Informed Designer®

Design and Graphics

Contacting Support

Shana Corporation has made every effort to make Informed Designer 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 software.

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 Designer…' 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 and version 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 pour 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** and click on the section marked "Technical 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.

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.

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 Designer 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 free Informed Support Credits.Please refer to your Informed Licence Certificate for details on credits included with every Informed product.

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 specifi-

cally 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.

For even more help with Informed…

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: (510) 820-7967
Fax: (510) 820-2288
Internet: training@shana.com

Introduction

In this chapter:

Introduction

With the advancement of computer technology and forms software, electronic forms offer an efficient, intelligent, and secure alternative to the traditional paper based forms systems used in many organizations. Shana Corporation offers a complete cross-platform electronic forms solution for each step in the paper forms process—from the design stage to "fill, sign, and send."

Informed Designer and Informed Filler together provide everything you need to design, distribute, fill, route, approve, submit, and track electronic forms.

Informed Designer

Informed Designer gives you flexible tools to draw professional quality forms quickly and easily. With advanced drawing tools, powerful graphics manipulation commands, and precision control, you have all you need to produce appealing, picture perfect forms on your computer. Since forms are stored electronically, you now have more freedom to change your forms as your needs change. It's as simple as "point and click" to move a line or change a heading.

If you want to design paper forms to be filled out by hand or with a typewriter, then Informed Designer is all you need. You can design forms for in-house printing, or you can prepare camera-ready artwork for your commercial printer.

When you're ready to move from paper forms to an electronic forms solution, Informed Designer provides all the features you need to design intelligent form templates, ready to be filled out electronically with Informed Filler. Use Informed Designer's powerful tools and functions to make your forms automatically calculate, format, lookup, and check information for the person using Informed Filler. You can also configure forms for electronic signing by using digital signatures.

Although Informed Filler is required to fill out and save forms electronically, you can test your forms using Informed Designer's Test mode. This allows you to make sure that your formatting, calculations, and other intelligent features work properly without having to switch to a different application.

The Informed Designer Manual Set

The Informed Designer manual set is designed to provide you with a complete reference to the features and capabilities of Informed Designer. The manuals combine text and graphics to thoroughly document every aspect of the software. In addition to your Informed Designer Design and Graphics manual, the set also contains the following:

■ The *Informed Designer Getting Started Guide* provides you with information on installing and registering Informed Designer, and also describes the minimum hardware and software configurations required to use the Informed Designer application.

■ The *Informed Designer Forms Automation* manual provides a detailed reference to Informed Designer's forms automation features. You'll learn about the data handling capabilities of Informed. You'll also learn about using digital signatures, linking forms to other data sources, using formulas and functions, and how to configure form templates for tracking. This manual also discusses Informed's AppleScript scripting capabilities, and provides guidelines for distributing both new templates and new revisions of templates in an organization.

About This Manual

This manual includes a complete reference to Informed Designer's design and graphics features. General topics are organized in the following chapters:

■ Chapter 1, "Overview," provides an introduction to the concept of electronic forms. It describes the Informed products and explains how each application works and integrates with the others to provide a complete electronic forms solution. The flexible nature of Informed's architecture and how it can be customized to fit your organization's environment is discussed, and guidelines are provided for designing form templates for multiple platforms.

■ Chapter 2, "Manipulating Documents," teaches you about the different types of Informed documents. Instructions are provided on how to open, close, and save form template documents. You'll also learn how to change a document's password.

■ Chapter 3, "Setting Up a Form," shows you how to lay out a form on the printed page. You'll learn how to choose a paper size and the size of a form.

■ Chapter 4, "Pages of a Form," describes the different pages of a form, how to add and remove pages, and how to move from one page to another.

■ Chapter 5, "Drawing Environment," presents information about the drawing window and its visual attributes, as well as the various drawing aids including rulers, the grid, guide lines, and the view scale.

■ Chapter 6, "Drawing Tools," describes Informed Designer's drawing tools and how to use them to draw and manipulate objects. You'll learn about the different types of objects and the various options that control their appearance.

■ Chapter 7, "Changing an Object's Appearance," explains how to change an object's visual attributes by using a variety of Informed Designer's commands.

■ Chapter 8, "Manipulating Objects," shows you how to select, resize, and reposition objects with the Pointer tool. You'll also learn how to move objects between the pages of your template and from one template to another.

■ Chapter 9, "Using Graphics," describes how you can use Informed Designer's Import command to add artwork created in other applications to your template. The publish and subscribe (Mac OS only), and drag and drop features are also discussed.

■ Chapter 10, "Spell Checking," explains how to use Informed Designer's spell checking feature to ensure the accuracy of text on your form templates.

■ Chapter 11, "Printing Forms," describes how to print form templates with Informed Designer. You'll learn about various print options and how to set Informed Designer's printing preferences.

■ Chapter 12, "Mailing Forms," provides information on how to mail form templates with Informed Designer. You'll learn how to use the Send command and the Mail panel of the Preferences dialog box.

Conventions Used in This Manual

This section describes the conventions used in this manual to ensure that you can easily find and understand the information you need to perform specific tasks with Informed Designer.

Finding Information

In addition to the table of contents at the beginning of this manual, you'll also find a table of contents at the beginning of each chapter, listing the main sections in that chapter. The example below shows the table of contents for Chapter 12, "Mailing Forms."

Inside each chapter, the main topics are highlighted in a gray bar like the one at the beginning of this section, making it easy for you to quickly scan a page to find the topic of your choice. Subsections for each topic are highlighted with a large, bold font.

Notes

Throughout this manual, you'll see paragraphs of text highlighted in gray boxes with the label "Note" in the left margin. These notes contain important information such as warnings, reminders, and specific conditions to be aware of. The example below shows a typical note.

Note   Important information about Informed Designer appears in highlighted gray boxes like this one.

Commands and Control Names

When specific instructions on how to perform a certain task are given in this manual, commands are shown in a different typeface from the rest of the text. The name of the menu where the command is found is also given in each instance. For example, when learning how to use Informed Designer's spell check feature, you'll read the following text:

"To spell check your current template, choose `Check Template...` from the Spelling submenu under Edit."

The names of controls such as buttons and settings on dialog boxes are always shown in single quotes. For lengthy control names, this helps to differentiate the control name from the text that surrounds it. For example:

"When setting preferences for Informed Designer's spell checking feature, you can select the 'Always provide alternative spellings' checkbox."

Cross-platform Notes

Although this manual has tried to be platform neutral, the cross-platform nature of Informed requires special attention when learning about certain features of Informed Designer.

Throughout this manual you'll see screens of dialog boxes and windows. Some of the screens show Windows dialog boxes and windows, others are from the Mac OS. In cases where a dialog box or window is substantially different between the two platforms, both versions are shown.

When a specific feature of Informed Designer is only applicable to one platform (Windows or Mac OS), an icon depicting either the Windows or Mac OS platform is displayed in the left margin next to the description of the feature as shown below.

 The Windows Metafile format is not supported on the Mac OS.

1 Overview

In this chapter:

1 Overview

Like many software products, Informed Designer and Informed Filler consist of different components, including applications, documents, preference files, and special files and folders that serve special purposes. The organization of these components is flexible, allowing for custom configurations to better suit your specific needs.

This chapter describes the different components of Informed Designer and Informed Filler. Even though Informed Filler comes with its own manual set, an overview of its use is included here to make you are aware of issues that can help you better plan the design and deployment of electronic forms in your organization.

Designing a Form Template

The design of a form is called a form template. A form template is created using Informed Designer and stored in a form template document. You draw a form template much like you would using other graphics applications: by typing text and drawing graphical objects—like lines, boxes, and shaded areas—using a variety of drawing tools. You can use Informed Designer's built-in spell checking features to check the spelling of the text on your template.

Included on Informed Designer's tool palette are the Field tool and Table tool. Like other drawing tools, these tools draw objects that have a visual appearance. However, they also contain cells. A cell is the part of a field or table that accepts information—that is, the areas on a blank form in which information is entered.

Item No	Cost	Retail
2:Item	Cost	Retail

Comment
1:Comment

Field cell   Table cells
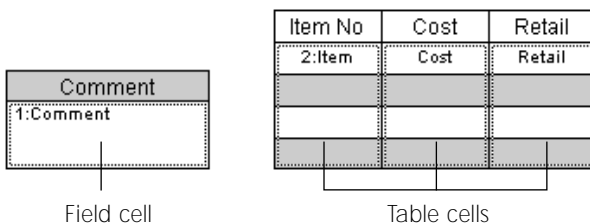
To aid the Informed Filler user when entering information, cells can be configured to use a variety of "intelligent" features. These include automatic formatting, calculations, error checking, lookups, choice lists, on-line help, and other features that make it faster and more accurate to enter information.

The design of a form template also involves linking the template to other services or systems used in your organization. For example, you might link a template to an Oracle database so that completed forms can be electronically "submitted," therefore eliminating the need to rekey the form information into other systems. The use of other services such as electronic mail for sending forms, and security services for signing forms with digital signatures can also be configured.

In addition to the appearance of the form template itself, and its "intelligence" features and links to other systems, you can also customize the menus that the Informed Filler user sees. By customizing menus, you can add custom menu commands with names that are more meaningful to the user. For example, you might change the "Add Record" command to "Add New Order" for a purchase order form. You can also simplify Informed Filler for the user by removing menu commands that are not relevant given the particular use of a form template. The electronic form begins looking more like a custom application rather than a custom form.

For forms that carry sensitive information, Informed provides many security features. First, you can protect any form template by assigning it a password. This prevents any other Informed Designer user from opening your templates and changing their appearance or logic. In addition, Informed Designer provides commands to authorize and verify templates using sophisticated public key encryption services. By authorizing a template, you are affixing your electronic stamp of approval to indicate that the template is valid for use within your organization. The Informed Filler user can verify a template at any time to check it authenticity.

Informed Plug-ins

Many of the services that Informed can link to are accessed via Informed plug-ins. An Informed plug-in is a file that contains the code that interacts with a particular service. For example, in order to mail a form template (with Informed Designer) or completed form (with Informed Filler) using a particular e-mail system, you must have the Informed mail plug-in for that e-mail system installed. Informed Designer and Informed Filler come with a variety of plug-ins for accessing e-mail systems, databases, signing services, and other services.

The table below lists the different types of plug-ins that Informed Designer and Informed Filler can take advantage of. Most plug-ins are used by Informed Designer for configuration purposes and by Informed Filler for providing the features themselves.

Informed Plug-ins

Plug-in Type	Uses
Template translation	Convert a form template to a different format.
Mail	Send form templates or completed forms using electronic mail.
Data access	Look up information from a database or data source. Submit completed forms to a database or data destination. Obtain unique form numbers from a database or data source. Track forms with a database or data source.
Signing	Authorize and verify form templates using Informed Designer. Sign and verify completed forms using Informed Filler.
Data translation	Import, export, or mail form data in a particular data format.

Informed Plug-ins (continued)

Plug-in Type	Uses
Distribution	Distribute form templates via a particular type of distribution center.
Spelling	Check the spelling of text on your template or the text entered on a completed form using an alternate spell checking system.

Informed plug-ins must be installed in a folder named "Plug-ins." The plug-ins folder must be located in your Informed folder.
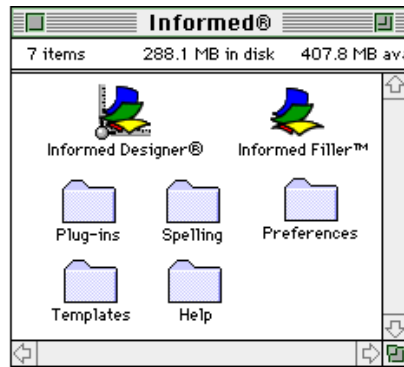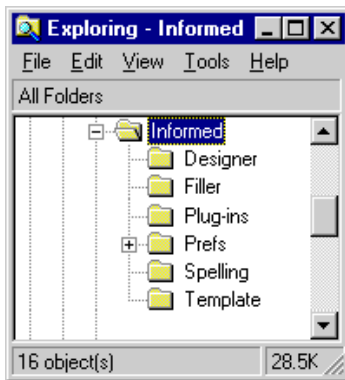
By using plug-ins, Shana can more easily support new types of services as they become available. For example, if a new electronic mail system were developed, Shana could easily enable the mailing of form templates and completed forms using that mail system by simply developing a new mail plug-in.

Distributing Form Templates

Once you've designed a form template, you need to make it available to the Informed Filler users in your organization. The way you do this depends on many things, including the size of your organization, the details of your networking environment, and the mobility of Informed Filler users.

In order to fill out a form of a particular type, Informed Filler must have access to the appropriate form template. There are two basic models for the distribution and storage of form templates. Form templates can be stored in a distributed manner—that is, distributed to, and stored locally on each Informed Filler user's computer, or they can be stored centrally on a file server and shared among all Informed Filler users.

If you distribute your form templates to each Informed Filler user's computer, these users have the freedom to take their computers anywhere and still have access to the templates they need. A network connection is not necessary to access templates. Furthermore, each time a user accesses a template, it is not at the expense of network bandwidth.

Centralized storage of form templates has converse advantages. Although access to templates requires a network connection, the distribution of a new revision of a template requires only that you replace the single template on the network file server. All Informed Filler users are instantly up to date since they all share the same form template. If form templates are stored locally on each Informed Filler user's computer, the distribution of a new revision requires that each user obtain the new version.

If you do not have the networking infrastructure or an available file server on which to make form templates available, or if many of the Informed Filler users in your organization are mobile users (that is, they are often disconnected from your network), you might consider storing form templates locally on each Informed Filler user's computer. That way, users will have access to the templates they need anytime, anywhere. If, on the other hand, your Informed Filler users have persistent access to a network file server, you might consider storing your templates there instead.

If you distribute your templates to each Informed Filler user's computer, you can rely on Informed's built-in forms distribution features to automate the distribution of new templates and revisions of existing templates. With Informed Designer, you configure one or more distribution centers. A "distribution center" is a place where you make your form templates available. A distribution center can be a file server or an FTP server. Since distribution centers are accessed via Informed distribution plug-ins, other types of distribution centers might be supported after this documentation is published.

Once you've configured a distribution center and added your templates there, Informed Filler users can then access the distribution center and obtain any template. From then on, Informed Filler will automatically check periodically for the user to see if a new revision of the template is available. When you need to change a template, you do so using Informed Designer and then update the distributed templates available at any of the distribution centers. Informed Filler users are automatically notified and the new revision replaces the previous version.

The Templates Folder

Regardless of whether Informed Filler users access templates on a shared file server or locally on their own computers, Informed Filler needs to know where the templates are located.

Templates are located in the templates folder. On Windows, this folder is named "TEMPLATE." On Mac OS, the folder is named "Templates." Regardless of platform, the templates folder, by default, is located in the Informed folder.
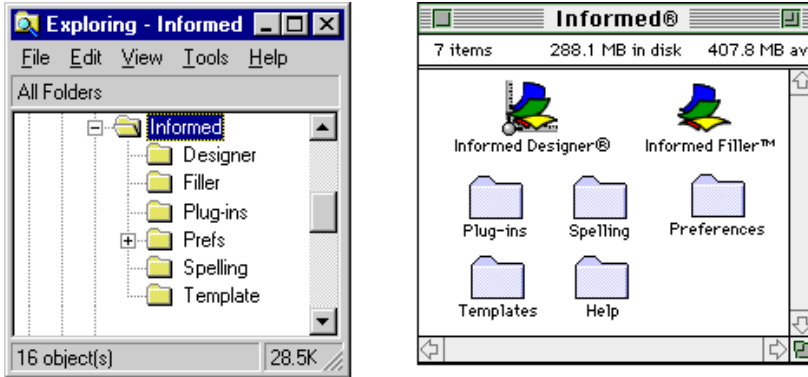
Informed Filler users can change the location of the templates folder using the Preferences command. This preference is also accessible using Informed Designer. For information about moving the templates folder, see "Moving Folders" later in this chapter.

In addition to the templates themselves, information about templates is stored in separate template preferences files. These files contain information that is personal to the Informed Filler user. For example, Informed Filler allows the user to list the information of multiple forms—or records—in a list format by displaying the Record List window.

The Informed Filler user can change which information is included on the Record List and its order and format according to specific needs and personal preferences. Each different Informed Filler user might want to format the Record List differently.

Since templates can be shared among many Informed Filler users, it is important that personal preferences, like the format of the Record List, be stored separate from the template itself. For this reason, Informed Filler maintains a separate preferences file for each template.

Template preferences files are stored in a folder named "TMPLPRFS" (Windows) or "Template Preferences" (Mac OS). This folder is found along with other items in another folder named "PREFS" (Windows) or "Preferences" (Mac OS). Like the templates folder, the default location for the preferences folder (that is, the folder that contains the template preferences folder) is inside the Informed folder.

The preferences folder contains other items in addition to the template preferences folder. The Informed Filler user can store the preferences folder at its default location or at any other location. For information about the other items found in the preferences folder, see "Where Everything Goes" later in this chapter. For information about moving the preferences folder, see "Moving Folders."

Filling Out Forms

While using Informed Designer, you can store form template documents anywhere you like. However, when you distribute templates to Informed Filler users, they must be stored in the templates folder. To the Informed Filler user, form templates are like hidden files that need not be manipulated directly. Instead, Informed Filler automatically locates and opens templates when needed as the user fills out new forms and opens previously filled out forms.

The information entered to fill out a form is stored in a form data document. When the user requests a new data document, Informed Filler presents a list of available templates to choose from. The user selects a template and is presented with a blank form, ready for filling. A form data document can store the information for one completed form, or many completed forms. A single completed form is called a record. For casual users who fill out very few forms, it is easiest to store one record in each data document. For users who fill out many forms, storing all records for a particular type of form in one data document allows the user to take advantage of Informed Filler's powerful database features.

While filling out forms, the Informed Filler user benefits from the powerful data entry and "intelligence" features that you configure while designing the form template. Features like automatic formatting, calculations, error checking, lookups, choice lists, and on-line help make it faster and more accurate to enter information.

The entire processing of a form is automated using Informed Filler, from the initiation of a new form, to the approval and submission of the completed form. After entering information, the user signs the form electronically using a digital signature. A digital signature provides a means of later verifying the identity of the person who signed the form and the integrity of the signed data.

If approval of the form is necessary, the user sends the completed form to the appropriate person or place using electronic mail. The process of entering and signing information, sending the form to other people, and, if necessary, approving the form continues, until the form is complete and approved. The completed form is then submitted electronically or printed.

The flexible nature of Informed makes it ideal for automating both simple and complex forms processes. With the ability to easily exchange information between different forms and different applications, you can design a comprehensive "forms system" that combines and integrates many different types of forms and different applications.

Form Tracking

For many types of forms, processing involves routing the form from person to person for approval purposes. Informed's built-in form tracking capabilities make it easy for the Informed Filler user to find out where a particular form is in the routing process.

Whenever the user sends a form, Informed Filler connects to a central tracking database and records information, including the sender and recipient names, the form identification numbers (that is, the type of form and a unique number, such as an invoice number or purchase order number), and the date and time that the form was sent. You can customize a form template to track other information as well.

At any time, the user can request the tracking status for any completed form. Informed Filler connects to the tracking database and retrieves the tracking information for the particular form. This information is displayed in a dialog box for the user to view.

Informed Filler can track forms using a variety of databases. That way you can take advantage of the existing database services that are already available in your organization. However, if an appropriate database is not available and you use Mac OS compatible computers in your organization, you can use Informed Tracker, the form tracking server that comes with Informed Designer.

Form Numbering

Many forms require unique identification for tracking and audit purposes. For example, invoices contain invoice numbers and purchase orders contain PO numbers.

The assignment of form numbers must be controlled to ensure that two different forms do not contain the same number. Informed provides a special feature for this purpose. Any cell can be configured to generate a new number at the user's request, or automatically whenever a new blank form is created. Form numbers can be obtained from within the form template itself, or from another database or data source.

Like form tracking, lookups, and form submission, Informed Filler can access a variety of databases for purposes of generating form numbers. If the appropriate database services are already available in your organization, you might take advantage of these services for form number generation.

If the Informed Filler users in your organization use Mac OS compatible computers, you can also link form number cells to Informed Number Server, a Mac OS application designed specifically for generating form numbers. Informed Number Server is included with Informed Designer. Informed

Filler uses Apple events, the IAC (Inter-Application Communications) capabilities of the Mac OS to communicate with Informed Number Server.

Where Everything Goes

When you install Informed Designer or Informed Filler, you are asked to specify a location for the "Informed" folder. The Informed folder contains the Informed Designer and Informed Filler applications, as well as other important components. The contents of the Informed folder following installation is pictured below.
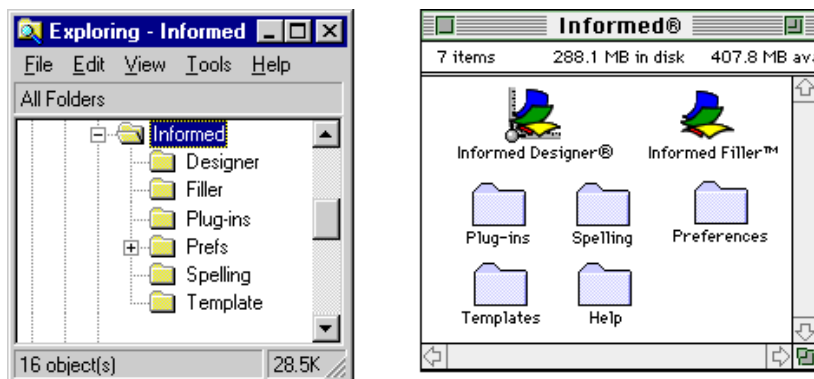
The Informed folder is a special folder. It contains certain items that are required in order for Informed Designer and Informed Filler to work properly. Some of the items in the Informed folder can be moved to different locations. The following sections describe the purpose of each item and the possible storage locations. For information about moving the Informed folder to a different location, please see "Moving Folders" later in this chapter.

Applications

On Windows, the Informed Designer and Informed Filler applications are each comprised of the executable files ("DESIGNER.EXE" and "FILLER.EXE") and other associated files. These files are found in the "DESIGNER" and "FILLER" folders. On the Mac OS, these applications are single files and are named "Informed Designer®" and "Informed Filler™".

The DESIGNER and FILLER folders (Windows) and Informed Designer® and Informed Filler™ applications (Mac OS) can be moved to any location you like. You can store the applications locally on your computer, or you can access them from a file server or applications server.

Plug-ins

The plug-ins folder contains Informed plug-ins and associated files. Informed plug-ins provide access to external services such as electronic mail systems and databases. The plug-ins folder must be located inside your Informed folder. See "Informed Plug-ins" earlier in this chapter for more information about plug-ins.

Templates Folder

The templates folder ("TEMPLATE" on Windows, "Templates" on Mac OS) contains the templates available for use with Informed Filler. The location of the templates folder can be changed using Informed Designer or Informed Filler's Preferences command. For more information, see "The Templates Folder" earlier in this chapter.

Preferences Folder

The preferences folder ("PREFS" on Windows, "Preferences" on Mac OS) contains the items pictured below.
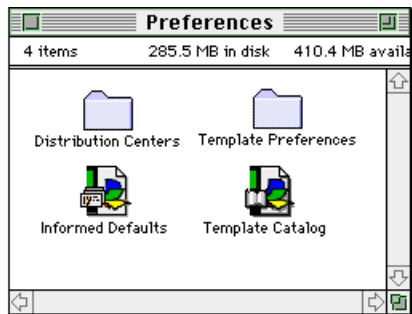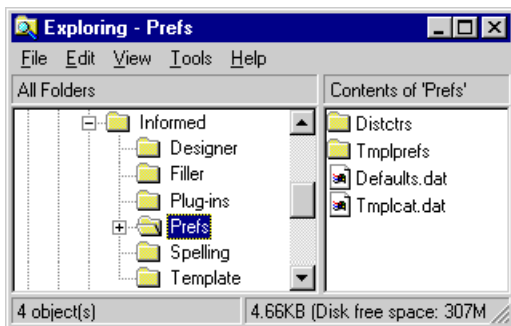
The template catalog ("TMPLCAT.DAT" on Windows, "Template Catalog" on Mac OS) is a file that is maintained by Informed Filler. It contains a list of all of the templates contained in the templates folder. Informed Filler uses the template catalog to quickly find the appropriate template when the user opens a data or package document.

The template preferences folder ("TMPLPRFS" on Windows, "Template Preferences" on Mac OS) contains template preferences files. Template preferences files are maintained by Informed Filler. Each file contains user-specific preferences for the template of the same name. The purpose of template preferences is described earlier in "The Templates Folder."

The Informed defaults file ("DEFAULTS.DAT" on Windows, "Informed Defaults" on Mac OS) is also maintained by Informed Filler. Like template preferences files, the Informed defaults file contains user-specific information that is associated with one or more templates. As explained in Chapter 3, "Filling Out Forms", of your *Informed Filler User's Manual*, the Informed Filler user can

memorize a cell value so that the value is automatically entered each time a new blank form is created. The memorized value is stored in the Informed defaults file.

The distribution centers folder ("DISTCTRS" on Windows, "Distribution Centers" on Mac OS) contains the distribution center profiles needed to access the distribution centers in your organization. You create distribution center profiles using Informed Designer. For detailed information about distribution center profiles and Informed's built-in forms distribution capabilities, please see Chapter 8, "Form Template Distribution and Revision," in your *Informed Designer Forms Automation* manual.

The preferences folder can be located anywhere you like. For information about moving the preferences folder to a different location, please see "Moving Folders" later in this chapter.

On-line Help

If you choose to install on-line help, installation will include the necessary help files. On Windows, the help files are installed in the DESIGNER and FILLER folders. On Mac OS, you'll find a folder named "Help" inside the Informed folder. The help files must remain in these locations.

Spell Checking

If you choose to install Informed Designer's spell checking option, you'll see a folder named "Spelling" in your Informed folder. The spelling folder contains the spell checking dictionary and related files. The spelling folder must remain in the Informed folder.
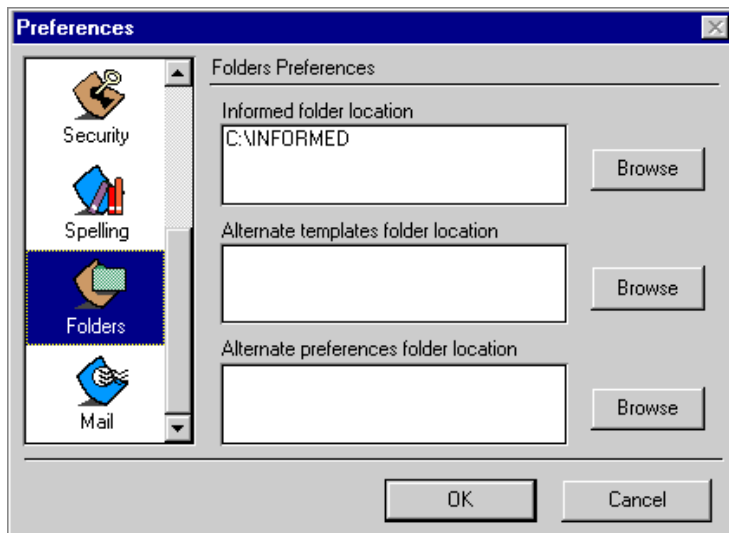
Informed Preferences

In addition to the items installed in the Informed folder, installation will also place a preferences file among your system related files. On Windows, this file is named "INFORMED.INI" and is found in your Windows folder. On the Mac OS, the file is named "Informed Preferences" and is found in your system's Preferences folder.

The Informed preferences file contains information necessary for Informed Designer and Informed Filler to find items such as the Informed folder, the templates folder, and the preferences folder. Other preferences associated with either application are also stored in the Informed preferences file.

Moving Folders

When you install Informed Designer or Informed Filler, the Informed preferences file is automatically updated with the locations of your Informed folder, templates folder, and preferences folder. When you run the Informed Designer or Informed Filler applications, they read these locations from your Informed preferences file in order to locate the appropriate files.

You can move the Informed folder, templates folder, or preferences folder to any location. However, when doing so, you must specify the new location using Informed Designer or Informed Filler's Preferences command. Choose **Preferences...** from the Edit menu and click the Folders icon to display the Folders preferences panel.

The location of the Informed folder is specified in the 'Informed folder location' text box. The location of the templates folder and preferences folder is assumed to be inside the Informed folder unless otherwise specified in the 'Alternate templates folder location' and 'Alternate preferences folder location' text boxes. That is, if these text boxes are blank, Informed Filler will look for these folders inside the Informed folder. If you want to move either of these folders to a different location, enter the new location in the corresponding text box.

You can enter a new location by typing in a text box or by clicking the adjacent 'Browse' button. Clicking 'Browse' displays a dialog box allowing you to navigate through the different folders or directories of any available volumes to select the desired location.

If you're using a Windows compatible computer, clicking 'Browse' displays the following dialog box:
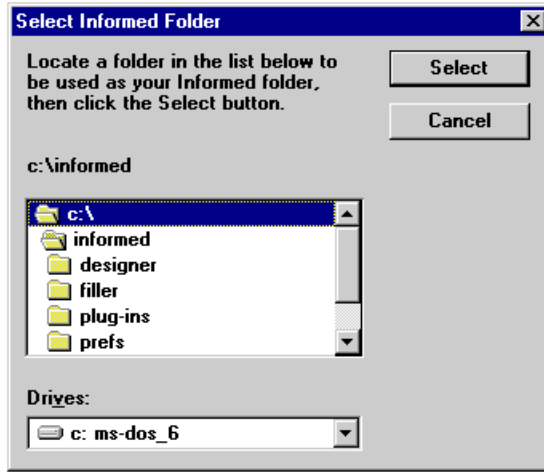
Select a folder in the scrolling list, then click 'Select.'

If you're using a Mac OS compatible computer, you'll see the dialog box shown below.
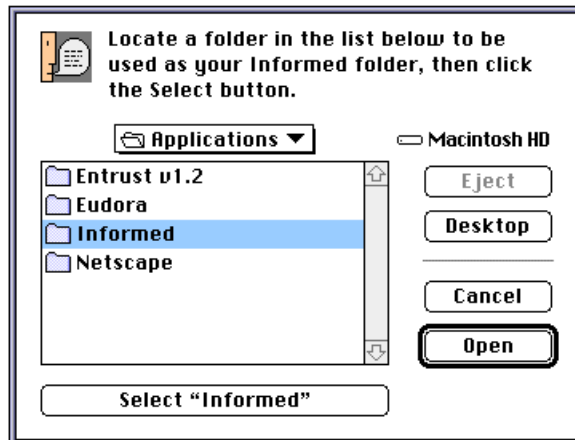
Locate a folder in the scrolling list, then click the 'Select' button.

While using Informed Designer or Informed Filler, if any of the Informed, templates, or prefer-
ences folders cannot be found at their expected locations, you'll see a dialog message indicating so.

The " Informed " folder location is not specified or is invalid. Do you wish to locate it?

| Cancel | Locate |

You can look for the missing folder or cancel the operation. If you click 'Look,' a dialog box appears allowing selection of the folder in its new location. This dialog box is the same one that appears when you click any of the 'Browse' buttons on the Preferences dialog box (see earlier).

Designing for Multiple Platforms

Informed Designer and Informed Filler are designed for seamless inter-operation across the Windows and Mac OS platforms. Both the design of form templates, and, most importantly, the distribution, filling, routing, approving, submitting, and tracking of forms can occur on either platform. Forms can be filled on Windows and Mac OS computers regardless of the platform that was used to design the form template.

Informed Designer and Informed Filler create and manipulate documents of different types. Informed Designer creates form template documents whereas Informed Filler creates form data and package documents. These different types of documents are platform neutral. This means that if a document is created using Informed Designer or Informed Filler on one platform, that same document can be transferred to the other platform and opened directly. No translation is necessary, nor is it necessary to have two versions of a form template, one for each platform.

Since Windows and Mac OS are two different operating systems, the details of how certain features and capabilities work may differ. These differences, in some cases, result in special considerations or guidelines that should be followed when designing form templates for use on both platforms. The remaining sections of this chapter detail these guidelines. If you intend to design form templates for use on both Windows and Mac OS computers, you should read these sections.

File and Folder Names

One of the biggest differences between the Windows and Mac OS operating systems is the format of file and folder names. (The term "folder" is used in place of the DOS term "directory.")

For Windows version 3.11 and earlier, a filename is made up of a name and an extension. A folder consists of a name only. A file or folder name cannot exceed eight characters. The extension is up to three character long and often identifies the type of file or document. On the Mac OS, a filename can be up to 31 characters long and a file's type is not specified as part of the filename itself.

This difference in file and folder naming conventions means that special files and folders are named differently on the different platforms. For example, the Informed preferences folder is named "PREFS" on Windows and "Preferences" on the Mac OS.

If you save and name a new template document using a Mac OS computer, and you intend to distribute that template to both Mac OS and Windows users, be sure to name the file according to the Windows file naming conventions. That is, use the format filename.ext where filename is the name of the template (and should not exceed eight characters in length), and ext is "ITP," the file extension for template documents.

Fonts and Type Styles

Different computers can have different fonts installed. When drawing a form template, be sure to use only those fonts that are installed on all Informed Filler users' computer's, both Windows and Mac OS. Furthermore, use fonts that are named exactly the same on both platforms, and whenever possible, use TrueType fonts or fonts that are based on the same font technology on both platforms.

Even when you use a font that's available on both platforms, you may occasionally notice slight differences in the size and spacing of text. These slight differences can cause text to wrap differently on the two platforms.

Text can wrap differently between...

Mac OS...   ...and Windows

| Reason for Sales Trip |

| Reason for Sales Trip |

To minimize word wrap differences, you should try to leave some space between the end of the text and the right edge of the object.

Mac OS   Windows

| Reason for Sales Trip | | Reason for Sales Trip | Leaving enough space between the end
                                                                of the text and the right edge of the
                                                                object eliminates the wrap difference.

After drawing a form template, and before distributing it to Informed Filler users, you should view it on both platforms to check for font consistency.

Informed Designer allows you to modify the appearance of text by selecting different type styles such as bold, underline, and italic. Certain type styles are available only on the Mac OS. They include: outline, shadow, condensed, and extended. If you draw text with one of these styles using Informed Designer on the Mac OS, the unsupported style will be ignored when the text is displayed by Informed Designer or Informed Filler on a Windows computer.

Importing Graphics

To include graphics created with other applications on your templates, Informed Designer allows you to import graphics using its Import command. Informed Designer can read graphics in files of the following formats:

- Windows bitmap
- Windows metafile
- Macintosh PICT
- Encapsulated Postscript (EPS)

All formats with the exception of Windows metafile can be imported using Informed Designer on either platform. Windows metafile can be imported, viewed, and printed only on Windows computers. If your templates will be used by Informed Filler users with Mac OS computers, you should not import graphics in the Windows metafile format. Use a different format instead.

Links to Other Systems

Many of Informed's capabilities rely on services provided by the operating system or other products or systems. The use of these capabilities often requires configuration using Informed Designer.

The following capabilities rely on external services:

- lookups to other databases or data sources
- form submission to other databases or data destinations
- obtaining form numbers from other databases or data sources
- form tracking with other databases or data sources
- authorizing templates and signing forms with digital signatures
- suggested routes for sending forms with electronic mail
- distribution of form templates via different types of distribution centers

Most of these services are available on both the Windows and Mac OS platforms. However, the details of accessing a service from each of the platforms might be different. For example, suppose that you're linking a lookup to an Oracle database. For Mac OS users, you might be accessing the Oracle database using the Mac OS Oracle client software (SQL*NET), whereas on Windows you might be using ODBC instead. The specific parameters needed to connect to the database, therefore, might be different depending on which platform the Informed Filler user is using.

Informed Designer automatically knows when a feature requires separate configuration on each platform. The Lookup dialog box, for example, contains a drop-down list with the items 'This platform' and 'All platforms.'
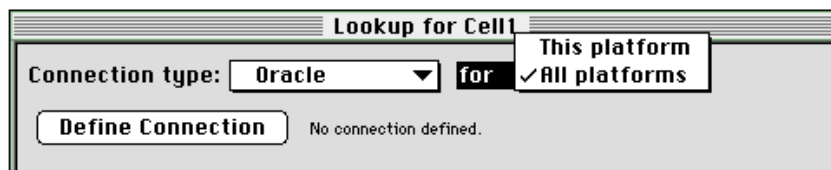
For each different type of database or data source that you can link to, Informed Designer knows if the configuration details are the same or different for the two platforms. If they're the same, the 'All platforms' option will be available and the lookup you configure on one platform will function on both.

If the configuration details are different for each platform, 'This platform' will be the only choice available in the drop-down list. For accessing these types of databases, you have to configure the lookup on one platform, then move the form template to the other platform and repeat the configuration. Informed Designer stores the configuration for both platforms. Informed Filler uses the configuration that corresponds to the user's platform.

Although certain features require that configuration be done twice, once on each platform, the resulting form template document is still a platform neutral document. That is, a single version of the template will work with Informed Filler on both platforms. Informed Filler automatically uses the configuration information that's appropriate for the user's platform.

Scripting

Chapter 12 of your *Informed Designer Forms Automation* manual provides an overview of Informed's AppleScript scripting capabilities and describes in detail how you can customize forms using AppleScript. AppleScript is a Mac OS scripting system and is therefore not available on Windows. Any AppleScript scripts that you attach to a template will not be available to Windows Informed Filler users.

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 form template 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 you create using Informed Designer. It contains all the intelligent features of the form as well as its graphic elements. The Informed Filler user fills out a form by entering values in the cells on the template. In order to use a template with Informed Filler, the user must place the template in his or her templates folder.

Form Data Documents (.IFM)

A form data document contains only a form's data. When the Informed Filler user fills out forms, the information entered is stored in a form data document. A single form data document can store one or more completed forms. Each completed form is stored as a record. Each form data document also contains a template ID. The template ID identifies which template is needed to display and manipulate the form data.

Package Documents (.IPK)

A package document combines a form template and its associated data. It is created using Informed Filler and is used primarily when a user mails a form to someone who doesn't have the corresponding template. When the Informed Filler user opens a package using Informed Filler's Open command, the data document and template (if needed) are extracted. If the user's templates folder does not already contain the template, the one extracted from the package is copied there and opened. The data document is opened as an untitled document that can later be saved in a new file.

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.

Creating a New Template

The New command creates a new form template.

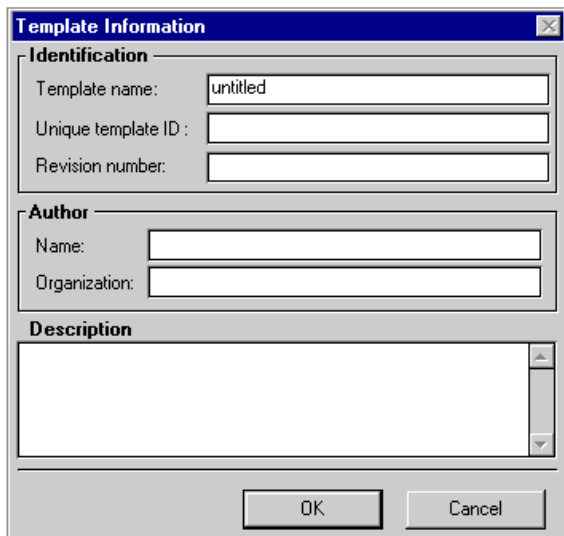To create a new template, choose **New** from the File menu. A new untitled window appears.
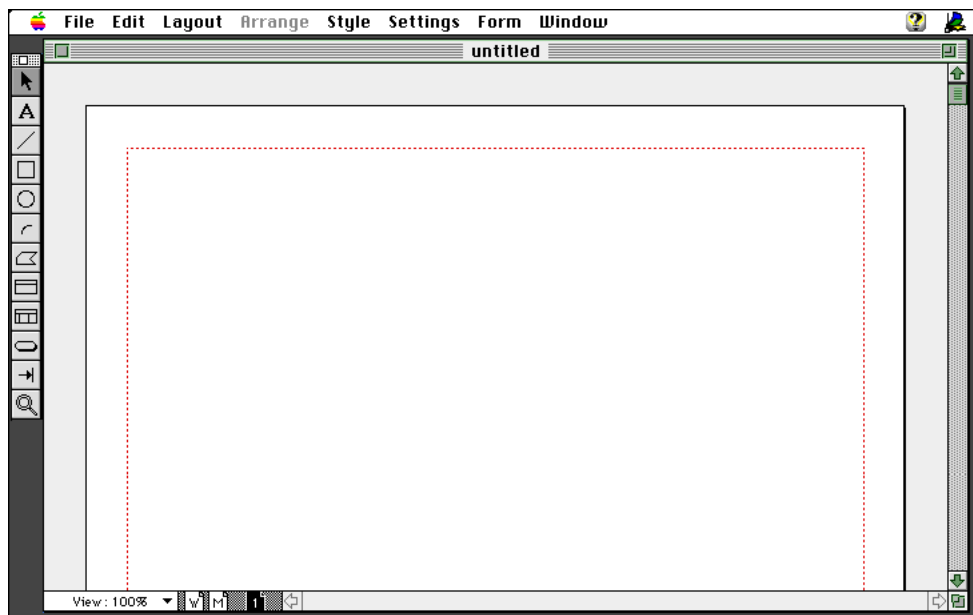
You can create as many documents—or open as many existing ones—as you like. You are only limited by the amount of available RAM (random access memory) in your computer.

Each new document is assigned a set of default settings. These defaults refer to the current settings of the object tools; that is, they determine what new objects will look like. For example, the default font for the text tool is Arial (Windows) or Helvetica (Mac OS). Similarly, the line tool has a default width of one point. See Appendix A for a complete list of default settings.

Template Information

Since templates and data documents are separate files, there needs to be a way to identify which template is used for a particular data document. Informed Designer's Template Information command allows you to enter information that identifies a particular template. This information includes a template name, template ID, and revision number.

To enter or view template information, choose **Template Information...** from the Form menu. The Template Information dialog box appears.

Type a name for the template in the 'Template name' text box. The name that you enter can be more descriptive than the filename of the template. This can be helpful for templates that are stored and accessed using Windows computers where file names are limited to a length of eight characters.

The Unique template ID provides a means of linking form data documents to form template documents. When the Informed Filler user creates a new data document, in addition to the form data itself, the template ID of the template used is also stored in the data document. When Informed Filler opens a data document, the template ID is used to identify and locate the correct template to use.

To enter a template ID, type a value in the 'Unique template ID' text box. It is recommended that you assign a meaningful ID. For example, if you create an expense form template for claiming expenses in US dollars, you might assign a template ID of 'Exp-USD-96,' whereas a template for claiming Canadian dollar expenses might be assigned 'Exp-CDN-96.' If you don't specify a template ID, Informed Designer assigns a random number for you the first time you save the template.

The revision number further identifies the template. If you don't enter a value in the 'Revision number' text box, Informed Designer assigns the revision number "1" when you save the template for the first time.

Note   The template ID and Revision number provide a means of coordinating the distribution of new templates and new revisions of existing templates using Informed's built-in forms distribution capabilities. For details on these capabilities and the importance of the template ID and revision number, see Chapter 8 of your *Informed Designer Forms Automation* manual.

The Author section of the Template Information dialog box contains two text boxes: 'Name' and 'Organization.' You can use these text boxes to store information that identifies the designer of the form template.

Note   Chapter 7 of your *Informed Designer Forms Automation* manual explains how you can authorize and verify templates to ensure their authenticity. It is important to note that entering your name in the Author section of the Template Information dialog box is not the same as authorizing a template by using the Authorize command.

You can also enter a brief description of the template in the 'Description' text box. Entering a description of the template can be helpful to both the Informed Filler user and other form designers who might have to revise the template in the future.

Changing the Password

As a security measure, you can use passwords to prevent other users from opening and changing templates with Informed Designer. If a template has a non-blank password, you'll be prompted to enter it when you attempt to open the template using Informed Designer's Open command (see "Opening a Template" later in this chapter).

To change the password for a template 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.
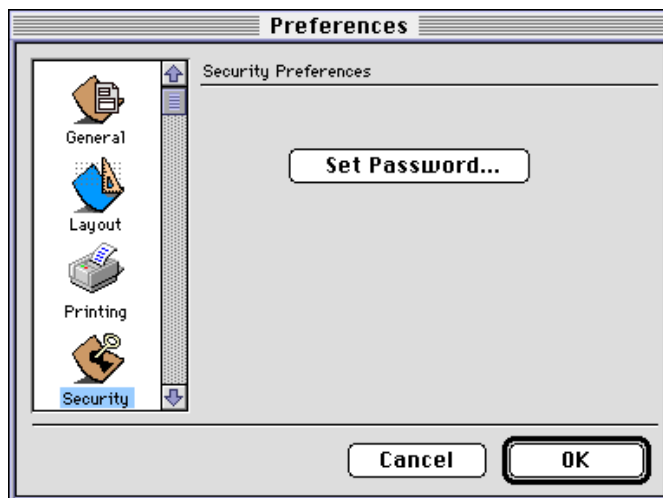
Click the 'Set Password' button to display the Set Password dialog box.

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 a password already exists, you must enter that password in the 'Old password' text box. 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 Designer will display a message confirming that you have successfully changed the password.

Opening a Template

The Open command opens an existing template.

To open a template, choose **Open...** from the File menu. If you're using a Windows compatible computer, you'll see the standard Windows Open dialog box.
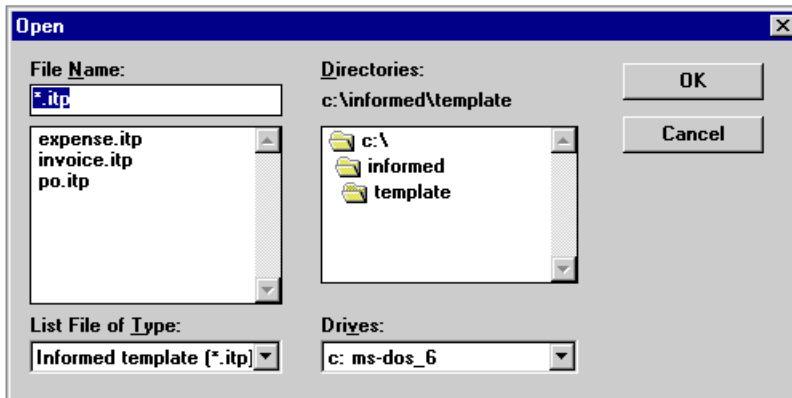
If you're using a Mac OS compatible computer, you'll see the standard Mac OS Open dialog box.
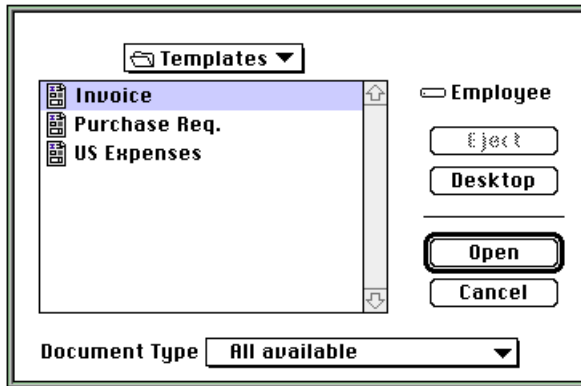
Select a template to open, then click 'Open.'

Note   You can make the Open dialog box appear automatically when you run Informed Designer by holding down the Alt (Windows) or Option (Mac OS) key after double-clicking the application icon.

If the template you've selected has a non-blank password, you'll be asked to enter it.
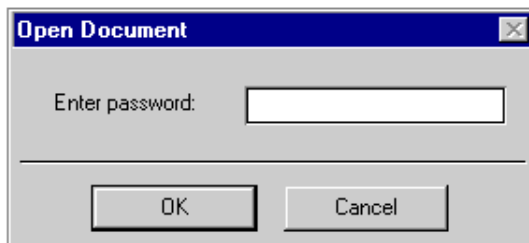
Informed Designer will not open the template until the correct password has been entered.

Note   Passwords are case sensitive. This means that upper and lower case letters are considered to be different. Be sure to check whether or not your Caps Lock key is pressed.

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

While the template is opening, Informed Designer displays progress information at the lower-left corner of the drawing window.

Reading: 90 % ▼
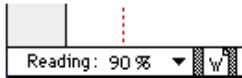
After a template is opened, its name appears in Informed Designer's Window menu.

Window
Tile
Cascade

✓ Invoice
Purchase Req.
US Expenses
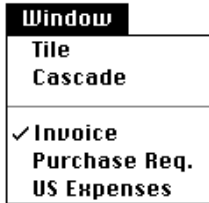
A checkmark appears next to the name of the active template. To make another template the active template, simply click its window, or choose its name from the Window menu.

Missing Fonts

When you open a template, Informed Designer 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 you draw a template on one computer, then transfer it to different computer, that computer might not have the fonts that you originally used to draw the template.

If Informed Designer detects that at least one font is missing from your system, you'll see the following dialog box.

Missing Fonts

Script MT Bold
New Century Schlbk

These fonts are used in this template but are not available in your system. They should be added in order to display the template properly

OK
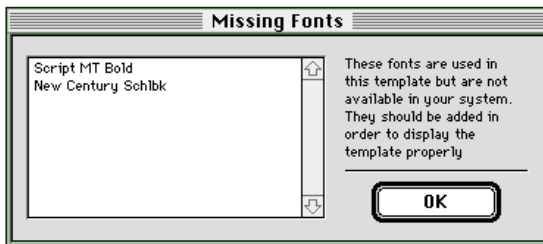
Any text that uses one of the listed fonts will display using a font that's available in your system.

Opening a Locked Template

If the template you choose to open is locked, or resides on a locked disk, Informed Designer will warn you.
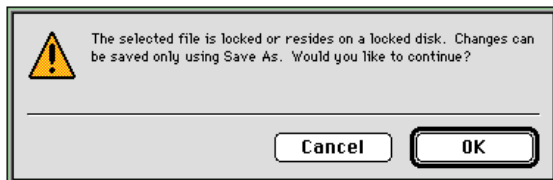
If you continue, the template will be opened as usual. However, you won't be able to save any changes (the Save command will always be disabled). To save any subsequent changes made to the template, choose **Save As...** from the File menu to save the template in a new file.

Opening a Template in Use

A template document that is presently in use cannot be opened. Most commonly, if a template is already in use, you've probably already opened it yourself in Informed Designer or Informed Filler. If you try to open a template already in use, you'll see a dialog indicating so.

You cannot open a template that resides on a file server and is being used by another user. If you attempt to do so, a dialog appears giving you the options of waiting until the template is available for use, or of canceling the Open command.

Closing a Template

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

To close the currently active template, 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.
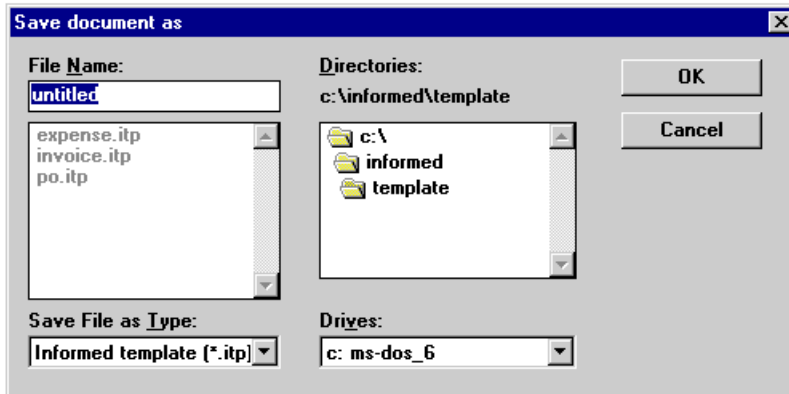
Closing a New Template

If you're closing a new template that has not been edited, the document is closed immediately.

If you're closing a new template to which changes have been made, Informed Designer will warn you to save the changes:
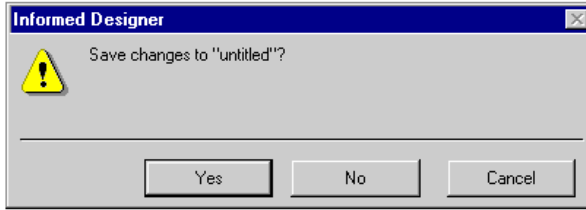
If you're using a Mac OS compatible computer, the button names on this dialog box will be differ-
ent. Instead of 'Yes', you'll see 'Save', and instead of 'No', you'll see 'Don't Save.' Clicking the
'Yes'/'Save' button displays the Save dialog box. If you're using a Windows compatible computer,
you'll see the standard Windows Save dialog box.

Type the name of the new template and select the 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.
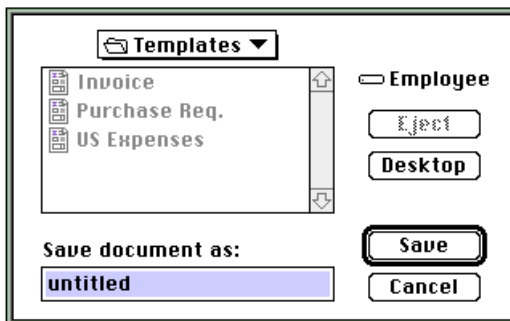
Type the name of the new template and select the location to store it, then click 'Save.' Clicking
'Cancel' instead cancels the Close command and your template document remains open.

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

Clicking 'No'/'Don't Save' closes the template without saving any of the work you've done. Clicking 'Cancel' cancels the Close command and your template remains open.

Closing an Existing Template

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

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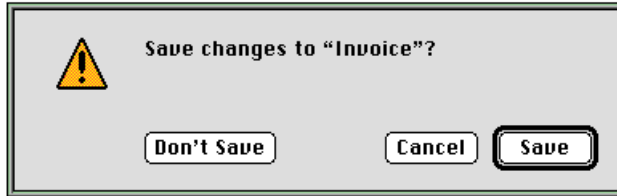
If you're using a Windows compatible computer, the button names on this dialog box will be different. Instead of 'Save', you'll see 'Yes', and instead of 'Don't Save', you'll see 'No.' Click 'Yes'/ 'Save' to save the changes and close the template. Click 'No'/'Don't Save' to discard the changes and close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

Saving a Template

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

To save a template, select **Save** from the File menu. If the template 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 template for the first time, you'll be asked to name the template 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 (see "Closing a New Template" earlier).

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

If a document with the name you specify already exists at the selected location, Informed Designer will warn you with options to replace the existing document or cancel the Save command.
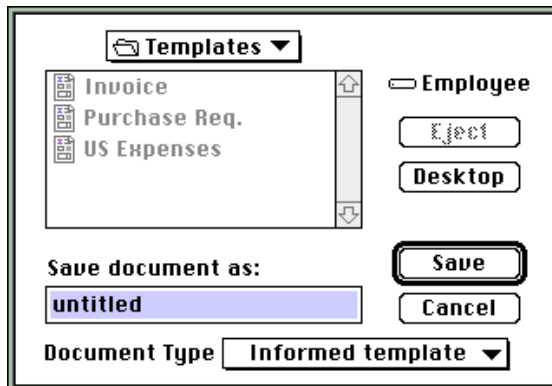
Saving Copies of a Template

Use the Save As command to save a copy of a template with a different name, or at a different location.

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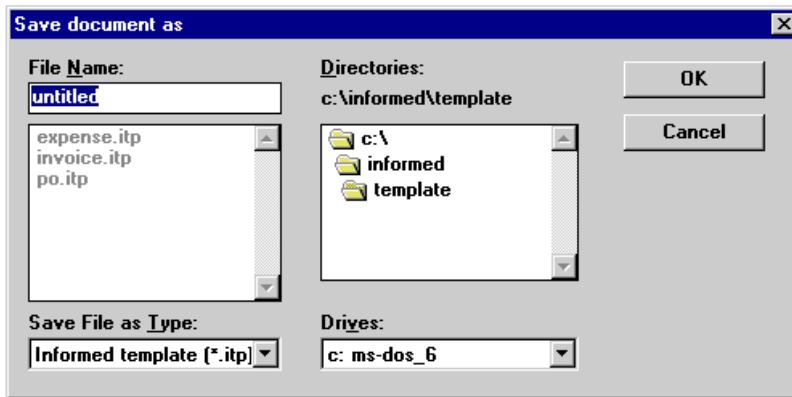
If you're using a Mac OS compatible computer, you'll see the following dialog box.

The same options apply as when saving a new document. After saving the new template document, Informed Designer will automatically close the original template. The new document will remain open for editing.

Template translation plug-ins allow you to save a template in different formats. If you have any template translation plug-ins installed in your plug-ins folder, you'll see those options in the 'Document Type' drop-down list.

3 Setting Up a Form

In this chapter:

3 Setting Up a Form

In this chapter, you'll learn how to lay out a form on the printed page. You'll learn how to choose a paper size and the size of a form. As well, you'll also learn how to replicate a form many times across a single page.

Informed Designer also supports multiple page and multiple part forms. For information about these and other page related features, see Chapter 4, "Pages of a Form."

Overview

When setting up your form template, you need to specify the paper size that your form will print on as well as the size of the form itself. The size of a form is called the *drawing size* or the *drawing area size* and it's specified independently of the paper size. This allows you to create and print forms of any size (up to a maximum of 17" by 17") regardless of the paper sizes available on the printer that you're using.

The minimum and maximum drawing sizes are 0.5 and 17 inches square, respectively. The allowable paper sizes vary from printer to printer.

When the drawing area size exceeds the printable area of the selected paper size, Informed Designer will automatically tile the form onto multiple sheets of paper as necessary. This process is illustrated below.

Tabloid drawing area
(11" by 17")

Four 8.5" by 11" sheets
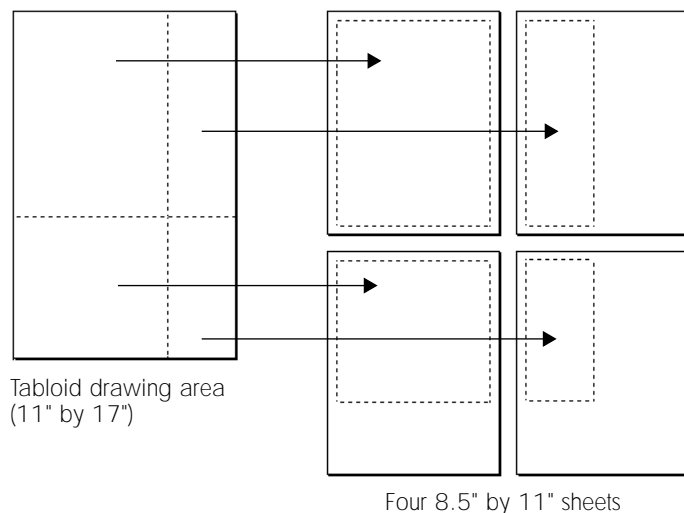
The dashed lines on the above tabloid form divide it into four sections, each of which will print on the printable area of one 8.5" by 11" page. Four 8.5" by 11" pages are required to print the entire tabloid form.

Tiling gives you the ability to print large forms on printers that don't support large paper sizes. By tiling, either automatically or manually, you can print the entire form or only parts of it onto smaller sheets.

The following sections explain the Page Setup and Drawing Setup commands. You use these commands to choose the paper size and drawing size. As well, they allow you to control various printer options.

Page Setup

The Page Setup command sets the standard page options supported by your printer. Use it to choose the paper size and to control printing related options such as page orientation.

Note   If the form you're designing will be used on both Windows and Mac OS computers, you must select your Page Setup settings once on each platform. Changing the Page Setup (the orientation, for example) of a form on one platform (Windows or Mac OS) does not change it also for the other platform (Mac OS or Windows).

Before setting the page options, make sure that your printer is properly set up and connected to your computer. Also make sure that it's the currently chosen or active printer for your computer. Then choose **Page Setup…** from the File menu. You'll see the Page Setup dialog box associated with your printer.

If you're using an HP LaserJet (or compatible) printer, you'll see a dialog box similar to the one shown below.
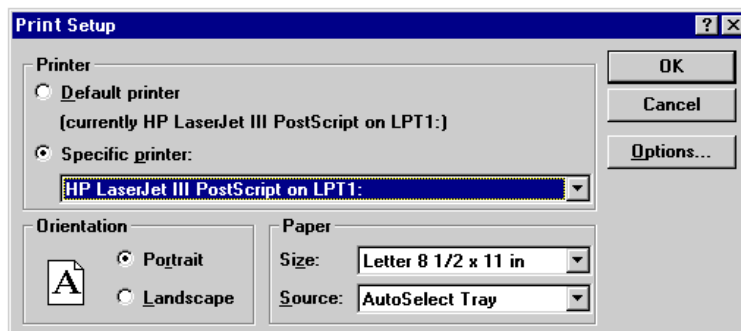

If you're using an Apple LaserWriter printer (or a printer that uses Apple's LaserWriter driver), you'll see a dialog box similar to this:
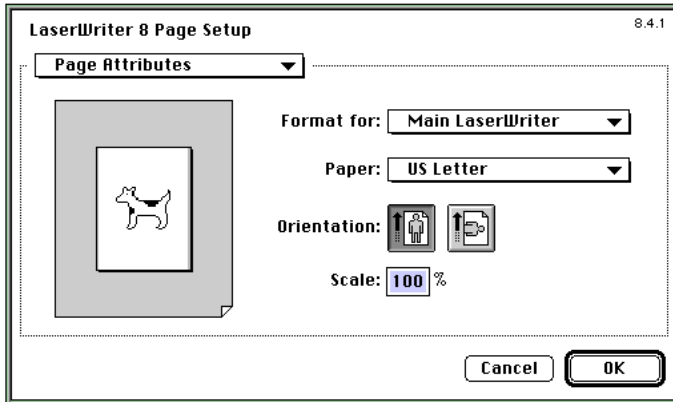
If your drawing size is larger than your paper size, then Informed Designer will tile your form onto multiple sheets when it prints your form. You also have the option to manually tile only a particular area of your form. Both the drawing window and the Drawing Setup dialog box visually indicate the currently selected paper size. See "The Drawing Window" and "Drawing Setup" for more information.

If you're using an Apple ImageWriter printer, choosing the Page Setup command will show a dialog box similar to this:
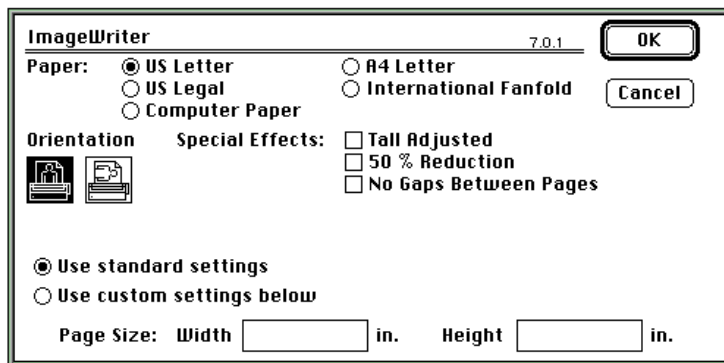
When using an ImageWriter printer you can specify custom paper sizes. This is necessary when you print onto pre-printed forms or labels of non-standard sizes. Setting the custom paper size will ensure that the proper length of paper is fed through the printer each time a form is printed.

If you choose the 'Use standard settings' option, the paper size is determined by your selection of a standard size (top of the dialog box). If you want to use a non-standard size, click the 'Use custom settings below' choice, then enter the custom width and height in the text boxes provided. The values that you enter are expressed in the current ruler units and are independent of whether you choose landscape or portrait printing. That is, even if you select landscape printing, you still enter the width and height of the physical sheet that exits the printer.

The size of a pixel (one dot) on the Mac OS screen is slightly wider than the size of a pixel on the ImageWriter printer. As a result, the width of a printed object appears slightly narrower than its corresponding size on the computer screen. For example, a horizontal line that measures 8 inches on the screen will be approximately 7.5 inches long when it's printed.
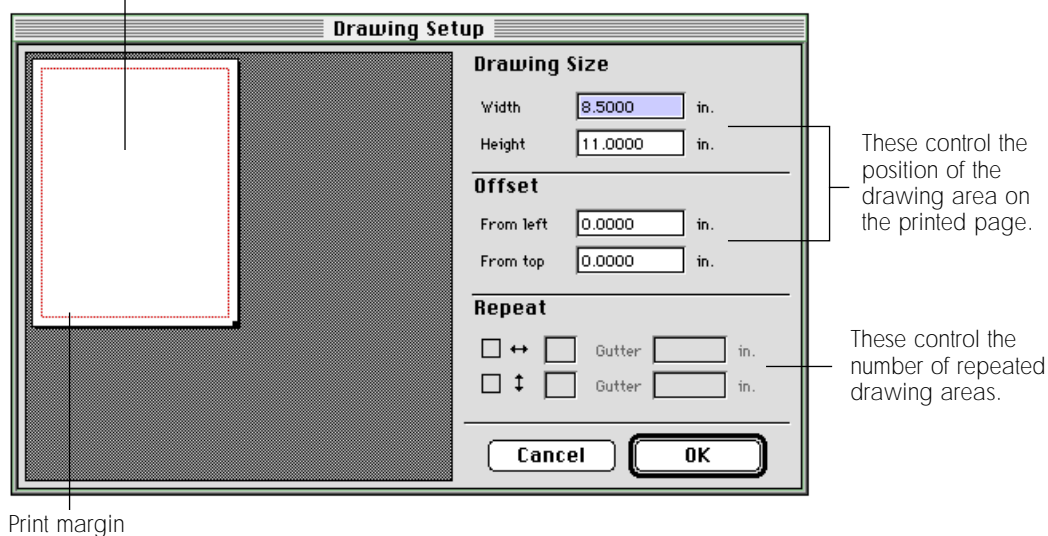
The Tall Adjusted option on the ImageWriter Page Setup dialog box adjusts the size of the printed pixel so that an object's printed size matches exactly with its corresponding size on the screen. Click the 'Tall Adjusted' checkbox on the ImageWriter Page Setup dialog box to turn this option on.

Drawing Setup

The Drawing Setup command controls the size and options of the drawing area. The *drawing area* is the area that appears in the drawing window. It's where you draw and manipulate the design of your form.

To set the drawing size of a document, choose **Drawing Setup…** from the Layout menu. The Drawing Setup dialog box appears.

Drawing area rectangle

These control the position of the drawing area on the printed page.

These control the number of repeated drawing areas.

Print margin

The left side of the Drawing Setup dialog box illustrates the drawing setup. It shows a scaled down version of the drawing area and the page (or pages) that the drawing area is printed on. Their sizes and orientation always reflect their current dimensions and placement relative to each other.

On the right of the Drawing Setup dialog box are the current measurements of the drawing size and the offsets. Also, you can see how many times the drawing area is repeated in the drawing setup. You can type in any of the text boxes or click any of the controls to change the associated dimensions or options of the drawing setup.

When you type in the text boxes to change the drawing area size or offsets, or to repeat the drawing area over the page, the drawing setup on the dialog box will be updated when you leave the text box. You leave the text box by pressing Tab or Shift-Tab, or by clicking a different text box or control.

Drawing Size

The white rectangle on the illustrated drawing setup is called the *drawing area rectangle*. It represents the drawing area and visually shows the size of the drawing area relative to the page it's printed on.

The measurements of the drawing size are expressed in the current ruler units and are indicated in the 'Width' and 'Height' text boxes. A document's minimum drawing size is 0.5 inches square. The maximum drawing size is 17 inches square.

Changing the Drawing Size

You can change the drawing size in one of two ways.

◻ Click and drag the handle at the bottom-right corner of the drawing area rectangle.
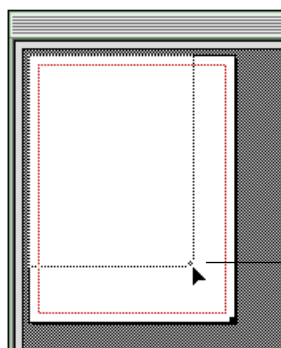
Click and drag this handle
to change the drawing size.

◻ Type directly in the 'Width' and 'Height' text boxes.

Drawing Size

Width   8.5000   in.
Height   10.5| in.

Type in the text boxes to
change the drawing size.

You can enter a new dimension in any units you like (inches, centimeters, points, or picas); Informed Designer performs the appropriate unit conversion for you. After entering a new dimension, press Tab (or Shift-Tab) to update the illustrated drawing setup.

When you change the drawing size, Informed Designer will always ensure that the new drawing size is not less than the minimum drawing size and not greater than the maximum drawing size. If you type an invalid value in a text box, Informed Designer will alert you (with a beep) and highlight the incorrect value when you Tab to or click another text box or control on the dialog box. As well, Informed Designer will always make sure that your drawing size remains large enough to hold all existing objects on your form. This means that objects cannot be accidentally dropped off the drawing area when you change the drawing size.

If you want to make the drawing area fit completely over the full area of a single page (based on the current paper size and page options), simply double-click anywhere in the drawing area rectangle.

Page Size

The lightly shaded gray area under the drawing area rectangle represents the paper size; it represents the page on which the drawing area is printed and it corresponds to the currently selected paper size. The red dotted line that appears on the drawing area near the edge of the paper indicates the edges of the printable area of the page.

If the drawing size is set larger than the current paper size, additional sheets of paper are used to print a page of the form. The illustrated drawing setup below shows the four sheets of paper that will be required to print one page of a form. Green lines are drawn to indicate where the page breaks will occur. The figure below shows the drawing setup for a tabloid drawing area (11" by 17") using the standard letter paper size (8.5" by 11").
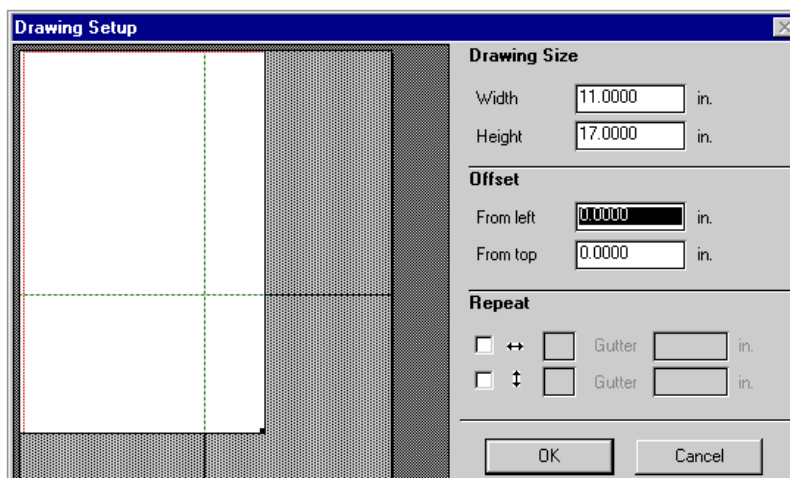
You can't change the page size using the Drawing Setup command. Use the Page Setup command instead. See "Page Setup" for more information.

Offsetting the Drawing

In addition to setting the drawing size, you can also change the position of the drawing area relative to the page (or pages) that it's printed on. This is useful if you want the top or left edge of the drawing area to start at a certain distance from the top or left edge of the page. For example, suppose that you want a one inch margin on the left side of your form to allow room for hole punching. Simply reduce the width of the drawing area, and then enter '1' in the 'From left' text box.
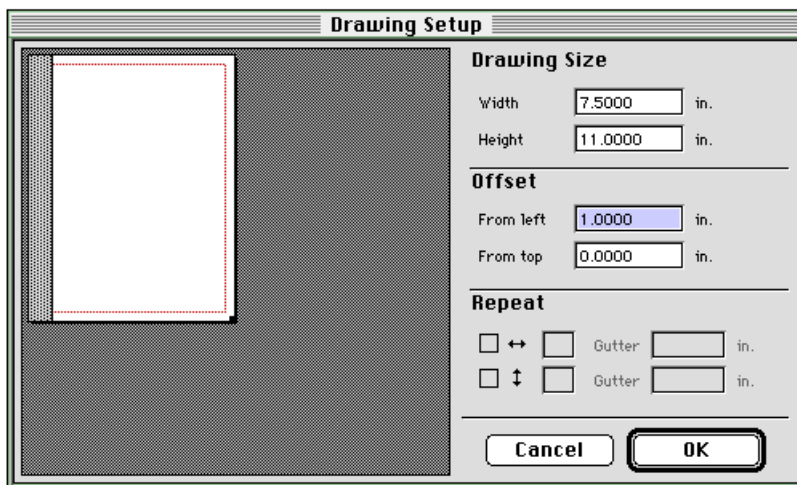

The horizontal drawing offset is the distance between the left side of the drawing area and the left edge of the page. The vertical drawing offset is the distance between the top of the drawing area and the top edge of the page. These values are expressed in the current ruler units and displayed in the 'Offset' text boxes.

You can change the offsets in one of two ways:

◼ Click and drag the drawing area rectangle across the page.

Click and drag to change the offsets.
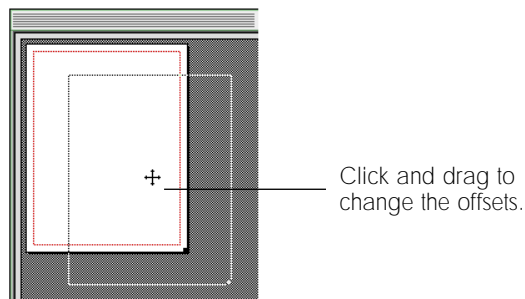
■ Type the offsets directly into the 'Offset' text boxes.
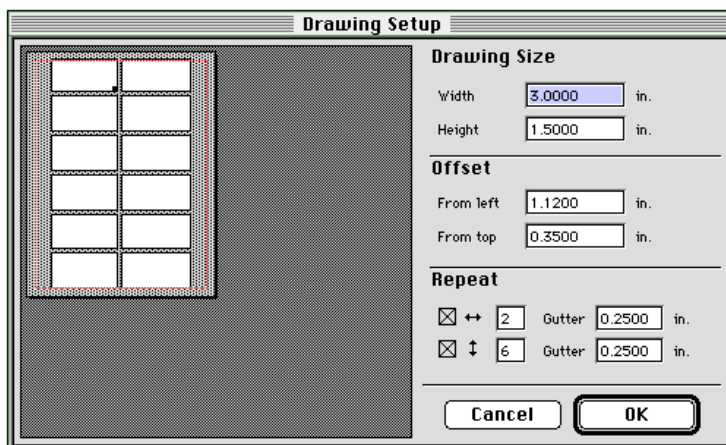

Type in the text boxes
to change the offsets.
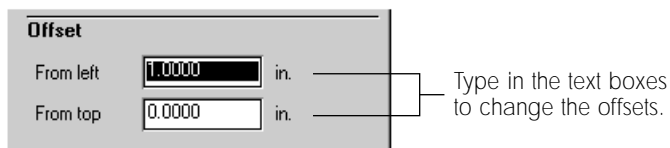
You can enter a new offset in any measurement unit you like (inches, centimeters, points, or picas); Informed Designer performs the appropriate unit conversion for you. After entering a new offset, press Tab (or Shift-Tab) to update the drawing setup on the dialog box.

When changing the offset values, Informed Designer will check to make sure that all values are valid. If you type an invalid offset, Informed Designer will alert you (with a beep) and highlight the incorrect value when you Tab to or click another text box or control on the dialog box.

Repeating the Drawing Area

If the drawing size is less than half the width or height of the selected paper size, Informed Designer allows you to repeat the drawing area. This is useful if you want to print more than one form on a single page.

For example, labels are often available on sheets for easy printing on laser printers. Suppose that a sheet of labels contains two labels across and six down, and that each label is 3 inches wide by 1.5 inches tall with a gutter of 0.25 inches. The figure below shows a sample drawing setup that would be appropriate in this situation. Note that the offset values have also been adjusted to ensure that the printed labels line up with those on the sheet.

To repeat the drawing area across or down the page, click the horizontal or vertical checkbox (indicated by horizontal or vertical arrows), and type the desired number of areas and gutters in the corresponding text boxes. If the number of areas you enter exceeds the maximum that will fit on a single page, Informed Designer will ignore those areas that don't fit.

When you print a form with a repeated drawing area, the form's layout is replicated across and down the page according to the parameters on the Drawing Setup dialog box. If you print a form while in Test mode, the cell values entered automatically appear in each drawing area printed.

The real advantage of this feature comes when printing completed records with the Informed Filler application. When you print a group of completed records, Informed Filler will automatically use the next record's data each time a new drawing area is printed. For more information, see your *Informed Filler User's Manual*.

Crop Marks

Informed Designer can automatically print crop marks. Crop marks act as page edge indicators; they're used for trimming commercially printed forms.
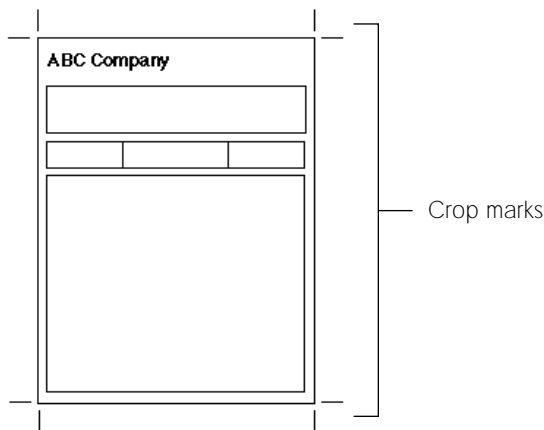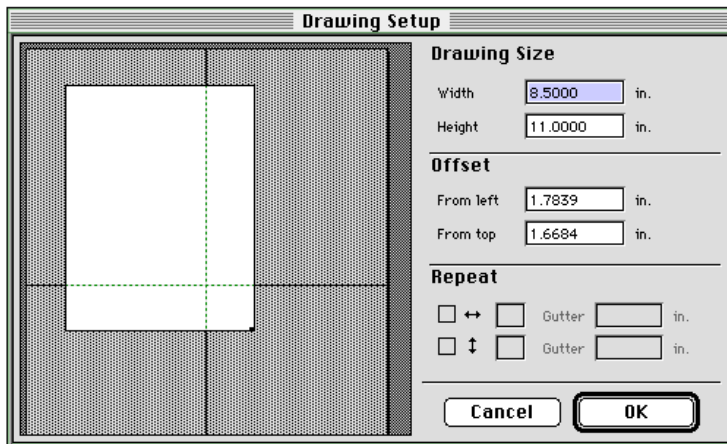

Crop marks

Crop marks are always positioned relative to the edges of the drawing area. Therefore, if you intend to print these markings, be sure to leave room between the edge of the drawing and the edge of the page.

Suppose that you're creating an 8.5 by 11 inch form. You're planning to print the form on a high resolution printer to prepare your form for commercial printing. However, as you design the form, you'd like to proof it on your laser printer.

Since you want to print crop marks, it's important that the drawing be offset slightly from the paper edge.

With a 1 inch offset, there's enough room between the top and left edges of the drawing area and the corresponding edges on the sheets of paper to allow for crop marks. Printing will occur as shown below.
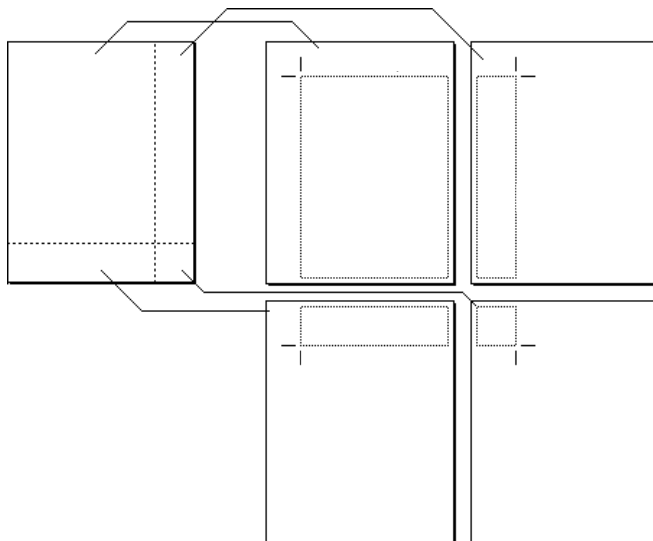
Before printing your finished form on the high resolution printer, you would first change the selected paper size to a larger size (perhaps 11" by 17") and adjust the orientation of the drawing area.

4 Pages of a Form

In this chapter:

4 Pages of a Form

Each form you create has one or more numbered pages, a work page, and a master page. The numbered pages contain the form's actual layout (as in the first and second pages of a two page form). The work page and master page each have a special purpose. This chapter describes the different pages of a form as well as the commands used to add and remove pages, and create multipart pages.

This chapter also describes the controls that are used to move from page to page in a form. These controls are found near the bottom-left corner of the drawing window.

View : 100% ▼ W M 1 ⟵

Numbered Pages

The numbered pages of a form are the actual pages that the Informed Filler user fills out. Each form can have between 1 and 99 numbered pages, with each page having as many as 99 parts (see "Multipart pages").
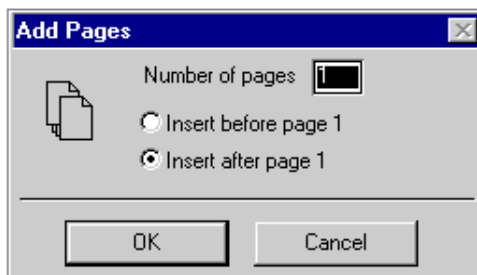
Adding New Pages

Use the Add Pages command to create new pages and add them to your form template.

Note   The maximum number of pages in an Informed document is 99. If your form contains 99 pages, the Add Pages command will be unavailable, preventing you from adding any more pages.

To add new pages, use the page controls to move to the page adjacent to where you want to insert the new pages (see "Changing pages"). Then choose **Add Pages...** from the Layout menu. The Add Pages dialog box appears:

Add Pages

Number of pages [1]
○ Insert before page 1
● Insert after page 1

[OK]   [Cancel]

The Add Pages command allows you to add either a single page, or multiple pages. Type the number of pages that you want to add in the 'Number of pages' text box. To insert the new pages before or after the current page, click the appropriate radio button. The diagram to the left of the radio buttons on the dialog box shows the page placement you've selected. To add the new pages, click 'OK' or press Return. To cancel the Add Pages command, click 'Cancel.' After inserting the new pages, Informed Designer will automatically display the first new page.

Note   Any items on the master page will appear on newly added pages.

Removing a Page

Use the Remove Page command to remove a single page and its contents from a form template.

To remove a page, use the page controls to select the page you want to remove (see "Changing Pages"). Then choose **Remove Page...** from the Layout menu. If removal of the page is permitted, then the Remove Page dialog box appears:
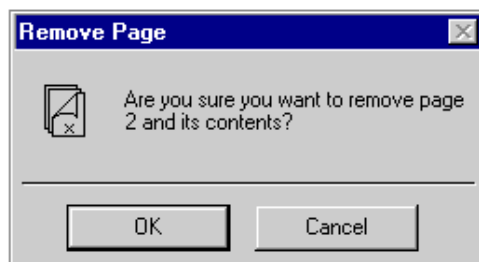
Click 'OK' to remove the page. Click 'Cancel' to resume editing your form without removing the page.

Before you can remove a page, Informed Designer will verify that the page doesn't contain any cells that are required by cells on other pages of the form. If a cell on the page being removed appears in the formula of a cell on a remaining page, Informed Designer will alert you.

Multipart Pages

Each numbered page can have up to 99 parts. When a page is printed, Informed Designer will automatically print one copy for each part.

Multipart pages are used most commonly when multiple copies of a form must be printed and circulated to different individuals or departments within an organization. For example, the bottom of a three part single page form might say 'Customer Copy' on the first part, 'Merchant Copy' on the second and 'Accounting Copy' on the third.

A single page... ...can have multiple parts.

Customer Copy
Merchant Copy
Accounting Copy
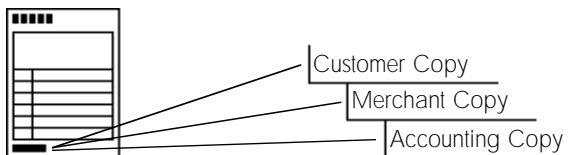
With the Multipart command, you can instruct Informed Designer to print a specified number of copies of a particular page (3 in the above example). Then, using cell calculations, you can calculate a cell's value using the PartLabel function. With the PartLabel function, you can specify the labels that appear on each different part. When Informed Filler prints a completed form, it will automatically insert the correct label on each part. For more information about formulas, functions, and the PartLabel function, please see Chapters 9 and 10 in your *Informed Designer Forms Automation* manual.

Note   When you print your form while in test mode, Informed Designer prints all parts for each multipart page. When you're in design mode, only a single copy of each page is printed. For more information about test mode, see "Testing Your Form" in your *Informed Designer Forms Automation* manual.

To set the number of parts for a page, first select the page using the page controls (see "Changing pages"). Then choose **Multipart Page...** from the Layout menu. The Multipart Page dialog box appears:
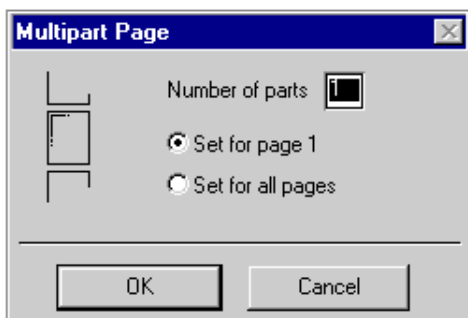
Enter the number of parts (up to a maximum of 99) in the text box. Set the number of parts for the current page or for all pages by clicking the corresponding radio button. Then click 'OK' to continue. Click 'Cancel' to cancel the Multipart command and resume editing your form.

Changing Pages

Use the page controls located near the bottom-left corner of the drawing window to change pages within a form.

The controls labelled 'W' and 'M' represent the work and master pages. The rightmost control represents the current numbered page of your form. When the numbered page control is selected, the number inside of it corresponds to the current numbered page in the drawing window.

There are two ways to change a page.

■ Click either arrow next to the page control to change pages in that direction. If you click and hold either arrow, Informed Designer will continue changing pages in that direction until you release the mouse button. If you're on page 1, the left arrow disappears. If you're on the last numbered page of the form, the right arrow disappears.

■ Choose **Go To Page...** from the Layout menu. The Change Page dialog box appears.
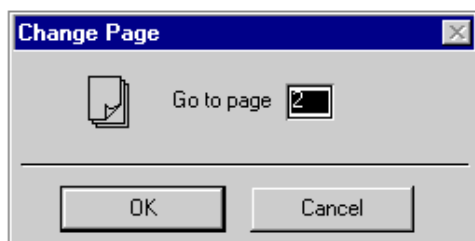
Type the number of the page that you wish to move to, then click 'OK' or press the Return key. Informed Designer will move directly to the requested page.

As a shortcut to choosing the Go To Page command, you can simply double-click the numbered page control.
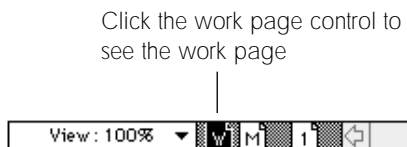
The Work Page

Every form contains one work page. Like the numbered pages of a form, the work page can contain graphics, text, and cells. The only difference between the work page and numbered pages is that the work page doesn't print, and whatever you place on the work page doesn't show on any other page of your form.

There are two common uses of the work page.

■ As a place to put instructions or information useful to someone filling out your form.

◼ As a place to put cells that should not be printed with the rest of the form. If you need to enter or calculate the value of a cell that doesn't appear on the form (but is required by other calcu-lated cells), place it on the work page. When the form is filled out, the work page functions like any other numbered page. The user can tab to cells on the work page and change their values. But when the form is printed, the work page won't print (unless the user selects the 'Work page' option on the Print dialog box).
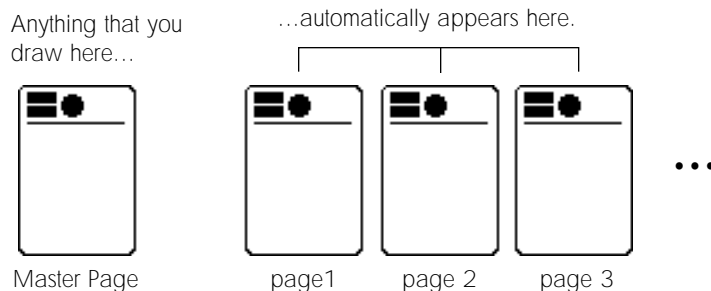
Display the work page by clicking the work page control near the lower-left corner of the drawing window.

Click the work page control to
see the work page

View : 100% ▼ W M 1 ↺

When the work page is displayed, you can create and manipulate objects like on any other num-bered page of your form.

The Master Page

Every form has a master page. Like other pages of your form, the master page can contain graphics, text, and cells. Objects drawn on the master page automatically appear on all numbered pages of your form. The master page, therefore, is useful for drawing elements such as company logos or page numbers that appear at the same position on all pages.

Anything that you
draw here...

...automatically appears here.

Master Page   page1   page 2   page 3

The master page is like an additional layer of objects that's printed with each numbered page. In terms of stacking order, objects on the master page are placed behind those on each of the num-bered pages. Therefore, an object on a numbered page that's positioned over a master page object will cover, and perhaps hide, the master page object.

Display the master page by clicking the master page control near the lower-left corner of the draw-ing window.

Click the master page control to
see the master page.

| View : 100% ▼ | w | M | 1 | ⇦ |

When the master page is displayed, you can create and manipulate objects as you do on any numbered page of your form. You can't print the master page alone.

Cells on the Master Page

When a form is filled out with Informed Filler (or Informed Designer's Test mode), pressing the Tab key moves from one cell to next. Each cell that you draw has a unique tab position which determines the tabbing order. When filling out a form, the Informed Filler user will automatically start on the page that contains the cell with tab position 1. If the user tabs from a cell on one page to a cell on a different page, Informed will automatically change pages.

Cells on the master page are no different. However, unlike numbered pages, the master page doesn't represent an actual page of a form. Therefore, instead of changing pages to the master page, the user simply remains on the current page when tabbing to a master page cell. For more information, see "Master Page Cells" in Chapter 1 of your *Informed Designer Forms Automation* manual.
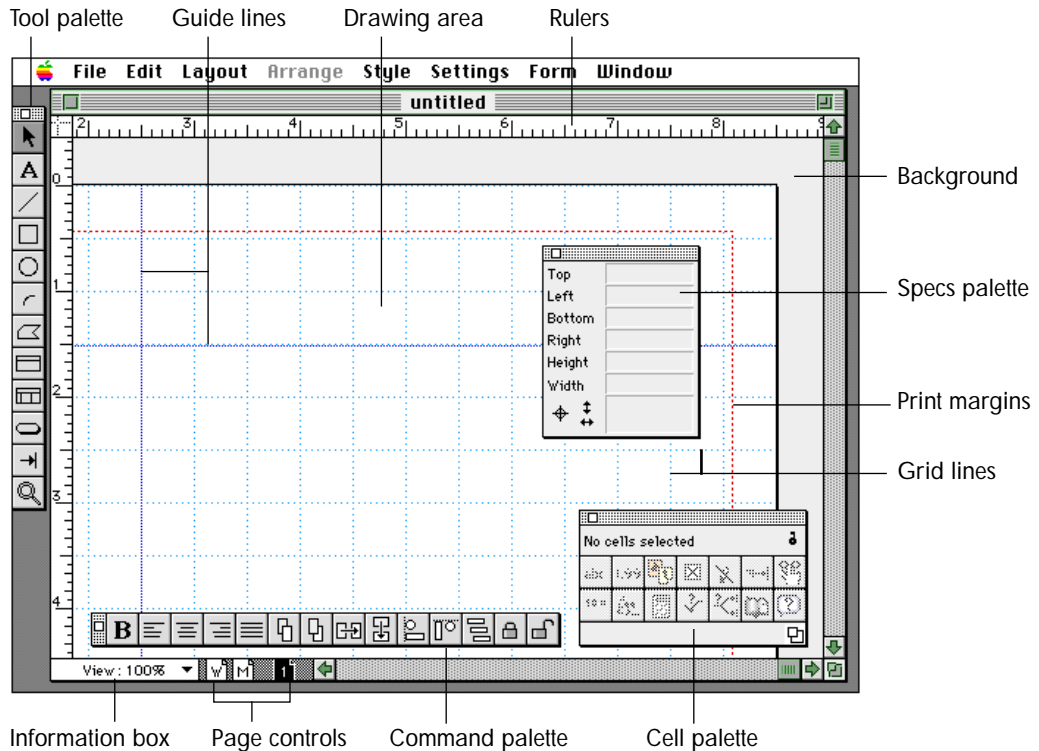
5 Drawing Environment

In this chapter:

5 Drawing Environment

This chapter presents information about Informed Designer's drawing environment. You'll learn about the drawing window and its visual attributes, as well as the various drawing aids including rulers, the grid, guide lines, and the view scale.

The Drawing Window

You use the drawing window to create and edit the template of a form. When you open or create a form template, a drawing window appears showing the template of the form.

Tool palette   Guide lines   Drawing area   Rulers

Background

Specs palette

Print margins

Grid lines

Information box   Page controls   Command palette   Cell palette

The elements of the Informed Designer drawing environment are briefly described below. For more information on these topics, please consult the indicated sections of this manual.

Drawing Environment Elements

| Element Name	Description
Drawing area	The drawing area is where you draw your template. Use the Drawing Setup command to change the size and options of the drawing area. See "Drawing Setup" in Chapter 3.
Rulers	The rulers help you measure and position objects accurately on your template.
Ruler crosshairs	The ruler crosshairs indicate the position of the mouse and objects relative to the ruler.
Zero point marker	Use the zero point marker to change the position of the ruler zero point. To change the zero point, click and drag the zero point marker. To set the zero point to its home position, click and release the zero point marker.
Grid lines	Grid lines help you to accurately position and size objects on your template.
Guide lines	The guide lines, like grid lines, help you position and size objects accurately; use the guide lines to align objects to specific points on your template.
Page break	For forms that are larger than one page, page breaks indicate the positions where the form crosses page boundaries. See "Page Size" in Chapter 3.
Print margins	Print margins show you the printable area of your template. Any object (or sections of an object) drawn outside the print margins will not print.
Page controls	Use the page controls to view different pages of your template. See "Changing Pages" in Chapter 4.
Tool palette	The Tool palette contains the Pointer tool, the Tab tool, the Zoom tool, and all drawing tools. See Chapter 6, "Drawing Tools."
Specs palette	The Specs palette displays the current position and dimensions of a selected object on your template as well as the current position of the pointer. You can use the Specs palette to change the dimensions of any object. See "Using the Specs Palette" in Chapter 8.
Command palette	The Command palette provides shortcuts to many of Informed Designer's graphics commands and settings. Use the Command bar for tasks such as aligning text, duplicating objects, locking the position of objects, and so on. See Chapter 8.
Cell palette	The Cell palette provides shortcuts to many of Informed Designer's data intelligence commands. See "Using the Cell Palette" in Chapter 1 of your *Informed Designer Forms Automation* manual.

Faster scrolling

If you are running Informed Designer or Informed Filler on a Mac OS compatible computer, you can further increase the scrolling speed of forms in Informed Designer by taking advantage of any available memory.

The amount of memory required for fast scrolling depends on the dimensions of your template and the monitor setting of your computer. The larger the form and the more grays or colors your monitor is displaying, the more memory you will need. You can, however, minimize the amount of memory required for fast scrolling by selecting a display preference.

To select the display preference, choose **Preferences...** from the Edit menu. The Preferences dialog box appears.
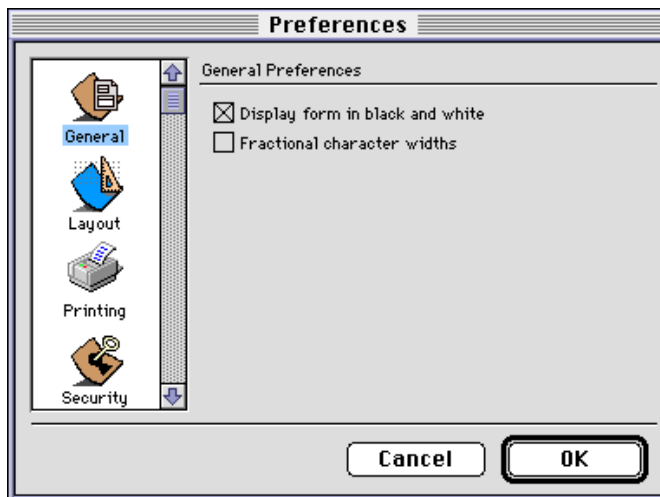
With the 'General' preference panel selected, the dialog box contains two options. The first option, 'Display form in black and white,' will display your form in black and white. If your monitor setting is set to multiple grays or colors, this option will significantly reduce the required memory. If your monitor is set to 'Black & White,' selecting this option will have no effect on the memory required.

The amount of memory available to Informed Designer depends on the size of the memory partition in which the software is running. This size can be changed to increase Informed Designer's available memory. For more information, please see your *Informed Designer Getting Started Guide*.

For information on 'Fractional character widths' please see Chapter 11, "Printing Forms."

Using Palettes

"The Drawing Window", earlier in this chapter, pictures the drawing window and Informed Designer's various palettes. The function of each palette is explained in other sections of this manual, and in your *Informed Designer Forms Automation* manual.

You can show or hide any of the Tool, Specs, Cell, or Command palettes. To do so, choose the corresponding item from the Show submenu under Informed Designer's Layout menu.
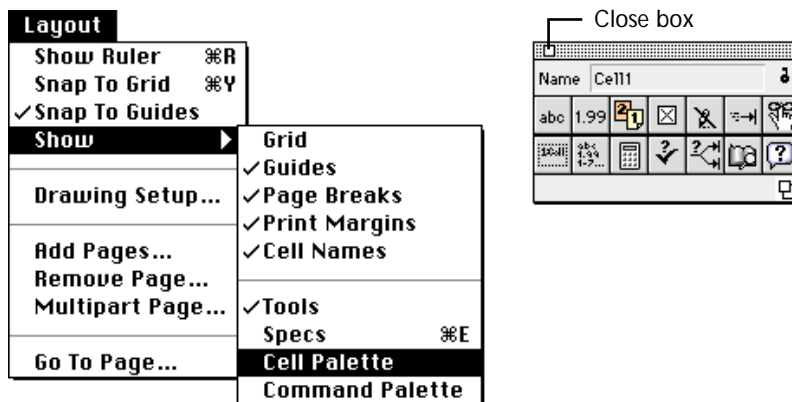
You can also hide a palette by clicking its close box. While a palette is displayed, a checkmark appears next to its name in the Show submenu.

Like drawing windows, you can move a palette to any position on the screen. Simply position the pointer in palette's title area, click the mouse button, drag to the new position, then release the mouse button.

Layout Preferences

To give you more design flexibility, Informed Designer allows you to change the options for various elements of the drawing environment by using the Preferences command. For example, if you prefer to measure in points rather than inches, you can change the ruler units from inches to points.

To set your preferences, choose **Preferences...** from the Edit menu. The Preferences dialog box appears. Click the 'Layout' icon in the scrolling list on the left.
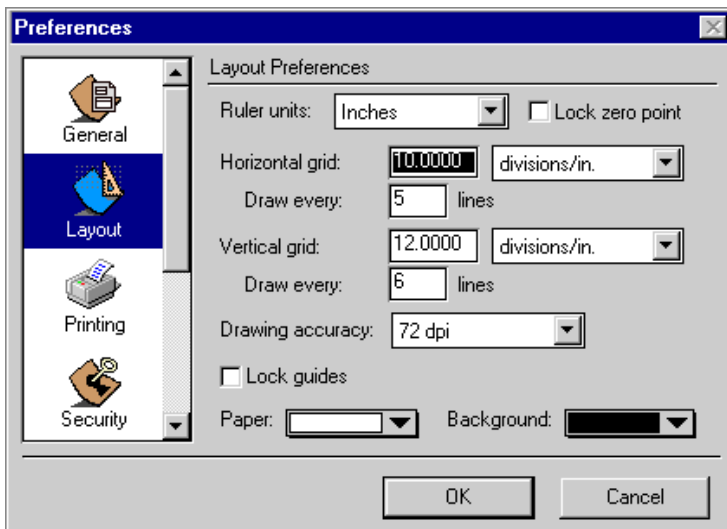
Details about the individual Layout Preferences and how to change them are discussed in the following sections. Once you've selected your preferred settings, click 'OK' to dismiss the Preferences dialog box.

Rulers

The rulers are a drawing aid that help you measure and align objects on your form. Use the rulers to draw, position, and resize objects accurately. When visible, the rulers appear on the top and left edges of the drawing window.
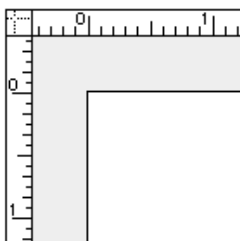
To display the rulers, choose **Show Ruler** from the Layout menu. Alternately, when the rulers are showing, this command becomes **Hide Ruler**. Choose this command to hide the rulers.

Note   Before you can create a new guide line, the rulers must be visible. For more information about guide lines, see "Guide lines."

On the 'Layout' panel of the Preferences dialog box you can select from four basic units of measurement: inches, centimeters, picas, and points. To change the ruler units, choose a unit from the 'Ruler' drop-down list.

The ruler zero point represents the intersection of the zero mark on each of the horizontal and vertical rulers. By default, the zero point is set to the top left corner of the paper. You can change the zero point to align it to any position on the drawing area.

To change the zero point, click and drag the zero point marker—the small box at the upper-left corner of the drawing window—then release the pointer at the new position.

Click here

Drag

Release here
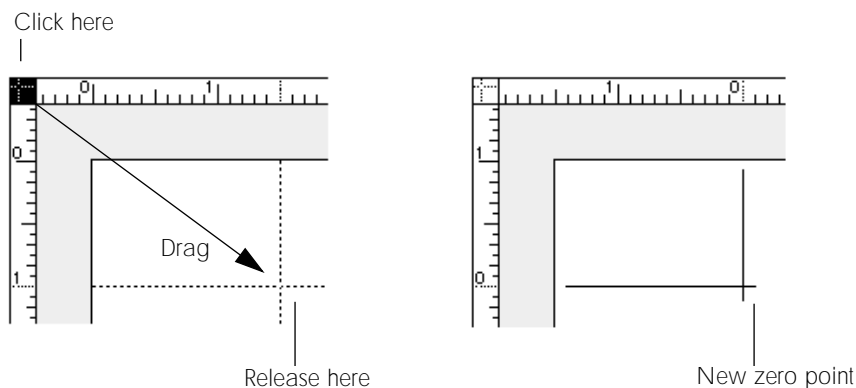
New zero point

If you release the mouse button in the content area of the drawing window, you'll change the zero point on each ruler. If you release the mouse in the content area of either ruler, the zero point changes for that ruler only.

If you want to reset the zero point to its default setting, click the zero point marker once.

To lock the zero point, select the 'Lock zero point' checkbox on the Layout panel of the Preferences dialog box. Locking the zero point prevents you from changing it accidentally. When the zero point is locked, the short gray lines on the zero point marker disappear.

Ruler crosshairs are visual aids that help you position the mouse and objects relative to particular points on the ruler. They appear as light gray lines on each ruler.
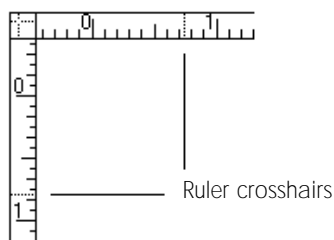
Ruler crosshairs

With the ruler crosshairs, you can easily position objects on the drawing area. For example, if you want to position the mouse one inch down and to the right of the ruler zero point, simply drag the mouse until the ruler crosshairs are over the one inch marks on both rulers.

The ruler crosshairs appear whenever the pointer is positioned over the drawing area or whenever you draw, drag, or resize an object. When you move the pointer, a single crosshair on each ruler shows the pointer's current horizontal and vertical position. When you draw, drag, or resize an object, the ruler crosshairs indicate the position of the object's edges.
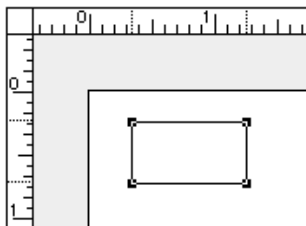

If the grid is turned on, the ruler crosshairs will also snap to the grid. Ruler crosshairs are therefore an accurate indication of where drawing will start while positioning the pointer.

The Grid

The grid consists of imaginary lines that run vertically and horizontally across the drawing area of a form. Use the grid as an aid to position and size objects on your form.

To display the grid, choose **Grid** from the Show submenu under Layout. When the grid is visible, a checkmark is displayed next to the Grid command. Choose **Grid** again to turn the grid display off. Grid lines are always drawn according to the options you select on the Layout panel of the Preferences dialog box. For more information about changing the appearance of the grid lines, see "Grid options" later in this chapter.
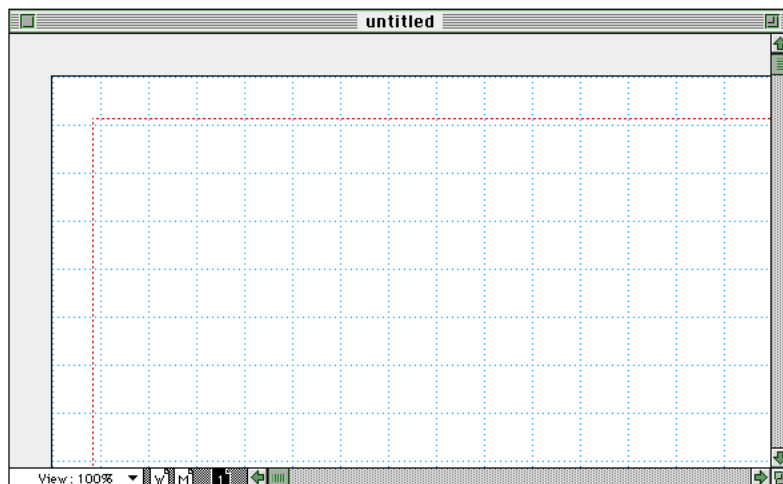
If you're using a color monitor, grid lines will appear in light blue.

With the grid, you can align objects in one of two ways: visually or by using the Snap To Grid feature. When used visually, you position and size objects by eye so that their boundaries lie along the grid lines.

Using Snap To Grid

When drawing, dragging, or resizing, you can have Informed Designer automatically align—or 'snap'—objects to the grid. You do this by choosing **Snap To Grid** from the Layout menu. While the Snap To Grid feature is on, a checkmark is displayed beside the menu item to indicate that the feature is active. To turn the snapping feature off, choose **Snap To Grid** again.

With the Snap To Grid feature turned on, all objects that you manipulate (by drawing, dragging, or resizing) will automatically align to the grid. When you draw or resize an object, its edges will be constrained to lie on the nearest grid lines, whichever are active. When you drag an object, its upper-left corner will be constrained to lie along the nearest grid lines.

When turned on, the Snap To Grid feature works regardless of whether the grid lines are visible or not.

Grid Options

With the Preferences command, you control the spacing of the grid lines on your form. Informed Designer gives you the ability to customize the grid for each form template you design.

To set the grid options, choose **Preferences...** from the Edit menu. When the Preferences dialog box appears, click the 'Layout' icon in the scrolling list to display the grid options.

Horizontal grid:	10.0000	divisions/in. ▼
Draw every:	5	lines
Vertical grid:	10.0000	divisions/in. ▼
Draw every:	5	lines

Grid separation—the distance between each grid line—can be specified in divisions per unit (inches, centimeters, picas, or points) or unit separation. Select the desired method by choosing an option from the 'Horizontal grid' and 'Vertical grid' drop-down lists. The unit of measurement displayed in the grid drop-down lists (as in divisions/in, divisions/cm, and so on) is determined by which unit of measurement you've chosen in the 'Ruler' drop-down list (see "Ruler Options").

Regardless of how you measure grid separation, you can control the exact spacing of the grid lines by typing a value in the appropriate text box. If you type '10' into the 'Horizontal grid' text box, with the grid separation set to 'divisions /in,' the vertical grid lines will be spaced at ten lines per inch. If you type '.125' into the 'Horizontal grid' text box, with the grid separation set to 'inches,' the vertical grid lines will be spaced 1/8 of an inch apart.

Use the 'Draw every' text boxes to control the visual density of grid lines on your form template. When you enter values into these text boxes, you specify how many grid lines are drawn across your form. For example, if the horizontal grid lines are spaced at five divisions per inch, and you type '5' into the 'Draw every' text box, then one vertical line will be drawn for every five vertical lines on the grid (that is, one grid line every inch).
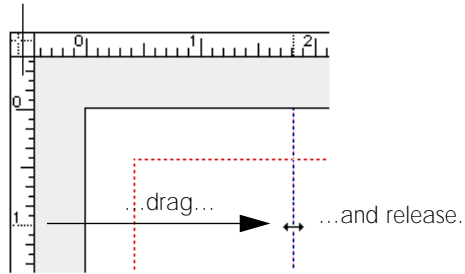
Guide Lines

Guide lines run vertically and horizontally along the drawing area of your form. Like the grid, you use guide lines as an alignment aid. However, they differ from grid lines because you create and adjust each guide line independently—one line at a time. With the help of the rulers you can place a guide line at any position on the drawing area, allowing you to align objects to a specific position on your form.

To display the guide lines, choose **Guides** from the Show submenu under Layout. When you choose Guides, a checkmark appears beside the Guides command to indicate that the feature is active. If you're using a color monitor, guide lines will appear in blue. To hide the guides, choose **Guides** again.

Before creating a guide line, make sure that the rulers are visible. Then, click in the content area of either ruler and drag the mouse onto the drawing area of your form. Release the mouse button when the new guide line is aligned at the desired position.

Click in the ruler's
content area…

...drag...   ...and release.

To remove a guide line, click and drag it back into the content area of the ruler, or drag it completely off the top or left edge of the drawing window if the rulers aren't displayed.

Note   If you reduce the size of the drawing area (using the Drawing Setup command), Informed Designer will automatically remove any guide lines that no longer lie in the drawing area.

The Snap To Guides Feature

When drawing, dragging, or resizing an object, you can have Informed Designer automatically snap the object to the guide lines on your form. You do this by choosing **Snap To Guides** from the Layout menu.

With the Snap To Guides feature on, any object that you manipulate (by drawing, dragging, or resizing) will automatically align to the nearest guide line, provided that the object falls within 5 pixels, the guide line's 'sensitivity area.'

Click and drag the object to
the appropriate guide line.
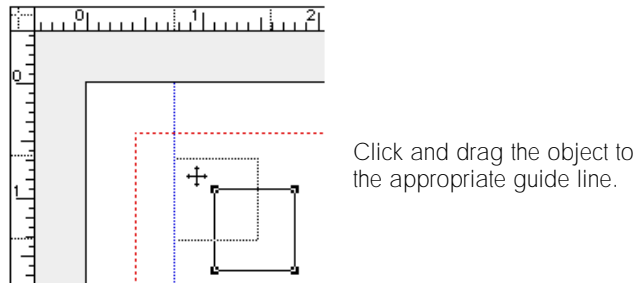
While the Snap To Guides feature is on, a check appears beside the corresponding menu item. To turn the snapping feature off, choose **Snap To Guides** again. The menu item will be unchecked, allowing you to manipulate objects on a pixel by pixel basis. The Snap To Guides feature works regardless of whether or not the guide lines are displayed.

If you want to lock the guide lines, select the 'Lock guides' option on the Preferences dialog box. This prevents you from accidentally moving the guide lines while you're editing your form.

View Scale

While editing your form, you can change the view scale of the drawing window. Changing the view scale allows you to view more or less of the drawing area in the drawing window. By reducing the view scale you can see and work with a larger area of the form. By enlarging the view scale, you can work with your form close up for greater precision.

Changing the View Scale

You change the view scale of the drawing window by using the Zoom tool or by choosing a view scale from the 'View' drop-down list. Informed Designer allows you to view a form at 25, 50, 100, 200, 400, 800, and 1600 percent of its actual size.
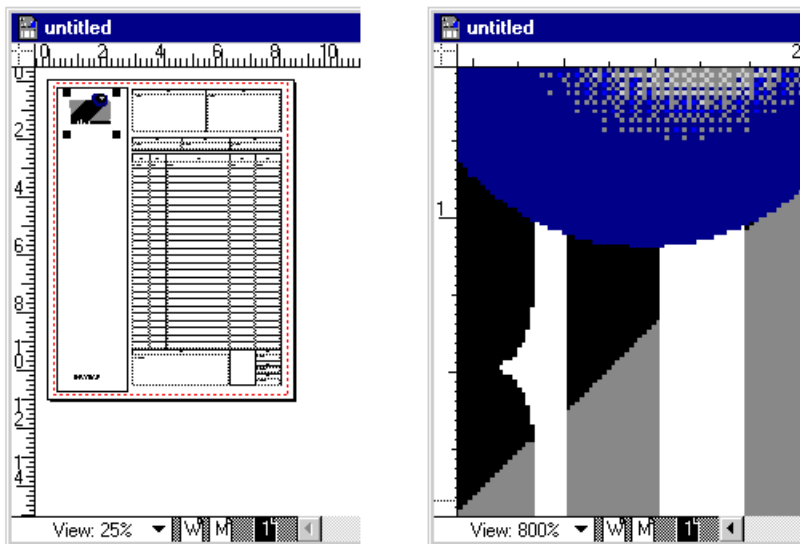
When you change the view scale, the elements of your form are enlarged or reduced accordingly. However, Informed Designer's drawing aids such as the rulers, grid lines, guide lines and object handles always remain the same size.

The current view scale of the drawing window is displayed in the 'View' drop-down list in the lower-left corner of the drawing window.

'View' drop-down list

To change the view scale using the 'View' drop-down list, simply click the drop-down list and choose a view scale from the options listed.

The Zoom tool (the 'magnifying glass') enlarges or reduces the view scale of your form. To use the Zoom tool, first select it from the tool palette and move the pointer to the position of interest on the drawing window. Click the mouse button once to bring your form to the next larger scale (from 100 to 200 percent, for example). The 'View' drop-down list in lower-left corner of the drawing window will change to indicate the current view scale.

When enlarging a drawing with the Zoom tool, the area on the drawing that lies under the Zoom tool will be centered in the drawing window when you click the mouse button.

Similarly, you can reduce the current view scale of the drawing window by clicking the Zoom tool in the drawing window while holding down the Alt (Windows) or Option (Mac OS) key.

To change the view scale of the drawing window to its actual size, simply double-click the Zoom tool on the tool palette. This changes the drawing window's view to 100% (actual size).

Note   You can also set the view scale to 100% by pressing the Control-1 (Windows) or Command-1 (Mac OS) keystroke combination.

Drawing Accuracy

Drawing accuracy refers to the level of precision with which you can size and position objects on your form. The higher the drawing accuracy, the more control you have over an object's exact size and position.

Drawing accuracy is measured in dots per inch (dpi). The number of dots per inch corresponds directly to how accurately you can position or size an object within a one inch distance. For example, if the drawing accuracy were 72 dpi, the smallest distance that you could move an object would be 1/72nd of an inch.
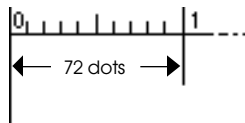
The drawing accuracy of your computer screen—sometimes called screen resolution—is often 72 dpi. This means that in any direction, there are 72 dots, or pixels, from one inch to the next. Therefore, when the view scale of the drawing window is 100% (actual size), moving an object from one pixel to the next will move the object a distance of 1/72nd of an inch. (You can change the view scale of the drawing window using either the Zoom tool or the 'View' drop-down list. See "View Scale" for more information.)

If you change the view scale of the drawing window, you effectively change the drawing accuracy as well. Each time you enlarge the view scale, the drawing accuracy doubles. This is because although everything becomes twice as large, you can still move an object one screen pixel at a time (which is now half the distance). If you enlarge the view scale from actual size to 200%, the drawing accuracy changes from 72 to 144 dpi. The smallest distance that you can move or resize an object changes from 1/72nd to 1/144th of an inch.

Note   You can select a maximum drawing accuracy by choosing a setting from the 'Drawing accuracy' drop-down list on the Layout panel of the Preferences dialog box. Informed Designer will limit the drawing accuracy to this setting, even if you change the view to a larger scale. See "Limiting the Drawing Accuracy" below.

Informed Designer allows a maximum drawing accuracy of 1152 dpi. This means that you can change the position or size of an object by a distance as small as 1/1152nd of an inch. In order to obtain this level of precision, you have to change the view scale of the drawing window to 1600%.

Limiting the Drawing Accuracy

Even though precise drawing accuracy is often necessary to position objects exactly on your form, you should be aware of possible—and often unexpected—alignment problems that can result when you manipulate objects at different view scales.

Suppose that you enlarge the view scale of the drawing window to 400% and draw a thin vertical line three pixels to the right of one inch. Since the drawing accuracy is 288 dpi at 400%, the distance of three screen pixels is 3/288ths of an inch.


288 dots

2 dots past one inch
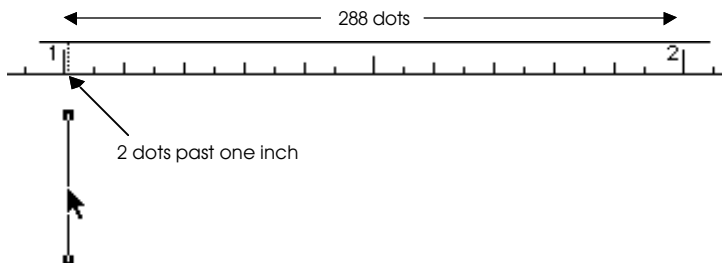
After drawing the line, let's say that you change the view scale back to actual size and draw another line over top of the first one. Since the maximum drawing accuracy is only 72 dpi when the view

scale is 100%, you wouldn't be able to position the second line as accurately as the first. Even though the two lines would appear to be at the same position, their exact locations would be different. This would become apparent if you enlarged the view scale, or if you printed the form on a high resolution output device.
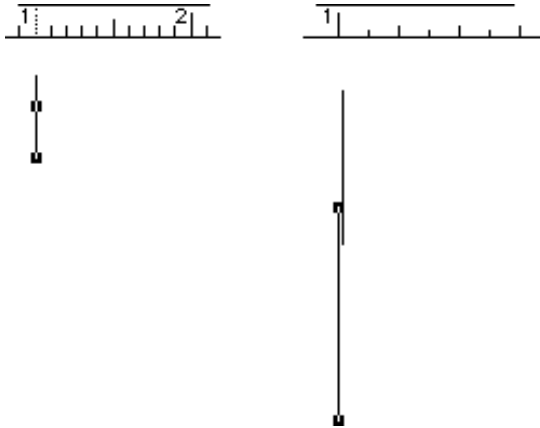
To avoid this problem, Informed Designer allows you to limit the drawing accuracy. You can set a maximum drawing accuracy by choosing a value from the 'Drawing accuracy' drop-down list on the 'Layout' panel of the Preferences dialog box.
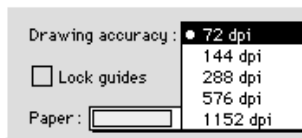
When you limit the drawing accuracy, Informed Designer restricts the placement of objects to the corresponding resolution. For example, if you choose a maximum drawing accuracy of 72 dpi, Informed Designer won't allow you to move an object less than 1/72nd of an inch, even if you enlarge the view scale to 200% or more.

By restricting the drawing accuracy to 72 dpi, you could avoid the alignment problem discussed above. When you'd try to draw the first line at three pixels to the right of one inch, Informed Designer would force the position of the line to 1 and 1/72nd of an inch—an even multiple of the drawing accuracy. At the 100% view scale, you could then draw the second line precisely on top of the first.

Paper and Background Color

You can make your forms more visually appealing by changing the color of the paper and background that appear on the screen.
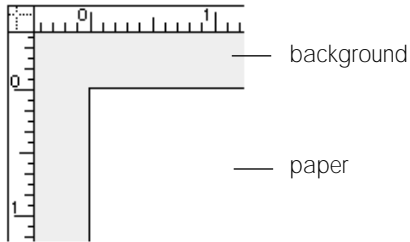
The controls for changing the paper and background color are found on the 'Layout' panel of the Preferences dialog box. Choose **Preferences...** from the Edit menu. When the Preferences dialog box appears, click the 'Layout' icon in the scrolling list.
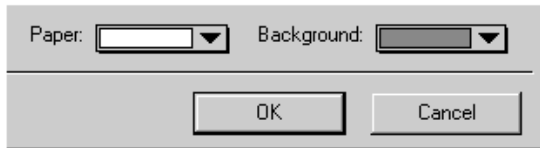
To change the paper and background color for your form, click the 'Paper' or 'Background' drop-down lists and select a color from the color palette displayed. Click 'OK' to save the changes. To cancel the changes and dismiss the Preferences dialog box, click 'Cancel.'

6 Drawing Tools

In this chapter:

Drawing Tools

This chapter describes Informed Designer's drawing tools. You'll learn about the different types of objects and the options that control their appearance. You'll also learn how to draw and manipulate objects using the drawing tools.

This chapter provides information about object types and their appearance attributes. For information about changing an object's appearance, see Chapter 7, "Changing an Object's Appearance."

The Tool Palette

The Tool palette provides access to Informed Designer's drawing tools. In addition to the drawing tools, the Tool palette also contains the Pointer tool, the Button tool, the Tab tool, and the Zoom tool.

Pointer tool

Drawing tools

Button tool

Tab tool

Zoom tool
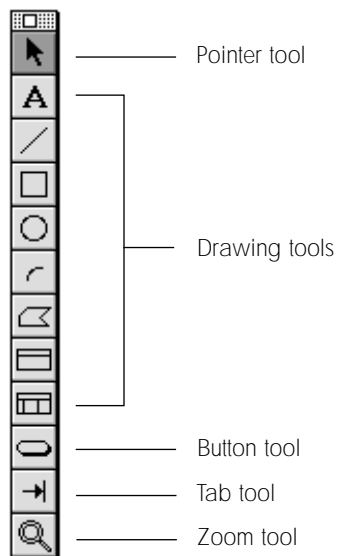
The Pointer tool selects, deselects, repositions, and resizes objects on your form. The Button tool is used to draw buttons and configure them to perform specific tasks. The Tab tool allows you to change the tab order of the cells on your form by clicking and dragging the pointer from one cell to another. The Zoom tool changes the view scale of the drawing window. For more information about the Pointer tool, see "Selecting Objects" in Chapter 8. For information about the Zoom tool, see "Changing the View Scale" in Chapter 5. For information about the Tab tool and Button tool, see Chapters 1 and 4 of your *Informed Designer Forms Automation* manual.

Like any palette, you can show or hide the Tool palette and drag it to a different position on your screen. To show the Tool palette, choose **Tools** from the Show submenu under Layout. When the Tool palette is displayed, a checkmark appears next to the Tools command. To hide the Tool palette, choose **Tools** again. You can also hide the Tool palette by clicking its close box in the title bar. To move the Tool palette on your screen, click and drag its title bar to a new position.

You select a tool by clicking it on the Tool palette. When a tool is selected, its icon is highlighted on the Tool palette.

Since you use the Pointer tool often, Informed Designer offers two shortcuts for selecting it. First, pressing the key located at the top-left of your keyboard will toggle the current tool between the Pointer tool and the last drawing tool used. Depending on which style of keyboard you're using, this key will be either the Escape key or the reverse quote (`) key.

You can also temporarily select the Pointer tool by pressing the Alt (Windows) or Option (Mac OS) key. As long as you hold down the Alt/Option key, the Pointer tool will remain in effect. When you release the Alt/Option key, the current drawing tool becomes active again. This shortcut is useful if you want to quickly move or resize an object while you're using the drawing tools.

The Text Tool

Use the Text tool to draw text or edit text objects. You can also use the Text tool to edit the titles of fields and tables. Select the Text tool by clicking it on the Tool palette.

As a shortcut, you can select the Text tool by pressing the Tab key once. In addition to selecting the Text tool, pressing Tab will also select the characters of the first text, field, or table object on your form (based on top-left to bottom-right position). If a text, field, or table object is selected, pressing Tab will select the characters of that object instead.

Drawing a Caption

To draw a caption (a title or heading), select the Text tool and position the pointer where you want the caption to start; the pointer changes to an I-beam. Then click the mouse and start typing.

While you type, you can begin a new line by pressing the Enter (Windows) or Return (Mac OS) key. If you try to type past the edge of the drawing area, your text will automatically wrap to the next line. When you finish typing, press the Enter key on the numeric keypad, or select another tool; Informed Designer selects the text object as a whole (that is, the object will show handles at its corners).

Unlike paragraphs of text (see next section), the dimensions of a caption automatically change when you edit it. For example, if you insert new words or change the object's font size, Informed Designer will automatically adjust the object's width and height to fit tightly around the text. How-

ever, once you've resized the object using the Pointer tool, its dimensions will no longer adjust automatically.

Drawing a Paragraph of Text

You can specify the margins of a text object by drawing a rectangle with the Text tool before you begin typing. This is useful for drawing paragraphs of text.

To create a paragraph, select the Text tool and position the pointer where you want the top and left margins to be. Then click and drag to draw a rectangle. As you drag, a rectangular outline appears, shrinking and expanding to follow the movement of the mouse. Release the mouse button when the outline is the right size. Then you can start typing your paragraph.

Click…

…drag

…release
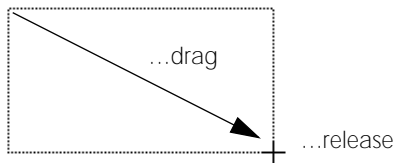
The paragraph is
confined to the
rectangle that you've
just drawn.

When text reaches the edge of the object's rectangle, it will automatically wrap to the start of the next line. If you type past the bottom edge of the rectangle, Informed Designer will extend the edge to accommodate any additional lines.

When you finish typing, press the Enter key on the numeric keypad or select another tool. The bottom edge of the object's rectangle will automatically snap up to the bottom edge of the last line of text and the object will be selected.

If you press F12 (Windows) or hold down the Option key while pressing Enter (Mac OS), the object's right edge will snap to fit tightly around the width of the longest line of text. This will happen if the initial width of the paragraph is wider than the longest line that you type.

Informed Designer makes it easy to draw text inside a box. Instead of drawing a rectangle with the Text tool (as described above), simply select a rectangle object with the Pointer tool and start typing. The text you type will automatically align itself inside the rectangle.

Editing Text

Use the Text tool to edit the words or characters of an existing text object. Field, table, and column titles are edited the same way.

To edit a text object or title, select the Text tool and click the text that you want to edit, then begin typing. As always, when you finish typing, press the Enter key on the numeric keypad or select another tool. Informed Designer will snap the bottom edge of the object's rectangle to the bottom

edge of the last line of text, then select the object as a whole. If you press F12 (Windows) or Option-Enter (Mac OS), the right edge of the object will adjust automatically to fit around the longest line of text.

Text Dimensions

The dimensions of a text object determine the maximum width of each line. When you draw a paragraph of text or when you draw text in a box, the width of the text object is fixed. This means that as you type, the text automatically wraps to stay inside its preset width. There's no need to press the Enter (Windows) or Return (Mac OS) key at the end of each line. If you draw a caption by clicking and typing, the width of the text object is determined by the length of the longest line that you type. You'll start a new line only if you type past the end of the drawing area or if you press the Enter (Windows) or Return (Mac OS) key.

Whenever you edit a caption, the width of the text object will change freely to fit around the longest line. If you resize the text object with the Pointer tool, the object becomes a paragraph of text with a fixed width. If you want to change a paragraph of text to a caption, simply press F12 (Windows) or Option-Enter (Mac OS) after editing the text. The object's width will expand or contract to fix around the object's longest line.

The Appearance of Text

The appearance of text is controlled by changing attributes such as the font, font size, type style, alignment, and leading. Some attributes apply to entire text objects, whereas others apply to individual characters. Individual characters each have the following attributes: font, font size, and type style. Each text object (as a whole) has these attributes: pen, leading, and horizontal alignment. For a complete description of text attributes and how to set them, see "Type Settings" in Chapter 7. See "Paint Settings" in Chapter 7 for information about the pen attribute.

When you draw a new text object, its type attributes are initially set to the current default settings for the Text tool. For example, if the default font is Times, each new text object that you draw will be Times. For instructions on changing the default text attributes, see "Changing Default Settings" in Chapter 7.

The Line Tool

Use the Line tool to draw lines on your form. Select the Line tool by clicking it on the Tool palette; the pointer changes to a cross.

To draw a line, position the pointer where you want the line to start, then click and drag the pointer to where you want the line to end, and release the mouse button. The new line is drawn and selected.

Click...

...drag

...release

The new line is automatically selected.
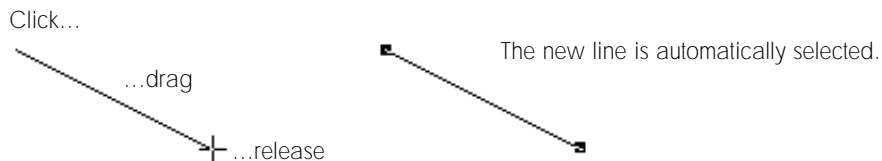
If you hold down the Shift key while drawing, the new line will be constrained to the horizontal or vertical axis, or diagonally at 45, 135, 225, or 315 degrees.

The Appearance of Lines

The appearance of lines can be changed by changing attributes such as the pen and line width. More specifically, each line has the following attributes: pen, line width, and line style.

The pen determines the color of the line. Changing the line width changes the line's thickness. Line styles include plain, dashed, double line, and arrowhead styles. For a complete description of line attributes and how to change them, see "Paint Settings" in Chapter 7.

When you draw a new line, its pen, line width, and line style attributes are initially set to the current default settings for the Line tool. For example, if the default line width for lines is 1 point, each new line that you draw will have a width of 1 point. For instructions on changing the default line attributes, see "Changing Default Settings" in Chapter 7.

The Rectangle Tool

Use the Rectangle tool to draw rectangles or boxes on your form. Select the Rectangle tool by clicking it on the Tool palette; the pointer changes to a cross.

To draw a rectangle, position the pointer where you want a corner to start, then click and drag the pointer to the opposite corner and release the mouse button. While dragging, a gray frame follows the movement of the mouse. When you release the mouse button the new rectangle is drawn and selected.

Click...

...drag

...release

The rectangle is automatically selected.
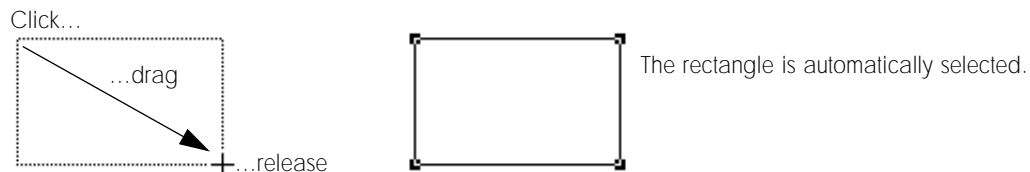
If you hold down the Shift key while drawing, the new rectangle will be constrained to a square (all sides equal length).

The Appearance of Rectangles

The appearance of rectangles can be changed by changing attributes such as the pen, fill, and line width. More specifically, each rectangle has the following attributes: pen, fill, line width, line style, and corner rounding.

The pen determines the color of the rectangle's frame. The rectangle's interior is drawn with the selected fill color. Changing the line width changes the frame's thickness. Line styles (also used to draw the rectangle's frame) include plain, dashed, and various double line styles. For a complete description of the pen, fill, line width, and line style attributes and how to change them, see "Paint Settings" in Chapter 7. For more information about rounding corners, see "Rounded Corners" in Chapter 7.

When you draw a new rectangle, its appearance attributes are initially set to the current default settings for the Rectangle tool. For example, if the default fill for rectangles is blue, each new rectangle that you draw will be automatically filled with blue. For instructions on changing the default rectangle attributes, see "Changing Default Settings" in Chapter 7.

The Oval Tool

Use the Oval tool to draw ovals and circles on your form. Select the Oval tool by clicking it on the Tool palette; the pointer changes to a cross.

To draw an oval, position the pointer where you want the oval to begin, then click and drag until the oval is the right size. An outline of the oval will appear and follow the movement of the mouse. When the oval is the right size, release the mouse button. The new oval is drawn and selected.

Click…

…drag

…release
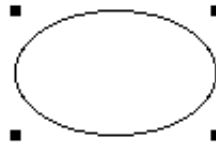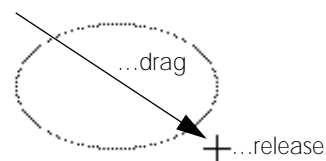
The new oval is automatically selected.

If you hold down the Shift key as you draw, the new oval will be constrained to a circle.

The Appearance of Ovals

All ovals have pen, fill, and line width attributes. You can change the appearance of an oval by changing any of these attributes.

The pen determines the color of the oval's frame. The oval's interior is drawn with the selected fill color. Changing the line width changes the frame's thickness. For a complete description of the pen, fill, and line width attributes and how to change them, see "Paint Settings" in Chapter 7.

As with lines and rectangles, newly drawn ovals inherit the default attributes of the Oval tool. For example, if the default line width of the Oval tool is 2 points, each new oval that you draw will have a frame that's 2 points thick. For instructions on changing the default oval attributes, see "Changing Default Settings" in Chapter 7.

The Arc Tool

Use the Arc tool to draw arcs on your form. Select the arc tool by clicking it on the Tool palette; the pointer changes to a cross.

To draw an arc, position the pointer where you want the arc to begin. Click and drag to the opposite end of the object. An outline of the arc will appear and follow the movement of the mouse. When the arc is the right size, release the mouse button. The new arc is drawn and selected.

Click…

…drag

…release

The new arc is automatically selected.
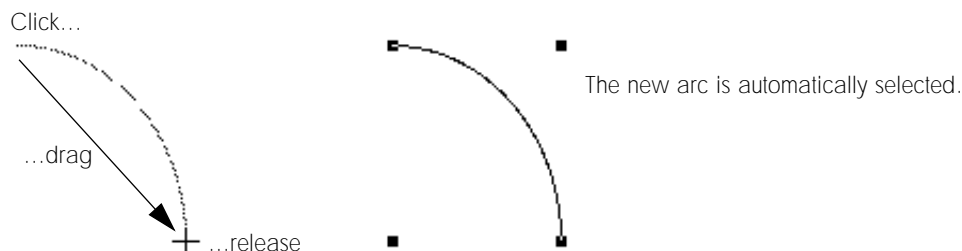
The initial motion of the mouse determines the direction and curvature of the arc. For example, dragging the mouse up and to the right creates an arc that slopes upward along the horizontal axis, while dragging the mouse to the right and then up creates an arc that slopes upward along the vertical axis. This is illustrated below.

You get this when you drag up and to the right.
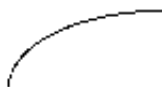
You get this when you drag to the right and then up.

The Appearance of Arcs

The appearance of arcs can be changed by changing the pen, fill, and line width attributes.

The pen determines the color of the arc. The arc's interior (a quarter oval), is filled with the selected fill color. Changing the line width changes the arc's thickness. For a complete description of the pen, fill, and line width attributes and how to change them, see "Paint Settings" in Chapter 7.
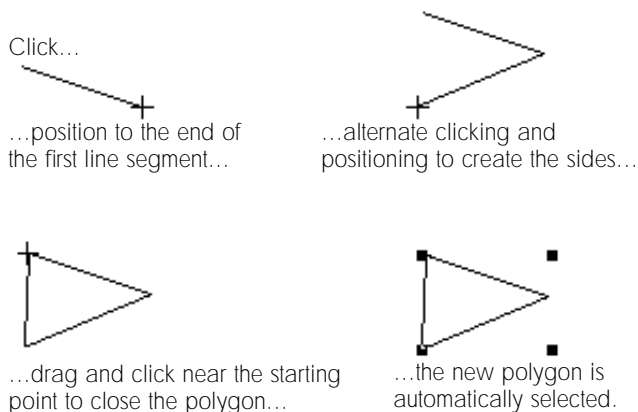
When you draw a new arc, its pen, fill, and line width attributes are initially set to the current default settings for the Arc tool. For example, if the default line width for arcs is 2 points, each new arc that you draw will be 2 points thick. For instructions on changing the default arc attributes, see "Changing Default Settings" in Chapter 7.

The Polygon Tool

Use the Polygon tool to draw polygons on your form. Select the polygon tool by clicking it on the Tool palette; the pointer changes to a cross.

To draw a polygon, move the pointer to where you want the first side to start, then click and release the mouse button. Move the pointer to the end of the first line segment and click the mouse button to create the first side of the polygon. Create the remaining sides of the polygon by alternately positioning the pointer and clicking until the polygon has the shape that you want.

Click…

…position to the end of the first line segment…

…alternate clicking and positioning to create the sides…

…drag and click near the starting point to close the polygon…

…the new polygon is automatically selected.

When creating the last side of the polygon, you can either join it with the first side, or leave the polygon open. To join the last side with the first, simply click once near the first end point of the polygon's first side. Informed Designer will automatically close and select the polygon. To leave the polygon open, position the pointer where you want the last side to end, then double-click the mouse button.

If you hold down the Shift key while positioning the pointer to create a side, Informed Designer will constrain the side to lie on either of the horizontal or vertical axes, or diagonally at 45, 135, 225, or 315 degrees.

The Appearance of Polygons

The appearance of polygons can be changed by changing attributes such as the pen and line width. More specifically, each polygon has the following attributes: pen, fill, and line width.

The pen determines the color of the polygon's sides. The fill color is used to draw the interior of the polygon. Changing the line width changes the width of the sides. For a complete description of these attributes and how to change them, see "Paint Settings" in Chapter 7.

When you draw a new polygon, its pen, fill, and line width attributes are initially set to the current default settings for the Polygon tool. For example, if the default line width for polygons is 1 point, the sides of each new polygon that you draw will be 1 point wide. For instructions on changing the default polygon attributes, see "Changing default Settings" in Chapter 7.

Reshaping a Polygon

As with all objects, you can select, reposition, and resize a polygon using the Pointer tool. However, when you resize a polygon, the relative position of each vertex (the joining of two sides) always remains the same. Handles appear only on the corners of the smallest rectangle that fits around the polygon.

To change the position of a particular vertex, use the Reshape Polygon command. First select the polygon with the Pointer tool, then choose **Reshape Polygon** from the Arrange menu. Handles will appear at each vertex of the polygon.
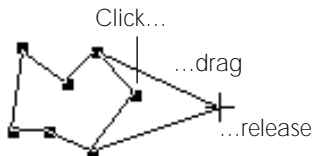

Again using the Pointer tool, click and drag any vertex. The polygon will remain in reshape mode until you deselect it.

The Field Tool

Fields are graphic objects that hold information. Each field contains a cell—a holding place for data. When you fill out a form, you enter information into each cell.

Unlike other graphic objects such as lines, rectangles, and ovals, fields are composed of various elements or parts. These parts automatically appear when you draw a field, making it easy for you to draw the graphics that commonly surround a cell.
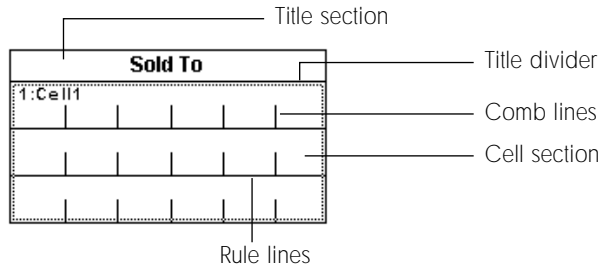
There are a variety of options that you can use to change the general appearance of a field. For example, you can show a field's title on any side of its cell, or you can hide the title altogether. You can turn the rule lines and combs on or off, and you can change their appearance too.
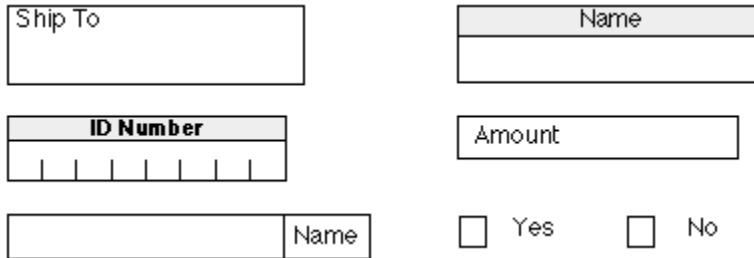
This section discusses the graphic attributes of fields. You'll learn how to draw a field and change its appearance. As well, you'll learn how to select and manipulate the parts of a field. For information about setting up a cell's data intelligence attributes, see Chapter 1, "Adding Intelligence to Your Forms" in your *Informed Designer Forms Automation* manual.

Drawing a Field

To draw a field, select the Field tool by clicking it on the Tool palette. Position the pointer on the drawing area; the pointer changes to a cross. Click where you want a corner to start and drag to the opposite corner. When you release the mouse button, the field is drawn and selected.
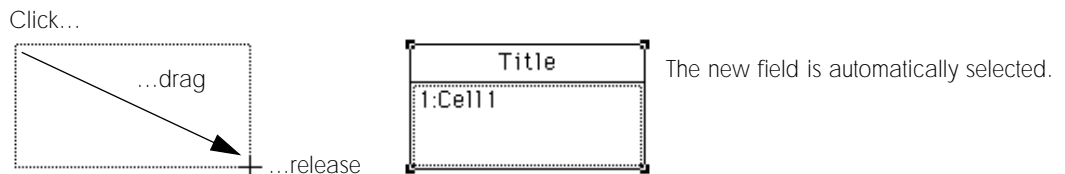
If you hold down the Shift key while drawing, the dimensions of the new field will be constrained to a square (all sides will be of equal length).

Selecting Parts of a Field

Clicking a field once with the Pointer tool selects the whole object. Clicking a second time selects a part of the field. For example, click a field on your form using the Pointer tool, and handles appear on the corners to indicate that the whole field is selected. Next, click in the title section of the field. A shimmering frame appears inside the title section, indicating that it is selected.

```
┌┄┄┄┄┄┄┄┄┄┄┄┄┄┄┄┄┄┄┄┄┄┐
┆        Sold To       ┆
┆┄┄┄┄┄┄┄┄┄┄┄┄┄┄┄┄┄┄┄┄┄┆
┆ 1:Sold To            ┆
┆                      ┆
└┄┄┄┄┄┄┄┄┄┄┄┄┄┄┄┄┄┄┄┄┄┘
```
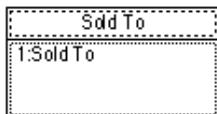
The Appearance of Fields

As already mentioned, a field consists of various parts that are automatically drawn, positioned, and resized as the field is manipulated. You can change the appearance of a field by changing the position, size, or visual attributes of each of its parts. You use the Pointer tool to select a part, or change the dimensions of a part by dragging. The Field command allows you to control the options associated with each part.
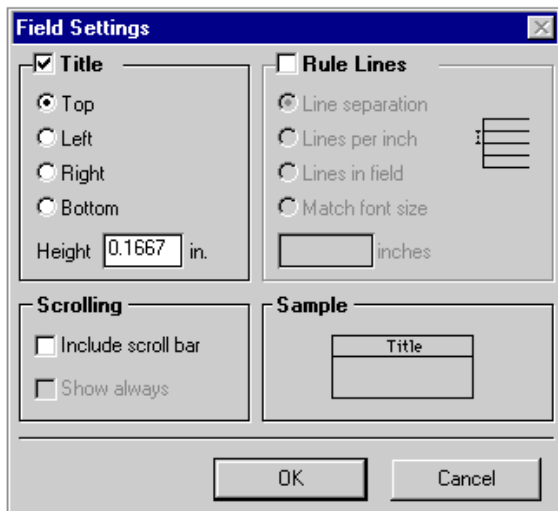

When you draw a field, its initial appearance is determined by the current default settings for the Field tool. For example, if the default position of the title section is on the left, each new field that you draw will have its title on the left. For instructions on changing the Field tool defaults, see "Setting Field and Table Defaults" in Chapter 7

Although the Field command is referred to throughout this section, a complete description of its use is not covered here. For more information, see "Field Settings" in Chapter 7.
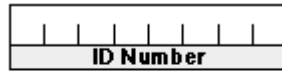
The Title Section

The title section commonly describes the information in a field's cell. It consists of a frame and the accompanying title text. To select the title section, click it (twice if necessary) with the Pointer tool. An inset frame in the title section will shimmer.

You can position the title section on any side of a field's cell, or you can hide it altogether. Use the Field command to choose an orientation for the title section.
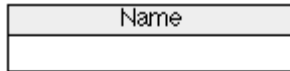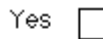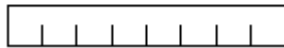
Title on top

Title on the bottom

Title to the right

Title to the left

No title

You can change the height or width of a field's title without affecting the size of the cell section by clicking and dragging the outer edge of the title section while holding down the Control (Windows) or Command (Mac OS) key. You can also resize the title section by moving the title divider (see "The Title Divider" below).

To edit the title text, use the Text tool and the appropriate text editing techniques. Like all text objects, the title text has font, font size, type style, leading, alignment, and pen attributes. Use the Type command in the Style menu or the various Style submenus to change these attributes. See "Type Settings" in Chapter 7 for more information.

Note   Unlike text objects, field titles can be vertically aligned within the title section. See "Type Settings" in Chapter 7 for more information.

The title section has many of a rectangle's visual attributes. For example, you can change the pen and fill colors and adjust the thickness of the title section's frame; or you can change the amount of rounding on each corner. Before choosing a setting, make sure that you first select the title section by clicking it (twice if necessary) with the Pointer tool. For a complete description of the pen, fill, and line width attributes, see "Paint Settings" in Chapter 7. For information about rounding corners, see "Rounded Corners" in Chapter 7.

The Title Divider

If a field's title section is on, the field will also have a title divider. The title divider divides the field into two sections: the title section and the cell section.

Like other parts of a field, you can select the title divider by clicking it (twice if necessary) with the Pointer tool; the line will shimmer. Once you select the title divider, you can change its appearance by changing the pen color or line width. If you want to hide the line altogether, change its pen to none. For information about the pen and line width attributes, see "Paint Settings" in Chapter 7.

To change the height or width of the title section, use the Pointer tool to drag the title divider in the appropriate direction (up/down or left/right, depending on position of the field's title). You can also change the height or width by clicking and dragging the appropriate edge of the title section while pressing the Control (Windows) or Command (Mac OS) key. See "The Title Section" for more information.

The Cell Section

The cell section represents the area of a field where you enter information. It consists of a cell, a frame, and optional rule lines and combs. To select the cell section, click it (twice if necessary) with the Pointer tool. An inset frame in the cell will shimmer.

You can change the height or width of the cell section by clicking and dragging any outer edge of the cell section with the Pointer tool. If the 'Rule lines' option is turned on for a cell, Informed Designer will constrain the cell's size to increments that equal the height of the space between the rule lines. Holding down the Control (Windows) or Command (Mac OS) key while dragging the cell section's edge overrides this feature.

If the 'Rule lines' option is turned off for a cell, you can click and drag the cell's bottom edge freely to change its height. If you hold down the Control (Windows) or Command (Mac OS) key while dragging, Informed Designer will constrain the cell's size to increments that equal the height of the font size selected for that cell. For more information on rule lines, see "Rule Lines" below.

Even though you can't see a cell's text until you actually fill out the form, Informed Designer allows you to specify the cell's type characteristics during the design process. When you fill out a form, each cell value will be displayed with its preset type settings.
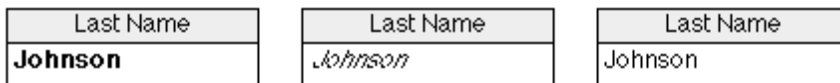

Like the title section, you can choose the font, font size, type style, leading, and alignment for each cell in each field. To change the type attributes of a cell, first select it with the Field tool, then use the Type command or the Style submenus to choose a different setting. For a description of each type attribute, see "Type Settings" in Chapter 7.

You can also set the color with which a cell value displays. For more information, see "Data Color" in Chapter 1 of your *Informed Designer Forms Automation* manual.

Informed Designer allows you to show or hide the cells in fields and tables. Choose **Cell Names** from the Show submenu under Layout to display the cell names and their tab positions. When they're showing, the menu command becomes Hide Cell Names. Choose this command to hide the cell names and tab positions.

When visible, a cell's name and tab order are displayed using the current type attributes of the cell. If you change a type attribute (for example, choose a different font or font size), the cell's name and tab position will change to reflect the new setting.
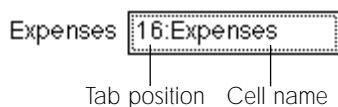

You can also use Informed Designer's Test mode to enter sample cell values. This allows you to see what a filled in cell will look like and to ensure that you've chosen the correct type settings. For information about Informed Designer's Test mode, see "Testing Your Form" in Chapter 1 of your *Informed Designer Forms Automation* manual.

A field's cell section also has many of the visual attributes of a rectangle. You can change the pen and fill colors, and you can adjust the thickness of the cell's frame. You can also change the amount of rounding on each corner. Before choosing a setting, make sure that you select the cell section first. For a complete description of pen, fill, and line width attributes, see "Paint Settings" in Chapter 7. For information about rounding corners, see "Rounded Corners" in Chapter 7.

You can add scroll bars to the fields on your form. This allows the Informed Filler user to enter more data than will fit in the cell area. For more information, see "Field Settings" in Chapter 7, "Changing an Object's Appearance."

The Rule Lines

Each field cell can use optional rule lines; these control the vertical spacing and provide a visual guide for the information in a cell. You turn rule lines on and off using the Field command (see "Field Settings" in Chapter 7).
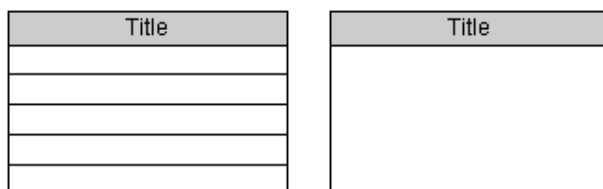
When rule lines are on, you can select them by clicking any rule line with the Pointer tool. The lines will shimmer when they're selected. You can set the rule lines' spacing by using the Field command or by clicking and dragging any rule line with the Pointer tool.
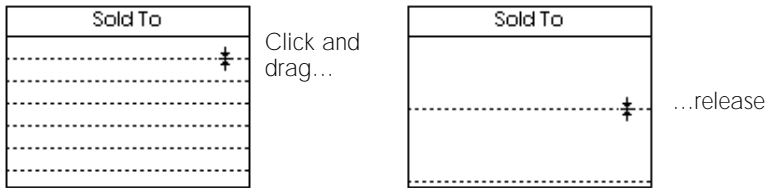
Note　When rule lines are on, the leading of a cell's information is controlled by the rule line spacing and not by the leading type attribute.

You can also change the appearance of the rule lines by changing their pen and line width attributes. To do this, select the rule lines, then use the Paint command or the Pen and Line Width submenus to choose a different setting. For more information, see "Paint Settings" in Chapter 7.

Combs and Checkboxes

Informed Designer has comb and checkbox features that can be applied to field cells. Combs are divider lines that divide a cell into equally spaced sections. Checkbox cells use check symbols instead of text to indicate a cell's value. For more information, see "Combs" and "Checkboxes" in Chapter 7, "Changing an Object's Appearance."

The Table Tool

Like fields, tables are graphic objects that hold information. Each table contains one or more columns and each column contains a cell—a holding place for data. When you fill out a form, you enter information into each cell.

Unlike other graphic objects such as lines, rectangles, and ovals, tables are composed of various elements—or parts—that automatically appear when you draw a table. This makes it easy to draw a table without having to draw the individual lines and titles that give a table its appearance. The structure of a table is shown below.

Table title section   Column title section



Title dividers

Column section

Row lines
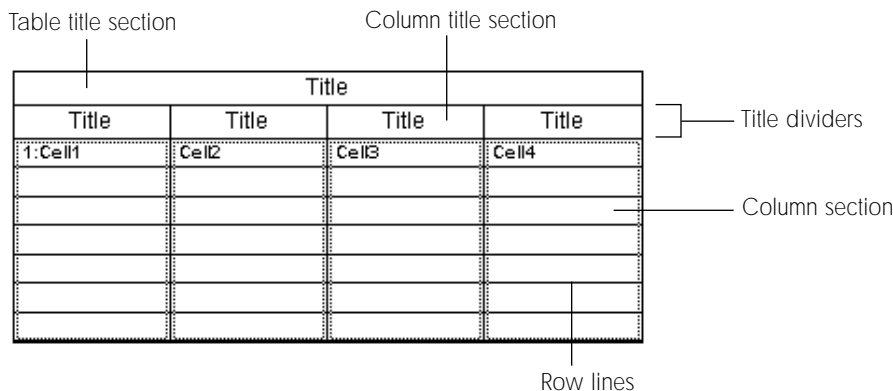
There are a variety of options that allow you to change the general appearance of any table. For example, you can show or hide the table title or column titles, or fill the alternating column rows with a color.

Rows alternately filled

Single column

Table title hidden
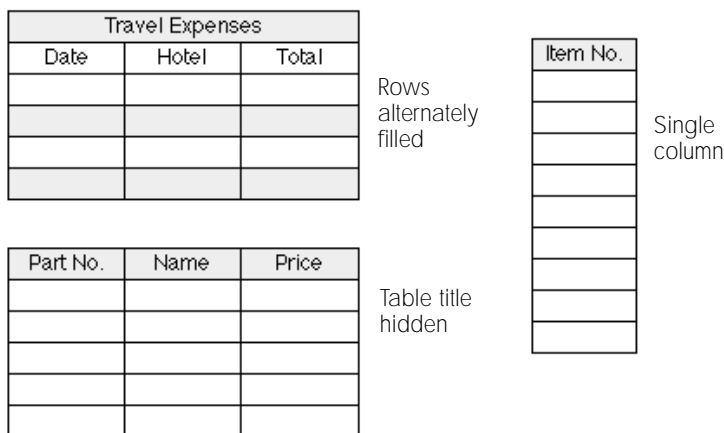
In this section you'll learn about the graphical aspect of tables; that is, you'll learn how to draw tables and how to change their appearance. For information about the data intelligence attributes of table cells, see Chapter 1 of your *Informed Designer Forms Automation* manual.

Drawing a Table

To draw a table, select the Table tool by clicking it on the Tool palette. Then position the pointer in the drawing area; the pointer changes to a cross. Click where you want a corner of the table to start and drag to the opposite corner. If you hold down the Shift key, the new table's dimensions will be constrained to a square (all sides will be of equal length). When you release the mouse button, the table is drawn, and the Add Columns dialog box appears.
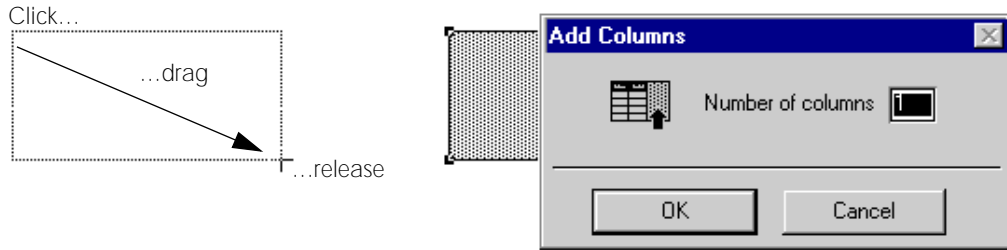
Type the number of columns that you want and click 'OK.' Informed Designer inserts the columns into the table and distributes them evenly. If the columns in the table need to be different widths, you can change them individually to suit your needs (see "Changing a Column's Width").

Once you've drawn a table, you can add and delete columns and change their widths and order. These features are described in the following sections.

When you draw a new table, its initial appearance is determined by the current default settings for the Table tool. For example, if the default font for the Table tool is Helvetica, then the font used for any subsequently drawn tables will be Helvetica. For instructions on changing the Table tool defaults, see "Setting Field and Table Defaults" in Chapter 7.

Selecting Parts of a Table

Clicking a table once selects the whole object. Clicking a second time selects a part of the table. For example, click a table on your form using the Pointer tool, and handles appear on the corners to indicate that the whole table is selected. Next, click in the cell section of one of the columns. A shimmering frame appears inside the cell section, indicating that it is selected.

Part No.	Description	Price
2:PartNo	Description	Price

Changing a Column's Width

You can change the width of a column by clicking and dragging either of its sides with the Pointer tool. If you drag the left side of the leftmost column or the right side of the rightmost column, you'll change the width of the table too.
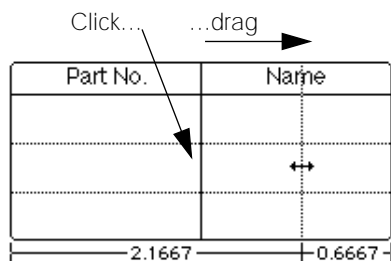
If you change a column's width by dragging a side that lies between two columns, the widths of both columns will change. As you drag, Informed Designer will display the width of the affected columns below the bottom edge of the table. The measurements are shown using the current ruler units. Informed Designer will constrain the pointer so that you don't make a column too narrow.

If you hold down the Control (Windows) or Command (Mac OS) key while dragging a column's side, only the width of the column to the left (if there is one) will change. This allows you to slide columns in either direction. You can use this option to move columns to the left in a full table to make room for new columns.

Adding New Columns to an Existing Table

You can add additional columns to an existing table in one of three ways:

- by using the Add Columns command
- by first making room in the table, then clicking with the Pointer tool
- by splitting one column into two

To add additional columns by using the Add Columns command, first select the table by clicking it once with the Pointer tool, then choose **Add Columns...** from the Table Columns submenu under Arrange. When the Add Columns dialog box appears, type the number of new columns that you want to add and click 'OK.' If the existing table has a gray space at the right side, the new columns will fill that space. If there is no gray space, the last column will be divided to accommodate the number of new columns. If the gray space or the last column is not wide enough to fit in the number of new columns, Informed Designer will alert you with a message. If this occurs, simply make room in the table and try adding the columns again.

You can make room for a new column either by extending the right edge of the table or by making the width of an existing column smaller. Extending the right edge of a table by default extends the right edge of the last column as well. However, if you hold down the Control (Windows) or Command (Mac OS) key while extending a table's right edge, the size of the last column doesn't change.

Hold down the Ctrl/Cmd key
as you click and drag…

…to create room for
more columns.

Similarly, if you press the Control (Windows) or Command (Mac OS) key while shrinking the
width of an existing column, only the width of the column to the left (if there is one) will change.
The columns on the right will slide to make more room in the table. The table will then contain a
gray area in which you can create a new column. With empty space in a table, you can add a new
column by simply clicking in the gray area with the Pointer tool.

You can also create a new column by splitting an existing column into two. Select the column by
clicking it (twice if necessary) with the Pointer tool, then choose **Split Column** from the Table Col-
umns submenu under Arrange.

Select a column, then choose
the Split Columns command…

…a new column is inserted
to the right of the last column.

If the existing column is too narrow to be split, Informed Designer will sound a beep.

Changing a Column's Position

Informed Designer allows you to change the ordering of columns in a table. To move a column, first click it or click its title with the Pointer tool, then choose **Move Left** or **Move Right** from the Table Columns submenu under the Arrange menu. The column is swapped with the one to its immediate right or left.

If you select Cell2 and choose Move Left…

…it will change positions with Cell1

Once a column reaches either end of the table, choosing a command to move it further in that direction does nothing.

Distributing Columns

Often you might want to make the width of all or some of the columns in a table the same. Although you can do this manually by adjusting the size of each column, Informed Designer provides a command to distribute columns automatically.

To evenly distribute all the columns in a table, select the table by clicking it with the Pointer tool, then choose **Distribute Columns** from the Arrange menu.

Before distributing columns…

…after distributing columns

If there's only one column in your table, the Distribute Columns command makes the column as wide as the entire table.

Removing a Column

You can remove a column the same way you remove any object on your form: select it, then choose **Clear** from the Edit menu or press either of the Delete or Backspace keys. The table is selected after you remove the column. Any columns to the right of the deleted column are moved left to take up the space originally occupied by the deleted column.

The Appearance of Tables

A table consists of various parts that are automatically drawn, positioned, and resized as the table is manipulated. The appearance of a table can be changed by changing the position, size, or visual attributes of each part. The Pointer tool is used to select a part or change the dimensions of a part by dragging. The Table command allows you to control the options associated with each part.
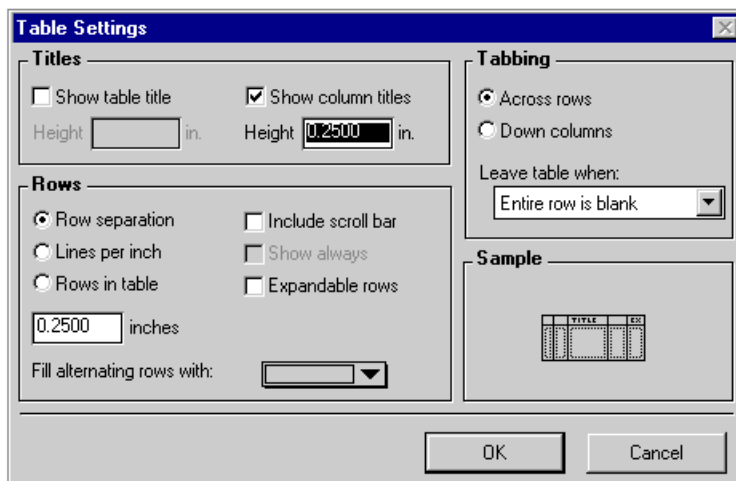
Although the Table command is referred to throughout this section, a complete description of its use is not covered here. See "Table Settings" in Chapter 7 instead.

The Title Sections

Each table has a table title and a column title for each column. A title section commonly contains a descriptive identifier of the information stored in the table or column. A title section consists of a frame and the title's text. To select a title section, click it (twice if necessary) with the Pointer tool. An inset frame in the section will shimmer.

The title sections of a table can be turned on or off using the Table command.

Expenses		
Hotel	Meals	

Table title and column titles showing

Expenses	

Table title showing

No title sections

To edit the text of a table title, use the Text tool and the appropriate text editing techniques (see "The Text Tool" earlier in this chapter for more information). Like all text objects, the title section has font, font size, type style, leading, and alignment attributes. Use the Type command or the Style submenus to change these attributes.

<table>
<tr><td>**Note**</td><td>Unlike text objects, title sections can also be vertically aligned. For more information, see "Type Settings" in Chapter 7.</td></tr>
</table>

A table's title section has many of the visual attributes of a rectangle. You can change the pen and fill colors, and you can adjust the thickness of the title's frame. You can also change the amount of rounding on each corner. For a complete description of the pen, fill, and line width attributes, see "Paint Settings" in Chapter 7. For information about rounding corners, see "Rounded Corners." in Chapter 7

The Title Dividers

If any of the title sections are on, the table will also have title dividers. These are the lines that divide either the table title from the column titles, or the column titles from the column cells.

Like other parts of a table, you can select a title divider by clicking it with the Pointer tool; the line will shimmer. Once you've select a title divider, you can change its pen or line width. If you want to hide the line altogether, change its pen to none.

To change a title section's height, use the Pointer tool to drag the title divider up or down. If you drag a column's title divider, Informed Designer will automatically adjust the dividers of all other columns as well. You can also click and drag the top edge of the table's title section while holding down the Control (Windows) or Command (Mac OS) key to change the title section's height.

The Column Sections

Like blanks on a form, the column sections are the parts of a table where you enter information. Each column section has a column cell (which is divided into rows) and a frame. To select a column section, click it with the Pointer tool. An inset frame in the column section will shimmer.

Inventory

Quantity	Item No	Price
2:Quantity	Item No	Price

Shimmering frame

You can change the height of a column by clicking and dragging its bottom edge with the Pointer tool. As you do this, Informed Designer constrains the increase or decrease of the column height to increments that equal the height of the rows in the table. This ensures that you don't end up with partial rows in your table. Holding down the Control (Windows) or Command (Mac OS) key while clicking and dragging the column's edge overrides this feature.

Even though you can't see a column's text until you fill out the form, Informed Designer allows you to specify a column's type characteristics as you design your form. When you fill out your form, the values in any column will appear with the type settings that you chose for that column.

Inventory

Part No.	Name	Price
1234	**widgets**	3.45
4534	**grommets**	4.52
3455	**rivets**	9.22
4355	**nails**	14.55

Like the title sections of a table, you can choose the font, font size, type style, leading, and alignment for each column in a table. To change the type attributes of a column, first select the column with the Pointer tool, then use either the Type command or the Style submenus to choose a different setting. When you choose a different setting, the type style of the cell's name and tab order in the selected column will change to reflect the new setting. For a complete description of each type attribute, see "Type Settings" in Chapter 7.

You can also set the color with which a cell value displays. For more information, see "Data Color" in Chapter 1 of your *Informed Designer Forms Automation* manual.

A column section also has many of the visual attributes of a rectangle. You can change the pen and fill, and you can adjust the thickness of the column's frame. You can also change the amount of rounding on each corner. Before choosing a setting, make sure that you select the column section first. For a complete description of the pen, fill, and line width attributes, see "Paint Settings" in Chapter 7. For information about rounding corners, see "Rounded Corners" in Chapter 7.

The Row Lines

The row lines in a table determine the vertical spacing of the data in each column. You can select the row lines by clicking any of them with the Pointer tool. The lines will shimmer when they're selected.

You can change the spacing of the row lines by using the Table command or by clicking and dragging any row line with the Pointer tool. Informed Designer will make sure that you don't make the row height too small.

Click and drag up or down to change the row spacing.
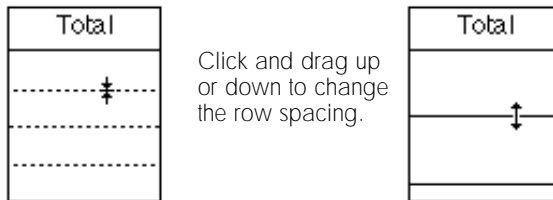
Informed Designer provides a feature that allows the spacing of the row lines to expand automatically when the Informed Filler user enters more data than the chosen row spacing can display. You can also include scroll bars on the tables on your form. When a table is 'scrollable' Informed Filler automatically adds new rows when the Informed Filler user enters more data than the table can display. For more information on these features, see "Table Settings" in Chapter 7, "Changing an Object's Appearance."

You can change the appearance of the row lines by changing their pen and line width attributes. To do this, select the row lines and then use the Paint command or the Pen and Line Width submenus to choose a different setting. You can also change the appearance of each alternating row by filling them with a color. To do this, click the 'Fill alternating rows with' drop-down list on the Table Settings dialog box, and choose an appropriate fill color from the color palette.
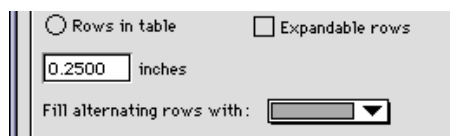
For more information about pen, fill, and line width attributes, see "Paint Settings" in Chapter 7.

Combs and Checkboxes

Informed Designer has comb and checkbox features that can be applied to table cells. Combs are divider lines that divide a cell into equally spaced sections. Checkbox cells use check symbols instead of text to indicate a cell's value. For more information, see "Combs" and "Checkboxes" in Chapter 7, "Changing an Object's Appearance."

7 Changing an Object's Appearance

In this chapter

7 Changing an Object's Appearance

After drawing an object, you can change its appearance by changing any of its visual attributes. A visual attribute is a setting that controls a particular characteristic of an object. Each different type of object has a different set of visual attributes. For example, line objects have pen, line width, and line style attributes. Changing any of these attributes changes a line's appearance.

In this chapter you'll learn how to change an object's visual attributes by using a variety of Informed Designer's commands. You'll also learn how to change the settings for new objects. For more information about objects and how to draw them, see Chapter 6, "Drawing Tools."

Overview

You change an object by selecting it and choosing a different setting from either a settings dialog box or a submenu. The following table summarizes the commands that are used to control the various attributes of an object.

Menu	Command	Description
Style	Paint	Controls paint attributes such as pen, fill, line width, and line style
	Type	Controls type attributes such as font, font size, and type style
	Corners	Controls the roundness of corners
Settings	Combs	Controls the number and height of comb dividers in a field or table cell
	Checkbox	Controls the style and dimensions of checkboxes
	Field	Controls field attributes such as title position and size, rule lines, and scroll bars
	Table	Controls table attributes such as titles, row separation, tabbing, and scroll bars
	Object	Used to lock an object's settings and position

When you choose any of the above commands, a dialog box appears showing the current settings of any selected object. For example, choosing the Paint command displays the Paint Settings dialog box.
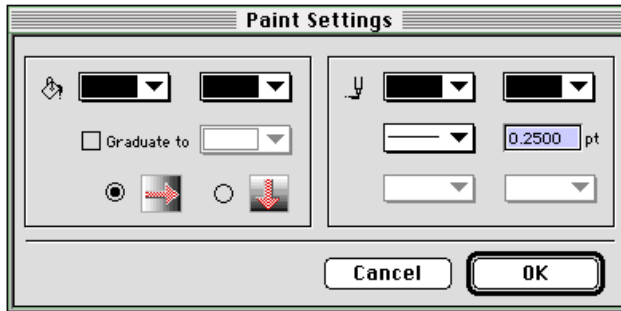
You can choose a different setting by clicking the various controls on the dialog box or by entering new values in the text entry box. Clicking 'OK' dismisses the dialog box and changes the selected object. You can cancel the dialog box by clicking 'Cancel' instead.
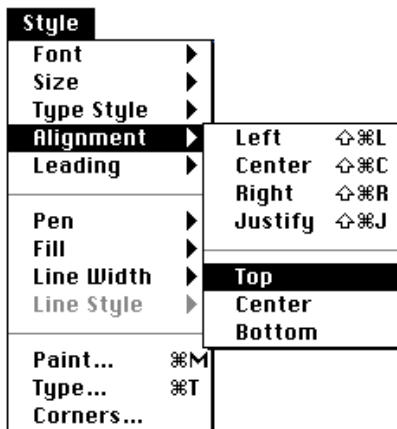
When you choose a settings command, Informed Designer enables only the controls that correspond to the attributes that apply to the selected object (or objects). For example, if you select a line and choose the Paint command, the fill and graduation controls are unavailable because lines don't have these attributes. When a control is unavailable, it appears gray and is unavailable.

Using Submenus

In addition to the various settings dialog boxes, you can also choose new settings using the submenus found in the Style menu. Each submenu contains settings for a particular attribute. Not all attributes are available in the submenus and, for some attributes, you can choose from only a few standard settings.

It's often more convenient to use a submenu when you want to change only one attribute of an object. For example, rather than using the Paint command to choose a different pen color, you could select a new setting from the Pen submenu instead.

To use a submenu, first choose it by clicking and dragging with the mouse until the item name is selected. A submenu will appear to the right of the item name. While still holding down the mouse button, drag the pointer over the desired setting and release the mouse button.

When you release the mouse button, the new setting is chosen and the selected object is changed. A check appears next to the current setting.

Using Pop-up Menus

Throughout this chapter you'll learn about many of Informed Designer's settings commands. These commands are available in menus and are selected in the normal way: by using the mouse, or by typing keyboard equivalents where they exist.

On both Windows and Mac OS compatible computers, clicking the mouse button provides a short-cut to selecting various commands. With any tool selected, position the pointer over an object and click the right mouse button (Windows) or click the mouse button while pressing the Ctrl key (Mac OS) to display a pop-up menu. The pop-up menu contains the settings commands that are applicable to the type of object. For example, if you position the pointer over a text object and click the right mouse button/Ctrl-mouse button, you'll see a pop-up menu containing the Type, Paint, Cut, Copy, Clear, and Object commands.
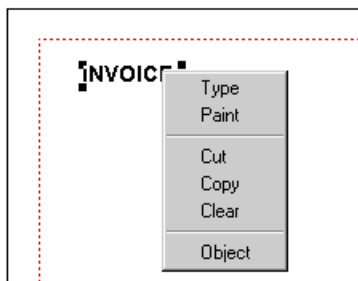
To select a command, drag the pointer to highlight the command, then click or release the mouse button.

Changing Multiple Objects

Informed Designer allows you to change more than one object at a time. Simply select the objects that you want to change and use a command or submenu as described above. For information about selecting more than one object, see "Selecting Multiple Objects" in Chapter 8.
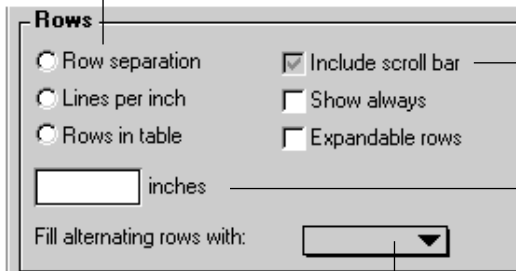
If you choose a command while two or more objects are selected, Informed Designer will show you only the current settings that are common to all of the selected objects. If an attribute is set differently among the selected objects, the controls that you use to set the attribute will show a blank value. For example, suppose that you select three lines, two of which have a line width of 1/2 point and the other has a line width of 1 point. Suppose also that the pen and line style attributes are the same for all three lines. If you choose the Paint command, this dialog box will appear:
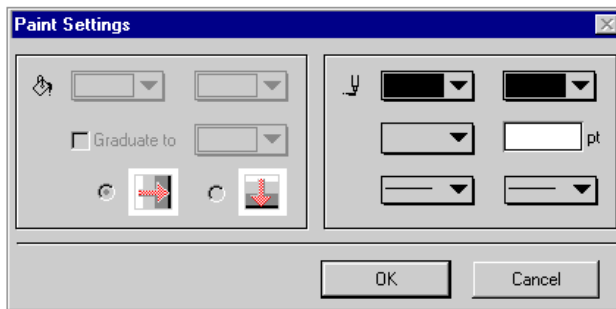
The line width drop-down list and text box are blank. This indicates that the line width setting is different among the selected objects. To choose a new setting, type a value in the text box, or choose a value from the drop-down list, then click 'OK' to dismiss the dialog box. The attribute is changed to the new setting for each of the selected objects. If you leave the setting blank, Informed Designer won't change the attribute.

Dialog boxes use a variety of controls to present different attributes. These include text boxes, checkboxes, radio buttons, drop-down lists, and scrolling lists. The following figure illustrates how a blank or empty value is shown using various types of controls.

Radio buttons don't
show any choices.

┌─ **Rows** ─────────────────────────────┐
│ ○ Row separation   ☑ Include scroll bar │
│ ○ Lines per inch   ☐ Show always   │
│ ○ Rows in table   ☐ Expandable rows   │
│   │
│ ┌──────────┐ inches   │
│ └──────────┘   │
│ Fill alternating rows with: ┌────────▼┐ │
└──┘

Checkmarks in checkboxes
appear gray instead of black.

Text boxes don't
show any values.

Drop-down lists don't
show any values.

Once you select a new setting (by clicking a control or entering a value in a text box), there's no way to change the setting back to the blank value. If you want to avoid changing the attribute, you must cancel the command by clicking 'Cancel' instead of 'OK.'

Like the settings commands, the Style submenus also show the current settings of any selected objects. If a checkmark appears in a submenu, you know that the corresponding attribute has the same setting for each selected object. If a setting isn't common to all the selected objects, no check-mark will appear in the attribute's submenu. To choose a new setting, simply make your choice from the submenu.
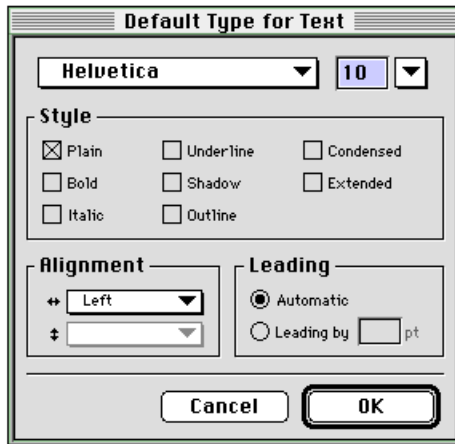
Changing Default Settings

When you draw a new object, Informed Designer sets its visual attributes to the current *default* set-tings. A default setting is automatically selected when a new object is drawn. For example, if the default line width attribute for lines is set to 1 point, each new line that you draw will (by default) be 1 point wide.

When you create a new form, Informed Designer assigns it a predefined list of default settings. These settings are listed in Appendix A. You can change the default settings so that new objects automatically appear with your preferred settings. For example, suppose that before drawing a form you know that the font of all text objects will be Times. Rather than changing the font each time you draw a new text object, simply change the default font for the Text tool to Times before you start drawing. Each subsequent text object that you draw will be Times.

To change a default setting, first deselect all objects on your form, then choose a different setting in the normal way—by using the commands or submenus in the Style or Settings menus. With the Pointer tool selected, default settings are changed for all drawing tools. If a particular drawing tool is selected, the default settings are changed for that tool only.

When you use a command, the fact that you're changing the default settings will be noted in the dialog box title. The figure below shows the Type command being used to change the default settings for the Text tool.


You can also use the Style submenus to change default settings. If no objects are selected, these submenus will show the current default settings for all tools if the Pointer tool is selected, or for the currently selected drawing tool. Choosing a different setting changes the current default.

Setting Field and Table Defaults

There's a second way to change the default settings for the Field and Table tools. If you double-click either of these tools on the tool palette, Informed Designer will present a list of default styles to choose from.
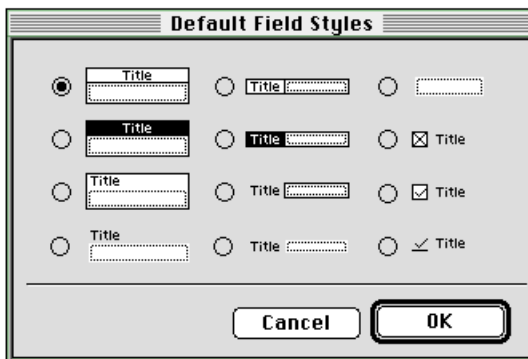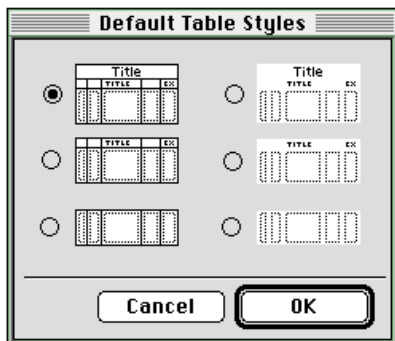
Choose a style by clicking the radio button next to your choice. After you make your selection, click 'OK' to change the default settings. To cancel the command, click 'Cancel' instead.

Locking an Object's Settings

You can prevent the settings of an object from being accidentally changed by locking the settings. You lock an object's settings using the Object command. Select the object whose settings you'd like to lock, then choose **Object...** from the Settings menu. The Object dialog box appears.
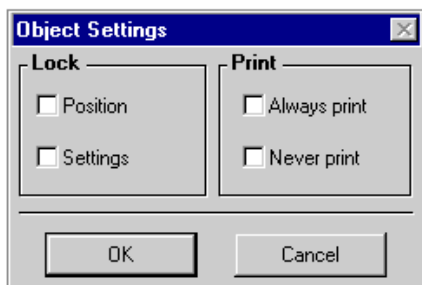
Click the 'Settings' checkbox below the Lock heading, then click 'OK' to dismiss the Object dialog box. To cancel the Object command, click 'Cancel' instead.

When an object's settings are locked, Informed Designer ignores any requests to change the object's appearance. When you choose a different attribute setting—for example, a new pen color—only those selected object's whose settings are not locked are affected.

For information about the other settings available on the Object dialog box, see "Locking an Object's Position" and "Objects and Printing" in Chapter 8.

Paint Settings

All objects have paint attributes which determine their color and the appearance of their lines and filled areas. This section describes paint attributes and how to select them. For information about drawing objects, see Chapter 6, "Drawing Tools".

Informed Designer offers two methods for changing paint attributes: the Paint command, and the Pen, Fill, Line Width, and Line Style submenus under Style. To use the Paint command, select the object or part that you want to change, then choose **Paint...** from the Style menu. The Paint Settings dialog box appears.
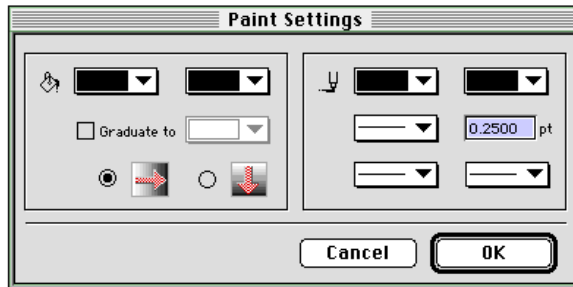
Choose a setting by clicking a control or entering a new value, then click 'OK' to commit the change and dismiss the dialog box. To cancel the command, click 'Cancel' instead.

In the Style menu, the Pen, Fill, Line Width, and Line Style submenus offer a convenient method for changing a single paint attribute. To choose an attribute, select the object or part that you want to change, then make your selection from the appropriate submenu.

Colors

The pen and fill attributes for an object are set by choosing colors from the color palettes found either on the Paint Settings dialog box, or in the Pen and Fill submenus under Style. The number of colors available on these color palettes depends on the number of colors your computer is capable of displaying. The following table shows how many colors will be available for computers that are capable of less than 16 colors, between 16 and 255 colors, and 256 or more colors.

Number of Colors on the Color Palette

Color Capability	The Color Palette Displays
less than 16 colors	Shades of grey (10, 25, 40, 50, 60, 75, 90, 100) and the standard colors red, green, blue, magenta, yellow, and cyan. The 'none' color is also included.
16 to 255 colors	15 colors (combination of grays and colors) and 'none.'
256 or more colors	87 colors and 'none.'

Note   Since the standard colors cannot be represented accurately for the 'less than 16 colors' group (especially for black and white displays), the color palette shows textual labels of the colors.

Pen

The *pen* determines the color of lines, text, and the frames of enclosed objects. All types of objects have a pen attribute. You can set the pen to 'none' or any one of a variety of colors. The 'none' color is invisible and transparent.

To choose a pen color for an object, first select the object, then choose **Paint…** from the Style menu. When the Paint Settings dialog box appears, click the pen drop-down list and choose a color from the color palette.

Another convenient way to set the pen color is to choose the Pen submenu under Style, and choose a color from the color palette. The number of colors available on the color palette depends on the number of colors your computer is capable of displaying. See "Colors" for more information.

Though it is uncommon, you can also set a pen pattern by choosing a pattern from the drop-down list on the Paint Settings dialog box. The pattern options are not available in the Pen submenu.

You can also set the pen attribute for multiple objects at once, and for each new object that you draw. For more information, see "Changing Multiple Objects" and "Changing Default Settings".

Fill

The *fill* determines the appearance of a shape's interior. You can fill any enclosed object with your choice of fill color, pattern, and graduation.

Fill Color

To choose a fill color for an object, first select the object, then choose **Paint...** from the Style menu. When the Paint Settings dialog box appears, click the fill color drop-down list, and choose a color from the color palette. Another convenient way to set the fill color is to choose the Fill submenu under Style, and choose a color from the color palette. The number of colors available on the color palette depends on the number of colors your computer is capable of displaying. See "Colors" for more information.

You can also set the fill color for multiple objects at once, and for each new object that you draw. For more information, see "Changing Multiple Objects" and "Changing Default Settings".

Fill Patterns

In addition to the fill color, objects can also have a fill pattern. This is useful for covering areas of a form where typing must be hidden. There are 40 different fill patterns to choose from. The figure below shows several sample fill patterns.

To choose a fill pattern for an object, choose **Paint...** from the Style menu. When the Paint Settings dialog box appears, click the fill pattern drop-down list and choose a pattern.
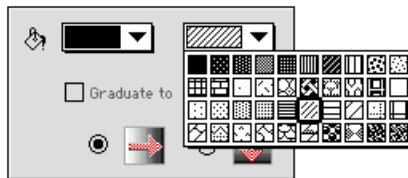
The fill pattern option is not available in the Fill submenu under the Style menu.

Graduated Fills

The fill colors of rectangles, fields, and tables can be graduated. A color that's *graduated* blends from one color to another.
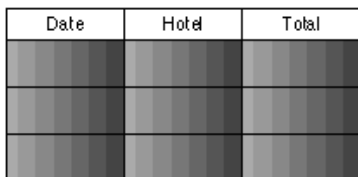
Field with cell graduated
from top to bottom

Table columns graduated
from left to right

Rectangle
graduated from
right to left

Rectangle
graduated from
bottom to top

To create a graduated fill color for an object, first select the object, then choose **Paint...** from the Style menu. The Paint Settings dialog box contains the controls for specifying both the color and direction of the graduation. Using the object's fill color as the starting point, click the 'Graduate to' checkbox, and then click the drop-down list and choose a color to graduate to. Next, click either the horizontal (left to right) or vertical (top to bottom) controls to specify the direction in which the fill will graduate.

Select a starting value here.

Select an ending value here.

Choose the graduation
direction here
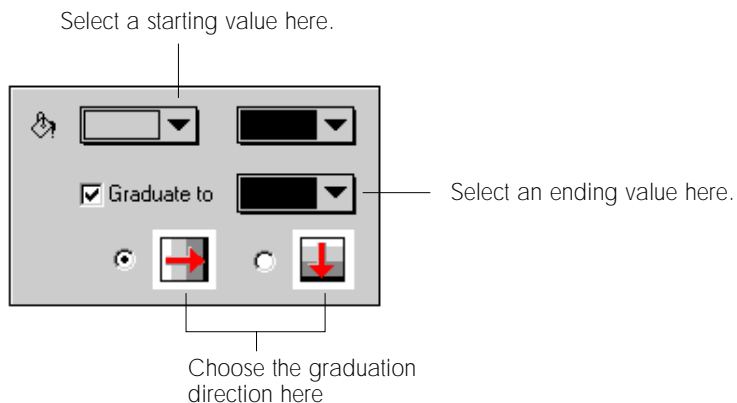
The graduated fill option is not available in the Fill submenu under Style.
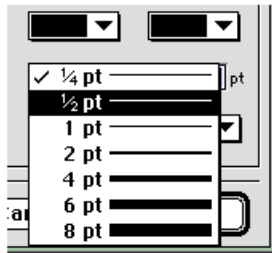
Line Width

Each line and enclosed shape has a line width. The *line width* determines the thickness of a line or a shape's boundary. When setting the line width attribute for an object, you can choose one of

Informed Designer's standard line widths or you can create a custom line width by entering a value on the Paint Settings dialog box.

6 point   4 point   2 point   1 point
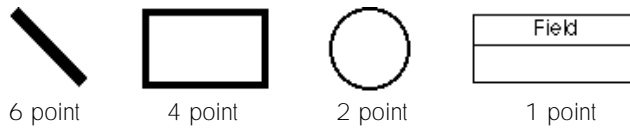
To choose a line width for an object, first select the object, then choose **Paint...** from the Style menu. When the Paint Settings dialog box appears, click the line width drop-down list and choose a line width. You can also type a value in the text box provided.

To change the line width, select a value from the drop-down list...
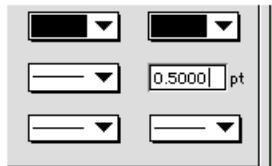
...or type a value into the text box

Another convenient way to set the line width is to make a selection from the Line Width submenu list under the Style menu.

Line Style

Lines and rectangle frames can be drawn using a variety of line styles. Line styles are grouped into three types: solid or dashed, single or double, and arrowhead. Different line styles are shown below.

Dashed   Double   Arrowhead
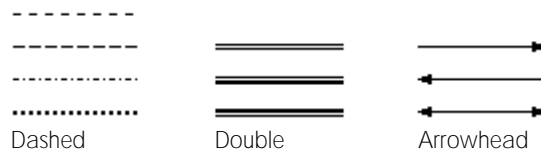
To select a line style, choose **Paint...** from the Style menu and make your selection by clicking either of the two line style drop-down lists. Another convenient way to select a line style is to make a selection from the Line Style submenu under Style. The Line Style submenu is divided into two

sections. The top section contains the solid and dashed styles, and the bottom section contains the single, double, and arrowhead styles.

You can combine different line styles with other attributes such as pen colors and line widths. For example, you could choose a double-dashed line style with a red pen.

Type Settings

You change the appearance of text by changing attributes such as the font, font size, and type style. In addition to text objects, field and table titles also have type attributes. For information about drawing and editing text, fields, and tables, see Chapter 6, "Drawing Tools".

Informed Designer offers two methods for changing type attributes: the Type command, and the Font, Size, Type Style, Alignment, and Leading submenus under Style. To use the Type command, select the object or characters that you want to change, then choose **Type...** from the Style menu. The Type Settings dialog box appears:
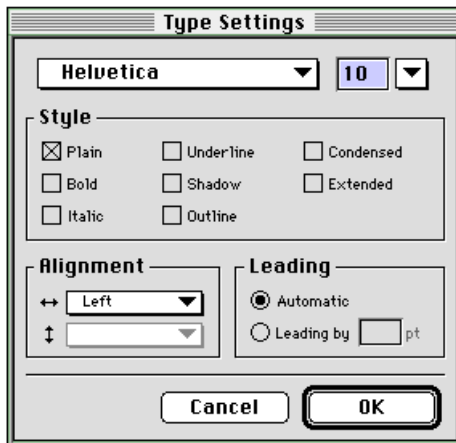
Choose a setting by clicking a control or entering a new value in a text box. Click 'OK' to dismiss the dialog box. To cancel the command, click 'Cancel' instead.

The Font, Size, Type Style, Alignment, and Leading submenus offer a convenient method for changing a single type attribute. To choose an attribute, select the object or characters that you want to change, then make your selection from the appropriate submenu.

The Command Palette provides shortcuts to some of Informed Designer's type settings. By clicking the appropriate icon on the Command Palette, you can change a text object's style to 'Bold' and its alignment to 'Left,' 'Center,' 'Right,' or 'Justify.'

For more information on the Command Palette, see "Using Palettes" in Chapter 5.

Font

Each *font* is identified by its name and a unique typeface. Only fonts that are installed on your computer will appear both in the Type Settings dialog box drop-down list and in the Font submenu.

To choose a font, select it from the drop-down list on the Type Settings dialog box, or from the Font submenu.

Note   Certain fonts that are available on Windows may not be available on Mac OS (and vice versa). When designing form templates for cross-platform use, make sure you use fonts that have identical names on both platforms.

Font Size

Font *sizes* range anywhere from 1 through 999 points. To choose a font size, select your choice from the 'Size' drop-down list on the Type Settings dialog box or type a value in the text box. You can also choose a size from the Size submenu under Style.

Type Style

Type style refers to the style of a font. You can vary the appearance of each font by choosing from up to eight different type styles. However, not all type styles are supported on both the Windows and Mac OS platforms. The following table shows which type styles are supported on each platform.

Type Styles for Windows and Mac OS

Type Style	Supported On
Plain	Windows and Mac OS
Bold	Windows and Mac OS
Italic	Windows and Mac OS
Underline	Windows and Mac OS
Condensed	Mac OS
Outline	Mac OS
Extended	Mac OS
Shadow	Mac OS

Each type style can be used individually or combined with others. For example, you could make a heading bold and then underline it for emphasis.

To change the type style, choose **Type...** from the Style menu, then click the corresponding check-boxes on the Type Settings dialog box. You can also choose a style from the Type Style submenu under Style. If you choose the Plain type style, all other type styles are turned off.

The Command Palette provides a shortcut for the bold type style only. To change an object's type style to bold, select the object, then click the bold icon on the Command Palette.

Leading

Leading refers to the amount of space between lines of text. By default, Informed Designer auto-matically separates one line from the next by enough space to hold the largest font size used in that line.

When you choose automatic
leading, each line is spaced
according to the largest
font size used in that
line of text

To choose automatic leading, click the radio button labelled 'Automatic' on the Type Settings dia-log box or select **Auto** in the Leading submenu under Style.

Alternately, you can enter a specific leading value if you want line spacing to be consistent. When you use a fixed amount of leading, all lines are spaced equally.

This is a sample
of twelve point leading.
All the lines are spaced
equally apart.

This is a sample
of eighteen point

leading

When you use the Type Settings dialog box, click the 'Leading by' radio button, then enter (in points) the leading amount in the text box. You can also choose a leading value from the Leading submenu. The Leading submenu lists only a few common choices.

Alignment

Alignment refers to the relative positioning of lines within a text object or title section. You can align text along its left or right edge, or along its center. You can also justify text so that both the left and right edges align.

You can left
align a text
object.

You can right
align a text
object.

You can align a
text object on
its center.

Or you can justify a
text object so both
sides align.

Unlike text objects, the titles and cells of field and table objects can also be aligned vertically.


Alignment is controlled by clicking the appropriate drop-down list in the 'Alignment' section on the Type Settings dialog box, or by selecting a choice from the Alignment submenu under Style.

As a shortcut, you can change the horizontal alignment of text objects and field and table titles by clicking one of the alignment icons on the Command Palette.

Rounded Corners

You can round the corners of rectangles, buttons, and the rectangular parts of fields and tables. Informed Designer allows you to round corners individually. This means that each corner can have a different amount of rounding.
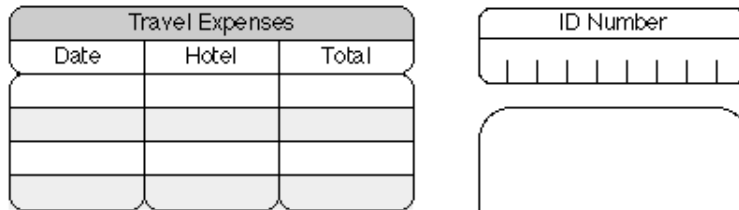
A corner can have up to 2 inches of rounding. The amount of rounding corresponds to the distance between the rectangle's edge and the end of the arc that forms the corner. The corner shown below has 0.5 inches of rounding.
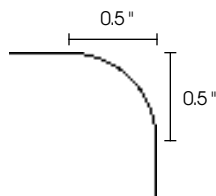
To round an object's corners, first select the object or part that you want to change. Then choose **Corners...** from the Style menu. The Rounded Corners dialog box appears:
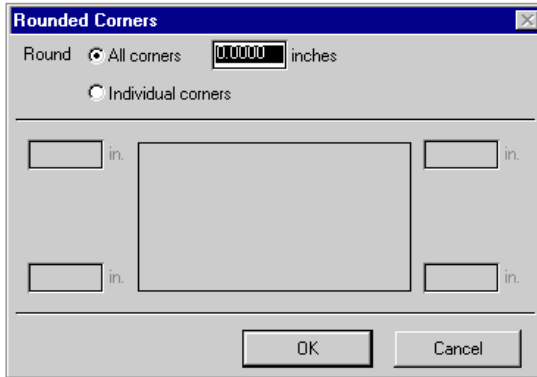
To round all of an object's corners, click the 'All corners' radio button and enter a value in the corresponding text box. To round individual corners, click the 'Individual corners' button and enter values in the text boxes at each corner of the sample rectangle. After entering your choice, click 'OK.' To cancel the Corners command, click 'Cancel' instead.

The rounding values are always displayed in the current ruler units. However, you can enter the values in any units you like; Informed Designer will automatically convert the value for you. For example, if the current ruler unit is 'inches', you can enter '2.54 cm.' After you press the Tab key, Informed Designer will convert that value to 1 inch and display it as such in the text box.

Field Settings

You can change the appearance of fields with the Field command and the Pointer tool. Use the Field tool to draw a field and the Pointer tool to select and manipulate its parts. You use the Field command to control the options associated with fields. This section describes the Field command. For information about drawing fields and the parts of fields, see "The Field Tool" in Chapter 6.

To use the Field command, select the field that you want to change, then choose **Field...** from the Settings menu. The Field Settings dialog box appears.
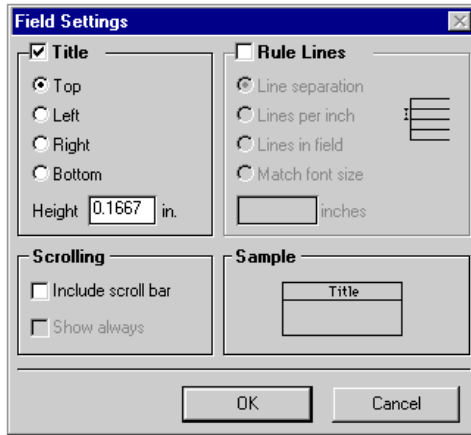
The Field Settings dialog box is divided into four sections: Title, Rule lines, Scrolling, and Sample. The Sample section displays the results of the choices that you make. After changing the settings, click 'OK.' To dismiss the dialog box and cancel the Field command, click 'Cancel.' The controls on the Field Settings dialog box are described in the following sections.

Title

Click the 'Title' checkbox to turn the field title on or off. When the title is on, you can choose its position by clicking any of the 'Top,' 'Left,' 'Bottom,' or 'Right' radio buttons. You can set the height of the title section by typing a value in the 'Height' text box. (You can also change the height of a field's title section by using the Pointer tool to move the title divider or to drag the title section's edge. See "The Field Tool" in Chapter 6 for more information.)

Rule lines

You can divide a field into lines using the rule lines option. Click the 'Rule lines' checkbox to turn this option on or off. When rule lines are on, you can specify the line spacing using the controls on the Field Settings dialog box, or by clicking and dragging any line using the Pointer tool. See "The Field Tool" in Chapter 6 for information about manipulating rule lines by dragging.

You can enter the rule line spacing using one of four methods. Choose a method by clicking the 'Line separation', 'Lines per inch', 'Lines in field', or 'Match font size' options, then enter a value in the text box below the radio buttons. When you use the 'Line separation' option, enter the actual distance that you want between each rule line. Enter either the number of lines per inch or the number of lines in the field, respectively, when you use either of those two options. Values are displayed in the current ruler units, but you can enter values in any units you like; Informed Designer will perform the conversion for you.

If you use the 'Match font size' option, Informed Designer will set the rule line spacing to match the height of the font size that you've chosen for the cell section in the field. If you change the font size for that cell, Informed Designer will automatically adjust the rule line spacing to match the new font size.

Scroll Bar

You can include scroll bars on the fields on your form. This allows the Informed Filler user to enter more data than will fit in the visible area of the cell section.

To include a scroll bar on a field, click the 'Include scroll bar' option on the Field Settings dialog box. A scroll bar is attached to right edge of the field.
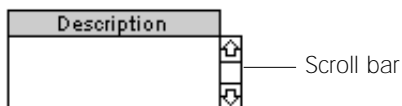
Scroll bar

If you include a scroll bar on a field, Informed Designer allows you to decide whether the scroll bar will be displayed always, or only when the Informed Filler user tabs into that field. Seeing a scroll bar on a field is an indication to the person filling out the form that the field can contain more data than will fit in the cell. Furthermore, an active scroll bar indicates that the field actually does contain more data. To make a scroll bar always visible, click the 'Show always' checkbox on the Field Settings dialog box.

In some cases, it might not be appropriate to have scroll bars visible at all times. For example, forms that must match a pre-defined layout (such as a government form) might not have room for visible scroll bars. For these instances, you can set the scroll bar on a field to display only when the user tabs into that field. This allows you to design your form without having to leave space for any scroll bars that you include. When the person filling out the form tabs into a field that includes a scroll bar, the scroll bar appears to the right of the field and overlaps any objects that are aligned next to it. As soon as the user tabs out of the field, the scroll bar disappears, leaving the layout of the form unchanged. To choose this option, turn the 'Show always' checkbox off.

When a form that contains scrolling fields is filled out and printed, Informed Filler repeats the printing of the page or pages that contain the scrolling fields, until all the data in those fields has been printed. For example, if page 2 of a two page form contains one scrolling field, Informed Filler will print page 1, then page 2, then page 2 again until all the data in the scrolling field has been printed. The extra copies of page 2 will contain only the data in the scrolling field; all other fields and tables will print blank.

Table Settings

You can change the appearance of tables using either the Table command or the Pointer tool. Use the Table tool to draw a table and the Pointer tool to select and manipulate its parts. You use the Table command to control the options associated with tables. This section describes the Table command. For information about drawing tables and the parts of tables, see "The Table Tool" in Chapter 6.

To use the Table command, select the table that you want to change, then choose **Table...** from the Settings menu. The Table Settings dialog box appears.
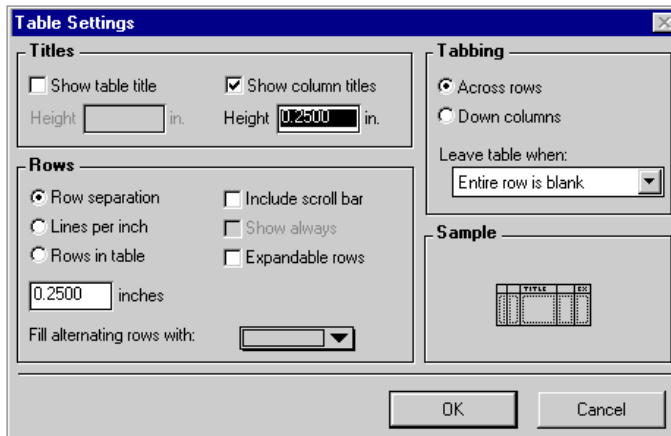
The Table Settings dialog box contains the options for a table's titles, rows, and tabbing order. A sample table illustrates the results of the choices that you make. After changing the settings, click 'OK' to change the selected table. To cancel the Table command, click 'Cancel' instead. The controls on the Table Settings dialog box (with the exception of the tabbing options) are described below. For information about the tabbing options, see "Tabbing in Tables" in Chapter 1 of your *Informed Designer Forms Automation* manual.

Titles

You can show or hide the title of a table or its columns. Click either of the 'Show table title' or 'Show column titles' checkboxes to turn the corresponding sections on or off. The sample table changes to show your choices. You can set the height of the table or column titles by typing a value in the appropriate checkbox on the Table Settings dialog box. Values are displayed in the current ruler units, but you can enter values in any units you like; Informed Designer will perform the conversion for you. You can also change the height of the title sections by using the Pointer tool to

move the title divider, or to drag the title section's edge. See "The Table Tool" in Chapter 6 for more information.

Rows

Each table is divided into rows. You can change the distance between each row by clicking and dragging any row line with the Pointer tool, or by entering a value on the Table Settings dialog box.

You can enter the row spacing using one of three methods. Choose a method by clicking the 'Row separation', 'Rows per inch', or 'Rows in table' options, then enter a value in the text box below the radio buttons. When using the 'Row separation' option, enter the actual distance that you want between each row line. When you use the other two options, enter either the number of rows per inch, or the number of rows in the table, respectively. Values are displayed with the current ruler units, but you can enter values in any units you like; Informed Designer will perform the conversion for you.

You can also change the color of each alternating row on a table. For more information, see "The Appearance of Tables" in Chapter 6, "Drawing Tools."

Expandable Rows

Informed Designer also provides a feature that allows the spacing of the row lines to expand automatically when the Informed Filler user enters more data than the chosen row spacing can display. To make your table rows 'expandable', click the 'Expandable rows' option on the Table Settings dialog box. Choosing this option makes all the rows in a table expandable, but only the rows that contain extra data are affected. For example, if only one row in a table contains more information than it could normally display, only that row will expand. The other rows will retain their original spacing.

| Qty	Description	Item No.
1	Boot Polish	BP100
1	Recipe for Disaster Cook Book	RD1313
2	Fishing Line	FL222

The row containing extra data expands, while the other rows retain their original spacing.

If all the rows in a table already contain data, Informed Filler will not allow the person filling out the form to expand any rows in the table, since doing so would cause the last row of the table to disappear. The Informed Filler user will be alerted with a message.

Scroll Bar

You can include scroll bars on the tables on your form. When a table is 'scrollable' Informed Filler automatically adds new rows to the table as the Informed Filler user enters more data than the table can display.

To include a scroll bar on a table, click the 'Include scroll bar' option on the Table Settings dialog box. A scroll bar is attached to the right edge of the table.
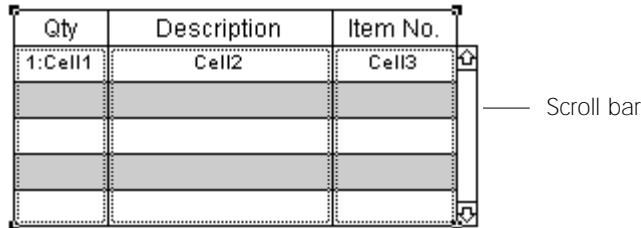
Scroll bar

If you include a scroll bar on a table, Informed Designer allows you to decide whether the scroll bar will be displayed always, or only when the Informed Filler user tabs into that table. Seeing a scroll bar on a table is an indication to the person filling out the form that the table can contain more data than will fit in the column sections. Furthermore, an active scroll bar indicates that the table actually does contain more data. To make a scroll bar always visible, click the 'Show always' checkbox on the Table Settings dialog box.

In some cases, it might not be appropriate to have scroll bars visible at all times. For example, forms that must match a pre-defined layout (such as a government form) might not have room for visible scroll bars. For these instances, you can set the scroll bar on a table to display only when the user tabs into that table. This allows you to design your form without having to leave space for any scroll bars that you include. When the person filling out the form tabs into a table that includes a scroll bar, the scroll bar appears to the right of the table and overlaps any objects that are aligned next to it. As soon as the user tabs out of the table, the scroll bar disappears, leaving the layout of the form unchanged. To choose this option, turn the 'Show always' checkbox off.

When a form that contains scrolling tables is filled out and printed, Informed Filler repeats the printing of the page or pages that contain the scrolling tables, until all the data in those tables has been printed. For example, if page 2 of a two page form contains one scrolling table, Informed Filler will print page 1, then page 2, then page 2 again until all the data in the scrolling table has been printed. The extra copies of page 2 will only contain the data in the scrolling table; all other fields and tables will print blank.

Combs

Combs are lines that divide the character spacing of fields and tables into equally spaced sections. Use the Combs command to specify the number and height of combs in a field or table cell.

To add combs, first select the cell in the field or table, then choose **Combs...** from the Settings menu. The Comb Settings dialog box appears:

Click the 'Combs' checkbox to turn comb lines on or off. When combs are on, you can enter the number of divisions in the text box provided. Furthermore, you can adjust the height of each comb line individually. To do this, click the 'Set Heights' button. The Comb Heights dialog box appears:
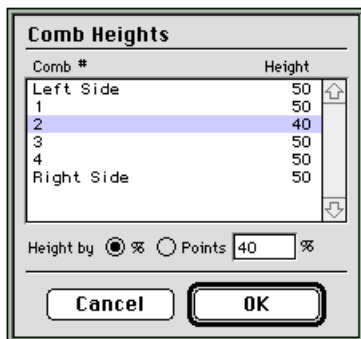
Using this dialog box, you can click and select each comb divider in the scrolling list, then enter a different value in the text box below the list. To change more than one divider line at a time, select each one while holding down the Control (Windows) or Command (Mac OS) key, then enter the new value.

You can measure comb heights in either percentage of cell height, or points. If you use the percentage of cell height option, the comb heights will automatically adjust when you resize the field's cell. Set the comb height by clicking either the '%' or 'Points' radio button, then enter a value in the

text box. Click 'OK' when you're finished changing the comb heights. To cancel the Combs command, click 'Cancel.'
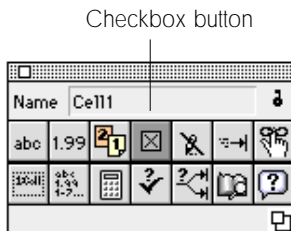
Checkboxes

Fields and table columns that are configured as checkboxes display a check symbol instead of a textual value. Use the Checkbox command to configure a field or a table column as a checkbox.

To configure a checkbox, select the field or table column that you want to change, then choose **Checkbox...** from the Settings menu. The Checkbox Settings dialog box appears.
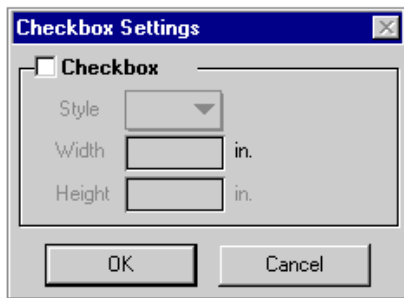
Click the 'Checkbox' option to turn the checkbox setting on or off. After you turn the checkbox option on, choose a checkbox style from the 'Style' drop-down list. Specify the dimensions of the checkbox by typing values in the 'Height' and 'Width' text boxes. If you enter a dimension that exceeds the size of the cell that holds the checkbox, Informed Designer will alert you with a message.

As a shortcut to the Checkbox command, you can also select a field or table column, and then click the checkbox button on the Cell palette.

Checkbox button

The selected field will display a checkbox with the default style and size; that is, a plain frame measuring 0.1667 inches by 0.1667 inches, with an 'X' check symbol. For more information about the Cell palette, see "Using the Cell Palette" in Chapter 1 of your *Informed Designer Forms Automation* manual .

Informed Filler stores a different value for each of the checked and unchecked settings of a checkbox cell. The values that correspond to checked and unchecked depend on the cell's type. The following table lists each cell type and the corresponding checked and unchecked values. Note that checkboxes do not work with picture and signature cells.

Checked and Unchecked Values

Cell Type	Checked Value	Unchecked Value
Text	"True"	"False"
Character	"True"	"False"
Number	1	0
Name	"True"	"False"
Date	"Current Date"	No Value
Time	"Current Time"	No Value
Boolean	True	False
Picture	n/a	n/a
Signature	n/a	n/a

If checkboxes are used in a table column, the checkbox frame does not appear until the person filling out the form tabs into that cell. After a value is entered and the users tabs out of the cell, the checkbox frame disappears again, but the checkmark remains visible.

Clustering Checkboxes

Checkboxes often appear grouped to offer a variety of choices. For example, you might show different payment methods on a sales slip using a group of checkbox cells.

☐ Cash   ☐ Credit Card

☐ Check   ☐ Other

Only one option can be checked. Normally, to change the payment method from one choice to another, you'd have to uncheck the current setting and then check the new method.

You can use the Cluster command to group a set of checkbox cells in this manner. This is different from grouping objects with the Group command. When you cluster two or more checkbox cells, Informed Filler will automatically uncheck the currently checked cell when the user selects a different cell in the cluster.

To cluster a set of checkboxes, select the cells you want clustered, then choose **Cluster** from the Arrange menu. You can view which cells participate in a cluster by clicking any cell with the Pointer tool and choosing the **Cluster Information...** command. A dialog box appears listing all cells that are currently clustered with the selected cell.
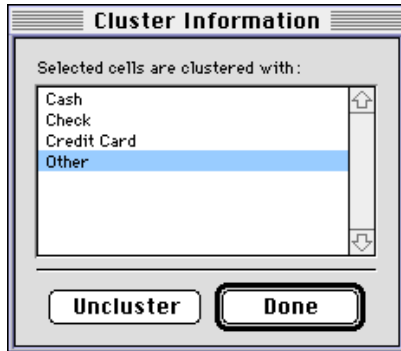
To remove a cell from a cluster, select it in the list, then click the 'Uncluster' button.

8 Manipulating Objects

In this chapter:

8 Manipulating Objects

Informed Designer provides a variety of commands and features that allow you to manipulate objects. This chapter describes how to select, reposition, and resize objects with the Pointer tool. You'll also learn how to manipulate objects using the commands in Informed Designer's Arrange menu, and how to use the Specs palette and the Clipboard.

Selecting Objects

Before you can manipulate an object on your template, you must select it first. With Informed Designer, you can select objects in one of two ways: by using the Pointer tool, or by using the object selection commands (Select All and Select Same) in the Edit menu.

Note When more than one object on your drawing is selected, all subsequent object manipulations that you perform are applied to all of those objects. Make sure that you select the right objects before you choose a command.

Using the Pointer Tool

The Pointer tool selects objects in a variety of ways. Before you can use the Pointer tool, you must first select it on the tool palette. Since the Pointer tool is used regularly, Informed Designer offers a shortcut for selecting it. In addition to clicking it on the tool palette, you can select the Pointer tool by pressing the key located at the top-left corner of your keyboard (either Escape or '`'). You can also select it temporarily by holding down the Alt (Windows) or Option (Mac OS) key. See "The Tool Palette" in Chapter 6 for more information.
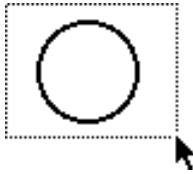
Selecting a Single Object

You can select a single object either by clicking it with the Pointer tool, or by drawing a selection rectangle around it.

To select an object by clicking, position the pointer over the object and click the mouse button. Handles appear on the object's corners to indicate that it's selected.

To select an object by drawing a selection rectangle, position the pointer outside of the object, then click and drag the mouse to surround the object with a *selection rectangle*. When the object is completely enclosed, release the mouse button.

Selecting Multiple Objects

You can select multiple objects by Shift-clicking the individual objects, or by drawing a selection rectangle around them.

To select objects by Shift-clicking, hold down the Shift key as you click the individual objects. Holding down the Shift key causes any previously selected objects to remain selected.

To select objects using a selection rectangle, position the pointer outside of the objects that you want to select, then click and drag the mouse to completely enclose them. This technique is useful when the objects you want to select are positioned near each other on your template.

Forcing a Selection Rectangle

Often you might want to draw a selection rectangle to select one or more objects that are positioned in front of other objects on your template. If the objects behind those that you want to select cover other areas of your template, you might unintentionally select and drag one of them when you attempt to draw the selection rectangle.

To prevent this from happening, hold down the Alt (Windows) or Option (Mac OS) key while drawing the selection rectangle. The Pointer tool will act as though there are no objects under the position where you click to begin drawing the selection rectangle.

If you hold down the Alt (Windows) or Option (Mac OS) key to force a selection rectangle, all objects that are completely enclosed within the rectangle will be selected when you release the mouse button. If you hold down the Alt and Control (Windows) or Option and Command (Mac OS) keys instead, all objects that intersect the drawn rectangle will be selected.
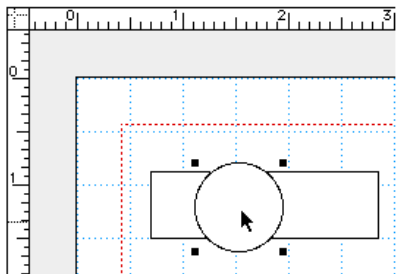
Selecting Through Objects

When you click the pointer to select an object, the front most object that lies below the pointer is selected. Often you might want to select an object that is obscured by other objects. Instead of moving these objects to reveal the object that you want to select, use the Control (Windows) or Com-

mand (Mac OS) key to select through an object. Each time you select while pressing the Control/ Command key, the object immediately behind the one currently selected is chosen.

For example, if you draw an oval over top of a rectangle and select the oval, clicking the oval again while holding down the Control/Command key causes the rectangle to be selected instead.

Clicking a selected object while holding down the Control/Command key...   ...selects the object behind it.
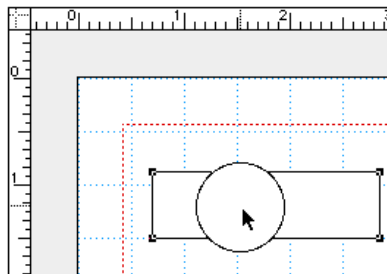
When selecting through an object, the pointer must be positioned over the region where the two overlapping objects intersect.

The Select All and Select Same Commands

Use the Select All and Select Same commands to select objects on the current page of your template.

Select All

The Select All command selects all the objects on the current page of your template. Functionally, this command is equivalent to selecting all objects with the Pointer tool. To use this command, choose **Select All** from the Edit menu.
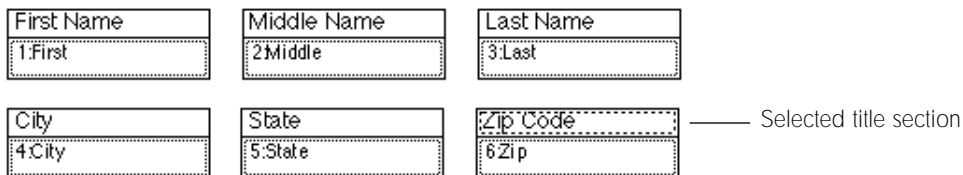
Select Same

The Select Same command selects all objects of given type. For example, if a rectangle and a line are currently selected, then the Select Same command will select all other rectangles and lines on the current page of your template.

To use the Select Same command, first select one or more objects on your template, then choose **Select Same** from the Edit menu. Informed Designer will select all remaining objects on the current page of your template that are of the same type as the ones you originally chose.

The Select Same command works differently when you work with fields or tables. If you're editing a field or a table, and a part of that object is selected (such as a cell or dividing line), then the Select

Same command will select the same parts in all other fields or tables on the current page of your template.

Choose the Select Same command…

———— Selected title section

…to select the same components on all other fields.
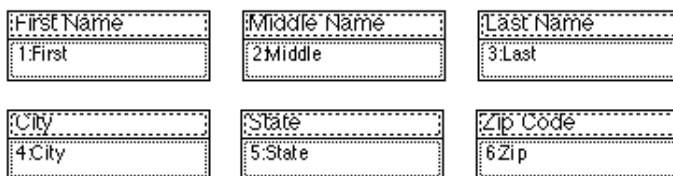
Deselecting Objects

To deselect all currently selected objects on your template, click on an area of your template that contains no objects, or double-click the Pointer tool on the tool palette.

To deselect a particular object on your template, click the object with the Pointer tool while holding down the Shift key. All other currently selected objects will remain selected.

Clearing Objects

To clear an object from your template, first select it. Then clear it by using one of these methods:

■ press the Backspace or Delete key
■ choose **Clear** from the Edit menu
■ choose **Cut** from the Edit menu

The Cut command places the selected object on the Clipboard and then clears it from your template.

Repositioning Objects

After drawing an object, you may want to reposition it to a different location on the page. An object is repositioned by dragging it with the Pointer tool. Informed Designer gives you the choice of how the object is displayed as you drag.
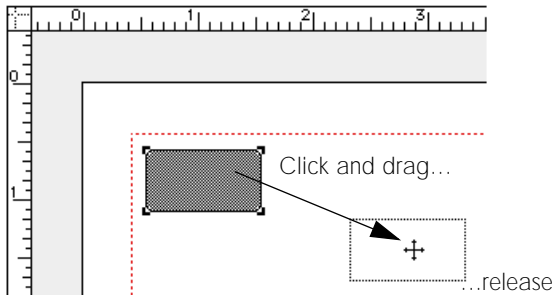

If you click and drag an object immediately, an outline of the object appears and follows the movement of the mouse as you drag. When you release the mouse button, the object is drawn at its new position.

Alternately, if you pause briefly before dragging the mouse, the pointer and all handles will disappear and the object will be drawn in detail as you drag. This method is particularly useful for repositioning text because the text itself remains visible as you drag the mouse.

You can constrain the direction of dragging by holding down the Shift key. The object's motion will be constrained in either the horizontal or vertical direction depending on the initial motion of the mouse.

Object Guides

Informed Designer's Object Guides feature makes it easy for you to align one object with another when dragging. To use this feature, click the object that you want to move, and drag it towards the object that you want to align it with. Drag the selected object until the pointer is over top of the second object and hold it there for a few seconds. Object guides appear around the second object, and remain there until you release the mouse button. As you position the selected object, it will snap to the object guides to ensure perfect alignment with any edge of the second object.

Click and drag over top of the second object…

…hold it there for a few seconds and the object guides appear.
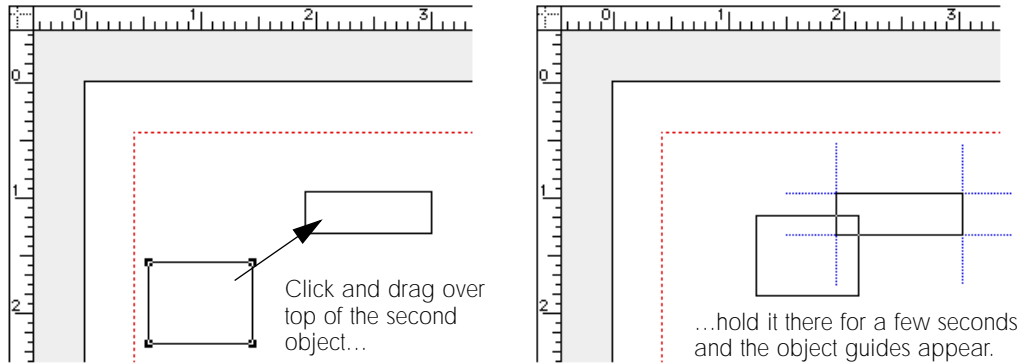
Note   The Align and Distribute commands, as well as the Arrow keys, can be used to reposition objects. For more information, see "Aligning Objects", "Distributing Objects", and "Nudging Objects" later in this chapter.

Moving Objects Between Pages

Earlier in this chapter, you learned how to reposition objects by simply clicking and dragging them from one position to another on a single page. Informed Designer provides a similar feature that makes it just as easy to move objects from one page of your template to another.

To move an object from it's current page to a different page, simply click and drag the object onto one of the page controls at the bottom of the drawing window. When a highlighted frame appears inside the page control, release the mouse button.

Click and drag the object onto a page control.

View : 100%

Highlighted frame
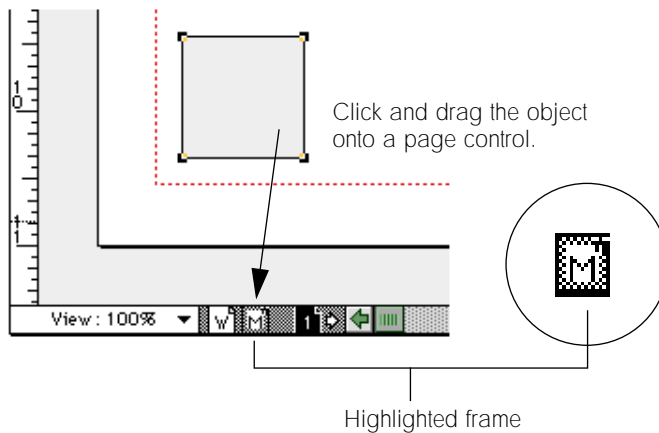
If you drag an object onto the work or master page controls, Informed Designer moves the object to the same position on that page and automatically displays the page. If your template has more than two numbered pages, Informed Designer will display the Change Page dialog box when you drag an object onto the numbered page control.
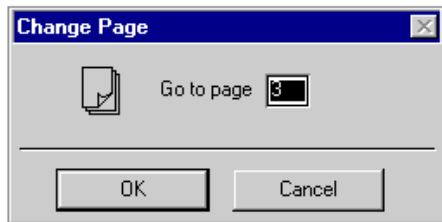
Enter the number of the page that you want to move the object to and click 'OK.' Informed Designer moves the object to the same position on that page and automatically displays the page.

If your template only has two numbered pages, you won't see the Change Page dialog box when dragging an object between those pages. Instead, Informed Designer will automatically move the object to the "other" page of your template. For example, if you drag an object from page 2 onto the numbered page control, the object will be moved to page 1, and that page will be displayed. Similarly, when moving objects from the work or master page to a numbered page, the Change Page dialog box will only appear if there is more than one numbered page on your template.

This feature is particularly useful for moving a cell between pages, because you can do so without deleting the cell as you would when using the Cut and Paste commands. Since Informed Designer will not allow you to 'Cut' a cell that's used in the formulas of other cells, you would have to remove formulas before cutting, and add them back after pasting. This is unnecessary when using the click and drag method.

For information about moving objects from one place to another using the Copy, Cut, and Paste commands, see "Using the Clipboard", later in this chapter.

Locking an Object's Position

You can lock an object's position to prevent it from being moved or resized accidentally. To lock an object's position, select the object, then choose **Object...** from the Settings menu. The Object Settings dialog box appears.
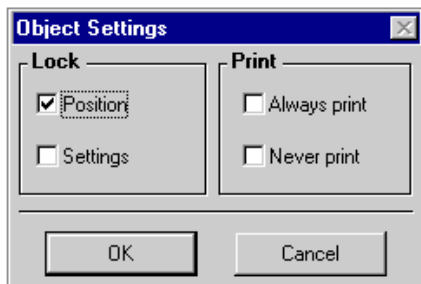
Click the 'Position' checkbox under the Lock heading. Click 'OK' to dismiss the Object Settings dialog box.

As a shortcut to using the Object command to lock an object's position, you can select the object and click the lock button on the Command palette.

Locks objects ———┘   └——— Unlocks objects

If you attempt to reposition or resize a locked object by dragging with the Pointer tool, Informed Designer will change the pointer to a lock. This indicates that the object is locked and cannot be dragged. When you use commands that reposition or resize objects, any objects that are locked are not affected.

For information about the other settings available on the Object Settings dialog box, see "Locking an Object's Settings" in Chapter 7, and "Objects and Printing" later in this chapter.

Resizing Objects

A selected object can be resized by using any of the following three methods:

- Pointer tool
- Resize command
- Specs palette

This section describes how to resize objects using all three of these methods.

Resizing with the Pointer Tool

You resize a selected object by clicking and dragging any of its handles with the Pointer tool. As you drag, Informed Designer draws a gray outline of the object, which shrinks and expands with the movement of the mouse to indicate the object's changing size. If you pause briefly after clicking a handle, Informed Designer will hide the pointer as you drag.
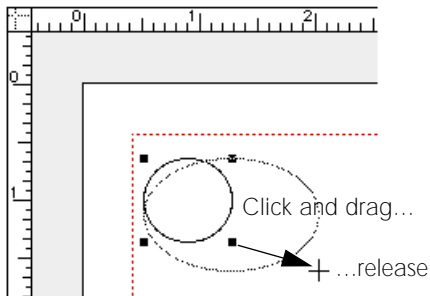
Resizing Lines

You resize a line by selecting it, then clicking and dragging one of its end point handles.
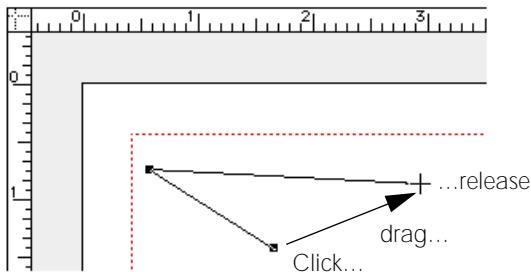

If you hold down the Shift key while resizing a line, the line will be constrained along the vertical, horizontal, or diagonal (45°) directions, depending on the position of the mouse as dragging occurs.

Resizing Boxes, Ovals, Arcs, and Polygons

You resize boxes, ovals, arcs, and polygons by clicking and dragging any corner handle of the object.

If you hold down the Shift key while dragging, resizing is constrained along the horizontal, vertical, or diagonal axes depending on the movement of the mouse. Resizing horizontally or vertically scales the object in that direction only. If you hold down the Shift key while resizing diagonally, the new object is scaled equally in both directions, resulting in a new size that's proportional to the original. As you drag while holding down the Shift key, the information box displays the current scaling percentage.

Scale 75%   W M 3
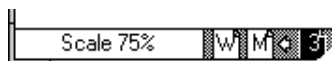
When resizing a polygon with the Pointer tool, Informed Designer scales the object in the same way as described above. More specifically, Informed Designer resizes the smallest possible rectangle that completely encloses the selected polygon. You can resize a polygon in any direction, and if you hold down the Shift key, the operation is constrained to the horizontal or vertical axis, or proportionally. To reposition individual vertices of a polygon, use the Reshape Polygon command in the Arrange menu. For more information see "Reshaping a Polygon" in Chapter 6.

Resizing Text

You resize text objects the same way that you resize boxes, ovals, rectangles, and polygons—by clicking and dragging a handle.

When you resize a
text object,
Informed Designer
reformats the type
to fit the new
object.

When you resize a text object,
Informed Designer reformats
the type to fit the new object.

When you resize a text object, Informed Designer automatically reformats the type inside the object to fit the object's new size.

If you resize a text object too small, Informed Designer will automatically extend its bottom edge so that all text in the object is visible. Likewise, if you make a text object too long, Informed Designer will snap its bottom edge up to the last line of text.

Resizing Fields and Tables

When you resize a field or table using the Pointer tool, Informed Designer adjusts the size of the object while preserving the spacing of the title sections. An example is shown on the next page.
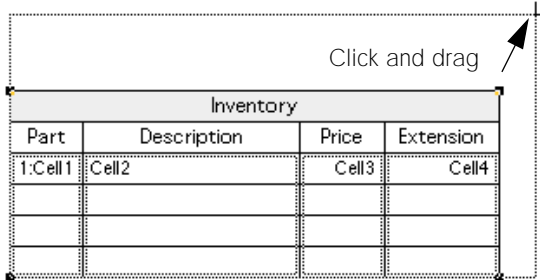
Resizing a field or table with the Pointer tool...
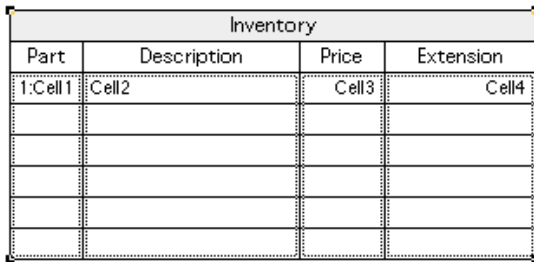
...doesn't change the spacing of the title sections

When you drag the edge of a field or table, any title sections move as well. If you hold down the Control (Windows) or Command (Mac OS) key while dragging the edge of a title section, the size of that section changes. You can also change the size of a title section by clicking and dragging the section's dividing line with the Pointer tool.

Holding down the Shift key while resizing a field or table constrains the motion of the resize operation to the vertical, horizontal, or diagonal axes, depending on the motion of the mouse. Scaling diagonally results in an object that is resized proportionally to the original. As you hold down the Shift key and drag, the Information box displays the current scaling percentage. For more information on resizing parts of fields and tables, please see "The Field Tool" and "The Table Tool" in Chapter 6.

Resizing Multiple Objects

Often you will want to resize more than one object by the same amount. For example, you might want to change the height of three adjacent fields. Informed Designer allows you to select more than one object, and then resize them all with one motion. Simply select each object, then resize one of them to the desired size. All selected objects will be resized by the same amount.
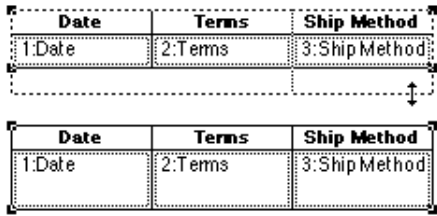
Select the objects, then click and drag to resize.

The spacing of the title section remains the same…

…and all selected objects are resized equally.

As multiple objects are resized, Informed Designer will constrain the new size to ensure that any object doesn't become too small or too large.

Resizing with the Resize Command

The Resize command resizes one or more selected objects.

You resize an object in one of three ways:

■ explicitly (by specifying the object's new dimensions)
■ by percentage (by specifying a percentage to enlarge or reduce)
■ by example (by clicking another object of the desired size)
■ to its original size (available for imported graphic objects)

To resize an object, first select it and then choose **Resize...** from the Arrange menu. The Resize Objects dialog box appears.
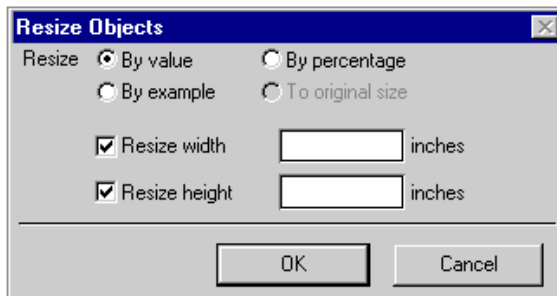
The width and height of the selected object can be resized independently. Do this by clicking either of the 'Resize width' or 'Resize height' checkboxes.

If you select the 'By value' radio button, you can specify the new width or height of the selected object by typing values in the text boxes. For example, you might enter a value of 5 inches for the height and 3 inches for the width of a selected object. The unit of measurement corresponds to the current ruler setting. However, you can enter the value in any units you like; Informed Designer does the conversion for you.

Similarly, if you select the 'By percentage' option, the selected object is resized to a percentage relative to its current size. For example, you might want to scale an object to half its present size. Simply enter '50' into each text box. Click 'OK' to perform the resize.

The resize 'By example' option allows you to change the size of an object to the size of a different object on your template. To use this method, follow the instructions below.

1. Select the object that you want to resize.

2. Choose **Resize...** from the Arrange menu, select the 'By example' option, then click 'OK.'

3. With the pointing hand, click the object that's the correct size. The size of the selected object will change to match the size of the object you click.
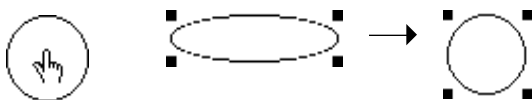

The resize 'To original size' option is available only if you've selected at least one object that corresponds to an imported graphic such as a Mac OS picture. This option resizes the object to its original pasted or imported size. (You can also double-click the object with the Pointer tool to resize it to its original size.

When using the Resize command, Informed Designer won't allow you to reduce the size of an object below its minimum size (for example, setting the width of a box to zero inches), or enlarge an object larger than the size of the drawing area. If you try, Informed Designer will alert you with an error message and cancel the Resize command.

Resizing with the Specs Palette

The Specs (specifications) palette is a drawing aid that helps you resize and reposition objects on your template. Use the specs palette to position or resize an object if you know its exact dimensions.

Specifications of the currently selected object

Current pointer position
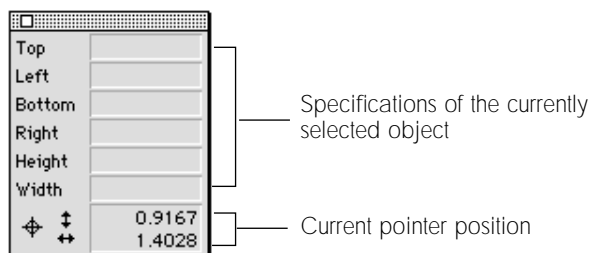
The Specs palette displays coordinate information pertaining to the pointer and any currently selected objects. Like the Tool palette, the Specs palette can be displayed, hidden, or dragged, but not resized. When visible, the Specs palette always displays the pointer's current position, unless the pointer is over the Specs palette or outside of the drawing window.

When the Specs palette is displayed, the units of measurement correspond to those currently set on the ruler.

Using the Specs Palette

To use the Specs palette, first display it by choosing **Specs** from the Show submenu under Layout. When the Specs palette is visible, a checkmark appears next to the Specs item in the Show submenu. To hide the Specs palette, choose **Specs** again or click its close box.

You can resize an object by changing any of the parameters displayed in the text boxes on the Specs palette.

|	
Top	1.2083
Left	0.6806
Bottom	1.9167

——— Click and type here
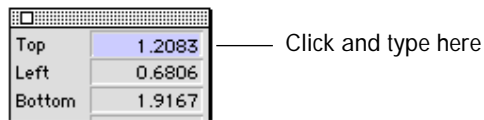
To change an object's parameters, type a new value in the appropriate text box, then press Tab or the Enter (Windows) or Return (Mac OS) key. The new value will be applied to the selected objects. Pressing Tab or Enter/Return moves to the next text box. Pressing Shift-Tab moves to the previous text box, and pressing Enter on the numeric keypad leaves the Specs palette.

When you alter any of the Top, Left, Bottom, or Right parameters, the object's corresponding edge always reflects the change. If you change the Height or Width parameters, the change always affects the bottom or right edge. For example, if the width of a table is five inches, and you type '6' into the Width text box on the Specs palette, the right edge of the table will be extended by one inch.

If more than one object is selected, the Specs palette shows only the values that are common to all objects. This means that a text box will be blank if its value is different for each of the selected objects. For example, if two objects of the same width are selected, the specs palette will show the corresponding width. However, only if their edges are aligned exactly will values appear in the top, left, right and bottom text boxes.

The figures below show the Specs palette and three selected objects. Since the dimensions and positions of each object are different, all text boxes in the first figure show blank values. When a value of '2.0' is entered in the 'Left' text box, the left edge of each selected object is moved to the 2 inch mark on the horizontal ruler.

When you type on the Specs palette…
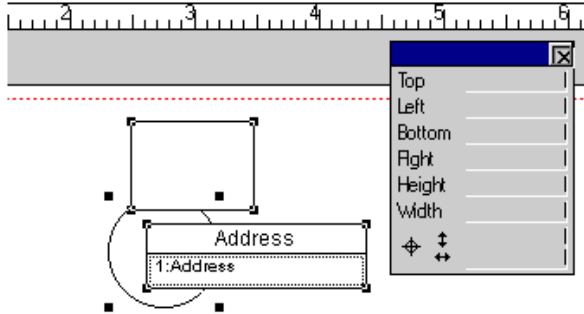
…the change is applied to all selected objects.
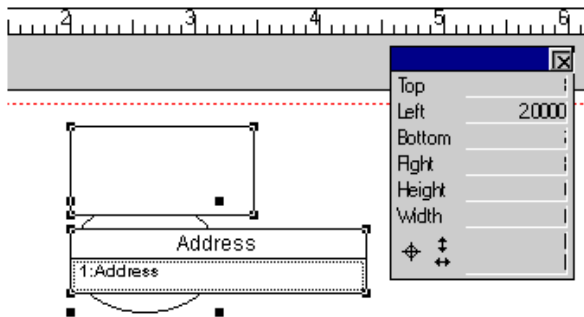
As with all other resizing operations, you can't enter values that would reduce the size of an object below its minimum, or enlarge an object so that it lies off the drawing area. If you try to enter a value that is too large or too small, Informed Designer will warn you (with a beep) and leave the original value unchanged.

Duplicating Objects

Often you'll want to create new objects that are similar, if not identical, to other objects on your template. Rather than redrawing an object by hand, you can use the Duplicate and Replicate commands to create one or more duplicates of an existing object.
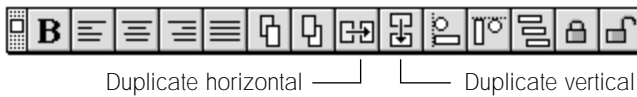
Duplicate

The Duplicate command duplicates one or more selected objects. It's useful for making a single copy of an object.

To duplicate an object, first select it and then choose **Duplicate** from the Arrange menu. For each selected object, Informed Designer places a copy directly to the right of the original. The original object is deselected and the new object is selected.
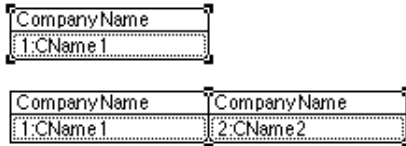
If you hold down the Alt (Windows) or Option (Mac OS) key while choosing the Duplicate command, the duplicate object will be placed directly below the original. If you reposition a duplicated object and immediately duplicate it again, Informed Designer uses the distance between the copy and the original as the offset for the next copy.

As a shortcut to choosing the Duplicate command, you can select an object and click either the 'Duplicate horizontal' or 'Duplicate vertical' buttons on the Command palette.

Duplicate horizontal ———   ——— Duplicate vertical

Replicate

The Replicate command duplicates one or more selected objects an arbitrary number of times. Replicated objects are created at evenly spaced intervals that you can set.

To replicate an object, first select it and then choose **Replicate...** from the Arrange menu. The Replicate dialog box appears.
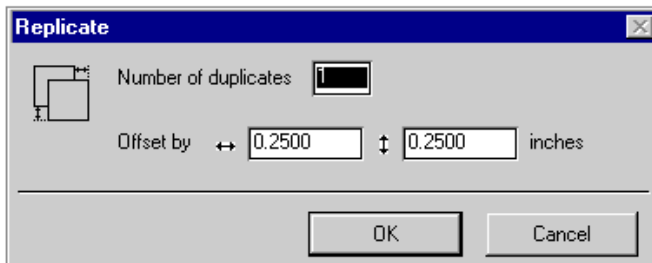
Use the 'Number of duplicates' text box to specify the number of copies that you want to make, then enter the horizontal and vertical offsets in the 'Offset by' text boxes. These values indicate the distance between each subsequent duplicate.

You can enter negative offsets as well. A negative offset causes a new object to be placed in the opposite direction of a positive offset. This means that positive horizontal and vertical offsets will place a duplicate object below and to the right of the original, whereas corresponding negative offsets will place a duplicate above and to the left instead.

After you enter the appropriate values, click 'OK.' To cancel the Replicate command, click 'Cancel' instead.

Duplicating Cells

When you duplicate cells on a template (either field cells or table cells), you should be aware of the following situations and how Informed Designer handles each one.

If you duplicate a cell, the new cell can't have the same name as the original (all cell names must be unique). Informed Designer will adjust the new cell name to ensure that it's unique.

Each newly duplicated cell receives the next available tab position. For example, if there are 15 cells on your template with tab positions 1 through 15, and two of those cells are duplicated, the two new cells will have tab positions 16 and 17.

If you're duplicating a cell that has a calculation, check, or tab formula, and that formula refers to cells that are also being duplicated (remember their names will change), then when you perform the duplication, the formula will be adjusted so that all cell references refer to the duplicate cells rather than the originals.

For example, suppose that your template has two cells, cell1 and cell2, and that the value of cell2 takes the value of cell1 (cell2 = cell1). If you duplicate the two cells together, then you'll get cell3 and cell4 where the value of cell4 is calculated as the value of cell3 and not the value of cell1 (cell4 = cell3).

Aligning Objects

You can align objects on your template to each other, to the drawing, or along the lines of the drawing grid by using the Align command.

To align a set of objects, first select them and then choose **Align...** from the Arrange menu. The Align Objects dialog box appears.
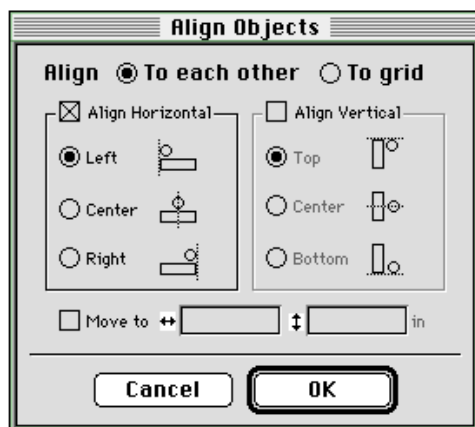
Aligning Objects to Each Other

To align a set of objects to each other, click the 'To each other' radio button. Choose the axes along which the alignment will occur by clicking the 'Align horizontal' and 'Align vertical' checkboxes. You can align objects along one or both axes.

If you check the 'Align horizontal' checkbox, then the alignment will take place along the horizontal axis—that is, in the left-to-right direction. Click the 'Left' radio button to align the objects along the left side of the leftmost selected object. Click the 'Right' radio button to align the objects along the right side of the rightmost selected object. If you click the 'Center' radio button, the objects' centers will be aligned along a path that lies roughly halfway between the leftmost and rightmost selected objects.
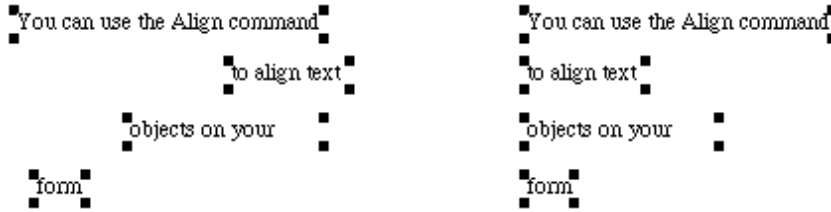
Similarly, you can click the 'Align vertical' checkbox to perform the alignment along the vertical axis. The 'Top' radio button aligns the objects along the top edge of the topmost selected object. The 'Bottom' radio button aligns the objects along the bottom edge of the lowest selected object. The 'Center' radio button aligns the objects' centers along a path that lies roughly halfway between the uppermost and lowest selected objects.

As a shortcut to using the Align command, you can quickly align a set of objects by clicking the alignment buttons on the Command palette. Clicking the 'Align horizontal' button aligns the objects along the left edge of the leftmost selected object. Clicking the 'Align vertical' button aligns the objects along the top edge of the topmost selected object.

Align horizontal ——⌐   ⌐—— Align vertical

Aligning an Object to the Drawing Area

The align 'To each other' option is available if you've selected more than one object to align. With only a single object selected, the 'To each other' option changes to 'To drawing.' Use this option to align an object to the edge or center of the drawing area. Click the 'Align Horizontal' or 'Align vertical' checkbox (or both) to choose which direction to align in. Then choose the edge or center to align to by clicking the appropriate radio button (Left/Center/Right, or Top/Center/Bottom).

Moving Objects on Your Template

When aligning objects to each other, you can optionally move the selected objects to a specified position on the drawing area by checking the 'Move to' checkbox and entering the desired coordinates. Enter the coordinates in any units that you like; Informed Designer performs the appropriate unit conversion for you.

Informed Designer combines the 'Move to' coordinates with the options that you've selected in the 'Align horizontal' and 'Align vertical' sections of the Align Objects dialog box. For example, if you click the 'Left' radio button and enter '2.5' in the 'Move to' horizontal text box, Informed Designer will align the left edge of the selected objects with the 2.5 inch mark on the horizontal ruler. If you

click the 'Center' radio button and enter the same coordinate, Informed Designer will try to align the center of the selected objects with the 2.5 inch mark on the horizontal ruler.

Aligning Objects to the Grid

To align a set of objects along the drawing grid, select the 'To grid' radio button. The upper left corner of all selected objects will 'snap' to the nearest grid lines, whichever are active.

You can also align and move objects by dragging them with the Pointer tool. For more information, see "Repositioning Objects" earlier in this chapter.

Distributing Objects

Often you'll need to evenly space a set of objects across an area of your template. You might be separating related fields of information, or you might be redistributing a set of newly replicated objects. Rather than tediously placing each object by hand, Informed Designer provides a simple and efficient way to do this.

The Distribute command evenly distributes a set of selected objects along an arbitrary path. This path is determined by you and may be specified in one of two ways: visually (with the help of the mouse), or by a specified value.

Note   While editing a table, you can use the Distribute command to evenly distribute the table's columns. For more information, see "Distributing Columns" in Chapter 6.

To distribute a set of objects, first select them and then choose **Distribute...** from the Arrange menu. The Distribute Objects dialog box appears.
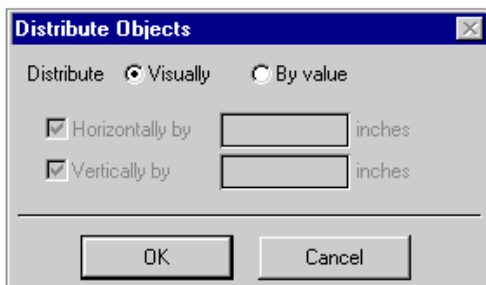
Distributing Objects Visually

When you distribute a set of objects visually, you align them along a path that's drawn with the Pointer tool.

To distribute a set of objects visually, select the 'Visually' radio button and click 'OK' to continue. You'll see the drawing window again with the selected objects in *distribute mode*. The selected objects will assume an initial distribution path where they are offset (in both directions) from each other by a fixed amount. The line of distribution depends on the initial placement of the selected objects. All objects remain selected, but on the upper-left corners of the topmost and lowest objects, you'll see a circular handle.
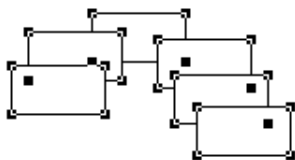
Select the objects and choose the Distribute command.
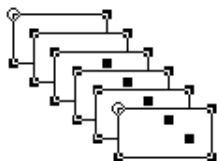
After you click 'OK', the selected objects assume an initial distribution.

Using the mouse, click and drag either of the circular handles. While you drag, an outline of the selected objects appears, indicating the position of the objects as the mouse is moved. When you achieve the desired distribution, release the mouse button. The objects remain selected and will be distributed along their new path.
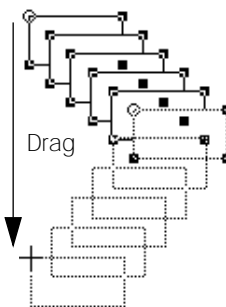
Drag

Click and drag a circular handle to distribute.
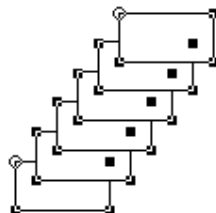
When you release the mouse, the objects assume their final position.

If you hold down the Shift key while adjusting the path, the resulting path will be constrained to the horizontal, vertical, or diagonal (45°) axes.

While the objects are in distribute mode, you can move or resize the objects normally using the Pointer tool. The selected objects will remain in distribute mode until they're deselected.

Distribute by Value

If you know exactly how far apart you want to distribute a set of selected objects, use the 'By value' option. If you check this option, you can specify the vertical and horizontal offsets with which to distribute the objects. Select either of the 'Horizontal' or 'Vertical' checkboxes (or both) and type the desired values into the associated text boxes.

When performing the distribution, Informed Designer will separate all objects along their upper-left corners by the given offsets. Positive vertical and horizontal offsets place each subsequent object down and to the right. The same negative offsets place each object above and to the left.
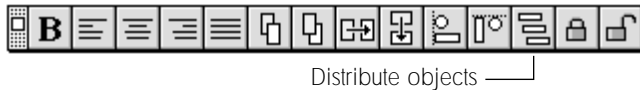
As a shortcut to choosing the Distribute command, you can quickly distribute a set of selected objects by clicking the 'Distribute' icon on the Command palette.

Distribute objects

Rotating Objects

Use the Rotate command to rotate one or more selected objects. Objects can be rotated 360 degrees in 90 degree increments.

All object types can be rotated with the exception of fields and tables. If you select a field or a table, or if a set of selected objects contains a field or a table, the Rotate command will be unavailable.

To rotate an object, first select it then, choose **Rotate** from the Arrange menu. The selected object is rotated 90 degrees.

The Rotate command is useful for placing vertical text on your template. To rotate a text object, select it with the Pointer tool, then choose **Rotate** from the Arrange menu.

A rotated text object can be edited in the usual manner. When you click the object with the Text tool, Informed Designer will rotate the text upright (back to zero degrees), and allow you to edit the text. When you press Enter on the numeric keypad, or deselect the object, it will return to its rotated orientation.

Grouping and Ungrouping Objects

There may be times when you want the ability to treat a set of objects as a single object. For example, suppose that you've drawn a logo on your template, and the logo consists of a collection of individual lines, rectangles, and text objects. Grouping these objects together allows you to treat the logo as if it were a single object. Informed Designer gives you this ability with the Group and Ungroup commands.

Grouping Objects

The Group command forms a single object that's composed of a set of selected objects.

To group a set of objects, first select them and then choose **Group** from the Arrange menu. Informed Designer surrounds the objects with handles at each corner of the group's smallest enclosing rectangle.

Since a grouped set of objects is treated as a single object, it's manipulated accordingly. This means that you can perform any operation on a grouped object (such as selecting, moving, or resizing) that can be performed on an individual object.

Note   If a group contains a locked object, then the group itself behaves as if it were locked. For more information about locking objects, see "Locking an Object's Position" earlier in this chapter.

All commands to manipulate a group, with the exception of resizing and rotating, function exactly as though the objects in the group were selected individually. For example, changing the font of a selected group will set the font for all text, field, and table objects in the group.

When you resize a grouped object, Informed Designer ensures that the size and relative spacing of the individual objects that make up the group remain unchanged. This is unlike resizing multiple selected objects where each object is resized by the same amount and the position of each object doesn't change. The figure below illustrates how a grouped and ungrouped set of objects are resized.

Resizing four selected objects

Resizing a grouped object
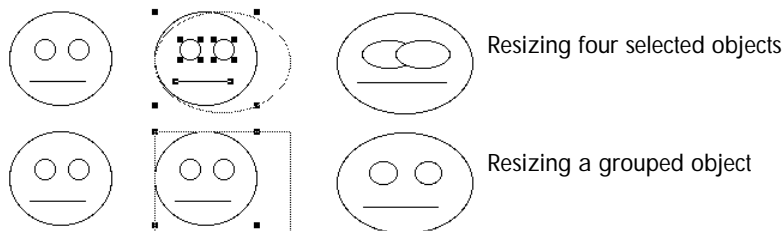
When you rotate a grouped object, rather than rotating each object in the group about its center (without moving its position), the group as a single object is rotated about its center.

Rotating three selected objects

Rotating a grouped object
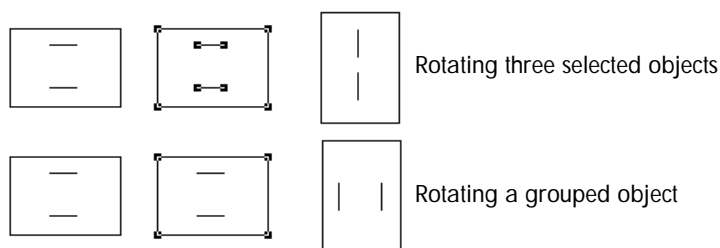
To manipulate a single object within a group, first ungroup the group (see next section), change the object, then regroup the objects.

Ungrouping Objects

The Ungroup command separates a grouped object into the individual objects that comprise it. Ungroup is the opposite of the Group command.

To ungroup a grouped object, first select it and then choose **Ungroup** from the Arrange menu. All objects that comprised the group will be individually selected.

The Ungroup command is useful when you need to work with a single object within a grouped object. For example, you might want to edit a text object that's part of a grouped object. Use the Ungroup command to ungroup the object. After editing the text, use the Group command to regroup the objects.

Moving Objects Through the Drawing Plane

Each object on your template resides in its own layer on the drawing plane. This means that all objects have a relative front to back ordering—or stacking order—on your drawing.

Often while editing a template, you might need to change an object's stacking order. For example, some objects might be partially obscured by others or you might want to bring an object to the front of a drawing so you can edit it. With the object layering commands (Bring Forward, Bring To Front, Send Backward, and Send To Back), Informed Designer gives you the ability to easily manipulate an object's front-to-back ordering.

Bring Forward

The Bring Forward command moves one or more selected objects closer to the front of the drawing plane.

To move an object closer in the drawing plane, first select it and then choose **Bring Forward** from the Arrange menu. The selected object is moved in front of the object immediately above it. The object remains selected.
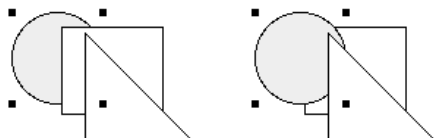
If you apply the Bring Forward command to a set of objects, then each object in the set is moved in front of the object that lies immediately above it. However, the relative stacking order of the selected objects doesn't change.

As a shortcut to choosing the Bring Forward command, you can click the 'Bring Forward' button on the Command palette.

Bring Forward

Bring To Front

The Bring To Front command moves an object directly to the front of the drawing.

To bring an object to the front of the drawing, first select it and then choose **Bring To Front** from the Arrange menu.

If two or more objects are selected, they are moved as a group to the front of the drawing. Their relative stacking order is not changed.

Send Backward

The Send Backward command moves one or more selected objects farther back in the drawing plane.

To move an object backward in the drawing plane, first select it and then choose **Send Backward** from the Arrange menu. The selected object is moved behind the object immediately below it. The object remains selected.

If you apply the Send Backward command to a set of objects, each object in the set is moved behind the object that lies immediately below it. The relative front-to-back order of the selected objects is left unchanged.

As a shortcut to choosing the Send Backward command, you can click the 'Send Backward' button on the Command palette.
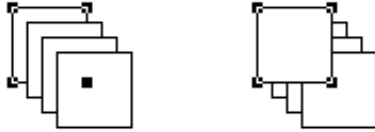
Send Backward

Send To Back

The Send To Back command moves one or more selected objects to the back of the drawing.

To send an object to the back of the drawing, first select it and then choose **Send To Back** from the Arrange menu.

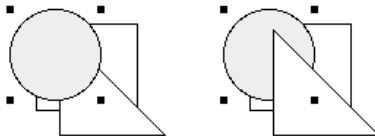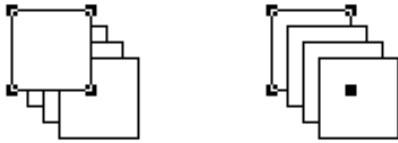If you select two or more objects, they're moved to the back of the drawing as a group. Their relative stacking order, however, is always preserved.

Nudging Objects

As in all drawing, it's important to position objects accurately on your template. Although the mouse is often accurate enough, there are times when you might like greater precision over object placement combined with greater ease of manipulation.

With the Arrow keys, Informed Designer allows you to move and resize objects precisely without using the mouse. Use the Arrow keys whenever you're doing detailed work or whenever you want maximum control over object sizing and placement.

Nudging an Object's Position

To nudge an object, first select it and then press the appropriate Arrow key (up, down, left, or right arrow). You can nudge more than one object at a time by first selecting all objects and then pressing the key.

When you nudge an object, you move it by a distance of 1 pixel at the current view of the drawing window. If the current view is set to 100%, this means that each time you nudge an object, its position changes by a distance of 1/72nd of an inch (because most monitors have a resolution of 72 dots—or pixels—per inch). Similarly, if the current view is set to 200%, nudging an object moves it 1/144th of an inch. At the largest possible view (1600%), nudging an object repositions it by a distance of 1/1152nd of an inch.

Nudging an Object's Size

You can also nudge the size of an object. First select the object and then press the desired Arrow key (up, down, left, or right arrow) while holding down the Shift key. Instead of moving the object, the object's bottom or right edge will resize one pixel in the corresponding direction.

You can resize more than one object at a time by first selecting all objects and then pressing an Arrow key while holding down the Shift key.

As with all resizing commands, you can't nudge the size of an object below its minimum size or larger than its maximum size.

Objects and Printing

In Chapter 11, you'll learn about printing templates and Informed Designer's print options. When the Informed Filler user prints a completed form, options are provided to hide the template or the data. The *template* refers to the graphical objects such as lines, boxes, and text labels. The form's *data* refers to the information that's entered in each cell to complete the form. For information about Informed Designer's print options, see Chapter 11, "Printing Forms".

By using the Object command, you can set additional print options for any object. You can choose to hide an object so that it doesn't print. This is useful if you want an object to appear on the screen, but not on the printed template. For example, you might want to label the different parts of your template to help the person who fills it out.

Alternately, you can choose to always print an object, even if the Informed Filler user prints a form with its layout hidden. This option is useful when using preprinted forms. For example, you might want a graphical object—such as your company logo—to print in addition to the form's data.

To change the print options of an object, choose **Object...** from the Settings menu. The Object Settings dialog box appears.
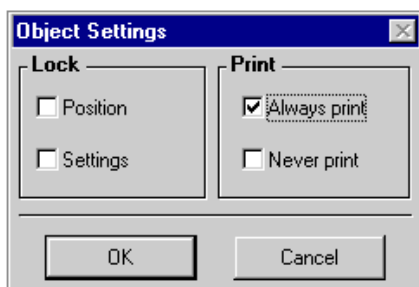
Click either of the 'Always print' or 'Never print' checkboxes. You can't use both options at the same time. After making your selection, click 'OK.' To cancel the Object command, click 'Cancel' instead.

For information about the other settings available on the Object Settings dialog box, see "Locking an Object's Settings" in Chapter 7, and "Locking an Object's Position" earlier in this chapter.

Using the Clipboard

The Clipboard is a temporary holding place for graphics and text. Commonly, you'll use it to perform one of these functions:

▪ move objects from one area of a template to another
▪ move objects from one page of a template to another
▪ move objects from one template to another
▪ to transfer artwork and text from other applications into Informed Designer
▪ to transfer artwork created with Informed Designer into other applications

You can use three commands to transfer objects to or from the Clipboard. The Cut and Copy commands place the selected objects onto the Clipboard. The Paste command transfers the contents of the Clipboard onto your template. These commands are described below.

If you are running Informed Designer on a Mac OS compatible computer, you can display the contents of the Clipboard by choosing **Show Clipboard** from the Edit menu. Informed Designer shows the Clipboard content in a window.
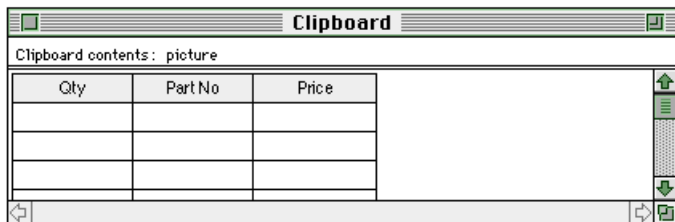
Like any Mac OS window, you can position the Clipboard window anywhere on your screen by clicking and dragging its title bar. You can hide the Clipboard by clicking the window's close box or by choosing the Close command while the window is active.

Moving Objects Onto the Clipboard

Use the Cut or Copy commands to move objects onto the Clipboard.

To move an object onto the Clipboard, select it and choose either **Cut** or **Copy** from the Edit menu. Your selection will be transferred to the Clipboard. If you choose Cut, the selected objects will also be removed from your template.

The Copy command is more commonly used to transfer objects to the Clipboard. When you want to remove an object from your drawing, use the Clear command instead. See "Clearing Objects".
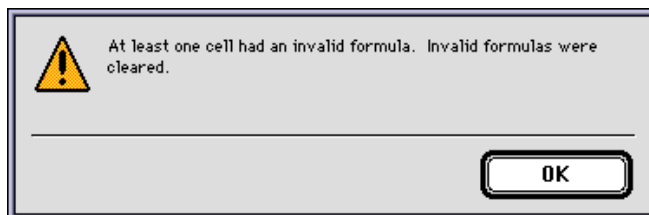
Pasting Objects From the Clipboard

To paste the contents of the Clipboard onto your drawing, choose the **Paste** command from the Edit menu. A copy of the Clipboard's contents will be positioned at the center of the drawing window.

If you hold the Alt (Windows) or Option (Mac OS) key down while choosing the Paste command, Informed Designer will place the objects at their original positions (that is, the position they were when you cut or copied them). This feature is useful for copying objects from one page of a template to another. After copying an object on one page, pasting it on another page while holding down the Alt/Option key will ensure that it's positioned at the same location as the original.

Pasting Informed Objects

When pasting objects created with Informed Designer, you should be aware of the following conditions and how Informed Designer handles each one:

■ If the Clipboard contains Informed objects that are larger than the drawing area, Informed Designer won't paste those objects onto your template. Instead, you'll be alerted with a warning message. If you click 'OK' on the message dialog box, the paste operation will continue, but only those objects that fit entirely on the drawing area will be pasted. If you click 'Cancel', the paste command will be cancelled.

■ To prevent duplicate cell names from occurring on your template, cells on the Clipboard are renamed (if necessary) before they're pasted. The naming conventions used to name the new cells are the same as those used for duplicating or replicating existing cells. Likewise, a newly pasted cell receives the next available tab position (see "Duplicating Cells" earlier in this chapter). If a cell being pasted contains a formula that references a nonexistent cell (a cell which was not copied from the original template), Informed Designer will alert you with a message.

When you click 'OK', Informed Designer will clear the invalid formula before pasting the cell.

Pasting Graphic Objects

A graphic object is treated as a single object and is pasted in the usual manner. However, if the Clipboard contains a graphic object that's larger than the drawing area (in either direction), you'll see a warning.
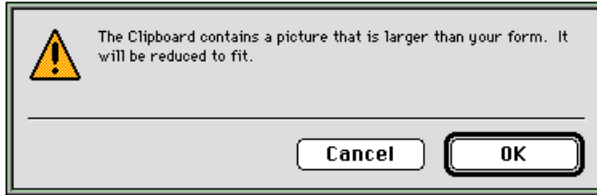
If you click 'OK', the large graphic object will be reduced proportionally and pasted onto your template. If you click the 'Cancel' button, the paste operation will be canceled.

Pasting Text

You can paste text in two different ways: as a new text object, and as text inserted into an existing text object.

If you're not editing a text object when you choose the Paste command, the text on the Clipboard will be pasted as a new object, and centered on the drawing window. If the text is pasted while you are editing a text object, the text on the Clipboard will be inserted at the current insertion point of the selected text object.

Using Drag and Drop

"Using the Clipboard" earlier in this chapter, explains how you can use various commands and the Clipboard to transfer material between different templates and different applications. If you're using a Mac OS compatible computer with System 7.5 or later installed, the "drag and drop" method provides an even easier way to do this.

As its name implies, the drag and drop feature consists of selecting an item, "dragging" it with the mouse, and "dropping" it at another place.

Although this section only describes the manipulation of objects from one template to another, you can also use drag and drop to perform other tasks such as:

▪ moving files from other applications onto your template
▪ moving material created with Informed Designer to other places

For a detailed description of using drag and drop for these tasks, see Chapter 9, "Using Graphics".

To use drag and drop to copy objects from one template to another, the drawing windows for both templates should be visible on your screen. Select the object that you want to copy from the first template, then drag it onto the drawing window of the second template. When a highlighted border appears around the edge of the second template's drawing area, release the mouse button. The selected object remains at it's original location, and a copy is placed at the current mouse position on the second template.

First template   Second template

Click and drag the   Release the mouse button   A copy of the object is
original object.   when a highlighted border   placed in the second location.
          appears around the window.
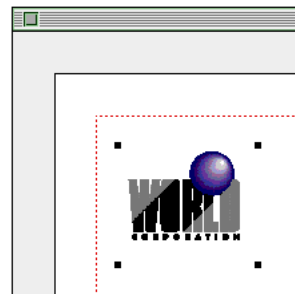
9 Using Graphics

In this chapter:

9 **Using Graphics**

Although Informed Designer provides you with a comprehensive set of drawing tools, you might want to read in or import artwork originally created with another application. To support the integration of different applications, various standard formats for storing graphical information have evolved. Informed Designer supports Windows Bitmap (.BMP), Windows MetaFile (.WMF), Macintosh PICT (.PCT), and Encapsulated PostScript (.EPS). Informed Designer also allows you to import text files.

Windows Metafile (.WMF) is not supported on the Mac OS.

In addition to the Import features, Informed Designer also supports the publish and subscribe features that are available on Mac OS compatible computers.

This chapter describes the import, publish and subscribe, and drag and drop features of Informed Designer.

The Import Command

The most common method of importing artwork from another application into Informed Designer is to use the Import command. You can import any artwork, as long as its format is of a type supported by Informed Designer (either through built-in support or through an Informed plug-in).

To import artwork or text, choose **Import...** from the File menu. If your computer uses Windows, you'll see the standard Open dialog box.
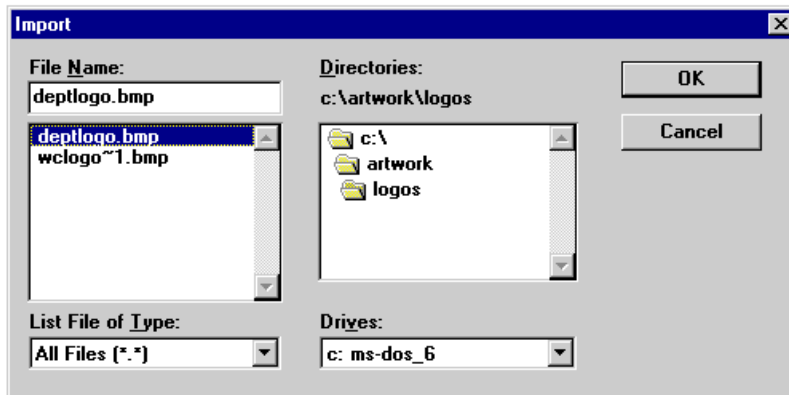
The dialog displays the names of all available files. The 'List file of type' drop-down list allows you to select particular types of files displayed in the dialog box.

To select a file to import, click it in the 'File Name' scrolling list, then click 'OK.' Informed Designer reads the graphics or text from the file, creates a new object to hold it, and centers that object in the drawing window.

If you're using a Mac OS compatible computer, you'll see the Import dialog box.
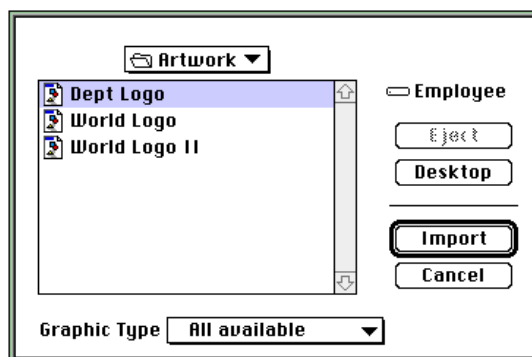
The Import dialog box displays the names of all files that are stored in the supported graphic type formats. The 'Graphic Type' drop-down list allows you to select the types of graphic files displayed in the dialog box. Select the file that you want to import and click 'Import,' or simply double-click the file's name. Informed Designer reads the graphics or text from the file, creates a new object to hold it, and centers that object in the drawing window.

Once imported, you can manipulate the object (resize, reposition, and so on) just as any other object created with Informed Designer. See Chapter 8, "Manipulating Objects" for more information.

As a shortcut to using the Import command, you can drag a file from another place and drop it on the drawing window. Providing the file contains text or graphics in one of the supported formats, Informed Designer will read the file and place the text or image at specified location.
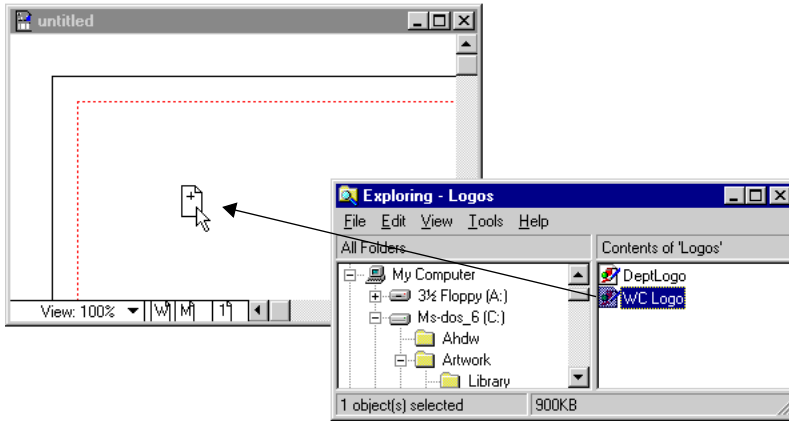
Drag a file onto the drawing window.
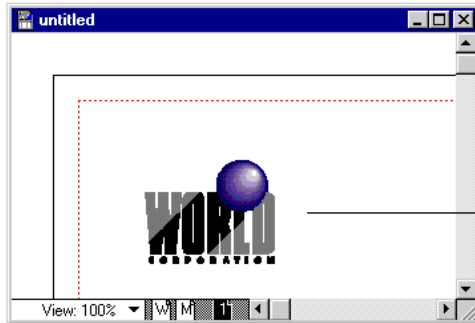
Informed Designer reads the file and places the image at the specified location.

In addition to importing files of text or graphics, on computers using Mac OS version 7.5 or later, you can also drag objects from one drawing window to another, or from a drawing window to a file. For more information, see "Using Drag and Drop" later in this chapter.

Errors When Importing

If the size of the graphic you're importing is larger than the current drawing area in either direction, Informed Designer will warn you with the following message dialog:
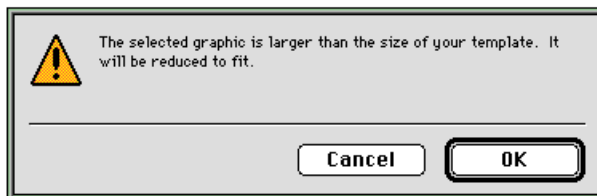
If you click 'OK' to continue, the graphic will be imported, reduced proportionally in size, and centered in the drawing window. To cancel the Import command, click 'Cancel' instead.

If you are importing a text file that contains more text than will fit on the drawing area, Informed Designer will warn you with this dialog:

> ⚠ The text being imported will not fit on your template. Some text
> may be lost.
>
> [Cancel]   [**OK**]
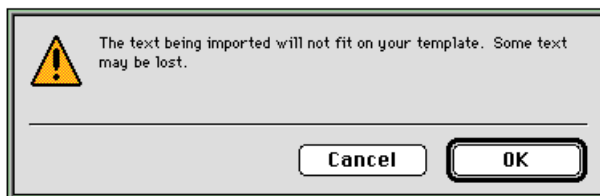
If you click 'OK,' the text will be imported, but some text may be lost. To cancel the Import command, click 'Cancel' instead.

Importing Scanned Forms

Instead of redrawing an existing paper form from scratch, Informed Designer allows you to import the form's scanned image. When you scan your form, make sure that you save the image in one of the graphic formats supported by Informed Designer. You can then use the Import command as described in the previous section to import the scanned image and place it on the drawing area. Use the Field and Table tools to draw cells on top of the blanks on the form.

Although scanning technology has evolved considerably over the past few years, there are still drawbacks in using the actual scanned image of a form. For example, the readability of small type sizes is often inadequate making it hard to read text on the screen.

Printing a scanned form also deserves careful consideration. If you print a completed template with its scanned layout onto blank paper, you'll find that a scanned image can be unclear, even on 300 dpi laser printers.

A scanned image is most useful as a tracing aid. After you import a scanned image, you can use Informed Designer's drawing tools to accurately place the graphics and text on your template.

Using Drag and Drop

If you're using a Mac OS compatible computer with System 7.5 or later installed, the "drag and drop" method provides a convenient way to transfer graphics and text between Informed Designer and another location. For example, you can move objects between one template and another, between templates and files, or between templates and other applications.

As its name implies, the drag and drop feature consists of selecting an object, "dragging" it with the mouse, and "dropping" it at another place. When you drag and drop a text or graphic object, you are basically performing the same operation as copying and pasting using the Clipboard.
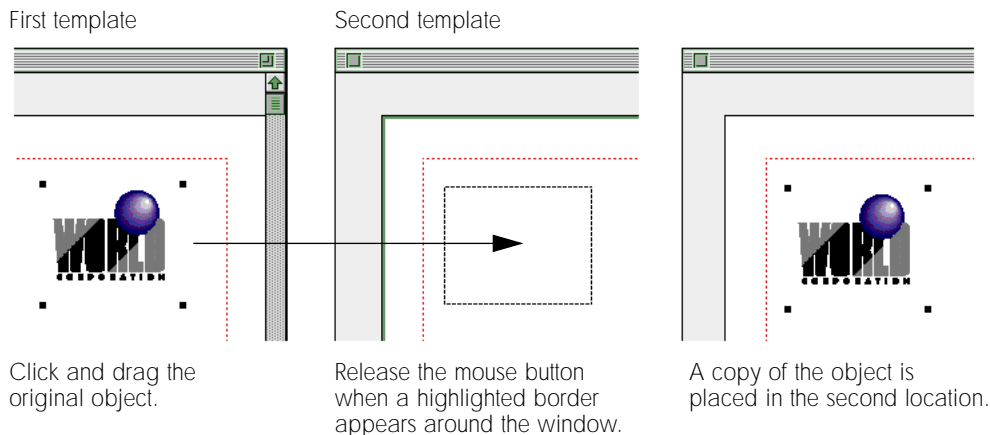
When you drag an object from a template to another location, Informed Designer makes the material available in both the Informed format and a format appropriate to the type of object being dragged. For example, if you drag a table, Informed Designer makes the object available as Informed and as a PICT. The template or application that you are dragging to uses the most appropriate format. If you drag and drop between templates, the Informed format is always used.

To drag and drop a graphic or text object between templates, or from a template to a different application, both windows should be visible on your screen. Select the object on your template, then drag it with the mouse onto the window of the other template or application. When a highlighted border appears inside the second window, release the mouse button. The selected object remains on your template, and a copy is placed in the second location.

First template   Second template

Click and drag the   Release the mouse button   A copy of the object is
original object.   when a highlighted border   placed in the second location.
                              appears around the window.

You can also use drag and drop to transfer text or graphic objects between your template and a file. For example, you can drag an object from your template to another folder on your hard drive, or you can drag a file from the desktop to your template. When you drag graphics or text from your template to the desktop, the Mac OS creates either a "picture clipping" or "text clipping" and displays a corresponding icon when you release the mouse button.

text clipping   picture clipping

As mentioned previously, Informed makes the material available in the appropriate formats—either PICT and Informed, or text and Informed (or sometimes all three). The file can then be dragged to another template or another application.

Publish and Subscribe

If you're running Informed Designer on a Mac OS compatible computer using System 7 or later, you can automate the process of updating artwork in one or more documents. By using the publish and subscribe features, Informed Designer can automatically update artwork on your templates whenever the original changes.

Publishing and subscribing to information is a two step process. First you select the material that you want to make available in other documents—called a *publisher*—and publish it. The material is saved in a file called an *edition*. You then open a document and indicate where you want the material to be placed. The placed material is called a *subscriber*. You can subscribe to the material as many times as you like. Once you've subscribed to the material, each subscriber will automatically update when the original changes.

Original artwork

Edition file

Form template documents
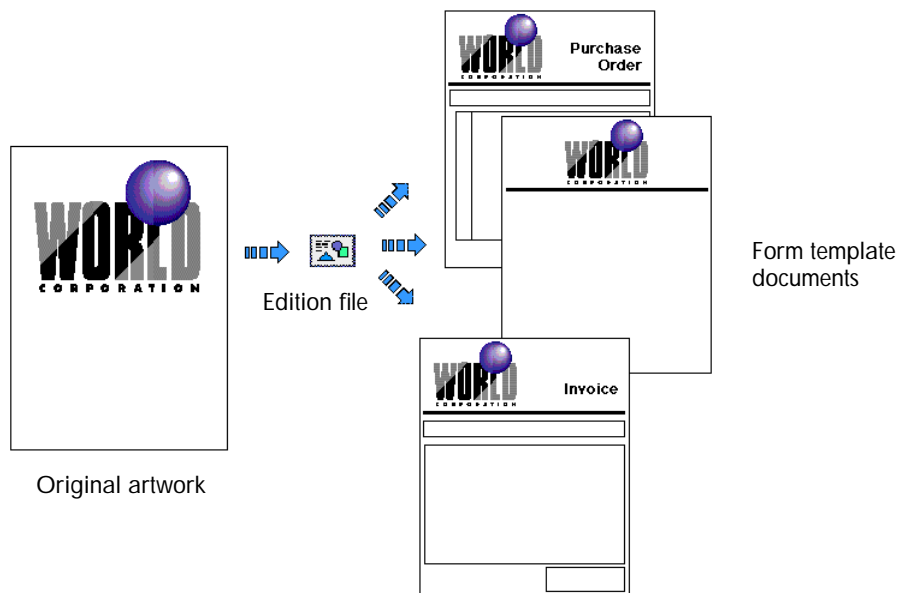
Like Informed Designer, applications that offer this capability have commands like 'Create Publisher' and 'Subscribe to' in the Publishing submenu under Edit.

With Informed Designer, automatic updating is most often used for company logos and artwork that's common to several forms. When you change the original logo or artwork, the changes are automatically reflected in each of the forms. You can use Informed Designer—or any other drawing program that offers publish and subscribe capabilities—to draw and publish the logo or artwork. Then using Informed Designer, you can subscribe to the material and position it appropriately on

any form template. The commands that you use to publish and subscribe are described in the fol-
lowing sections.

Creating a Publisher

In order to make text and graphics in an Informed document available for automatic updating in
other documents and applications, you have to create a publisher using Informed Designer. With the
document containing the original material open, select the objects that you want to publish, then
choose **Create Publisher...** from the Publishing submenu under Edit. The dialog box for publish-
ing appears.
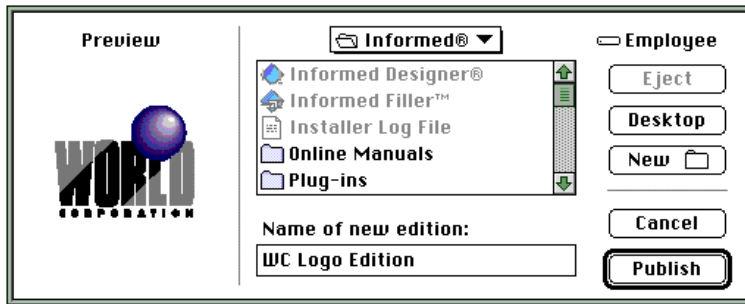
The Publishing dialog box shows you a preview of the material that you're publishing. Type a name
for the new edition, specify where to store it, then click the 'Publish' button. The selected objects
become a publisher and the edition file is saved.

| Note | When you publish objects using Informed Designer, a pictorial—or PICT—version of the material is stored in the edition file. The cells of field and table objects are ignored. |

A publisher is identified by a light gray, highlighted border that encloses the published objects. In
the drawing window, you can show and hide these borders by choosing **Show Borders** and **Hide
Borders** from the Publishing submenu under Edit. You can select, move, and resize a publisher like
any other object. If a publisher only partially encloses an object, the object will appear cut off when
the edition is subscribed to.
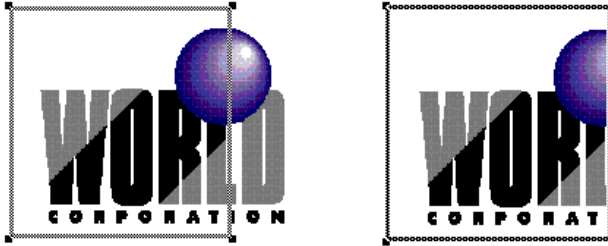
If the publisher cuts off the logo...   ...the subscriber will be cut off too.

Once you've created a publisher, you can subscribe to the material in other documents and other applications. By default, whenever you save a document, any changes made to a publisher or the objects it encloses are updated in the edition file. Subsequently, the next time you open a document containing a subscriber of that edition, the subscriber is automatically updated. Publisher and subscriber options allow you to turn the automatic updating feature off.

Publisher Options

Publishers have certain options that you can control such as automatic or manual updating of edition files. To view or change a publisher's options, select the publisher, then choose **Publisher Options...** from the Publishing submenu under Edit. (This command changes to **Subscriber Options...** when you select a subscriber.)
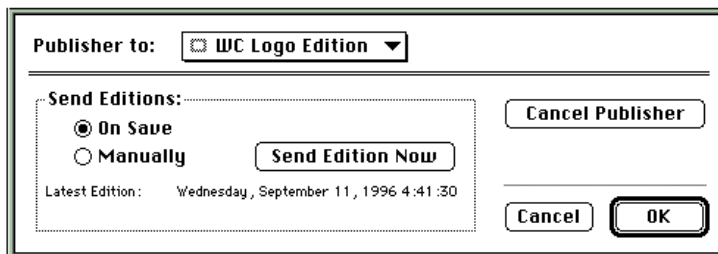
The 'Publisher to' drop-down list shows the name and location of the edition file. Other controls let you cancel the publisher or change when the edition file is updated.

Although automatic updating is an important convenience that publish and subscribe offers, you may want to turn this feature off occasionally. For example, suppose that you're about to make several changes to your company logo (which has been published and subscribed to in several documents). Since you'll be saving the logo document periodically during the revision process, you might want to turn off automatic updating until the final change is made.

To turn automatic updating off, click the 'Manually' option on the publisher options dialog box. With this option selected, the edition file is updated only by clicking the 'Send Edition Now' but-

ton. With the 'On Save' option selected instead, the edition file is updated each time you save the document.

Note   Informed Filler DOES NOT automatically update subscribers, even if automatic updating is turned on. Only Informed Designer offers automatic updating.

If you want to permanently cancel a publisher, click 'Cancel Publisher.' Canceling a publisher removes the associated edition file. You can also cancel a publisher by clearing the publisher box in the drawing window (select the publisher then choose **Clear** from the Edit menu or press the Delete key).

Creating a Subscriber

Once you've created an edition by publishing material, you can place it on any document at any position and at any size. With the document that you want to place the material on open, choose **Subscribe To...** from the Publishing submenu under Edit. The dialog box for subscribing appears.
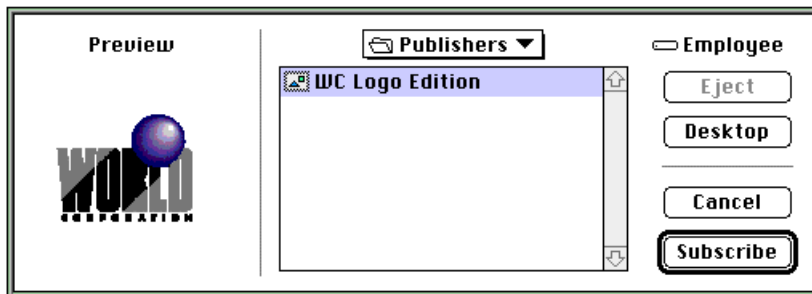
The dialog box shows a scrolling list of files and folders with the last edition file that you created selected. A preview of the edition is shown on the left. Select the edition that you'd like to subscribe to, then click 'Subscribe.' A subscriber is created and the material in the edition is placed on your template.

A subscriber is identified by a dark gray, highlighted border around its frame. In the drawing window, you can show and hide these borders by choosing **Show Borders** and **Hide Borders** from the

Publishing submenu under Edit. Like any object on your template, you can select a subscriber by clicking it with the Pointer tool. You can change the size and position of a subscriber the way you normally do. You can also use commands that manipulate objects—such as Duplicate, Replicate, and Align—to change the position, size, and orientation of a subscriber. For information about manipulating objects, please see Chapter 8, "Manipulating Objects."

Once you've created a subscriber, Informed Designer will automatically update it whenever the material in the edition file changes. Publisher and subscriber options allow you to turn the automatic updating feature off.

Subscriber Types

Different applications publish material using different standard formats for text and graphics. Normally, if the material consists of graphics and text (or graphics only), the PICT format is used. (PICT is the standard format for Macintosh graphics.) The TEXT format is used for textual information. Some programs publish material in both PICT and TEXT formats. For example, a spreadsheet might publish a picture of a color graph in PICT format along with the numerical data that the graph is based on in TEXT format.

When you create a subscriber, Informed Designer determines which formats are contained in the selected edition file. If both PICT and TEXT formats are available, a dialog appears requesting that you select which format you'd like to subscribe to.
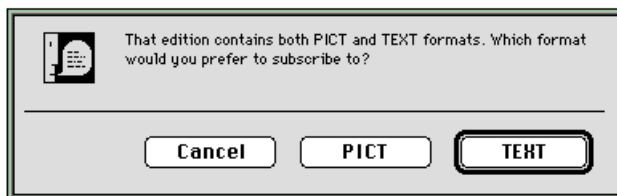
Unlike pictures, textual subscribers have their own font, size, and style information. You can change these attributes by selecting the subscriber with the Pointer tool and choosing a different setting the way you normally do. This is often referred to as *adorning the subscriber*. For information about the characteristics of text, please see "The Appearance of Text" in Chapter 6, "Drawing Tools."
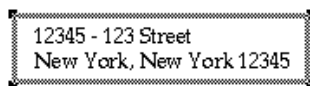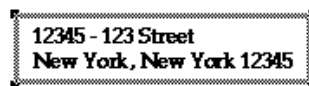
Select the subscriber...   ...then choose a style.

The effect of changing an attribute of text is not lost when the subscriber is updated with a new version of the edition. For example, if you subscribe to some text and change its style to bold, when the subscriber is later updated, the new text will remain bold.

Subscriber Options

Like publishers, subscribers have various options that you can control. To view or change a sub-scriber's options, select the subscriber, then choose **Subscriber Options** from the Publishing sub-menu under Edit.
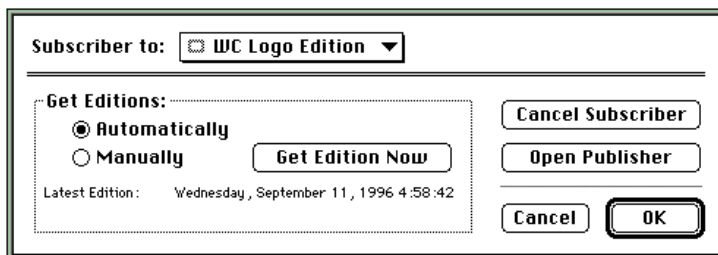
With automatic updating on, a subscriber is updated whenever the material in the edition file changes. You can turn automatic updating off by selecting the 'Manually' option. With this option selected, a subscriber is updated only by clicking the 'Get Edition Now' button. If you want to open the document that contains the original material, click the 'Open Publisher' button. Your Mac OS compatible computer will run the application that was used to create the original material and open the appropriate document.

If you want to cancel a subscriber permanently, click the 'Cancel Subscriber' button. Canceling a subscriber detaches the artwork (a PICT object) from the associated edition file. The remaining object acts as though it was originally copied and pasted from the original document.

10 Spell Checking

In this chapter:

10 Spell Checking

This chapter describes how to check spelling on form templates with Informed Designer. You can ensure the accuracy of text objects and the title sections of fields and tables by checking for spelling mistakes on either the entire template or on particular selections of text.

Informed Designer relies on the spell checking services available via Informed spell checking plug-ins. Because Informed was developed with an "open" architecture, Shana can easily support new spell checking services by developing new plug-ins. For spell checking to be available, you must have the Spelling plug-in installed in your plug-ins folder. You must also have the spelling dictionaries installed.

Informed Designer comes with a built-in spell checker and the spell checking plug-in needed to use it. These items are automatically installed when you install Informed Designer. For installation instructions, see your *Informed Designer Getting Started Guide*.

Spelling Preferences

By setting Informed Designer's spelling preferences, you can specify certain criteria used when spell checking is performed.

To set Informed Designer's spelling preferences, choose **Preferences...** from the Edit menu, then click the Spelling icon in the scrolling list. The Preferences dialog box changes to show the Spelling preferences panel.
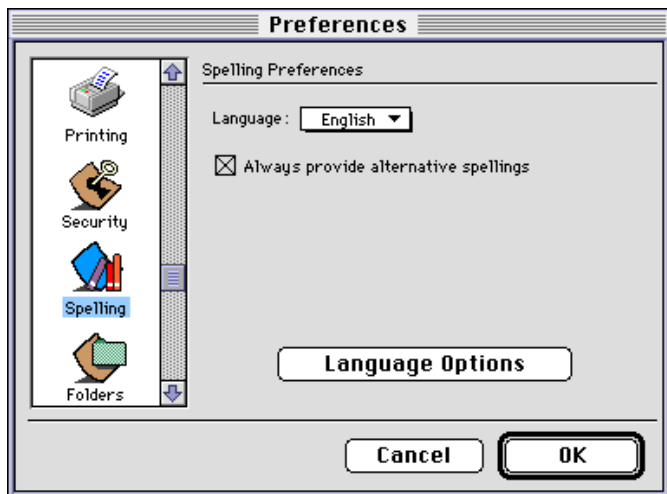
The language dictionaries that are built into Informed Designer allow you to check spelling in several different languages. To select a dictionary, click the 'Language' drop-down list and make a selection from the available choices.

By default, Informed Designer provides alternative spellings for questionable words when you perform spell checking. If you don't want to see alternative spellings, turn off the 'Always provide alternative spellings' checkbox.

You can set various options for each of the dictionaries by clicking the 'Language Options' button. The Language Options dialog box appears. Depending on which language you've chosen, the dialog box will display different options. The following illustration shows the options available for the English dictionary.
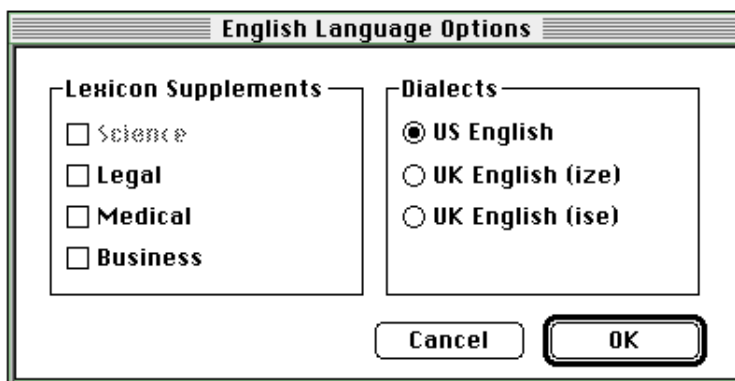
To set your options, click the appropriate radio buttons or checkboxes, then click 'OK.'

Note The options you select on the Language Options dialog box do not take effect until you click the 'OK' button on the Spelling Preferences panel.

Spell Checking Your Template

Informed Designer allows you to check the spelling of text objects and the title sections of fields and tables on your template. Any questionable words on your template (that is, words that are not found in the spell checking dictionary you've chosen) are flagged and displayed on the Check Spelling dialog box.

To spell check your template, choose **Check Template...** from the Spelling submenu under Edit. If you want to check the spelling of only a particular section of your template, select the text that you want to check, then choose the **Check Selection...** command instead. The Check Spelling dialog box appears and Informed Designer begins checking for errors.
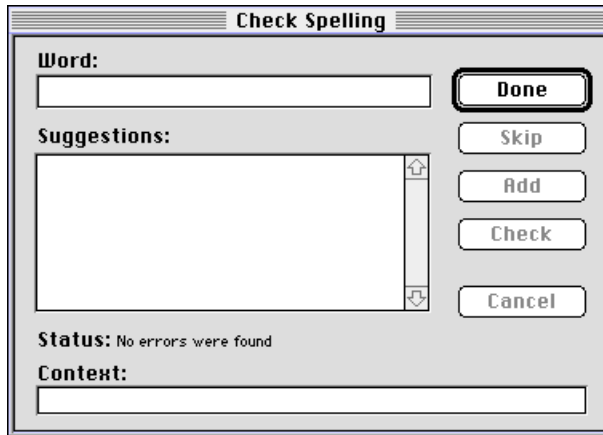
Informed Designer begins checking the entire template, page by page, starting with the work page. If no questionable words are found, the text boxes and scrolling list on the Check Spelling dialog box are blank, and only the 'Done' button is available. Click 'Done' to return to the drawing window.

If a questionable word is found, Informed Designer flags it and displays it in the 'Word' text box. If the 'Always provide alternative spellings' preference is turned on, Informed Designer will display a list of possible replacement words in the 'Suggestions' scrolling list. Below the list of suggestions is a status line that describes the type of questionable word. Informed Designer's spell checker will detect misspelled words, double words, and other questionable occurrences. The 'Context' box at the bottom of the dialog displays the questionable word in context. That is, if the word is part of a sentence, the full sentence is shown. If the word is a single word (such as a title), it is displayed by itself.
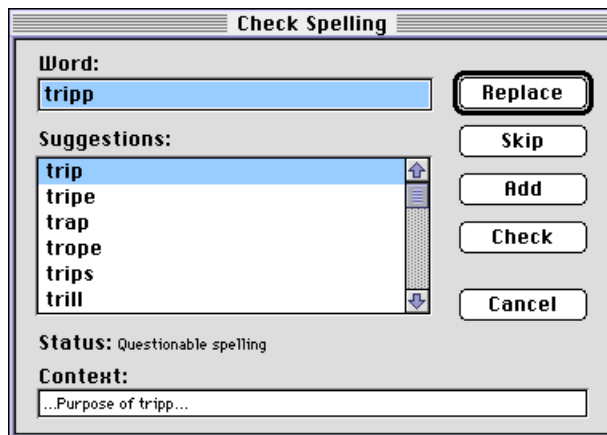
When a questionable word is found, you can replace it with a word from the 'Suggestions' scrolling list, you can skip the word, you can add the word to the dictionary, or you can type a different word in the 'Word' text box.

To replace a questionable word with one of the alternative spellings, select the alternative in the 'Suggestions' scrolling list, then click 'Replace' or simply double-click the alternative word in the list. Informed Designer replaces the word and continues checking the template.

You can skip a questionable word by clicking the 'Skip' button. Clicking 'Skip' passes over the word during the current spell check. The next time you spell check the template (without changing the questionable word), Informed Designer will flag and display the word again.

To add a word to the dictionary, click the 'Add' button. This feature can be very helpful if you use a lot of unusual words or abbreviations on your templates. For example, you might often use the abbreviation "Qty" instead of the word "Quantity" in the title section of a cell. Normally, the word "Qty" would be questioned when you spell check the template. By adding the word to the dictionary, Informed Designer accepts it as a valid word.

As mentioned previously, when a questionable word is found, Informed Designer provides a list of alternative spellings in the 'Suggestions' scrolling list. If the word you are looking for is not in the list, you can check the dictionary for other alternatives. For example, if the word "surreal" was misspelled as "cureal," the scrolling list might show the following alternatives: cruel, cure-all, and churl. Since none of these are the correct word, you can try to find other alternatives by changing the spelling in the 'Word' text box and clicking the 'Check' button. If you change the spelling to "sureal" and click 'Check,' the 'Suggestions' scrolling list will show the correct spelling of "surreal" as an alternative.

Once Informed Designer has checked all pages or all selected text, and you've dealt with any questionable words, the Check Spelling dialog changes to show the 'Done' button. Click 'Done' to return to the drawing area.

11 **Printing Forms**

In this chapter:

11 Printing Forms

This chapter describes printing with Informed Designer. You can print your form templates on any printer that works with Windows and Mac OS compatible computers.

To print your template, choose **Print...** from the File menu. The Print Job dialog box appears.

If you're using an HP LaserJet (or compatible) printer, you'll see a dialog box similar to the one below.
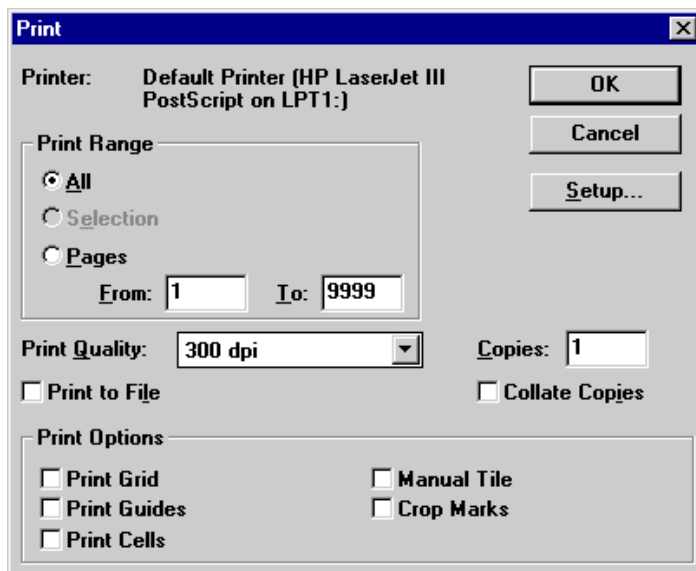
If you're using an Apple LaserWriter printer (or any printer that uses the Apple LaserWriter driver) you'll see a dialog box similar to this:

```
                                                           8.4
  Printer:  Main LaserWriter ▼        Destination:  Printer ▼
    General                      ▼

              Copies:  1

              Pages: ● All
                     ○ From:        To:

        Paper Source: ● All pages from:    Auto Select              ▼
                      ○ First page from:  Cassette (250 Sheets)    ▼
                        Remaining from:   Cassette (250 Sheets)    ▼


    Save Settings                           Cancel     Print
```
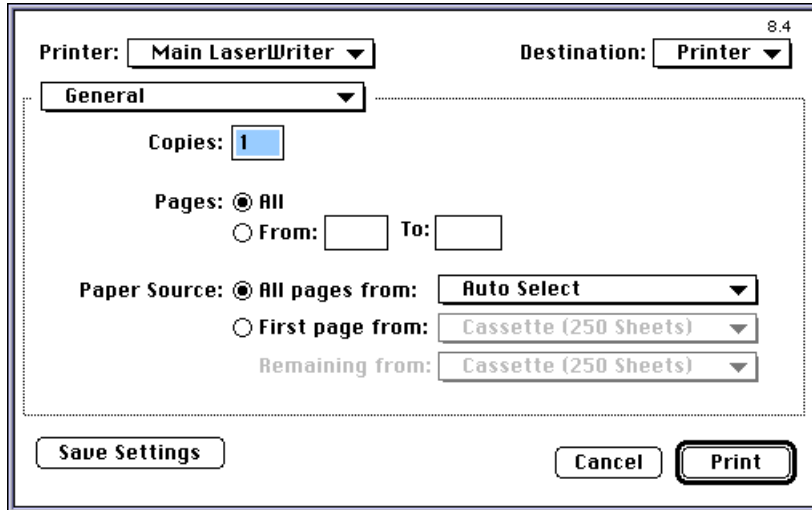
The above dialog box shows the 'General' print options available. These options vary depending on which printer you're using. You can display the print options specific to Informed Designer by choosing 'Informed Designer®' from the drop-down list.

```
    Informed Designer®      ▼

  Print Options: ☐ Print grid    ☐ Print guides   ☐ Print cells
                 ☐ Manual tile   ☐ Crop marks
```
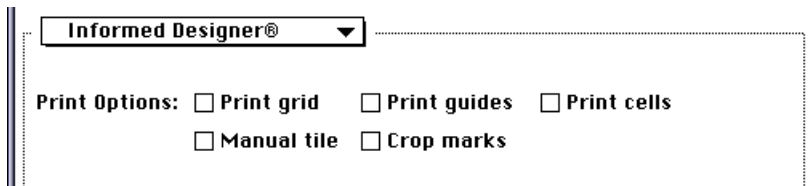
The Informed Designer specific options are described later in this chapter.

After you select your printing options, click 'Print' to print your template. Informed Designer will display the Print Progress dialog:

```
    🖨  Printing page 1...            Cancel
```
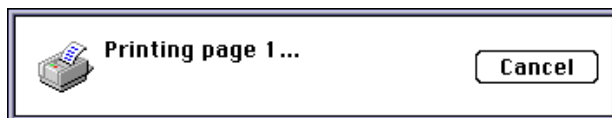
You can cancel printing at any time by clicking 'Cancel.'

Printing Preferences

By setting Informed Designer's printing preferences, you can determine how a form will print when it's filled out and printed by the Informed Filler user.

By default, both the template and the data for a form will be printed. This is useful for forms that are printed onto blank paper. When the form is to be printed onto pre-printed paper forms, you can set the print preference so that only the form data will print.

To set this option, choose **Preferences...** from the Edit menu and click the 'Printing' icon in the scrolling list. The Preferences dialog box changes to show the Printing preferences panel.

To print the data without the template, click the 'Print data only' checkbox.

The Printing preferences panel also contains two text boxes in which you can specify an offset adjustment for printing. This feature allows you to adjust the position of the form on the printed page.

When printing data onto pre-printed forms, the offset adjustment feature is useful for accurately aligning the data with the blanks on the pre-printed form. The entire form is shifted by the distance specified in the 'Offset Adjustment' text boxes. Positive values shift the form down and to the right. Negative values have the opposite effect.

The amount of offset is displayed in the currently chosen ruler units (see Chapter 5, "The Drawing Environment"). You can override this setting by typing the abbreviation for the units you'd like to enter. For example, typing '1.0 pt' will enter a value of 1 point.

Although available in Informed Designer, it's more common that the Informed Filler user will adjust these settings to account for the particular characteristics of the paper and printer being used.

Printing Your Form Template

When printing from design mode, you can print the grid, the guide lines, and the cells by clicking any of the corresponding checkboxes on the Print Job dialog box.
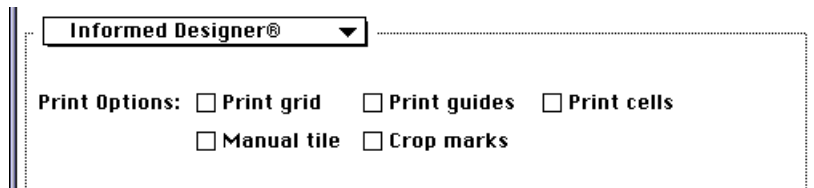
Informed Designer overlays the grid and the guide lines as they appear in the drawing window on your screen. If you choose the 'Print Cells' option, the name and tab position of each cell will appear in the fields and tables on your template.

Tiling

When a template's drawing area is larger than the selected paper size, Informed Designer will *tile* the template onto multiple sheets of paper. For example, suppose that you're printing a tabloid size form (11" by 17") on standard US letter sheets (8.5" by 11"). Informed Designer produces four sheets of paper for each copy of the form that you print.

Tabloid drawing area
(11" by 17")

Four 8.5" by 11" sheets
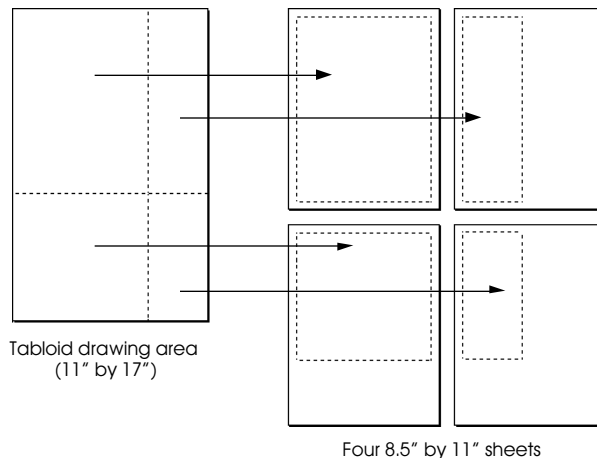
When you set up your form's drawing area, Informed Designer indicates how tiling will occur by drawing gray 'page break' indicators on the Drawing Setup dialog box. Page break indicators also appear on the drawing window. See "Page Size" in Chapter 3 for more information.

If you select the 'Manual tile' print option, Informed Designer prints a single sheet containing the area of your form that's immediately below and to the right of the zero point. (The zero point is the position where the zero mark on the horizontal and vertical rulers intersect.) For forms templates that are larger than the selected paper size, the manual tile option allows you to print a particular area of the form without having to print the entire form on multiple sheets.

To use the manual tile option, position the zero point just above and to the left of the area on your form that you want to print. When you choose the Print command, click the 'Manual Tile' check-box on the Print Job dialog box. The following figure illustrates manual tiling.

Drawing window

Printed page
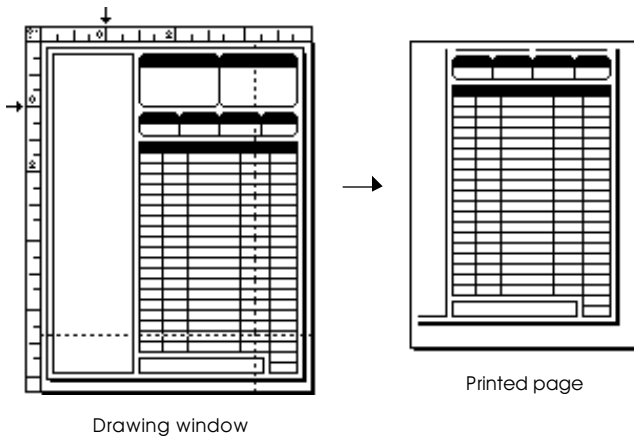
If you printed the form above without the manual tile option, Informed Designer would print four sheets instead of one. For information about changing the zero point, see "Rulers" in Chapter 5.

Crop Marks

When a commercial printer prints your form template, the size of the paper stock used is often larger than the size of the form itself. To indicate where to trim a printed form, crop marks are printed at each corner.
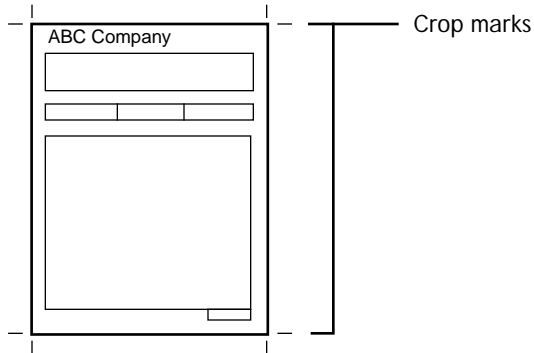
Crop marks

Informed Designer can print crop marks for you automatically. Simply click the 'Crop marks' checkbox on the Print Job dialog box.

Since crop marks appear outside the edge of a form, you must allow enough space between the drawing area and the page edge when you set up your template. Otherwise, crop marks won't print. For more information, see "Crop Marks" in Chapter 3, "Setting up a Form."

Fractional Character Widths

On occasion, the inaccuracies between the resolution of your computer screen and many of the laser printers will result in inconsistent type spacing. You can correct this problem by selecting the 'Fractional character widths' option from the General panel of the Preferences dialog box. Informed Designer will then adjust the spacing of text on the screen and on the printed form. You should use this option if you're printing on a laser printer.

Note   When designing forms for use on both the Windows and Mac OS platforms, it is very important to turn on the 'Fractional character widths' option. This ensures that the form will display and print properly on both platforms.

To turn fractional character widths on or off, choose **Preferences…** from the Edit menu. When the Preferences dialog box appears, click the 'General' icon in the scrolling list, then select the 'Fractional character widths' checkbox.
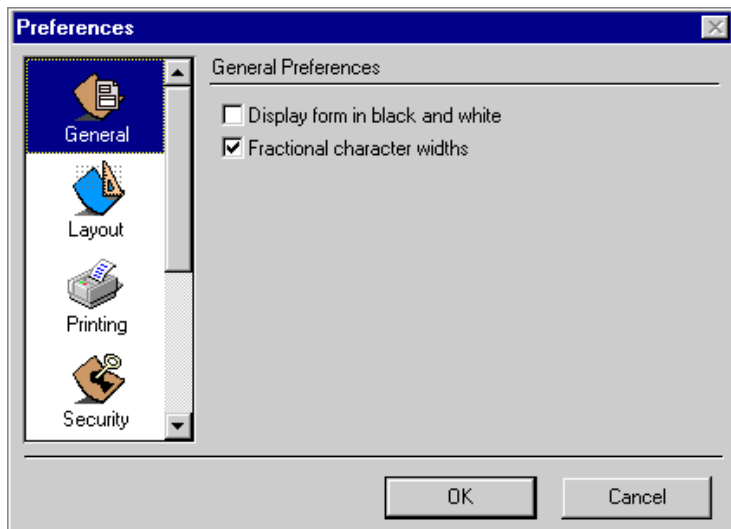
For information on the other option on this dialog box, please see "Faster Scrolling" in Chapter 5.

12 Mailing Forms

In this chapter:

12 Mailing Forms

An electronic mail system provides services for sending and receiving information electronically, making it an effective tool for moving information throughout an organization. Although this capability is most valuable for routing completed forms for approval purposes (using Informed Filler), the occasional need to send a form template to another colleague makes e-mail a useful tool for form designers as well.

In this chapter you'll learn how to send form templates with Informed Designer. In particular, you'll learn about the Mail panel of the Preferences dialog box, and how to use the Send command in Informed Designer's File menu. The remaining sections of this chapter assume that you're familiar with the electronic mail system used in your organization.

In addition to mailing form templates, you can also specify suggested routes using Informed Designer's Routing command. Suggested routes aid the Informed Filler user in addressing and mailing completed forms. For more information, see Chapter 5, "Routing," in your *Informed Designer Forms Automation* manual.

Choosing Your Mail System

Informed Designer accesses your e-mail system through an Informed mail plug-in. By using plug-ins, Shana can easily support new e-mail systems by simply implementing new mail plug-ins.

Using Informed Designer's Preferences command, you can specify your preferred mail system. By doing so, you will avoid being asked to select a mail system each time you send a form template.

To specify your preferred mail system, choose **Preferences...** from the Edit menu and click the Mail icon in the scrolling list. The dialog box changes to show the Mail preferences panel.
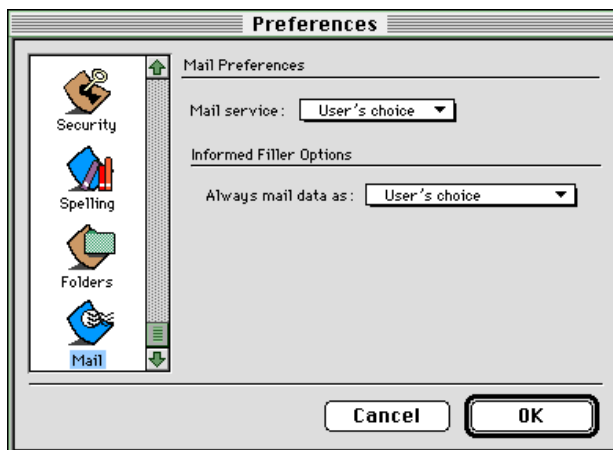
Click the 'Mail service' drop-down list and make a selection from the available choices. The choices in the 'Mail Service' drop-down list correspond to the Informed mail plug-ins you have installed in your plug-ins folder.

For details of the specific e-mail systems supported by Informed Designer, see the on-line document "DGRPLG.PDF" (Windows) or "Informed Designer Plug-ins" (Mac OS). This document is automatically installed when you install Informed Designer and is viewed using Acrobat Reader (also included with Informed Designer).

For information about the 'Always mail data as' option, see Chapter 5, "Routing," in your *Informed Designer Forms Automation* manual.

The Send Command

To mail a form template, choose **Send...** from the File menu. If your template is a new untitled template, or a template to which changes have been made but not saved, you'll be warned that the template will be saved before continuing.
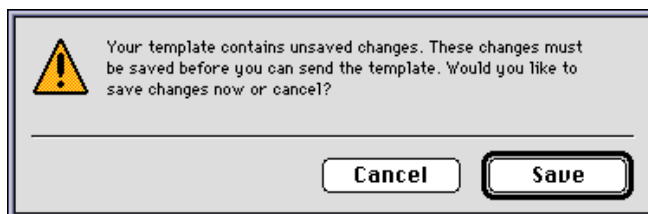
Click 'Save' to save the template and continue, or click 'Cancel' to cancel the Send command.

If 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.
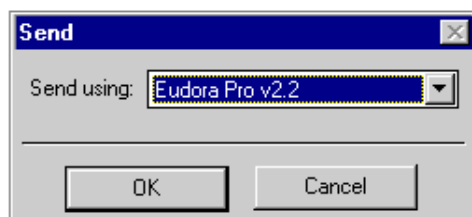
Click the 'Send using' drop-down list and make a selection from the available choices, then click 'OK.'

When the addressing dialog appears for your selected mail system, specify the subject, the format in which to send the template, and one of more recipients. The addressing dialog and the method of

selecting recipients varies depending on which mail system you use. These details can be found in the on-line document "DGRPLG.PDF" (Windows) or "Informed Designer Plug-ins" (Mac OS). This document is automatically installed when you install Informed Designer and is viewed using Acrobat Reader (also included with Informed Designer).

Below is the Send dialog box that you'll see if you're using the Eudora Pro mail system.

For most mail systems, the only available format under 'Send as' is 'Informed template.' Some support additional formats. Click 'Send' to send the template.

Appendix A

Default Settings

Appendix A - Default Settings

As described in Chapter 7, "Changing an Object's Appearance," Informed Designer remembers the default settings for each of the drawing tools. A default setting is a setting that's automatically selected for new objects. For more information, see "Changing Default Settings" in Chapter 7.

When you create a new template, Informed Designer automatically selects a standard set of default settings for each drawing tool. These settings are listed in the following table.

Default Settings

Tool	Attribute	Default Setting
Text	font	Arial (Windows), Helvetica (Mac OS)
	font size	10
	type style	plain
	alignment	left
	leading	automatic
	pen color	black
Line	line width	1/4 point
	pen color	black
	line style	plain
Rectangle	line width	1/4 point
	pen color	black
	fill color	white
	fill pattern	solid
	line style	plain
	corners	square
Oval	line width	1/4 point
	pen color	black
	fill color	white
	fill pattern	solid
Arc	line width	1/4 point
	pen color	black
	fill color	white
	fill pattern	solid
Polygon	line width	1/4 point
	pen color	black
	fill color	white
	fill pattern	solid

Default Settings (continued)

Tool	Attribute	Default Setting
Field	title font	Arial (Windows), Helvetica (Mac OS)
	title font size	10
	title type style	plain
	title alignment horizontal	center
	title alignment vertical	center
	title leading	automatic
	cell font	Arial (Windows), Helvetica (Mac OS)
	cell font size	10
	cell type style	plain
	cell alignment horizontal	left
	cell alignment vertical	top
	cell leading	automatic
	pen color	black
	fill color	white
	line width	1/4 point
	line style	plain
	title	on
	title position	top
	corners	square
	data color	black
Table	title font	Arial (Windows), Helvetica (Mac OS)
	title font size	10
	title type style	plain
	title alignment horizontal	center
	title alignment vertical	center
	title leading	automatic
	cell font	Arial (Windows), Helvetica (Mac OS)
	cell font size	10
	cell type style	plain
	cell alignment horizontal	left
	cell alignment vertical	center
	cell leading	automatic
	pen color	black
	fill color	white
	line width	1/4 point
	line style	plain
	title	off
	column titles	on
	corners	square
	cell type	character (no options)
	color	black

Appendix B

Entering Measurements

B Appendix B - Entering Measurements

To use many of Informed Designer's object manipulation commands, you're often requested to enter measurements for parameters such as the size or position of an object. For example, when you duplicate objects using the Replicate command, you specify the distance between each duplicate by typing measurements in the 'Offset' text boxes on the Replicate dialog box.
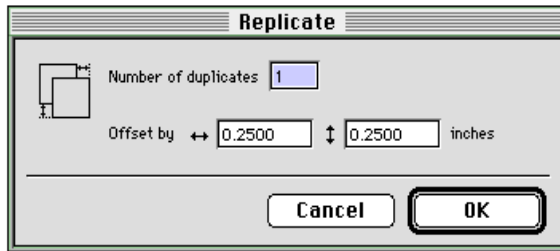
Informed Designer makes it easy to enter measurements. Although measurements are displayed using your choice of ruler units, you can enter measurements in any units you like. You can also type fractional values such as '1/2' or '3/8.' The remaining sections of this appendix describe these features of Informed Designer.

Accuracy

When you draw a form template with Informed Designer, you can size and position objects with a maximum precision of 1/1152 of an inch. Measurements are displayed using four decimal places of precision. The 'Drawing accuracy' setting on the Layout panel of the Preferences dialog box lets you change the maximum precision (see "Drawing Accuracy" in Chapter 5 for more information).

Whenever you enter a measurement, Informed Designer rounds the value to the closest multiple of the current drawing accuracy setting. For example, if the drawing accuracy is set to 1/1152 dpi (dots per inch) and you type the value 1.0010, Informed Designer will round the value to 1.0009. This is because 1.0009 is the closest multiple of 1/1152.

Measurement Units

Informed Designer displays measurements using your choice of ruler units. For example, if you've set the rulers to display picas, all measurements will display in picas. You can change the ruler units by selecting a different setting from the 'Ruler units' drop-down list on the Layout panel of the Preferences dialog box. For more information about ruler options, please see "Rulers" in Chapter 5.

When you enter a measurement, you can specify the unit of measure by appending an abbreviated suffix to the value you type. For example, if the current ruler unit setting is inches and you want to enter a value in points, simply append a space and the letters 'pt' to the numeric value that you type. Informed Designer will automatically convert the value to inches when you press the Tab key.

| 12 pt | inches ——→ | 0.1667 | inches |

The complete list of unit abbreviations is shown in the following table.

Unit Abbreviations

Unit	Abbreviation
inches	in
centimeters	cm
picas	pc
points	pt

Entering Fractions

Although fractional numbers are displayed in floating point form (1.5, for example), you can also enter fractions by typing the numerator and denominator separated by the slash symbol (/). For example, instead of typing '5.375', you could also enter '5 3/8.' Informed Designer will automatically convert the value to its decimal form when you press the Tab key.

| 5 3/8 | inches ——→ | 5.3750 | inches |

Appendix C

Shortcuts

Appendix C - Shortcuts

This section contains a list of shortcuts and convenience features. Many of these shortcuts and features are performed by pressing either a single key or a combination of keys. Since some of these keys are different on Windows and Macintosh keyboards, this section is divided into two tables—one for Windows shortcuts, and one for Mac OS.

Windows Shortcuts

Category	Key/Feature	Description
Startup	hold down Alt key after double-clicking application icon	opens a document during startup
Tool palette	Escape/reverse quote key	toggles between Pointer tool and drawing tool
	Alt key	selects Pointer tool while pressed
	Tab key	selects Text tool and first selected text object or title
Pointer tool	double-click tool	deselects all objects
	Shift-click object	selects multiple objects
	Ctrl-click	selects object behind
	Alt-click	forces selection rectangle
		selects objects completely enclosed
	Ctrl-Alt-click	forces selection rectangle
		selects intersecting objects
	click and drag any object	drags outline of object(s) with pointer
	click, pause and drag	drags object detail with pointer
	double-click text object	Type command
	double-click line object	Paint command
	double-click rectangle object	Paint command
	double-click oval object	Paint command
	double-click arc object	Paint command
	double-click polygon object	Paint command
	double-click button object	Button command
	double-click cell section of field or table	Format command
	double-click title section of field or table	Type command
	double-click title divider of field or table	Paint command
	Ctrl-drag bottom edge of field	overrides 'snap to rule lines' (if rule lines on)
		snaps height to font size (if rule lines off)
	Ctrl-drag bottom edge of table	overrides 'snap to row lines'
	click in gray area of table	creates new column

Windows Shortcuts (continued)

Category	Key/Feature	Description
Pointer tool	Ctrl-drag column divider	moves table columns on right
	Ctrl-drag right edge of table	extends right edge without changing width of last column
	Shift-resize	constrains horizontally, vertically, proportionally, or diagonally at 45, 135, 225, or 315 degrees
Text tool	double-click tool	default type settings for text
	Shift-draw	constrains dimensions to a square
	Tab key	selects first text object or title
	Enter key on numeric keypad	accepts text editing
	F12 key	accepts text editing and adjusts object width to fit text
	Alt key	selects Pointer tool while pressed
Line tool	double-click tool	default paint settings for lines
	Shift-draw	constrains horizontally, vertically, proportionally, or diagonally at 45, 135, 225, or 315 degrees
	Alt key	selects Pointer tool while pressed
Rectangle tool	double-click tool	default paint settings for rectangles
	Shift-draw	constrains to a square
	Alt key	selects Pointer tool while pressed
Oval tool	double-click tool	default paint settings for ovals
	Shift-draw	constrains to a circle
	Alt key	selects Pointer tool while pressed
Arc tool	double-click tool	default paint settings for arcs
	Shift-draw	constrains to a quarter circle
	Alt key	selects Pointer tool while pressed
Polygon tool	double-click tool	default paint settings for polygons
	Shift-draw	constrains edge horizontally, vertically, or diagonally at 45, 135, 225, or 315 degrees
	Alt key	selects Pointer tool while pressed
Field tool	double-click tool	default field styles
	Shift-draw	constrains to a square
	Alt key	selects Pointer tool while pressed
Table tool	double-click tool	default table styles
	Shift-draw	constrains to a square
	Alt key	selects Pointer tool while pressed
Button tool	double-click tool	default button settings
	Shift-draw	constrains to a square
	Alt key	selects Pointer tool while pressed

Windows Shortcuts (continued)

Category	Key/Feature	Description
Tab tool	double-click tool	Change Tab Order dialog box
	click & drag between cells	changes tab order from one cell to another
	Alt key	selects Pointer tool while pressed
Zoom tool	click	enlarge view scale
	Alt-click	reduce view scale
	double-click tool	actual size
any tool	click right mouse button	pop-up menu containing commands that correspond to the type of object clicked
Imported pictures	double-click	reverts to original size
Paste command	Alt-paste	positions pasted objects at original location
Changing pages	double-click numbered page	Change Page dialog box

Mac OS Shortcuts

Category	Key/Feature	Description
Startup	hold down Option key after double-clicking application icon	opens a document during startup
Tool palette	Escape/reverse quote key	toggles between Pointer tool and drawing tool
	Option key	selects Pointer tool while pressed
	Tab key	selects Text tool and first selected text object or title
Pointer tool	double-click tool	deselects all objects
	Shift-click object	selects multiple objects
	Cmd-click	selects object behind
	Option-click	forces selection rectangle
		selects objects completely enclosed
	Option-Cmd-click	forces selection rectangle
		selects intersecting objects
	click and drag any object	drags outline of object(s) with pointer
	click, pause and drag	drags object detail with pointer
	double-click text object	Type command
	double-click line object	Paint command
	double-click rectangle object	Paint command
	double-click oval object	Paint command
	double-click arc object	Paint command
	double-click polygon object	Paint command

Mac OS Shortcuts (continued)

Category	Key/Feature	Description
Pointer tool	double-click button object	Button command
	double-click cell section of field or table	Format command
	double-click title section of field or table	Type command
	double-click title divider of field or table	Paint command
	Cmd-drag bottom edge of field	overrides 'snap to rule lines' feature (if rule lines on) snaps height to font size (if rule lines off)
	Cmd-drag bottom edge of table	overrides 'snap to row lines' feature
	click in gray area of table	creates new column
	Cmd-drag column divider	moves table columns on right
	Cmd-drag right edge of table	extends right edge without changing width of last column
	Shift-resize	constrains horizontally, vertically, proportionally, or diagonally at 45, 135, 225, or 315 degrees
Text tool	double-click tool	default type settings for text
	Shift-draw	constrains dimensions to a square
	Tab key	selects first text object or title
	Enter key	accepts text editing
	Option-Enter key	accepts text editing and adjusts object width to fit text
	Option key	selects Pointer tool while pressed
Line tool	double-click tool	default paint settings for lines
	Shift-draw	constrains horizontally, vertically, proportionally, or diagonally at 45, 135, 225, or 315 degrees
	Option key	selects Pointer tool while pressed
Rectangle tool	double-click tool	default paint settings for rectangles
	Shift-draw	constrains to a square
	Option key	selects Pointer tool while pressed
Oval tool	double-click tool	default paint settings for ovals
	Shift-draw	constrains to a circle
	Option key	selects Pointer tool while pressed
Arc tool	double-click tool	default paint settings for arcs
	Shift-draw	constrains to a quarter circle
	Option key	selects Pointer tool while pressed

Mac OS Shortcuts (continued)

Category	Key/Feature	Description
Polygon tool	double-click tool	default paint settings for polygons
	Shift-draw	constrains edge horizontally, vertically, or diagonally at 45, 135, 225, or 315 degrees
	Option key	selects Pointer tool while pressed
Field tool	double-click tool	default field styles
	Shift-draw	constrains to a square
	Option key	selects Pointer tool while pressed
Table tool	double-click tool	default table styles
	Shift-draw	constrains to a square
	Option key	selects Pointer tool while pressed
Button tool	double-click tool	default button settings
	Shift-draw	constrains to a square
	Option key	selects Pointer tool while pressed
Tab tool	double-click tool	Change Tab Order dialog box
	click and drag between cells	changes tab order from one cell to another
	Option key	selects Pointer tool while pressed
Zoom tool	click	enlarge view scale
	Option-click	reduce view scale
	double-click tool	actual size
any tool	click mouse button while holding the Ctrl key	pop-up menu containing commands that correspond to the type of object clicked
Imported pictures	double-click	reverts to original size
Paste command	Option-paste	positions pasted objects at original location
Changing pages	double-click numbered page	Change Page dialog box