will be returned in the order in which they are received.

Note

We can only return support calls in North America. For those of you living, working, and using Informed Filler outside of North America, if you cannot reach our support staff immediately, please try one of the other means of reaching us noted above. For the purposes of this document, North America is defined as Canada and the US, including Alaska and Hawaii.

Support Credits Policy

1. Technical support for Informed products is available to registered users only.
2. Registration of an Informed product entitles you to a specified number of Informed Support Credits. For details on credits included with Informed products, please refer to the “Support Policies” area on Shana’s web site at <http://www.shana.com/services/support/Policies/>.
3. Support credits can be purchased from Shana Corporation at 1-800-386-7244.
4. Informed Support Credits are permanently linked to a registered serial number.
5. Informed Support Credits will NOT be used when you call:
 - about known problems inherent in the software
 - to tell us about a reproducible bug (if it really is a bug)
 - to replace bad disks (hey, it happens)
6. Support Credits are applied to Tech Support Inquiries as follows:
 - 1 Credit - E-mail, Fax, Postal Mail
 - 2 Credits - Phone calls

Terms & Conditions

Below is a summary of the terms and conditions which govern technical support services for Informed products.

1. Technical Support for Informed products will be provided as described in this document.
2. Access to Technical Support for Informed products is limited to registered users of Informed products only.
3. Informed Technical Support Credits supplied free with Informed products have no redeemable cash value.
4. Purchased Informed Technical Support Credits are valid for two (2) years from date of purchase. Credits cannot be refunded or exchanged at any time.
5. Informed Technical Support Credits are not transferable by you to anyone.
6. All prices and other terms and conditions contained in this document are subject to change by Shana Corporation without notice at any time prior to your purchasing additional Informed Technical Support Credits.

7. Access to Informed Technical Support using additional credits shall start when your payment for the credits is received by Shana Corporation.

8. Your access to Informed Technical Support shall terminate in the event that you transfer your Informed product(s), or the end user license included with your Informed product(s) is otherwise terminated. Your access to Informed Technical Support may also be terminated at Shana Corporation's discretion whereby your sole and exclusive remedy shall be to receive a refund for your purchased unused Informed Technical Support Credits which have not yet expired. All other Informed Technical Support Credits are not redeemable for cash.

9. Shana Corporation shall use reasonable commercial efforts to provide technical support in a professional manner, but cannot guarantee that every question raised by you will be resolved. Nothing in this document shall be construed as expanding or adding to the warranty for your Informed product contained in the end user license agreement included with your Informed product(s). Except for this express limited warranty, Shana Corporation makes and you receive no warranties or conditions of any kind, express, implied or statutory, related to or arising in any way out of the provision of Informed Technical Support, and Shana Corporation specifically disclaims any implied warranty of merchantability, fitness for a particular purpose and noninfringement of third parties.

10. Shana Corporation's liability relating to the provision of Informed Technical Support is limited to the amounts paid by you for the services ordered by you. In no event shall Shana Corporation have any liability for any special, indirect, or consequential damages including, without limitation, damages for lost profits, loss of data, or interruption of business, arising in any way out of the provision of Informed Technical Support under any theory of liability, whether or not Shana Corporation has been advised of the possibility of such damages.

Training on Informed products

Shana Corporation also offers training on Informed products through Russ Associates, the Official Informed Trainer. Further information can be obtained by contacting Russ Associates at:

Russ Associates
1016 Kirkcrest Lane,
Alamo, CA
94507

Phone: (925) 820-7967
Fax: (925) 820-2288
Internet: training@shana.com



Converting From 1.x

In this chapter:

- The Conversion Process 2-2

2

Converting from 1.x

Both Informed Designer and Informed Filler can open version 1.4 (and earlier) form documents and convert them to the new format. However, certain changes in how these applications now store and access forms and information means that your form templates (formerly called form layouts) and form data are now organized differently.

Depending on the procedures used in your organization, you can convert 1.x documents yourself using Informed Filler, or the form designer may choose to pre-convert the form templates used in your organization and distribute the new versions.

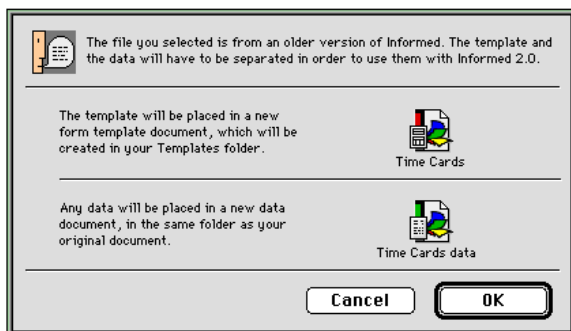
Note

1.x form documents must be converted using Informed Designer or Informed Filler on a Mac OS compatible computer. Once the form documents are converted, they can then be transferred to a Windows compatible computer for use.

The Conversion Process

In version 2.x, form templates are stored separately from form data. You can have several form data documents all sharing the same form template. With earlier versions of Informed, both the form template and form data were stored in the same file. (For an overview of Informed's document types, and a description of the templates folder and other special folders, see Chapters 1 and 2 of your *Informed Filler User's Manual*.)

You convert a 1.x form document to version 2.x by opening it using Informed Filler's Open command. Informed Filler will create two new files: one to store the converted template of the form, and the other to store the converted form data. When you choose the Open command and select a 1.x form document, Informed Filler warns you that conversion will take place.



The icons pictured on the dialog box show the filenames that will be used when Informed Filler creates the new template and data documents. The form template document is created in your templates folder. The form data document is stored next to the original 1.x form document.

Note

The data conversion process can be fairly long, depending on the number of records in the document and the number of indexed fields on the form.

Following the conversion process, the converted data document appears in a form window, ready for editing.

Time Cards data

WORLD CORPORATION
World Corporation
1 Avenue of the Americas
New York, NY 12345

TIME CARD
245963

Emp. No.	Employee Name	Department
100	Charles Windsor	Administration

Mail Stop	Location	Office Number	Week Ending
299	London	10	11/15/96

DETAIL

Description	Pay Code	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Total
Research	REG	2.5							2.5
Allan's Project	REG	3.0							3.0
Marten's Project	REG	2.5							2.5
TOTALS		8.0							8.0

EMPLOYEE SIGNATURE

☐ Approve
☐ Reject

AUTHORIZED SIGNATURE

22 Records | 22 of 22

Note

Converting a 1.x form document does not alter the original document in any way. The conversion process essentially “opens” the existing file, “extracts” the necessary information, and creates the new 2.x files.

During the conversion process, Informed Filler reads the different objects and components of the 1.x form document and converts them to the new 2.x format. Depending on the complexity of the 1.x form document and the particular features used, Informed Filler may request your interaction during the conversion process. For example, if your 1.x form document contains a

cell configured to lookup information in another form document, Informed Filler will prompt you to select the converted data document. These details of the conversion process are found in remaining sections of this chapter.

If you use Informed Filler to convert a 1.x form document, it first checks to see if your templates folder already contains a template with the same template ID (formerly called the “form ID”). If such a template is found, the template in the 1.x document is not converted. The existing template with the same template ID is used instead.

To make the conversion process easier for you, the form designer can pre-convert the 1.x forms you will need to view and edit your converted data. As long as the form designer distributes the converted form templates before, or together with, the distribution of Informed Filler 2.x, Informed Filler will use these templates and ignore those in any of the 1.x form documents that you convert.

Distributed Form Documents

If you use Informed Filler to convert a distributed form document, that is, a 1.x form document that was distributed using Informed Revision Distributor, Informed Filler will convert the data but not the template. Before you convert a 1.x distributed form document, you must first obtain a pre-converted version of the template and place it in your templates folder. Informed Filler will use the pre-converted template when you convert any 1.x form document of the same template ID. If Informed Filler cannot find a pre-converted template in your templates folder, you’ll be asked to find one yourself.

AppleScript Scripts

There are several changes in version 2.x’s terminology that could affect any AppleScript scripts that you’ve written to automate specific tasks with Informed Manager. To ensure that your existing scripts work with converted 2.x data documents, you should make the following terminology changes:

- change “Informed Manager®” to “Informed Filler®”
- change “choices” to “extra choices”
- change “form” to “record”
- change “formID” to “templateID”
- “pre-address” should be removed

If Informed Manager is still installed on your computer, your scripts will still display with the old terminology and must be manually changed. If you remove Informed Manager from your

hard drive, you'll be asked to locate it when you edit a script. By selecting the Informed Filler™ application instead, all the terminology will automatically update.

Pre-Addressed Forms

The feature that allowed you to pre-address a form for routing purposes has been replaced with the more powerful suggested routes feature. If a 1.x form has been pre-addressed, the converted 2.x template will have a single suggested route that corresponds to the original pre-address settings. The suggested route name will be displayed as “Converted 1.4 pre-address.” For information on the suggested routes feature, see Chapter 10, “Mailing Forms” in your *Informed Filler User's Manual*.

Lookups and Form Submission

There are several issues regarding lookups and form submission when converting form documents from 1.x to 2.x.

Lookups Between Forms

When converting a form that contains a lookup to another form document, you'll be prompted to select the “target document” in which the information is “looked up.” Informed Filler allows you to select the existing 1.x document or look for the equivalent 2.x document (if one exists). For the best results, you should convert all “target documents” to 2.x before converting the form documents that link to them.

AppleScript

AppleScript lookups and form submission in 1.x forms must be altered so that any references to “Informed Manager®” are changed to “Informed Filler®.” If this is left unchanged, Informed Filler will display a warning message and the lookup will be cleared from the form template. Lookups of this type must be reconfigured by the form designer.

Sequelink

Sequelink lookups and form submission are not supported in version 2.x. When converting a form that is configured to use Sequelink, Informed Filler will display a message warning you that Sequelink is no longer supported, and the configuration will be cleared. Lookups and form submission of this type must be reconfigured by the form designer.

Form Tracking

When a 1.x form is converted, all existing tracking information is ignored and must be reconfigured by the form designer.