

Informed Designer[®]

Getting Started

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Welcome to Informed Designer

Welcome to Informed Designer® by Shana Corporation. Informed Designer is sophisticated yet easy to use forms design software that allows you to quickly and easily create professional looking forms for paper, electronic, and Internet use.

About this Guide

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

- Chapter 1, "Installing Informed Designer" explains each step of the installation process from the system requirements to installing and registering Informed Designer. You'll also learn about the various installation options that come with Informed Designer, and how to use on-line help.
- Chapter 2, "What's New in 2.0?" lists and describes the many new features and improvements in Informed Designer version 2.0.
- Chapter 3, "Converting from 1.x" provides guidelines for converting your forms from earlier versions of Informed and taking advantage of the powerful features and benefits of the new version.

The Informed Designer Manual Set

The Informed Designer manual set gives you comprehensive, wide-ranging coverage of Informed Designer's easy to use design and graphics capabilities as well as its powerful forms automation features. In addition to this Getting Started Guide, the set also contains the following manuals:

- The *Informed Designer Design and Graphics* manual provides a complete reference to Informed Designer's design and graphics features. Instructions are given for every step in the form design process, including preparing the drawing area of the template, using the drawing tools, adding graphics, and printing. You also learn how to mail form templates using an electronic mail system.
- 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.

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Installing Informed Designer

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Installing Informed Designer

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

What Comes with Informed Designer

With previous versions of Informed Designer, features such as database access, tracking, revision distribution, and obtaining form numbers using Informed Number Server were only available by purchasing additional Informed products. In version 2.0, all of that functionality is included with Informed Designer.

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

Note

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

Here’s what comes with Informed Designer:

For Windows:

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

For Mac OS:

- Informed Designer application and related files
- complimentary copy of Informed Filler application (single user)
- Informed Number Server
- Informed Tracker (form tracking server)

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

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

- Informed Designer manual set
- Informed Filler manual set
- license certificate
- registration card
- pre-registration card (if software is pre-registered)
- stickers with peel-off registration number labels for your Informed Designer and Informed Filler applications

Informed Filler for the Internet

Included on the CD-ROM is a folder named “Internet” (Windows) or “Informed Filler™ for Internet” (Mac OS). This folder contains a “Read Me” file and several installer applications. With a special license agreement from Shana Corporation, these installers can be distributed freely along with licensed forms for use by the general public.

This innovative licensing option is intended to allow your organization to conduct business on the Internet using intelligent electronic forms designed with Informed Designer. Users outside of your organization can download licensed Informed forms from your Web site, fill them out with Informed Filler, then submit the form data back to your Web server. You benefit by empowering your customers with intelligent forms that save time and reduce errors as well as reduce your own processing time and costs.

YOU CANNOT DISTRIBUTE INFORMED FILLER FOR THE INTERNET WITHOUT FIRST CONTACTING SHANA CORPORATION AND OBTAINING THE REQUIRED LICENSE AGREEMENT. For detailed information about Informed Filler for the Internet and the licensing procedures, please contact Shana Corporation’s Sales Department at (403) 433-3690.

System Requirements

To use Informed Designer and Informed Filler, you'll need the following hardware and software:

Windows

- a 386 or better with at least 8 megabytes (MB) of RAM
- a hard drive with at least 12MB of free disk space
- Windows 3.1 or later (including 3.11, NT, or Win95)

Mac OS on 68K Macintosh

- a 68K Macintosh computer (68030 processor or better) with at least 4MB of RAM
- a hard drive with at least 8MB of free disk space
- System 7.0 or later (some features require PowerTalk™ or AppleScript™)

Mac OS on PowerPC Macintosh

- a PowerPC Macintosh (or compatible) with at least 8MB of RAM
- a hard drive with at least 8MB of free disk space
- System 7.1 or later

Informed Designer allows you to link form templates to different types of systems for:

- lookups to other data sources
- submission of data to other databases
- signing services for signing forms and authorizing templates with secure digital signatures
- e-mail systems for mailing templates and forms to other users
- file servers and FTP servers for automatic revision and distribution of form templates

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

Informed Tracker Server

You can use Informed Designer to configure form tracking using any database that is accessible via Informed data access plug-ins. These include Oracle, Sybase, and others using ODBC and DAL. If you don't already have a database suitable for form tracking, Informed Designer comes with Informed Tracker Server, a DAL database server that runs on the Mac OS. Informed Tracker Server includes client software for each user, a server, and administration software for management and analysis.

In order to use Informed Tracker Server, you'll need the following:

Informed Filler users:

- Informed Filler version 2.0 or greater
- Mac OS version 7.0 or greater
- an e-mail system supported by Informed

Informed Tracker Server:

- a Mac OS compatible computer (68030 processor or better, or PowerPC)
- 8MB RAM
- System 7 or greater
- hard drive with at least 8MB of free disk space

Informed Tracker Admin (administration application):

- a Mac OS compatible computer (68030 processor or better, or PowerPC)
- System 7 or greater
- AppleScript 1.1 or greater

Network:

All computers (Informed Filler users, Informed Tracker Server, and Administrator) must be connected to the same network.

For more information on using Informed Tracker Server, see Chapter 6 of your *Informed Designer Forms Automation* manual.

Informed Number Server

Using Informed Designer, you can configure auto-incrementing cells to obtain unique identification numbers for forms from a variety of sources. These sources include the template itself, Apple event aware applications, or other databases accessible using Informed data-access plug-ins.

If you're running Informed on Mac OS compatible computers, you can generate unique form numbers using the Informed Number Server application that is included with Informed Designer.

Informed Number Server has the following system requirements:

- a Mac OS compatible computer (68030 processor or better, or PowerPC)
- System 7 or later
- hard disk with 200K of free disk space
- Informed Designer and Informed Filler version 2.0 or greater

For more information on using Informed Number Server, see Chapter 11 of your *Informed Designer Forms Automation* manual.

Installing Informed Designer

Installation of Informed Designer is done with easy to use installer applications that you'll find on both the CD-ROM and floppy disk versions. The CD-ROM and disks contain the same installers. The only difference is that the CD contains both Windows and Mac OS software, while the floppy disks are divided into two sets; one for Windows and one for Mac OS.

While the installation process itself differs slightly between Windows and Mac OS, the installation options are the same, regardless of whether you're installing from CD or disks, on Windows or Mac OS. Full installation requires approximately 16MB (Windows) and 18MB (Mac OS) while a minimal installation (Informed Designer application only) requires about 9MB (Windows) and 7MB (Mac OS).

Installing on Windows

The following sections explain the procedures for installing Informed Designer on Windows 95 and Windows 3.11.

Windows 95

To start the installation process on Windows 95:

- insert the CD or the disk labelled “Informed Designer Disk 1” into your drive
- select the Start button
- select Run
- for installation from CD, enter “E:\DESIGNER\SETUP.EXE” in the text box, then click ‘OK.’ If your CD-ROM drive uses a different drive letter, enter it in place of “E.”
- for installation from floppy disks, enter “A:\SETUP.EXE” in the text box, then click ‘OK.’ If your floppy disk drive uses a different drive letter, enter it in place of “A.”

Windows 3.11

To start the installation on Windows 3.11:

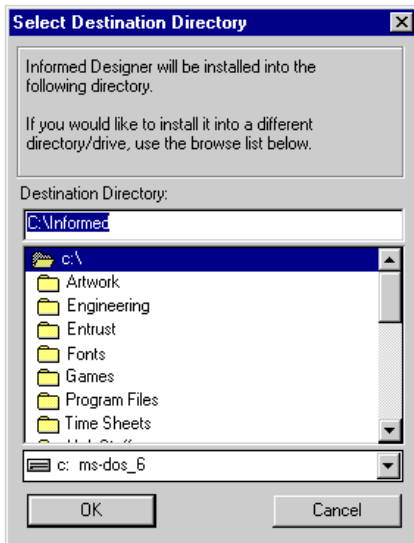
- insert the CD or the disk labelled “Informed Designer Disk 1” into your drive
- In the Program Manager, select Run from the File menu.
- for installation from CD, enter “E:\DESIGNER\SETUP.EXE” in the text box, then click ‘OK.’ If your CD-ROM drive uses a different drive letter, enter it in place of “E.”
- for installation from floppy disks, enter “A:\SETUP.EXE” in the text box, then click ‘OK.’ If your floppy disk drive uses a different drive letter, enter it in place of “A.”

After starting the installation, the welcome screen appears.

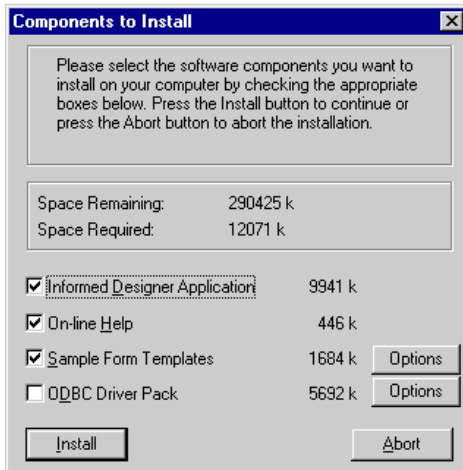


When you click the ‘Continue’ button, the installer prompts you for the installation location.

1-8 : Installing Informed Designer



The location you specify is where the installer will create a folder named “Informed”. Most items are installed in this folder. Select the appropriate folder or directory, then click ‘OK.’ The main installer window appears.



The options available for installation are divided into categories such as ‘Informed Designer Application’ and ‘Sample Form Templates.’ You select a category by clicking its checkbox. Some items have additional options that you can view by clicking the corresponding ‘Options’

button. After you've made your selections, click 'Install.' Each installation option is described in "Installation Options" later in this chapter.

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

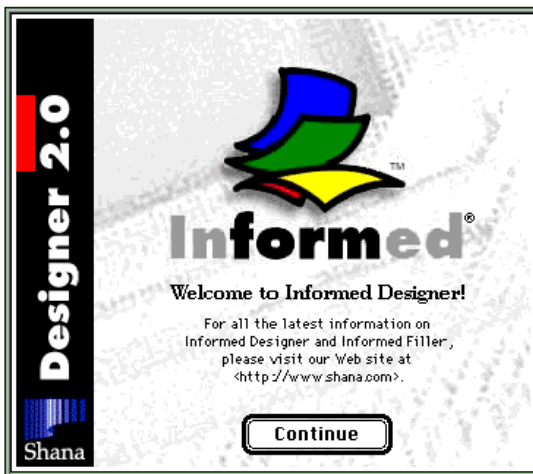
After installation, a dialog appears informing you that installation was successful. If you have installed all the items you need and wish to quit the installer, click 'Quit.' If you wish to install additional items, click 'Continue' and repeat the installation process to install the desired items.

Installing on Mac OS

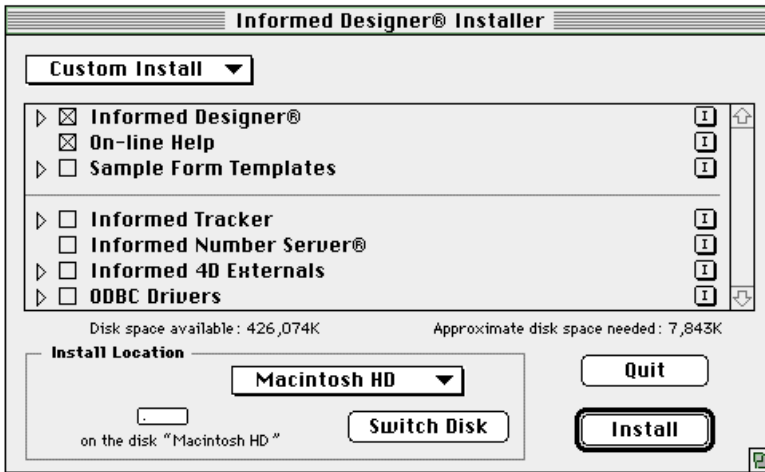
To start the installation process on Mac OS using the CD-ROM, insert the CD into your drive, then double-click the "Informed Designer® Installer" icon to start the installation process. This item is found inside the folder "Informed Designer®."

To start the installation on Mac OS using floppy disks, simply insert the disk labelled "Informed Designer Disk 1" into your floppy drive, then double-click the "Informed Designer® Installer" icon when it appears.

After starting the installation, the welcome screen appears.



Click 'Continue' to display the main installer window.



The Install Location determines where the installer will create a folder named “Informed®.” Most items are installed in this folder. To select a different disk or volume, click the ‘Switch Disk’ button. To select a different folder on the currently chosen disk, choose “Select Folder...” from the drop-down list above the ‘Switch Disk’ button, then pick a folder from the list.

The options available for installation are divided into categories such as ‘Informed Designer Application’ and ‘Sample Form Templates.’ You select a category by clicking its checkbox. Some items have additional options that you can view by clicking the triangles to the left of the item names. You can obtain information about each option by clicking its corresponding ‘information’ button to the right. After you’ve made your selections, click ‘Install.’ Each installation option is described in “Installation Options” later in this chapter.

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

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

Installation Options

This section describes each installation option and includes information on where the files are installed.

Informed Designer Application

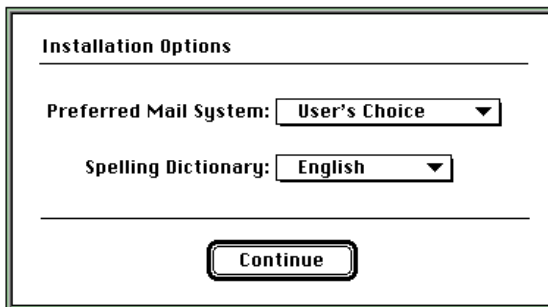
Selecting the ‘Informed Designer Application’ option installs:

- Informed Designer application
- all Informed plug-ins
- spell checking

On Windows, the Informed Designer executable file and related items are installed in a folder named “Designer” inside the Informed folder.

On Mac OS, the Informed Designer application is a single file and is installed in the Informed folder. By default, the installer installs a version of the application that runs on both PowerPC and 68K Macintosh computers. You can expand the Informed Designer Application option and select a particular version.

All Informed plug-ins are installed in a folder named “Plug-ins” inside the Informed folder. All spell checking related files are installed in a folder named “Spelling” inside the Informed folder. During installation, you’ll be asked to select your preferred mail system and spell checking language.



The image shows a dialog box titled "Installation Options". It contains two dropdown menus: "Preferred Mail System:" with "User's Choice" selected, and "Spelling Dictionary:" with "English" selected. A "Continue" button is located at the bottom center of the dialog box.

If you’ve already installed Informed Designer, the dialog will prompt you only for the spell checking language option.

On-line Help

Selecting the ‘On-line Help’ option installs the on-line help files for Informed Designer. Help files are installed in folder named “Help” inside the Informed folder. On Mac OS, a help viewer application called “QuickHelp” is also installed in Help folder.

Sample Form Templates

Clicking the ‘Sample Form Templates’ option installs a collection of sample form templates and data documents. The sample templates are installed in a folder named “Samples” inside your templates folder. The sample data documents are installed in a folder named “Samples” inside the “Data” folder of the Informed folder. You can expand the ‘Sample Form Templates’ option to select individual templates.

Informed Tracker (Mac OS only)

Installation of Informed Tracker is required only if you intend to use Informed Tracker as your form tracking database. Other databases can be used in place of Informed Tracker (see Chapter 6 of your *Informed Designer Forms Automation* manual for more information). If you intend to track forms using a different database, do not install this software.

Informed Tracker consists of three components: Client, Server, and Admin. Expand the Informed Tracker item to select the individual components.

Installation of server software should be done on the computer that will act as your form tracking server. Installation of the Admin software should be done on the computer from which you intend to administer the tracking database (often the same computer that you install Informed Designer on).

Installation of the client software is also available in the Informed Filler installer and should be done on all Informed Filler users’ computers.

Informed Number Server (Mac OS only)

The ‘Informed Number Server’ option installs the Informed Number Server application. In addition to Informed Number Server, Informed Designer supports the generation of unique form numbers using other external data sources and Apple event aware applications (see Chapter 1 of your *Informed Designer Forms Automation* manual for details). Install Informed Number Server only if you intend to use it for form number generation. Installation installs the Informed Number Server application in the Informed folder.

Informed 4D External (Mac OS only)

The 'Informed 4D External' option installs the Informed 4D external and sample database. You can expand this item to select individual options. All items are installed in a folder named "4D" inside the Informed folder.

ODBC Drivers

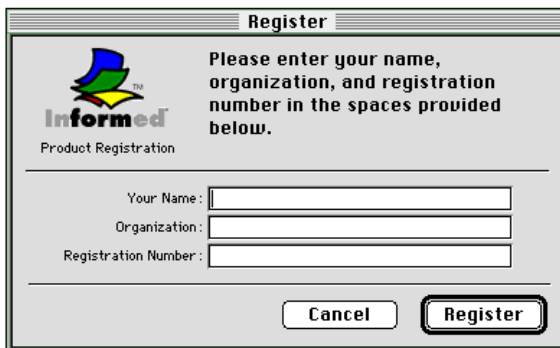
The 'ODBC Drivers' option installs the Intersolv DataDirect ODBC drivers that are included with Informed Designer. These drivers are required in order to define and configure links to ODBC data sources. On Windows, the ODBC drivers are installed in the plug-ins folder inside the Informed folder. On Mac OS, the ODBC drivers are installed in the Extensions folder in your System Folder.

If you expand the 'ODBC Drivers' option, you'll see another option named 'ODBC Drivers On-line Help.' This option installs on-line help documents that describe the ODBC drivers. Be sure to install this option if you expect to need detailed information about the ODBC drivers. On Windows, these help documents are installed in the plug-ins folder inside the Informed folder. On the Mac OS, the ODBC on-line help is contained in a single help file named "ODBC Help." This file is installed inside your Help folder.


Additional information can be found in the on-line manual titled "DGRPLG.PDF" (Windows) or "Informed Designer Plug-ins" (Mac OS).

Registering Informed Designer

When you run Informed Designer for the first time, the Register dialog box appears, asking you to enter your name, your organization (optional), and your registration number.



Register


Product Registration

Please enter your name, organization, and registration number in the spaces provided below.

Your Name:

Organization:

Registration Number:

Your registration number can be found on the stickers included in your Informed Designer package. If you received Informed Designer electronically or via some other method, you should have received your registration number at the same time.

After you've entered your registration information, click 'Register' to continue. Click 'Cancel' if you wish to cancel the registration process. Clicking 'Register' displays the license agreement screen.



Please read this agreement carefully. If you accept the terms of the agreement, click 'Agree.' If you cannot or do not wish to abide by one or more conditions of the agreement, click 'Cancel' instead.

Once you've completed the registration process, Informed Designer will open and display a new untitled template document, ready for editing.

Registering with Shana

If you purchased Informed Designer version 2.0 direct from Shana, your software is already pre-registered and you'll receive all the benefits of being a registered user. If you received Informed Designer from another source, please take a moment to contact us and register your software. As a registered Informed Designer owner, you're eligible for:

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

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

Using On-line Help

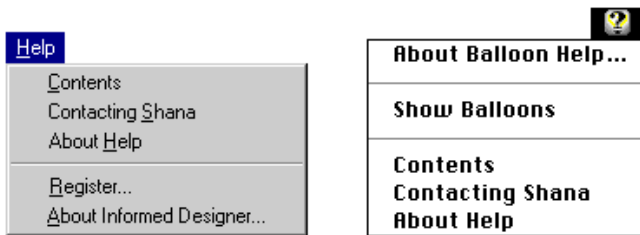
In addition to your Informed Designer manual set, reference information and instructions are now available through Informed Designer's new on-line help feature.

If you choose to install on-line help, installation will include the necessary help files. Help files are installed in a folder named "Help" inside the Informed folder. The help files must remain in this location.

Note

On the Windows platform, Informed 2.0 relies on the Windows built-in help system to display on-line help. On Mac OS, on-line help is displayed using an application called "QuickHelp™," which is also located in the Help folder.

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



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



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

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

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

Appropriately enough, choosing **About Help** displays an on-line help document that provides detailed instructions on, what else, how to use on-line help.

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

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

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What's New in 2.0?

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2 What's New in 2.0?

Version 2.0 brings Informed Designer to an even higher level of functionality and power. You'll find a multitude of new features and improvements such as seamless cross-platform inter-operability, faster performance, leading edge security capabilities, easier database access, and enhanced e-mail support.

This chapter describes the new features and benefits in Informed Designer version 2.0 and provides references to more detailed information in other Informed Designer manuals.

Truly Portable Forms

The biggest change you'll see in Informed Designer 2.0 is that it's now a cross-platform application, running equally on three operating systems:

- Windows (3.1, 3.11, NT, and Win95)
- Mac OS on 68K
- Mac OS on Power PC

Informed Designer allows you to create truly portable forms that are platform neutral. This means that if a form template (formerly called the “layout”) is created using Informed Designer on one platform, that same template 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. With version 2.0 of Informed Designer and Informed Filler, the entire forms process—design, distribution, filling, routing, approving, submitting, and tracking—can occur on either platform, regardless of the platform used to design the form template.

Document Types

Version 2.0 introduces new types of Informed documents, as well as a new way of storing the template (the intelligent features and graphic elements) and data associated with a particular form. In previous versions, the template and data were stored together in a single form document. In version 2.0, these components are stored separately in form template documents and form data documents.

By separating the form template from the form data, you can organize your data so that multiple form data documents can share the same form template.

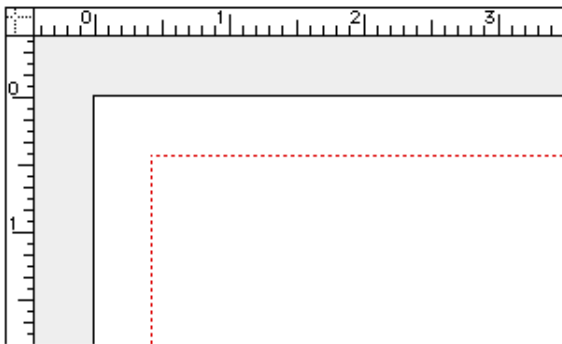
For information on the different types of Informed documents and their uses, see “Informed Documents” in Chapter 2 of your *Informed Designer Design and Graphics* manual.

Design and Graphics

Informed Designer’s award winning design and graphics capabilities have been improved to make the setup and design of a form faster and easier than ever.

Drawing Setup

Drawing environment has changed so that what you see in the drawing window and on the Drawing Setup dialog box reflects the actual page size, not just the printable area of the form. The printable area of the form is now indicated by a red dotted line called the print margin.



You can also set gutter widths for printing labels. See Chapter 3 of your *Informed Designer Design and Graphics* manual for more information.

Color

To make your forms more visually appealing you can now:

- set different pen and fill colors for the same object
- set the paper and background color
- create graduated fills using colors instead of shades

For more information, see Chapter 7, “Changing an Object’s Appearance” in your *Informed Designer Design and Graphics* manual.

Drawing Fields and Tables

New features for fields and tables include:

- new checkbox styles, including radio buttons
- the ability to include comb lines in table columns
- heights for table and column title sections can be set by measurement

See Chapters 6 and 7 of your *Informed Designer Design and Graphics* manual for more information. To see the new intelligence features for fields and tables, see “Data Intelligence” later in this chapter.

Command Palette

The new Command palette provides shortcuts to many of Informed Designer’s graphics commands and settings.



Use the Command palette for tasks such as aligning text, duplicating objects, or locking an object’s position.

Drag and Drop

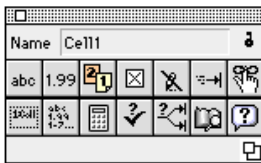
You can use the “drag and drop” method to quickly move objects between the different pages of your template, or to move material from other applications onto your templates. If you’re using Informed Designer on a Mac OS compatible computer with System 7.5 or later installed, you can also drag and drop objects from one template to another, from a template to a file, or from a template to another application. See Chapters 8 and 9 of your *Informed Designer Design and Graphics* manual for more information.

Data Intelligence

Informed Designer's rich set of data intelligence features has been expanded and simplified to make designing "intelligent" forms a snap.

Cell Palette

The new Cell palette provides quick access to cell settings and attributes.



Using the Cell palette, you can easily perform tasks such as:

- changing the name and title of a cell
- configuring a selected set of cell attributes by clicking buttons on the palette
- accessing Informed Designer's cell settings commands with the click of a button

For more information, see "Using the Cell Palette" in Chapter 1 of your *Informed Designer Forms Automation* manual.

Fields and Tables

Informed Designer 2.0 gives you even greater control over how data is entered and displayed in fields and tables. For example, now you can:

- add scroll bars to allow variable amounts of data in fields
- specify vertical or horizontal tabbing in tables
- add scroll bars to allow an endless number of rows in tables
- set table rows to expand automatically to hold variable amounts of data
- set common data entry options (optional, recommended, required) for cells without having to write complex check formulas
- share choice lists between multiple cells
- use longer cell names

- restrict cell character lengths and the use of the carriage return

For more information, see Chapter 1 of your *Informed Designer Forms Automation* manual, and Chapters 6 and 7 of your *Informed Designer Design and Graphics* manual.

Tabbing

The new Tab tool allows you to change the tab order of the cells on your form by simply clicking and dragging the pointer from one cell to another. You can also specify the tab direction (vertical or horizontal) in tables, and you can create “conditional” tab formulas for cells to specify a different tab order based on different conditions. See “Tab Order” in Chapter 1 of your *Informed Designer Forms Automation* manual for more information.

Functions

Several new functions have been added. Many types of formulas that were once complex can now be created using a single function. See Chapter 10 of your *Informed Designer Forms Automation* manual for a complete list of Informed Designer’s powerful functions.

Data Access

Informed’s ability to access external data sources has been extended with new data access plug-ins (formerly called extensions). Informed Designer includes plug-ins for Oracle, Sybase, and any DAL supported database server. The ODBC plug-in and drivers (included) provide access to a wide range of databases such as:

- dBase III, IV, V
- FoxBase and FoxPro
- ORACLE 6, ORACLE 7
- SYBASE System 10

In addition to providing access to data services for lookups and form submission, data access plug-ins can now also be used for generating unique form numbers for auto-incrementing cells, and for form tracking using a variety of databases.

For information on accessing external data sources, see Chapter 1 of your *Informed Designer Forms Automation* manual. See Chapter 6 of the same manual for information on form tracking.

E-mail

Informed Designer 2.0 provides enhanced e-mail support through the use of new Informed mail plug-ins. Plug-ins are currently available for MAPI, VIM, and MHS mail systems. The e-mail systems supported include Microsoft Mail, Microsoft Exchange, GroupWise, cc:Mail, and Eudora Pro. QuickMail and PowerTalk are also supported (Mac OS only).

With Informed Designer's new routing feature, you can aid Informed Filler users in selecting the appropriate place or person to send a form to by adding one or more suggested routes to a template. You can also control the data format used when forms are mailed with Informed Filler. See Chapter 5, "Routing" in your *Informed Designer Forms Automation* manual.

Spell Checking

Informed Designer now comes with a built-in spell checker and the spell checking plug-in needed to use it. 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 for particular sections of text. See Chapter 10 of your *Informed Designer Design and Graphics* manual.

Security

Version 2.0 extends Informed's digital signature capabilities to include support for Nortel's Entrust signing service. Signature cells can now be configured to sign attachments.

In addition to configuring forms for electronic signing, Informed Designer now allows you to use digital signatures to authorize form templates for use in your organization. Authorizing templates provides the same authentication and tamper detection for your form templates as signing completed forms with Informed Filler does for form data. With authorized templates, Informed Filler users can verify the authenticity of a template at any time.

For more information on configuring signature cells and authorizing templates, see Chapter 2, "Using Digital Signatures" and Chapter 7, "Authorizing Form Templates" in your *Informed Designer Forms Automation* manual.

Form Applications

As organizations move away from paper and towards electronic forms, the appearance of forms changes. Forms become more like stand-alone applications that have a “custom” look and feel. You can achieve this through the use of two new features in version 2.0: menu customization and buttons.

Menu Customization

Informed Designer now allows you to customize the menus that are presented to the Informed Filler user. By customizing menus you can:

- remove menus and commands that are not relevant to your form template
- use terminology that's specific to the process for which a template is designed
- add commands that perform custom tasks

For a detailed explanation of how to customize menus, see Chapter 3 of your *Informed Designer Forms Automation* manual.

Buttons

Buttons make a form easier to use by making important or common commands visible on the form itself. With Informed Designer's new Button tool, you can draw and configure buttons to invoke commands that are built into Informed Filler, commands that are accessible through Informed plug-ins, or AppleScript scripts that are attached to the form template (Mac OS only). See Chapter 4 of your *Informed Designer Forms Automation* manual.

Distribution and Revision of Form Templates

Informed now provides fully integrated revision control for your templates. The posting of a template to a distribution center using Informed Designer, and the copying of that template to the Informed Filler user's templates folder are accomplished through the use of Informed distribution service plug-ins. Distribution plug-ins are currently available for distributing templates via file servers or FTP servers. Informed 2.0 also includes support for using multiple distribution centers (primary and backup). See Chapter 8 of your *Informed Designer Forms Automation* manual.

Internet

The Internet and Intranet have a significant relevance to electronic forms software. The Internet provides an ever expanding communications network connecting millions of people and organizations around the world. Using the same networking and communications protocols, the Intranet is becoming a popular internal networking environment for many organizations.

The routing of forms and form templates via the Internet is made possible by many of the e-mail systems supported by Informed. Furthermore, Informed 2.0 includes two new plug-ins that take advantage of the Internet and Intranets in new ways.

The new FTP distribution plug-in allows you to distribute form templates via any FTP server. Users can now connect to your FTP server from anywhere in the world to obtain new form templates for use with Informed Filler. Also included is the new HTTP data access plug-in. With this plug-in installed, you can link form templates to web servers for electronic form submission. The Informed Filler user submits a completed form to a web server by the selection of a single menu command.

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3 Converting From 1.x

In this chapter:

- The Conversion Process 3-2
- Pre-converting Forms for Informed Filler Users 3-4
- Conversion Details 3-5

3 Converting from 1.x

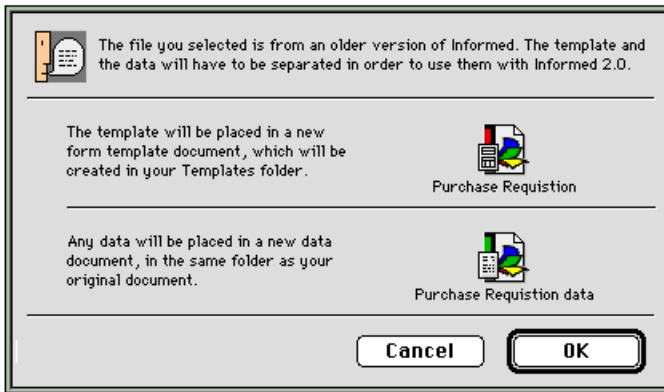
This chapter is intended to provide you with helpful guidelines as you plan the deployment of Informed 2.0 in your organization. Version 2.0 of both Informed Designer and Informed Filler can open version 1.4 (and earlier) form documents and convert them to the new format. However, certain changes in how these applications now store and access forms and information means that your form templates (formerly called form layouts) and form data are now organized differently.

If you support a large organization of Informed Filler users, you may benefit from understanding clearly the conversion process. You may choose to pre-convert the form templates used in your organization yourself and distribute the new versions prior to the installation of Informed Filler 2.0. If you choose to use some of the features available only in version 2.0, your templates may require additional configuration.

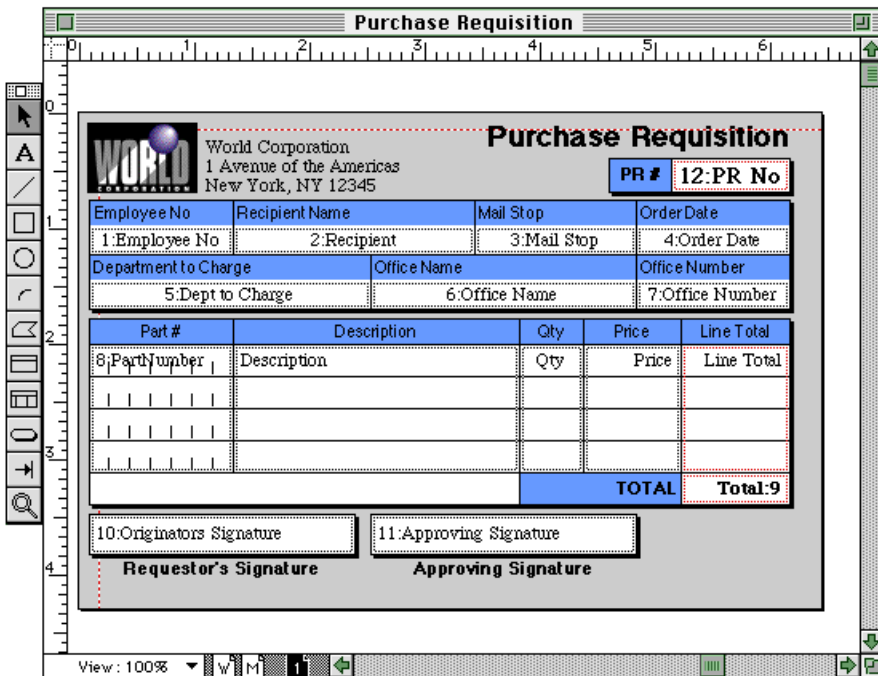
The Conversion Process

The most significant difference in the way forms are now stored is that form templates are stored separately from form data. You can have several form data documents all sharing the same form template. With earlier versions of Informed, both the form template and form data were stored in the same file. (For an overview of Informed's new document types, and a description of the templates folder and other special folders, see Chapter 1, "Overview," of your *Informed Designer Design and Graphics* manual.)

You convert a 1.x form document to version 2.0 by opening it using Informed Designer's Open command. Informed Designer will create two new files: one to store the template of the form, and the other to store the form data. When you choose the Open command and select a 1.x form document, Informed Designer warns you that conversion will take place.



The icons pictured on the dialog box show the filenames that will be used when Informed Designer creates the new template and data documents. The form template document is created in your templates folder. The form data document is stored next to the original 1.x form document. Following the conversion process, the converted template appears in a drawing window, ready for editing.



Note

Converting a 1.x form document does not alter the original document in any way. The conversion process essentially “opens” the existing file, “extracts” the necessary information, and creates the new 2.0 files.

During the conversion process, Informed Designer reads the different objects and components of the 1.x form document and converts them to the new 2.0 format. Depending on the complexity of the 1.x form document and the particular features used, Informed Designer may request your interaction during the conversion process. For example, if your 1.x form document contains a cell configured to lookup information in another form document, Informed Designer will prompt you to select the converted data document. These details of the conversion process are found in remaining sections of this chapter.

Pre-Converting Forms for Informed Filler Users

Both Informed Designer and Informed Filler can convert 1.x form documents to the 2.0 format. When the Informed Filler user converts a 1.x form document, Informed Filler first checks to see if the user’s templates folder already contains a template with the same template ID (formerly called the “form ID”). If such a template is found, the template in the 1.x document is not converted. The existing template with the same template ID is used instead.

This behavior is important because it allows you to pre-convert forms for the Informed Filler user. As long as you distribute the converted form templates before, or together with, the distribution of Informed Filler 2.0 to licensed users, Informed Filler will use these templates and ignore those in any of the 1.x form documents that the user converts. Below is a summary of the steps that you should follow if you would like to pre-convert templates for the Informed Filler users in your organization.

- Use Informed Designer 2.0 to open and convert all 1.x form documents to version 2.0 templates.
- Distribute the converted templates to all Informed Filler users.
- Install Informed Filler on each user’s computer.
- Place the converted templates in each user’s templates folder.

When the Informed Filler user opens and converts a 1.x form document, the corresponding pre-converted template will be found in the templates folder. This template will be used and conversion of the 1.x template will be avoided.

Note

Informed Filler relies on the template ID of the 1.x form document to locate an existing template in the user's templates folder. Be sure that you do not change the template ID of a pre-converted template to anything different from the template ID (formerly "form ID") of the original 1.x form document.

Conversion Details

Distributed Form Documents

The conversion of distributed form documents—that is, 1.x form documents that were distributed using Informed Revision Distributor—requires special consideration. When Informed Designer converts a distributed form document, the existing form distribution information is ignored and must be reconfigured using the new integrated distribution features of version 2.0.

If an Informed Filler 2.0 user converts a 1.x distributed form document, Informed Filler will convert the data but not the template. Unless the user already has the distributed 2.0 template in his or her templates folder, he or she will be asked to select a template to associate the converted data to.

In order to make the conversion process as easy as possible for Informed Filler users, we recommend that you follow the conversion strategy outlined here:

- Use Informed Designer 2.0 to open and convert all 1.x distributed form documents to version 2.0 templates.
- Set up new distribution centers.*
- Create distribution center profiles, and add the converted templates to the distribution centers.*
- Install Informed Filler on each user's computer.
- Place the converted templates in each user's templates folder.

*See Chapter 8 of your *Informed Designer Forms Automation* manual for details.

When the Informed Filler user opens and converts a distributed 1.x form document, the corresponding pre-converted template will be available in the templates folder. The user will not be asked to select an associated template.

Character Formats

Informed Designer allows you to use “special” characters when formatting a character cell. Several of these special characters can no longer be used in version 2.0, and have been replaced with other characters. When a 1.x form document that uses these special characters is converted, Informed automatically replaces them with new special characters. The following table shows the old special characters and their replacements.

Converted 1.x Special Characters

1.x Character	New Character used in 2.0
«	<
»	>
∂	\

For more information, see “Character” in Chapter 1 of your *Informed Designer Forms Automation* manual.

Default Formulas

Default formulas for cells in 1.x documents are converted to calculations in 2.0. Because calculations are now stored in 2.0 (that is, they will not recalculate unless the value of any cell in the formula changes), these converted “defaults” will function the same as they did in previous versions.

AppleScript Scripts

There are several changes in version 2.0’s terminology that could affect any AppleScript scripts attached to your forms when you convert them to 2.0. You should check your scripts after conversion if they contain any of the following terms:

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

If Informed Manager is still installed on your computer, any scripts attached to the converted form will still contain the old terminology and must be manually changed. If you remove Informed Manager from your hard drive, you’ll be asked to locate it when you edit one of the

converted scripts. By selecting the Informed Filler™ application instead, all the terminology will automatically update.

Pre-Addressed Forms

The feature that allowed you to pre-address a form for routing purposes has been replaced with the more powerful suggested routes feature. If a 1.x form has been pre-addressed, the converted 2.0 template will have a single suggested route that corresponds to the original pre-address settings. The suggested route name will be displayed as “Converted 1.4 pre-address.” For information on the suggested routes feature, see Chapter 5, “Routing” in your *Informed Designer Forms Automation* manual.

Lookups and Form Submission

There are several issues regarding lookups and form submission when converting form documents from 1.x to 2.0.

Lookups Between Forms

When converting a form that contains a lookup to another form document, you’ll be prompted to select the “target document” in which the information is “looked up.” Informed allows you to select the existing 1.x document or look for the equivalent 2.0 document (if one exists). For the best results, you should convert all “target documents” to 2.0 before converting the form documents that link to them.

AppleScript

AppleScript lookups and form submission in 1.x forms must be altered so that any references to “Informed Manager®” are changed to “Informed Filler™.” If this is left unchanged, Informed will display a warning message and the lookup will be cleared from the form. See “AppleScript Scripts” earlier in this chapter for more information about AppleScript-related conversion issues.

SequeLink

SequeLink lookups and form submission are not supported in version 2.0. When converting a form that is configured to use SequeLink, Informed will display a message warning you that SequeLink is no longer supported, and the configuration will be cleared.

For instructions on how to configure lookups and form submission, see “Using Lookups” and “Forms Submission” in Chapter 1 of your *Informed Designer Forms Automation* manual.

Form Tracking

When a 1.x form is converted, all existing tracking configuration is ignored and must be reconfigured in the new 2.0 template. See Chapter 6 of your *Informed Designer Forms Automation* manual for instructions on how to configure form tracking in version 2.0.

Cell Names

In version 2.0, there are additional reserved words that cannot be used as cell names. These reserved words include the names of the new functions in 2.0:

IFT, IFTE, ASCIIChar, ASCIICode, LastDayOfMonth, WorkDays, TimeSpan, TemplateID, TemplateRevision, TemplateName, TemplateStatus, AuthorName, AuthorOrg, CreationDate, CreationTime, ModifyDate, ModifyTime, SendDate, SendTime, PrintDate, PrintTime, Trunc, WhichMember, Column, External, Attachments, Platform, TransLiterate, Tokenize, ToPicture, ToSignature, Application, Random, MakeList, MakeColumn, CollapseList, CollapseColumn.

If you convert a 1.x form containing cells named with a 2.0 reserved word, the cells in question will be renamed using the word “Field” followed by a three digit number (Field###). It is recommended that you change these cell names in the 1.x form BEFORE converting the document to 2.0.

EachValueOf Function

The name of the EachValueOf function has changed to “MakeList.” Informed Designer automatically converts each occurrence EachValueOf to MakeList when converting templates.