



FileNet eForms for Open Client User's Guide

Release 5.1.0

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FileNet Corporation
3565 Harbor Boulevard
Costa Mesa, California 92626
800.FILENET (345.3638)
Outside the U.S., call:
1.714.327.3400
www.filenet.com

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Introduction

Welcome to FileNet eForms for Open Client, a robust form solution designed for use with FileNet Open Client. This guide provides the general user with a complete guide to filling out and working with electronic forms (*eForms*) in the Open Client environment. Information about designing forms for use with Open Client is provided in the *FileNet eForms Designer Help*.

FileNet eForms for Open Client

eForms for Open Client solution is comprised of *OC eForms Templates*, *OC eForms Data documents*, and the *eForms HTML Step Processor*.

You can use OC eForms Templates and data documents at any step in a workflow. The workflow author designs business processes with the eForms HTML Step Processor to integrate templates and data documents in the workflow.

eForms HTML eRouting Slips are special templates that allow *form authors* and workflow authors to customize the instructions that can be shown at any step in a workflow. They can also be configured with *intelligence features* such as *lookups*.

About This Manual

The topics in this manual are organized in the following sections:

- “Overview,” introduces the concept of eForms for Open Client. It describes how forms are displayed in the Open Client environment and how to access them.
- “Filling Out eForms,” explains how to enter information in eForms.
- “Working With eForms,” outlines the ways you can work with eForms (including printing, saving, and editing) in the Open Client environment.

NOTE *For definitions of *italicized* terms, please see the glossary at the back of this manual.

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 work with eForms for Open Client.

Terminology

Term	Definition
User	Fills out and works with forms derived from OC eForms Templates.
Form author	Creates and manages eForms for Open Client templates using eForms Designer.

Finding Information

You will find a table of contents at the beginning of this manual and an index at the back.

Definitions of Terms

To help you understand the terms used in this manual, definitions are included in a glossary at the end of the manual. The first time a term is used in a section, it appears in *italicized* text. A note is included at the beginning of each section that refers you to the glossary for definitions of italicized terms.

Notes

Throughout this manual, you'll see text 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 eForms for Open Client appears in notes like this one.

Button Names

When instructions for how to perform a certain task are given in this manual, the button names are shown in a bold typeface. For example, the instructions for deleting an image from a picture field look like this:

To delete an image from a picture field

1. Click the **Delete Picture** button.

Overview

The *form author* can attach *OC eForms Templates* and *OC eForms Data* documents to workflows. When you launch a workflow, the *eForms* are available at their assigned steps. When you open an *eForm*, fill it out, and save it, you've created an *OC eForms Data* document.

Many data *intelligence features* are supported in FileNet *eForms* for Open Client. These features can reduce the time that is needed to fill out forms and ensure that the information is accurate. These are some of the features:

- *Auto-incrementing*. If your forms must be numbered, this feature retrieves the next number in the series.
- Automatic calculations. Calculations are performed automatically (e.g., the expenses on a form can be totalled).
- *Choice lists*. You can select a value from a list of choices in a *field*. For example, you can select a shipping method from a list of available methods.
- *Digital signature* support. You can sign forms electronically.
- *Error checking*. A field can display an error message if you enter the wrong type of information (e.g., if you enter text in a field that requires numbers).
- *Lookups*. Information can be retrieved automatically from web servers or databases. This reduces the amount of data that you must enter and ensures its accuracy.
- *Submits*. Information can be sent automatically to web servers or databases. This eliminates the need to enter information in more than one place and ensures data accuracy.

This section explains what *eForms* look like in the Open Client environment and how to access them.

What eForms Look Like

eForm is the term used for an electronic form. In Open Client, “*eForm*” is used to generically describe templates, data documents and *eRouting Slips*.

eForms are displayed according to how they are made available to users. They can be made available in two ways:

- Attached to a workflow.
- Stored in a *Content Services library* but not attached to a workflow.

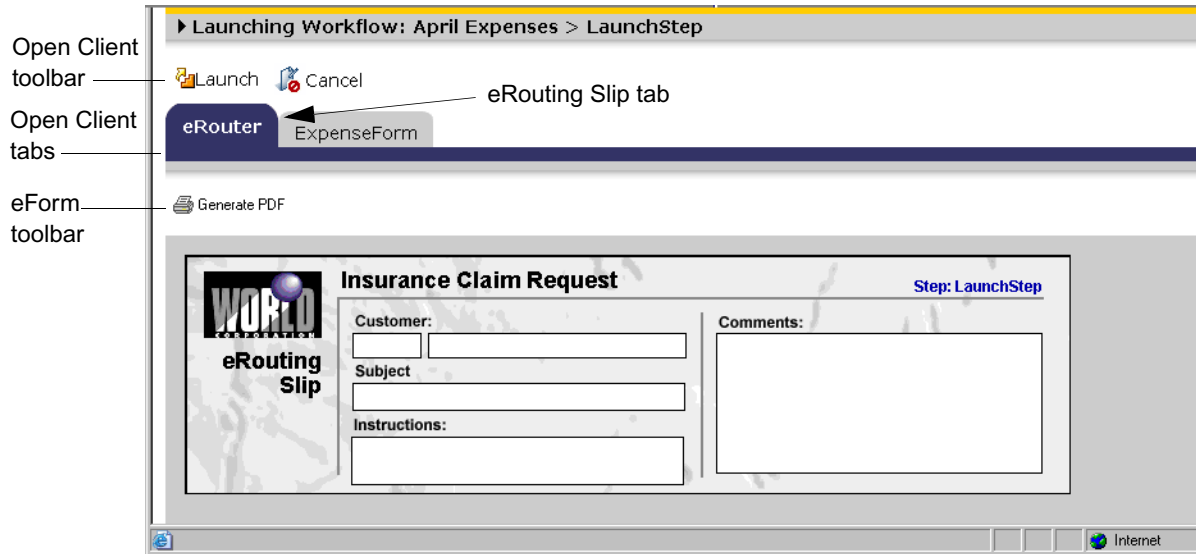
eForms Attached to a Workflow

When you launch a workflow that includes one or more *eForms* attachments, the forms are displayed on a tabbed interface. The tabs may have labels that are specified by the workflow author, or they may have the names “*eRouter*,” “*eForm*,” and “*Attachments*.”

NOTE *For definitions of *italicized* terms, please see the glossary at the back of this manual.

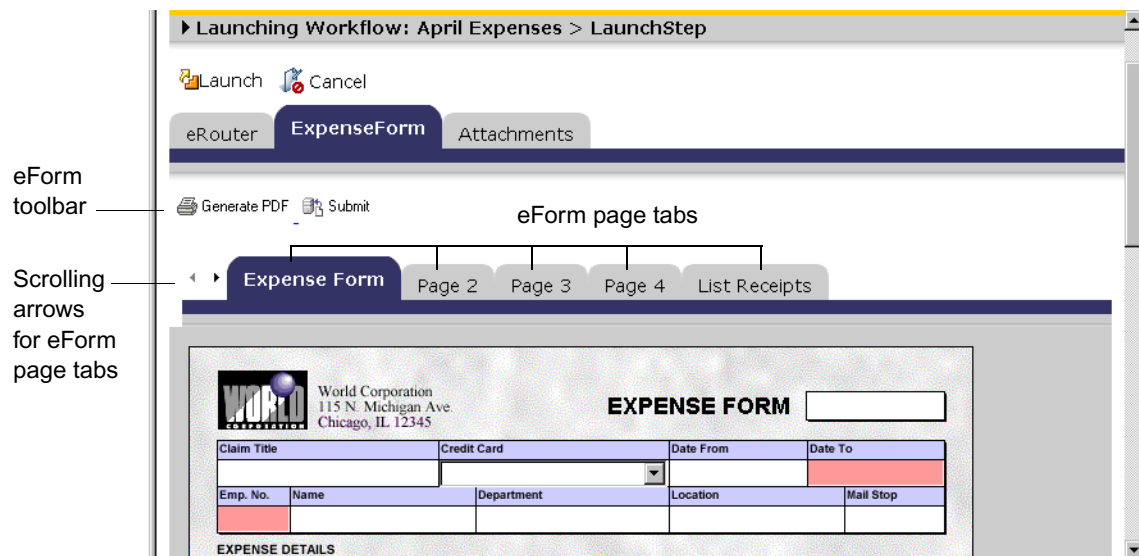
The eRouting Slip Tab

The workflow author can configure a step so that the eRouting Slip tab is displayed when the workflow is launched. The default name for the eRouting Slip tab is “eRouter.” However, the workflow author can configure this tab with a custom name. In the example below, the eRouting Slip is displayed on a tab with its default name.



The eForm Tab

The main form in the workflow can be displayed on its own tab. The default name for the eForm tab is “eForm.” Like the eRouting Slip tab, the workflow author can configure the eForm tab with a custom name. In the following example, the eForm tab has been named “ExpenseForm.”



eForm Toolbar

When an eForm is presented in the Open Client environment on its own tab, the form displays with the following buttons on the eForm toolbar:

- **Generate PDF:** Generates a PDF version of the entire form. You can print the PDF file from Acrobat Reader.
- **Submit:** Submits the data on your completed form to an external data source. The **Submit** button is visible only if the form author has configured the form with a submit action.

eForm Page Tabs

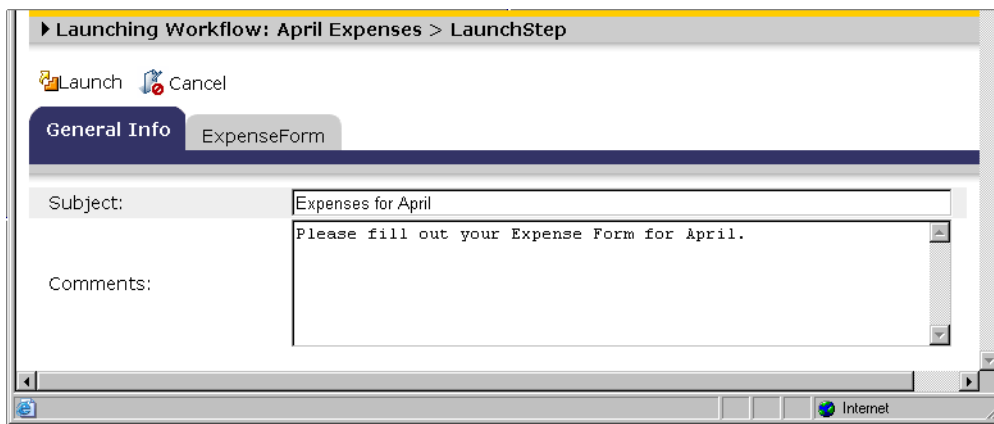
Tabs such as eRouter and eForm are part of the Open Client environment. However, an eForm can have its own tabs, each corresponding to a page. The form in the above example has five page tabs: Expense Form, Page 2, Page 3, Page 4, and List Receipts. When you click a page tab, the corresponding page of the form is displayed.

Scrolling Arrows

You may see two small arrows beside the eForm page tabs. The arrows indicate that the form contains more pages than are currently visible. Click the arrows to scroll through the page tabs.

General Info Tab

If the workflow author has not configured an eRouting Slip for the workflow, the General Info tab is displayed. For information about using the fields on this tab, please see your Open Client user documentation.



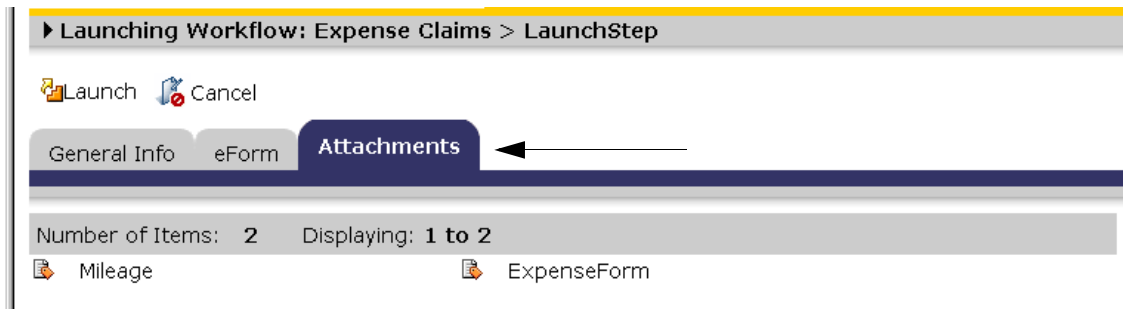
The screenshot shows a web browser window titled "Launching Workflow: April Expenses > LaunchStep". The window contains a toolbar with "Launch" and "Cancel" buttons. Below the toolbar is a tabbed interface with two tabs: "General Info" (selected) and "ExpenseForm". The "General Info" tab displays a form with the following fields:

- Subject:** Expenses for April
- Comments:** Please fill out your Expense Form for April.

The form is displayed in a scrollable area with a scrollbar on the right. The browser's status bar at the bottom shows "Internet".

Attachments Tab

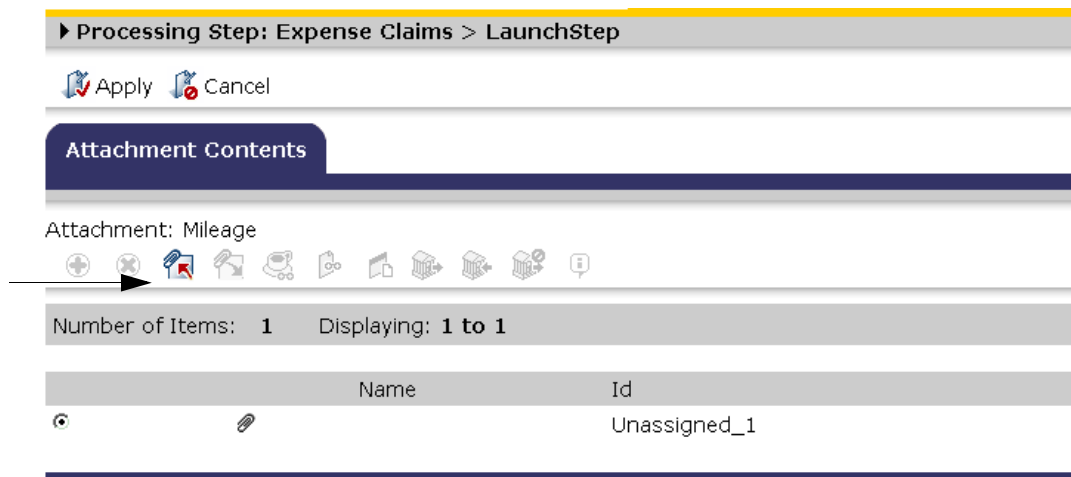
Some workflows may require additional forms or documents. A workflow author can create placeholders for these files, allowing you to attach extra files as needed at one or more steps in the business process. When attachment placeholders are provided, you'll see an attachments tab in the window as shown below.




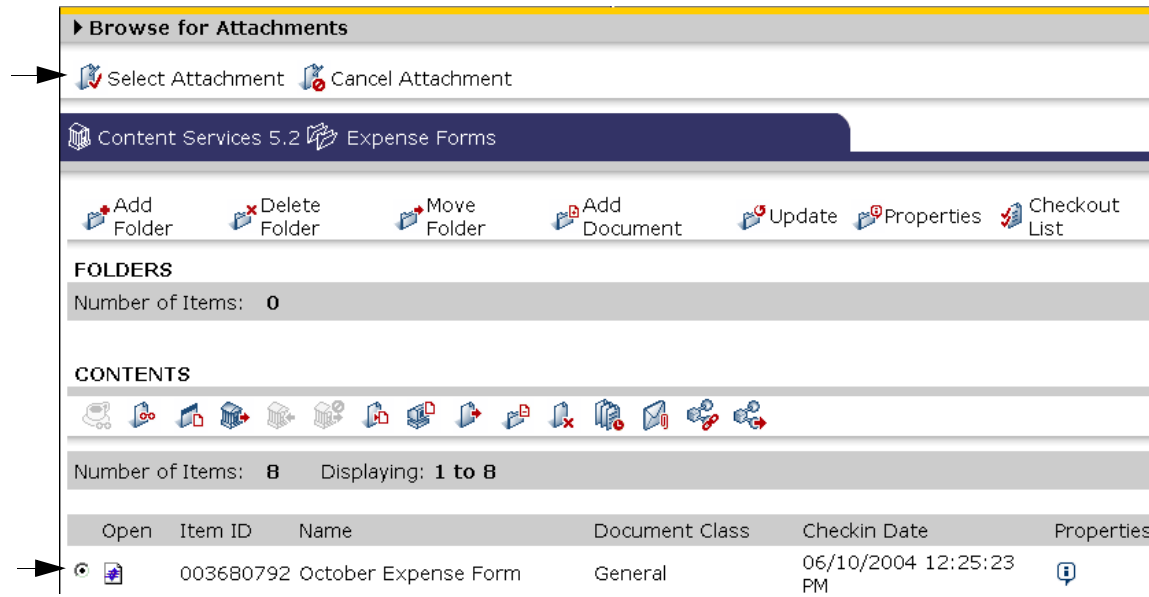
To assign an attachment to the attachments tab

1. Launch the workflow.
2. On the Attachments tab, click the placeholder name (e.g., ExpenseForm) to display the Attachment Contents tab.
3. Click the option button beside the unassigned attachment to activate the toolbar.

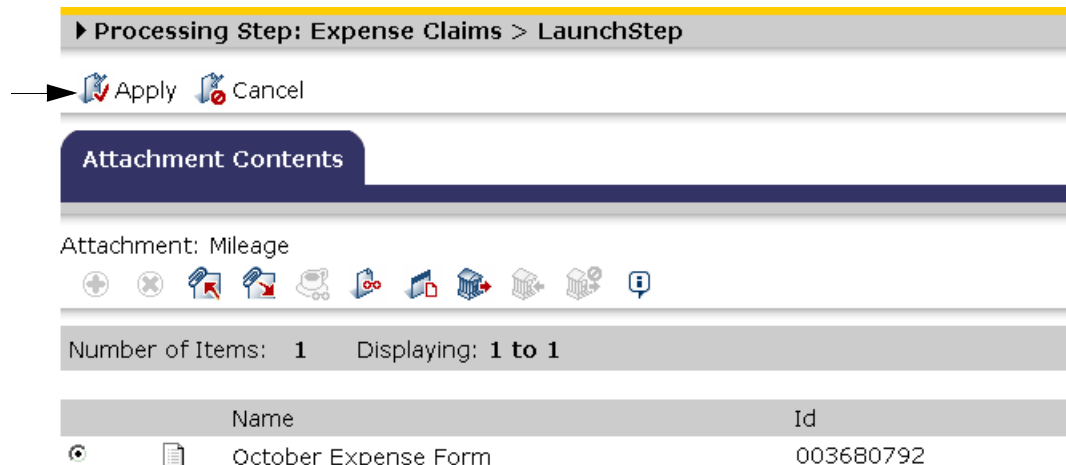
NOTE If there is already an attachment assigned, the old attachment will always be replaced with the new one.



4. Click  **Assign**; then choose a library to assign the attachment to.
5. Navigate to the folder that contains the file you want to attach. In the list of files, click the option button beside the file you want to attach.



6. Click **Select Attachment**.
7. Click **Apply** to attach the file and display the launch step again.




8. Click the placeholder name from step 1 to view your attachment.

To update an existing attachment

1. Launch the workflow.
2. On the Attachments tab, open the file and do one of the following:
 - If it's a template, enter data and then click **Add To Library**.
 - If it's an OC eForms Data document, enter data and then click **Add To Library**.
3. Click **Apply**.

NOTE If the form template attachment is opened and added to the library or if the OC eForms Data document attachment is saved and closed, the reference that is listed in the Attachments tab is updated to reflect the new or modified document. However, you must click **Apply** to successfully update the reference.

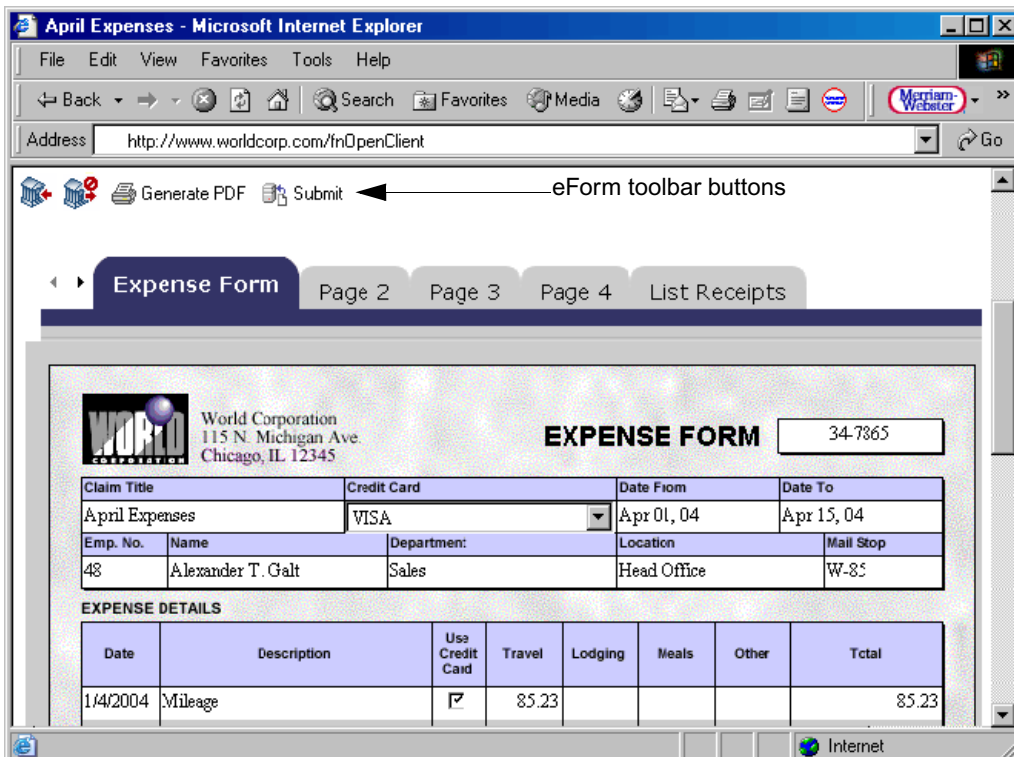
To unassign an attachment

1. Launch the workflow that has an attachment.
2. On the Attachments tab, click the placeholder name (e.g., ExpenseForm) to display the Attachment Contents tab.
3. Click the option button beside the assigned attachment.
4. Click  **Unassign**.
5. Click **Apply** to return to the Attachments tab or click **Assign** to return to the library and browse for another file to attach.



eForms From Content Services

OC eForms Data Document

When you open a saved eForm (OC eForms Data document) from a Content Services library, the form is checked out and it opens in a new browser window.

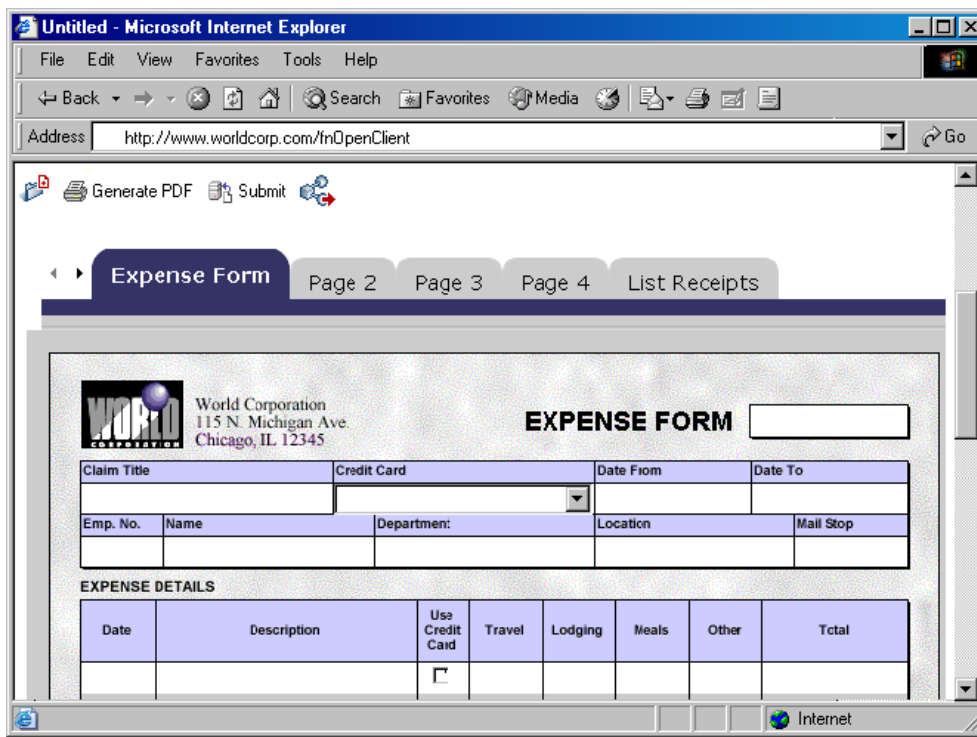


For a data document opened from a Content Services library, the eForm toolbar displays the following buttons:



-  • **Save and Close:** Saves changes you made to the form and checks it into the library.
-  • **Cancel and Close:** Cancels the checkout and closes the form without saving it.
- **Generate PDF:** Generates a PDF version of the entire form. You can print the PDF file from Acrobat Reader.
- **Submit:** Submits the data on your completed form to an external data source. The **Submit** button is visible only if the form author has configured the form with data submission.

OC eForms Template

When you open an OC eForms Template from a Content Services library, a blank form opens in a new browser window.



For a template opened from a Content Services library, the eForm toolbar can display the following buttons:

-  • **Add to Library:** Saves the form and adds the resulting data document to a Content Services library.
- **Generate PDF:** Generates a PDF version of the entire form. You can print the PDF file from Acrobat Reader.
-  • **Submit:** Submits the data on your completed form to an external data source. The **Submit** button is visible only if the form author has configured the form with data submission.

- **Launch Workflow:** Launches a workflow from a form. The Launch Workflow button is visible only if the form author has configured the form with a launch workflow action.

Filling Out eForms

As discussed in the previous section, an *eForm* can display in two ways. If the eForm is presented on its own tab in the workflow, it displays in the Open Client environment. If you have opened the eForm from the workflow Attachments tab or from a *Content Services library*, it displays in a new browser window. In both cases, the first step in working with the eForm is to fill it out.

eForms contain areas called *fields* where you enter information. The *form author* specifies the type of information that you can store in each field, as well as the desired formatting options. Calculations, choices, *lookups*, and other *intelligence features* are also added to the form, making entering information fast and accurate.

Your company may provide you with instructions for filling out a specific form. These instructions could be included with an eRouting Slip or on a page of the eForm. This section, however, explains how to use and work with the standard features of any form in the Open Client environment or in a separate browser window. You'll learn how to enter information and use a variety of intelligence features that make it easy for you to fill out a form.

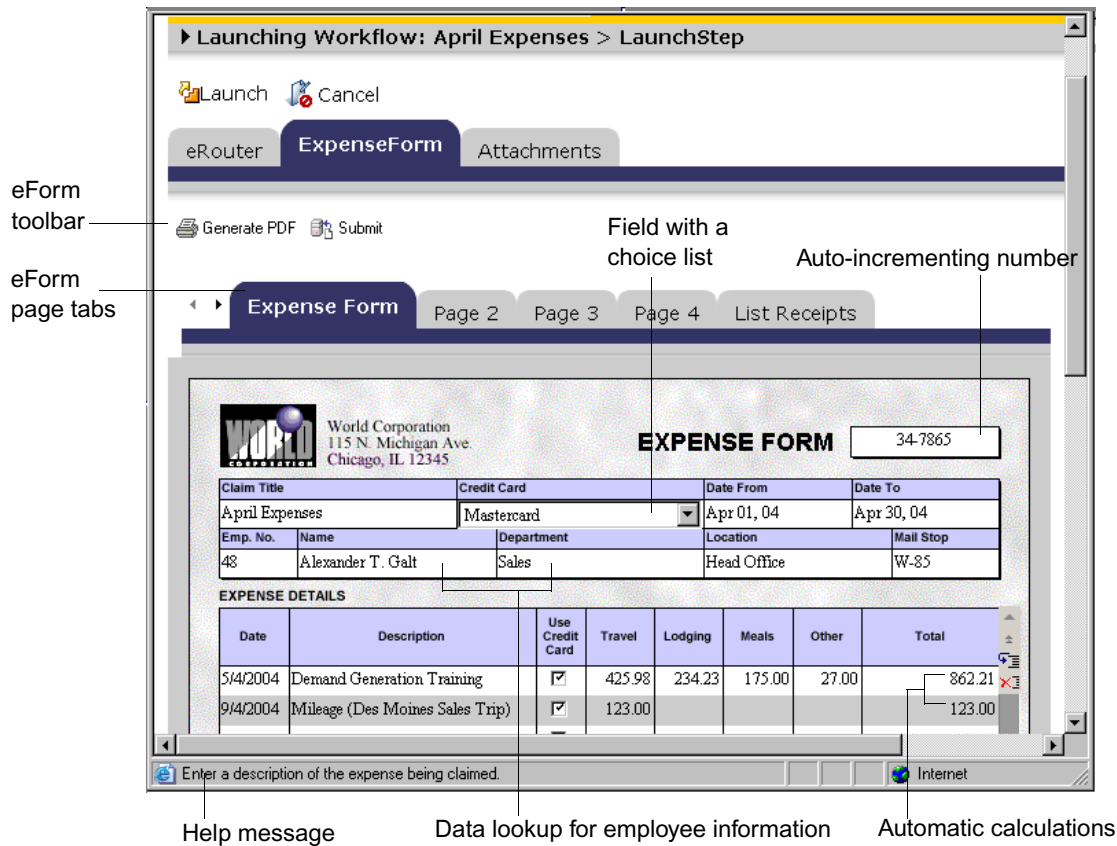
Entering Information

To fill out a form, you enter information into fields. When you tab to or click a field, a blinking cursor appears to indicate that the field is active. You can then enter information by typing or by selecting values from *choice lists*. You can move from field to field by pressing the Tab key on your keyboard or by clicking a field with the mouse.

NOTES You cannot tab out of a Recommended or Required field unless you enter data in these fields; however, you can click in any other field to leave a Recommended or Required field without entering data.


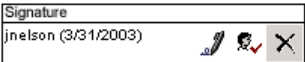
*For definitions of *italicized* terms, please see the glossary at the back of this manual.

The following illustration shows an example of an eForm being filled out in the Open Client environment.



Each field on your form accepts a particular type of information. The form author is responsible for naming and choosing the most appropriate type for each field. The following table lists the possible types of fields with examples.

Field Type	Example 1	Example 2
Text	Business form #29	12345 - 123 Street, A Big City
Character	(555) 555-1212	02983-1283
Number	101	\$12,550.75

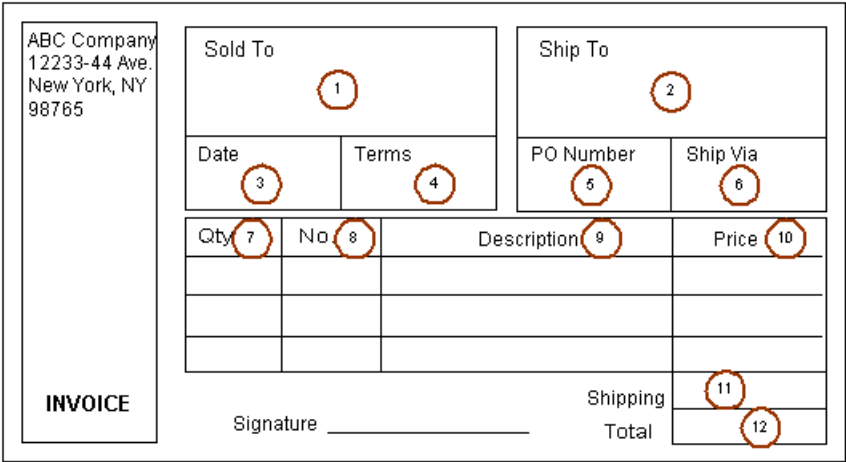
Field Type	Example 1	Example 2
Date	10/25/89	Wednesday, November 8, 1989
Time	14:20	03:15:04 PM
Boolean	Yes or No	True or False
Picture		
Signature		

When you enter information in a field, the value must be appropriate for the type of information that the field holds. For example, you can't type a name into a field that stores numbers. If you enter an incorrect value, an error message will appear when you attempt to click or tab to a different field.

Associated with each field type are formatting options that the form author can use to make it easier for you to enter information. For example, the form author may have configured number fields to display with a currency symbol, thousand separators, and two decimal places of accuracy. This way, when you type a value such as "1500," the information converts to "\$1,500.00" on the form.

Tab Order

Each form has a predefined *tab order* (configured by the form author) that determines the order in which you move from field to field each time you press the Tab key. The following figure illustrates tab order.



ABC Company
 12233-44 Ave.
 New York, NY
 98765

INVOICE

Sold To (1)

Ship To (2)

Date (3) Terms (4)

PO Number (5) Ship Via (6)

Qty (7)	No (8)	Description (9)	Price (10)

Signature _____ Shipping (11)

Total (12)

The circled numbers indicate the tabbing order for this form.

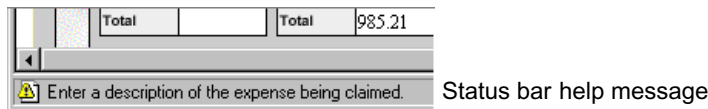
When you fill out a form, pressing the Tab key moves the cursor from one field to the next in the tab order. Pressing Shift + Tab moves the cursor in the reverse direction.

If your form contains more than one page, when you tab out of the last field on one page, the cursor automatically moves to the first field on the next page.

The form author might also have configured conditional tabs for certain fields on the form. A conditional tab moves the cursor to another area of the form based on the information that you've entered in the field you're tabbing out of. For example, the form author might configure conditional tabs for 'Local' and 'Out of Town' checkboxes on a travel expense form. If you select the 'Local' checkbox, you would tab past sections for claiming expenses such as 'Hotel Accommodation' and 'Airline Travel,' and go directly to sections for claiming expenses such as 'Parking' and 'Fuel.'

Help Messages for Fields

Some fields on your form may have been configured with the help messages to assist you to enter the correct information. When you click or tab to one of these fields, the help message is displayed in the bottom pane of the browser window. Some browsers also display a tooltip message box that appears when you move your mouse pointer over the field.



Font, Font Style, and Size

The form author specifies the font, font style, and size attributes used to display information in each field on the form. When you enter a value in a field, the information is always displayed according to those specifications.

Display-only Fields

The form author can prevent you from entering information in a field by making it display-only. Display-only fields often obtain their values from other fields on the form. You can't click or tab to a display-only field.

Required Fields

You must enter information in a required field. If you don't enter a value, a message that prompts you for a value is displayed when you attempt to click or tab to a different field.

Required fields are usually displayed on the form with a different fill color than other fields. The default color is pink. However, because the form author can customize fill colors for fields, you may see a color other than pink for required fields.

Optional Fields

You can enter information in an optional field or leave it blank.

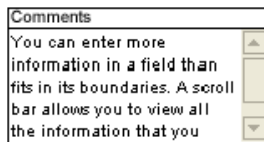
Recommended Fields

You should enter a value in a recommended field. If you leave the field blank, a message is displayed to indicate that a value is recommended.

Recommended fields are usually displayed on the form with a different fill color than other fields. The default color is yellow. However, because the form author can customize fill colors for fields, you may see a color other than yellow for recommended fields.

Entering Text

The text field type is used for fields that hold text information such as an address, a comment, or a memo. The form author may have used formatting options that automatically capitalize letters, words, or sentences in the information you enter. If the designer has configured a field to accept multiple lines of text, you can type more lines than will fit in the field area. In this case, a scroll bar allows you to view all the information in the field. Depending on which browser you use, the scroll bar on a multiple-line field might be visible at all times or only when you type extra lines of text.



Entering Character Values

Character fields also store text values. However, unlike text fields, character values must match a specific format that the form author defines. The character field is often used to store information such as telephone numbers or values that are always formatted the same way.

When you enter a value in a character field, the value is checked to see if it matches the field's specified format. Characters such as dashes and spaces are automatically entered for you. If you enter an incorrect value, a message is displayed indicating the required format.

Entering Numbers

Number fields store numbers in a variety of formats. Numbers that you enter are automatically formatted according to the field's specified format. Characters such as the currency symbol, thousand separators, and the decimal point are entered for you. However, the percent symbol (%) is not supported.

Entering Dates and Times

When you enter dates or times in your form, you can type the values in any format you like. For example, to enter the date "January 1, 1999," you can type "jan 1 99" or "1 1 99." If you want to enter a date that includes the current month and year, enter the day or 'D' value. The information you enter is formatted according to the formatting options specified for the field. If you accidentally enter an invalid date, for example, "January 45, 2005," the focus will not leave the field until you correct the error.

Entering One Pair of a Value

Some fields are designed to receive one of the following pairs of values: Yes or No, True or False, or On or Off. If you type only part of a value in a boolean field, it is converted to its full form. For example, to enter "No" into a Yes/No style boolean field, type the letter "n" and press Enter or Return.

Entering Checkbox Values

The form author can configure forms with checkboxes and option buttons. You select a value in a checkbox or option button by clicking it with your pointer. Click a checkbox again to clear it. To clear an option button, you must select another option button.



Entering Information in Tables

Each table on your form has one or more columns and one or more rows. You fill out a table by tabbing from column to column and row to row, entering data in each field.

The form author specifies when tabbing leaves a table. Usually, if you're tabbing across the rows, tabbing leaves the table when you tab through one empty row. However, the form author can also configure the tab order so that tabbing leaves the table after you tab out of the first column of an empty row.

Scrolling Tables

If the form author has configured a table to include a scroll bar, a bar with command buttons appears on the right side of the table. Depending on how the designer has configured the table, you may see the buttons when you first open the form, or you may see them only when you tab into the table. These buttons allow you to scroll up or down through your table entries, delete a row, and add a row. The scrolling buttons are enabled only if information is entered in all the rows of the table.

Shipped	Price	Amount
4	\$ 20.02	\$ 80.08
3	\$ 20.02	\$ 60.06
2	\$ 30.03	\$ 60.06
1	\$ 30.03	\$ 30.03
6	\$ 30.03	\$ 180.18
8	\$ 30.03	\$ 240.24
1	\$ 30.03	\$ 30.03
4	\$ 20.02	\$ 80.08
	Tax	72.87

Scrolling table with command buttons.

- Scroll up one row at a time.
- Scroll up to display the top row of the table.
- Adds one row above the row your cursor is on.
- Deletes the row your cursor is on. If you delete the top row of a table, you can keep clicking the **Delete** button to remove each subsequent row, one at a time.
- Scrolls down to display the bottom row of the table.
- Scrolls down on row at a time.

You can also add a new row to a scrollable table by pressing Tab after you enter information in the bottom row of the table.




NOTE Scrolling tables do not store an infinite number of rows. For best results, it's recommended that the scrolling table feature be used to store only a few extra rows of data.

Entering Pictures

You may have a field on your form that has been configured as a picture field. When you tab to or click a picture field, three buttons appear in the bottom right corner of the field and the Insert Picture dialog box displays. These buttons allow you to insert a picture, delete a picture, and save a picture.

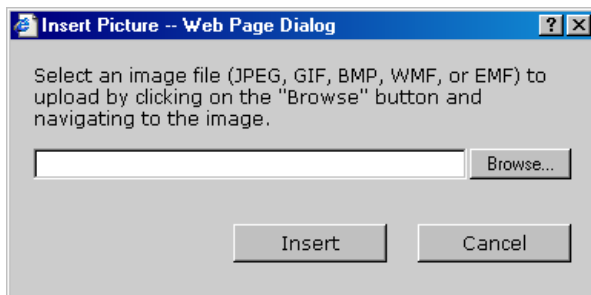


— Command buttons on a picture field.

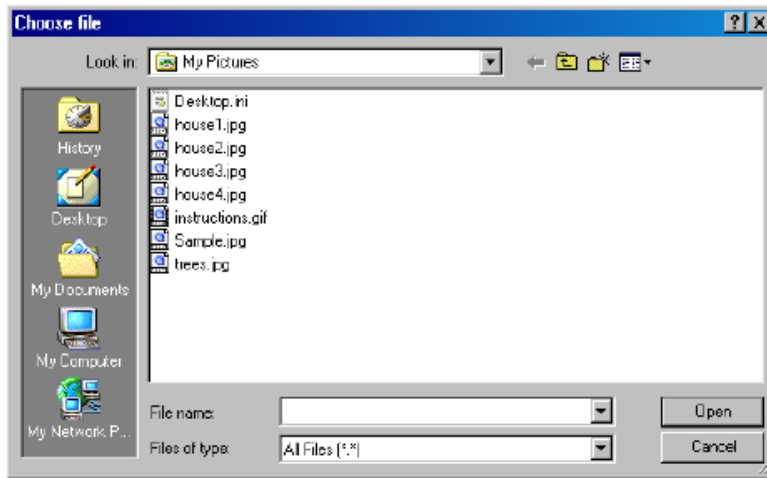
-  Inserts an image in the picture field.
-  Deletes an image from the picture field.
-  Saves an image to your local computer.

To insert an image in a picture field

1. With the form open in the browser window, tab to or click the picture field (or click the **Insert Picture** button). The Insert Picture dialog box appears.



2. Click **Browse** to find the location of a picture. The standard Choose file dialog box for your operating system appears.



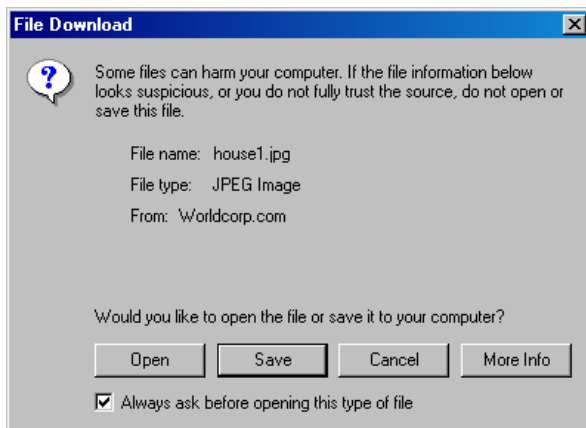
3. Select an image and click **Open**.
4. On the Insert Picture dialog box, click **Insert** to insert the image in the picture field. If you insert an image in a field that already contains a picture, the new image replaces the first one.

To delete an image from a picture field

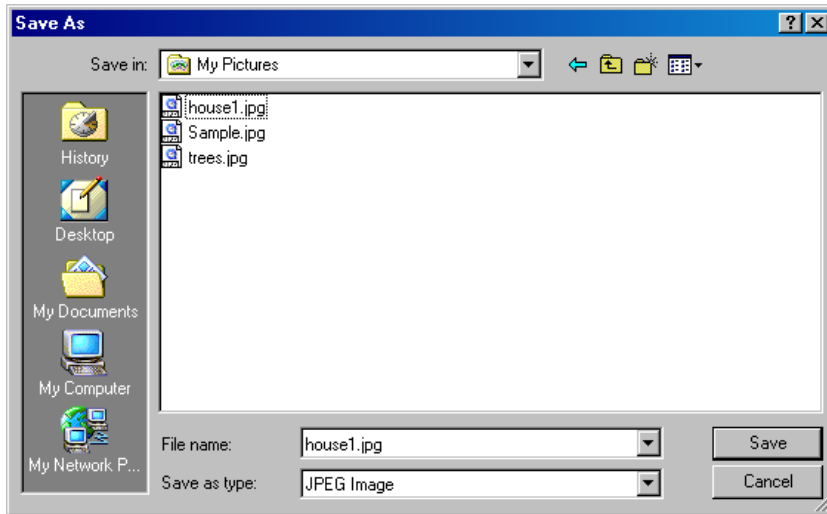
1. Click the **Delete Picture** button.

To save an image to your local computer

1. Click the **Save Picture** button. A standard file download message for your operating system appears. The example below shows the File Download dialog box for Internet Explorer 6.0.



2. Click **Save** to display the Save As dialog box.

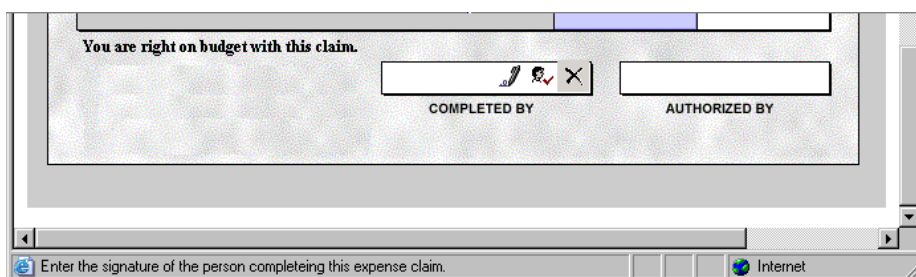


3. Select a location in which to store the image.
4. Click **Save** to save the picture.

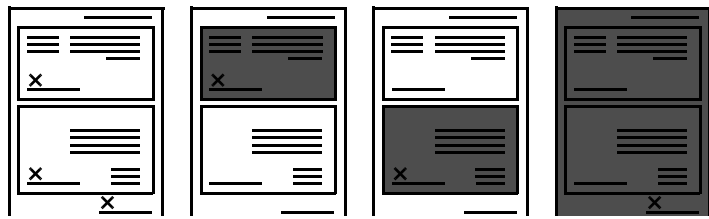
Entering Digital Signatures

Approval is often a necessary step in the processing of a form. With an electronic form, you can use *digital signatures* to sign it electronically and check the validity of signatures already on the form.

A digital signature is like a special number that's derived from information about the person signing and the data being signed. This number can reliably identify the signer and detect any changes in the signed data. The form author can include one or more *signature fields* on a form. Each signature field can sign the entire form or only certain parts of the form.



Each form can have more than one signature field, and each signature field can sign different information. For example, a form that has two sections that are often filled out by two different people could have two signature fields. Each signature field would sign only the fields in its respective section. You could have a third signature field that signs the entire form, including the other signatures. The form author specifies which fields are signed by the signature fields.

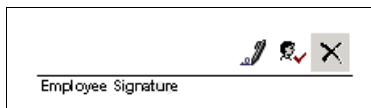





Form with three signatures. 1st signature field signs 1st section. 2nd signature field signs 2nd section. 3rd signature field signs all fields.

Once you've signed a form, the signed fields are locked to prevent changes to the signed information. You cannot change the values in the signed fields. If you want to change the information on the signed part of the form, you can delete your signature. This unlocks the fields so you can edit them.


Signing a Form

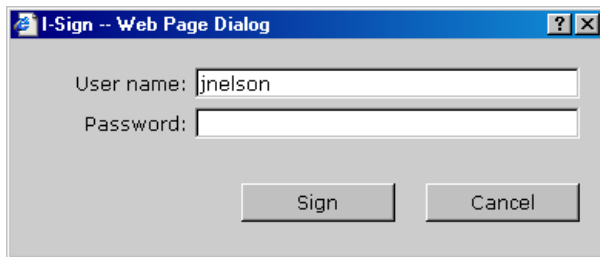
When you tab to or click a signature field, three buttons appear in the bottom right corner of the field. These buttons allow you to sign a form, verify a signature, and delete your signature.



-  Digitally signs the form.
-  Verifies a signature.
-  Deletes your signature.

To sign a form

1. Tab to or click the signature field.
2. Click the  **Sign Form** button. The I-Sign dialog box appears with your user name automatically filled in.



3. Enter your password. This is the same information you use to log in to the Content Services library.
4. Click **Sign** to close the I-Sign dialog box. Your name appears in the signature field.

NOTES

- Your organization may use a third party signing service such as Capicom for Microsoft CSP (Windows only). If this is the case, you may have to follow other steps after you click the **Sign Form** button. Please see your system administrator for more information.
- If you attempt to sign a form before entering data in other fields that are signed by the signature field, you may see an error message. For example, you may see a message stating “You must enter a value there” if you did not enter a value in a required field. Once the errors are corrected you can sign your form.
- If you click Launch, Complete, Save, Reassign, Checkin, or Add To Library while one or more invalid signatures exist on your form, a warning message appears that alerts you to the cell or cells containing the error. You will not be able to proceed with these actions until the error has been corrected.
- If you sign a form, then return to a cell that is not locked by the signature, change its value which thereby affects the value of a calculated cell that is locked by the signature, and then click Launch, you will see an error message. However, if you return to the unlocked cell and change its content to the original value at the time the form was signed and then click Launch, the workflow will launch successfully.
- You cannot successfully sign a form until all the cells that are signed and locked by the signature are error free. For example, if you missed a value in a required field, the form will not permit a signature until the error is corrected.

Verifying a Signature

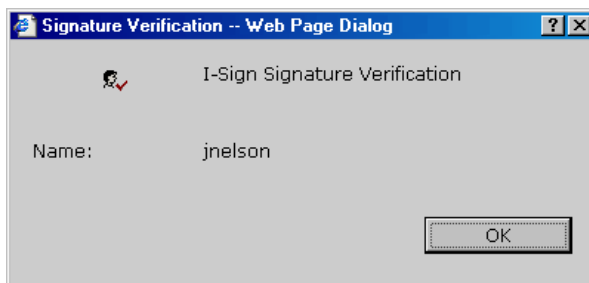
You may receive a form that has been signed by another person. You should verify the signature so you can be sure of the signer’s identity.

The verification process involves re-creating parts of the digital signature using current data and then comparing the results with the original signature. If they match, the signature is valid. This means that the person identified on the verification dialog box is the person who signed the form, and the signed data has not changed.

If verification of a digital signature fails, you’ll see a message dialog box indicating this. Verification fails if the originally signed data or the digital signature has been changed or tampered with.

To verify a signature

1. Click the signed field; then click the **Verify Signature** button to display the Signature Verification dialog box. The information in the dialog box provides details about who signed the form. It also verifies the authenticity of that digital signature.



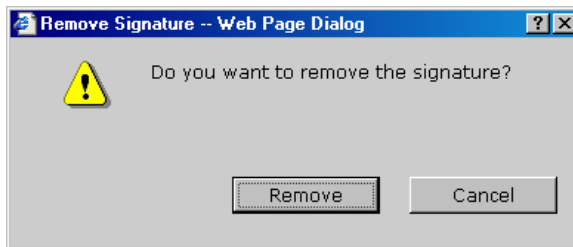
2. Click **OK** to close the dialog box.

Deleting Your Signature

Deleting your signature unlocks the fields on the form that were signed by your signature. This allows you to make changes to the information in those fields before you sign the form again.

To delete your signature

1. Click the signed field; then click the **Delete Signature** button. The Remove Signature dialog box appears.



2. Click **Remove**. Your name is cleared from the signature field.

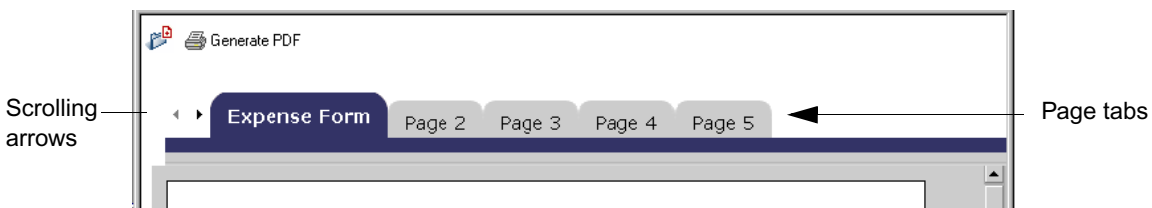
Pages of an eForm

Each form has at least one numbered page. If a form has more than one numbered page, you'll see a set of tabs at the top of the form window that indicate the name or number of each page.

Changing Pages

On forms with multiple pages, page tabs are displayed along the top of the form. When you tab out of the last field on a page, the cursor automatically moves to the next page of the form. You can also click the page tabs to change pages manually.

If the form contains so many pages that not all the tabs can be displayed at once, scrolling arrows appear, allowing you to scroll through the remaining page tabs. When the page tab you want is displayed, you click the tab to display the page of the form.



To change from one page to another

1. Click the tab that corresponds to the page you want to go to.
 Or
2. Tab out of the last field on a page.

To scroll through page tabs

1. Click the right arrow to display the next set of page tabs or the left arrow for the previous set of page tabs.
2. When you see the tab for the page you want, click it to display the page.

NOTE You can also use keystrokes to move through the pages of a form. Press Alt + N to move to the next page and Alt + B to move to the previous page.

Intelligence Features

The form author uses various data intelligence features in forms to help you fill them out quickly and accurately. Forms can automatically format, calculate, look up, and verify data. The following illustration shows a completed form with various intelligence features identified.

The illustration shows an invoice form with the following sections and callouts:

- Company Information:** ABC Company, 12345 - 123 St, New York, NY 15243. Callout: "Numbers automatically increment." points to the Invoice # field containing 552.
- Sold To:** Mr. Smith, 8273 Long Way, San Francisco, CA 27363. Callout: "Prefills with name and address information."
- Ship To:** Mr. Smith, 27364 Short Way, San Francisco, CA 82734. Callout: "Prefills with name and address information."
- Date/Terms/PO No./Ship By:** 9/14/96, Cash, PO No., UPS. Callout: "Offers a list of choices."
- Item Table:**

Qty	Part	Description	Price	Ext.
2	872	Gadgets	79.23	158.46
12	231	Widgets	771.10	9,253.20
- Summary:** Shipping 8.00, Total \$9,419.66. Callout: "Fields automatically calculate values."
- Other Callouts:**
 - "Prefills with today's date." points to the Date field.
 - "Looks up data in another form or data source." points to the Description field.
 - "Checks for errors." points to the Price and Ext. columns.

Calculated Fields

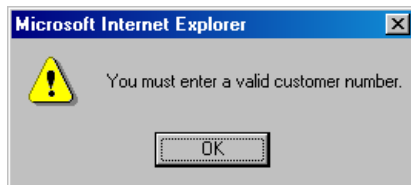
The form author may have created calculated fields on your form. A calculated field obtains its value based on the data in other fields on your form. After you enter values in the fields that participate in the calculation, the calculated field automatically fills with the calculation result. For example, suppose your form has a calculated field called Total. Behind the scenes, this field gets its value from totalling the values in the Food Expenses and Travel Expenses fields. Each time you change a value in either Food Expenses or Travel Expenses, the information is recalculated and a new value is automatically displayed in Total.

As explained in "Display-only Fields" on page 19, the form author can prevent you from changing the value of any field (including a calculated field) by making the field display-only. In most cases, designers set calculated fields to display-only. However, if a calculated field is not display-only, you can tab to it and change its value as you can for any other field. For example, if you have an invoice with a calculated field called Discount, you might want to give a customer more than the calculated discount. If the field is not display-only, you can override the calculated value by entering a different value.

Error Checking





To help you fill in your form accurately, the form author can create *error checking* rules (check formulas) for fields. These fields are automatically checked for mistakes as you fill out a form.

Some check formulas detect errors and others warn you of specific conditions. For example, a field may be checked to ensure that its value is within a particular range. In either case, an alert message box appears when you try to click or tab to a different field.



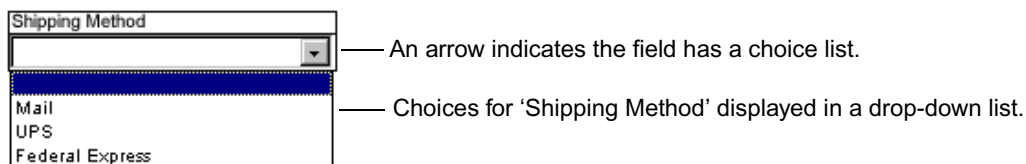
Depending on how the form author has configured the form, you may not be able to tab out of a field until you have entered the correct value. In addition, the designer may prevent you from printing a form with invalid data. In this case, when you try to print the form, a message displays to inform you that required information is missing from your form. You must enter the required information before you can print the form. The form author may also prevent you from saving a form that has invalid information.

With error handling configuration, you may not be able to perform any of the actions below if invalid data is entered in a field on the form or if data is missing from a recommended or required field. For example, you may see an error message that states “The value you entered doesn’t match the required format. The required format is as follows: Yes/No.” You must enter the required data in the specified format in a field before you can perform any of the following actions:

- In Content Services, the  Check in action.
- In the eForms HTML Step Processor, the  Complete Complete and  Save Save actions.
-  Reassign For reassigning a work item to another user.

Viewing Choice Lists

Your form can include fields with drop-down lists of values to choose from. Instead of typing a value in the field, you can select a choice. For example, a field called Shipping Method could be configured with the choices Mail, UPS, and Federal Express. Fields that are configured with a choice list display with an arrow on the right side of the field.



To make a selection from a drop-down choice list

1. Click the arrow indicator under the field’s title section.

2. In the drop-down list, click the choice you want.
3. Your choice appears in the field.

Another convenient way to select a choice is to type the first few characters of the choice you want. As you type characters, the choice that most closely matches your typed value is selected. For example, suppose a field has been configured with the choices listed in the following table.

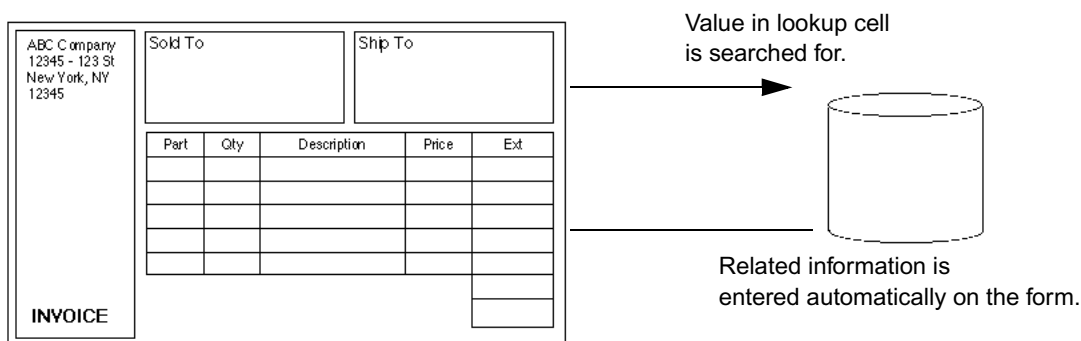
Sales Person Choices
Brown, Tom
Dawson, Greg
Dickens, Sharon
Johnson, Cindy

Typing the letter “D” would select “Dawson, Greg,” the first choice that starts with that letter. Typing “Da” would also select “Dawson, Greg.” However, typing “Di” would select “Dickens, Sharon” instead. In each case, the entry is copied into the field as the selection is made.

Once you’ve selected the correct choice, press Tab to accept the choice and move to the next field. If you press Tab without selecting a choice, the field is left blank and the cursor moves to the next field.

Lookups

The form author can configure forms to look up information in another information system and fill it in on the form. Lookups reduce the amount of typing necessary to fill out a form and improve the accuracy of the information you enter.



The field for which information is looked up is called the lookup field. In the figure above, the Part field is the lookup field. The place where the lookup field looks for information is called the lookup source.

To use a lookup

1. Enter a value in a lookup field and press Tab to leave the field. You might be prompted to enter some information, such as your name and a password when the lookup is performed. This depends on the lookup source and how the connection is configured. When a lookup is performed, the value that you type in the lookup field is searched for in the lookup source. If you delete data from a lookup cell and

tab out of it, a lookup is completed for the cell. If a single match is found, the related information is returned and entered on the form.

- If the search fails, a message is displayed.
- If multiple matches are found, you'll see a dialog box requesting that you select a single entry. If there are more entries than can fit in the window, use the vertical and horizontal scrollbars. If the entries are in a table with column headings and you use the vertical scroll bar to view all the entries, the column headings will no longer be visible in the window. If you use the horizontal scroll bar to view the rest of an entry in the window, the selection point will no longer be visible.

2. Select the appropriate value and then click **OK**. To cancel the lookup, click **Cancel**.

Submit OC eForms Data

If your template has been configured to allow you to *submit* data from the form to a specified database, you will see a **Submit** button on the eForm toolbar. Click the button to send the OC eForms Data to the database.

NOTE If you submit a form before all the fields have been correctly filled out, you may see an error message when you try to submit the form. For example, you may see an error message stating "You must enter a value there" if you did not enter a value in a required field. You may see another message if the form has invalid data in one of the fields. Once the errors are corrected you can submit the form.

 Submit

Submit the form data.

Working with eForms

After you've filled out an *eForm*, you're ready for the next steps in your business process. Business process steps could include the following:







- Saving OC eForms Data documents to Content Services.
- Printing OC eForms Data documents.

You can also edit *OC eForms Data* documents that you've saved. This section explains these procedures.

Saving OC eForms Data to Content Services

After you've filled out a form, you can save the data to a *Content Services library*. When a form has been saved, it's called an OC eForms Data document.

There are four ways to save an OC eForms Data document to a Content Services library

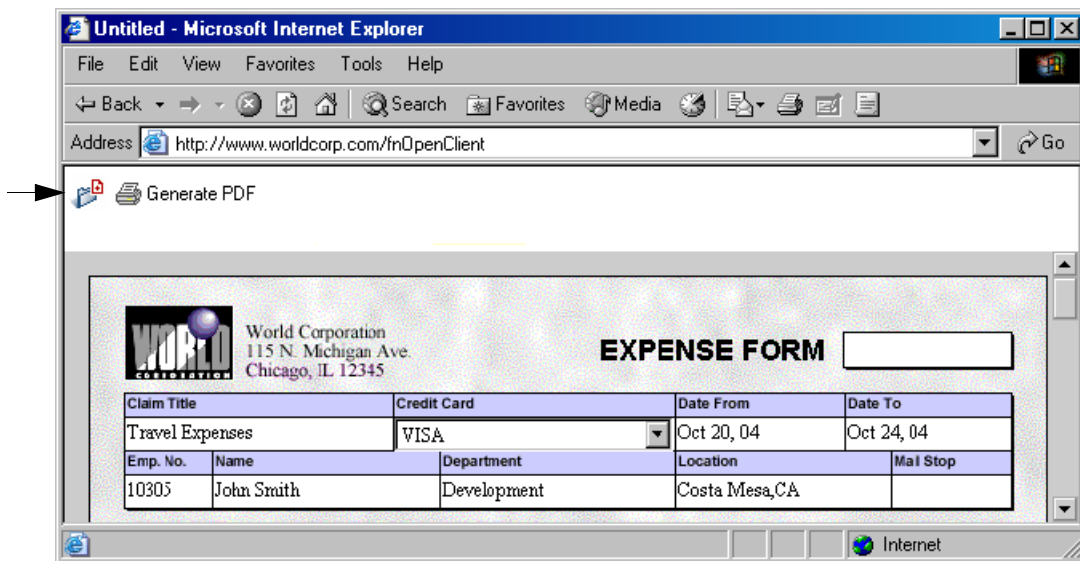
1. When a form is displayed in a separate browser window (i.e., you have opened it from the Attachments tab in a workflow or from a Content Services library), you can save it by clicking the  **Add to Library** button on the eForm toolbar.
2. When a form is displayed on its own tab in a workflow, you can save it by clicking the  **Launch** button on the Open Client toolbar.
3. To save a form and launch a workflow from a form, click the  **Launch Workflow (wf)** button.
4. When a template is displayed in a work item step, you can click  **Save**,  **Complete**, or  **Reassign** to save an OC eForms data document.

NOTE Depending upon how error handling is configured for the form template, if you add a document to the library, launch a form, or launch a workflow before all the fields on your form are correctly filled out, you may see an error message when you try to perform one of these actions. For example, you may see an error message if the number of characters in a field does not match the length limit of characters set for the field. You may see another message if the form has invalid data or is missing required data in one of the fields. Once the errors are corrected you can perform the above three actions.

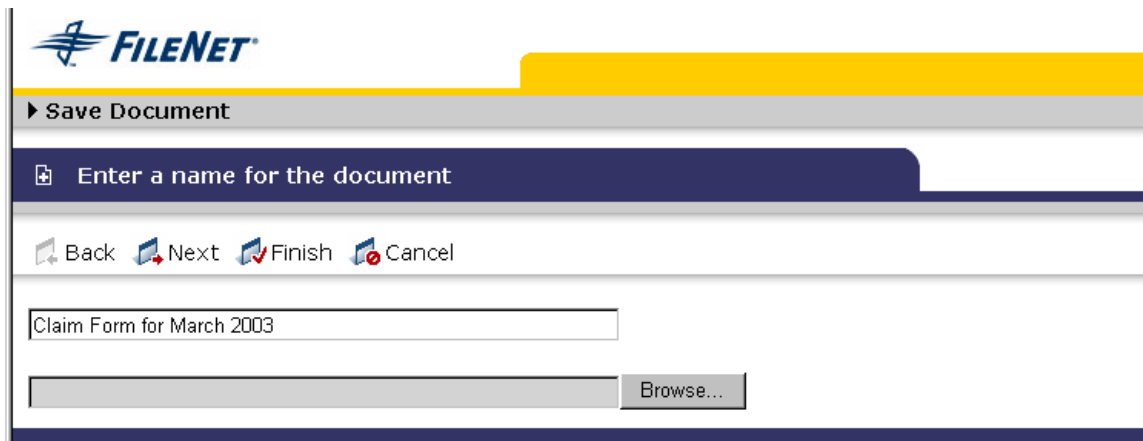
To save OC eForms Data to Content Services using the Add to Library button

1. With the form filled out, click the **Add to Library** button.

NOTE *For definitions of *italicized* terms, please see the glossary at the back of this manual.




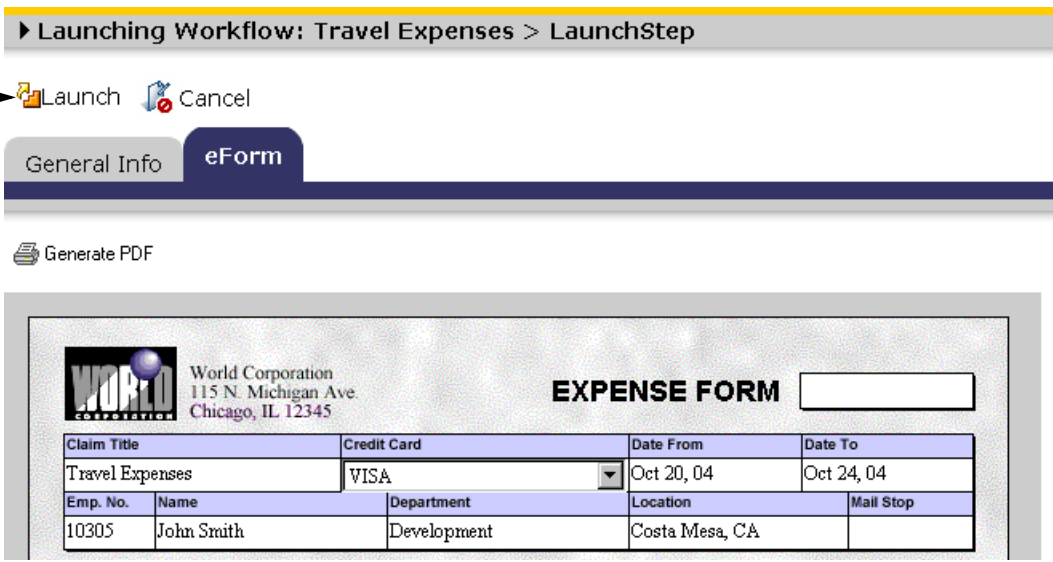
The Save Document window appears.



2. Enter a name for your document.
3. Click **Browse** to locate a folder in which to store the document. When you've selected the folder, click **Finish**. The Save Document window is displayed again.
4. Click **Next** if you want to enter user/group and access level properties (optional).
5. Click **Finish** to complete the save.

To save OC eForms Data to Content Services using the Launch button

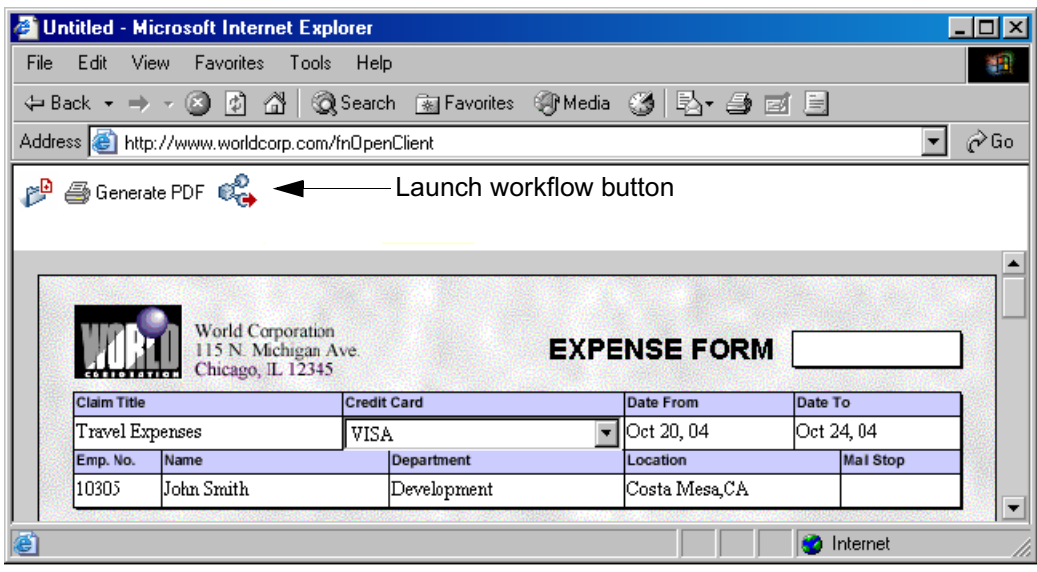
1. When a form is displayed on its own tab in a workflow, you can save it by clicking the  Launch **Launch** button on the Open Client toolbar.



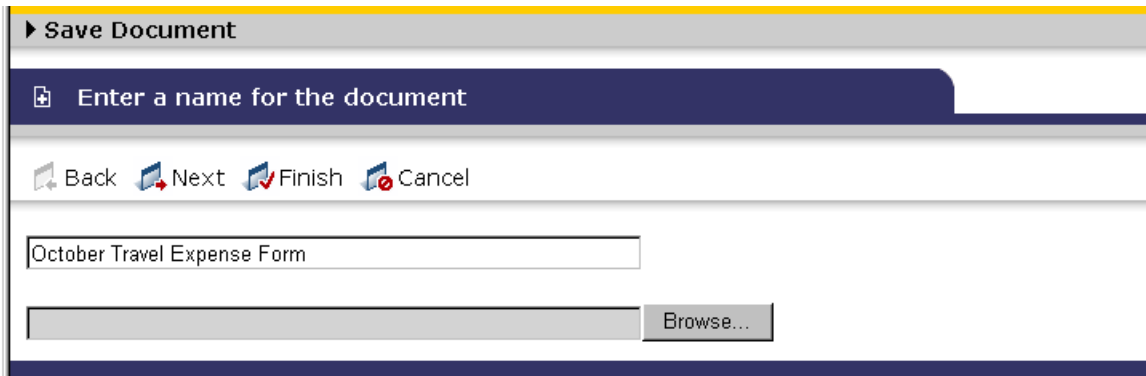
2. Follow steps 2-5 in the above procedure “To save OC eForms Data to Content Services using the Add to Library button.”

To save an OC eForms Data document with a Launch Workflow button

1. With the form filled out, click the **Launch Workflow** button.



You are prompted to save your form unless the form author has configured the template for autosaving.



2. Click **Browse** to locate a folder in which to store the document. When you've selected the folder, click **Finish**. The Save Document window is displayed again.
3. Click **Next** if you want to enter user/group and access level properties (optional).
4. Click **Finish** to complete the save.
5. The form is closed and the workflow is launched.

To verify that the OC eForms Data was saved

1. Navigate to the folder where you stored the OC eForms Data document and open it to check that the data you entered appears.

NOTE When you make changes to a checked out data document, you can click **Launch Workflow** to check in the document and launch the workflow.

Saving an OC eForms Data Document from a Template to a Work Item

To save an OC eForms data document from a work item step

1. Follow the steps in the Save OC eForms Data Document with a Launch Workflow button procedure above.
2. Open the work item and click the eForm tab if necessary.
3. Click the **Save, Complete, or Reassign** button.

► Processing Step: Travel Expenses > Supervisor Approval

Complete
 Save
 Reassign
 Return
 Move to Inbox
 Status
 Cancel

General Info **eForm**

Generate PDF

World Corporation
 115 N. Michigan Ave.
 Chicago, IL 12345

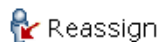
EXPENSE FORM

Claim Title	Credit Card	Date From	Date To	
Travel Expenses	WISA	Oct 20, 04	Oct 24, 04	
Emp. No.	Name	Department	Location	Mail Stop

- When you click **Save**, a copy of the OC eForms data document is saved to the library; then the work item closes and moves to the next step in the workflow. When you click **Complete**, a copy of the OC eForms data document is saved to the library, then the work item is removed from your Inbox. When you click **Reassign**, a copy of the OC eForms data document is saved to the library when the work item is reassigned.

Reassigning a Work Item with an eForm

For any work item containing an eForm, before you reassign it to another workflow participant or work queue, ensure that you view the eForm before you click **Reassign**.



If you do not view the eForm before you click **Reassign**, **Launch**, **Complete**, or **Save**, you will see the message “Please make sure that the form is valid” and the eForm will automatically appear.


Printing OC eForms Data Documents

When your eForm is open, you can generate and print a PDF version of the entire form. With this option, overflow information is printed. (The Generate PDF command will repeat the printing of the page or pages that contain overflow information until all the information is printed.)

NOTES

- The Generate PDF option will print overflow pages only if this feature has been configured for your form template.
- If you choose the **Generate PDF** action while your form is missing data in a particular field, (e.g., numeric value in a date formatted field) you may see an error message. You must enter the required information before you can print the form.

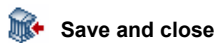
To generate and print a PDF version of an eForm

1. In the form window, click **Generate PDF**  Generate PDF on the toolbar. A PDF version of the document opens in Adobe Acrobat.
2. In the Acrobat window, click the **Print** button to display the Print dialog box.
3. Change the print options if necessary; then click **OK**.

Editing OC eForms Data Documents

There may be times that you want to edit an OC eForms Data document that you've saved to Content Services. For example, you may fill out and save the same timesheet form every day for a month; at the end of the month, you may send the form for approval.

The command buttons you need to save and close (or cancel and close) an eForm are located on the eForm toolbar above the form:



To edit an OC eForms Data document

1. In a Content Services library, navigate to the document.
2. Click the document's icon. The document opens in a browser window.

Claim Title	Credit Card	Date From	Date To	
Training Expenses	American Express	Mar 22, 04	Mar 26, 04	
Emp. No.	Name	Department	Location	Mail Stop
2110	Lynn Anderson	Marketing	Denver	

EXPENSE DETAILS							
Date	Description	Use Credit Card	Travel	Lodging	Meals	Other	Total
3/22/04	Course Materials	<input checked="" type="checkbox"/>				495.00	495.00

3. Edit the fields as necessary.

4. Click the **Save and Close** icon to save your changes and check the form into the library or click **Cancel and Close** to cancel the checkout and discard your changes.

Editing Work Items

Work items can contain embedded eForms. When you open and then complete a work item with an embedded eForms data document in the step processor, the work item becomes locked. When you open the work item later, a message appears asking if you want to assume the checkout. As you click **Yes**, the work item and the data document are automatically checked out to you and both documents become editable. In previous releases, only the work item was editable.

Glossary

The following definitions are provided to help you understand the terms used in this manual.

Auto-incrementing number	A unique number on a form that automatically increases by a specified value.
Choice list	Displays choices in a drop-down list.
Content Services library	A document management system. You can search for, check out, edit, and check in documents using a Content Services library.
Digital signature	An electronic signature that is used to sign a form or authorize a template. You must have a user ID and password to create a digital signature.
eForm	A generic term used for an electronic form. In Open Client, "eForm" is used to generically describe templates, data documents, and eRouting Slips.
eForms HTML eRouting Slip	A special <i>OC eForms Template</i> that allows form authors and workflow authors to customize the instructions that can be shown at any step in a workflow.
eForms HTML Step Processor	A processor that allows a workflow author to attach eForms to workflows and to control how eForms display in the Open Client environment.
Error checking	An action that provides an error or alert message if you enter the wrong type of information in a field.
Field	An area in a dialog box or on a form in which you enter information. Every field has a name that describes the type of information you enter. Also known as a <i>cell</i> .
Form author	Creates and manages templates using FileNet eForms Designer.
Intelligence features	The features of a form that include calculations, choices, lookups, auto-incrementing numbers, submits, tracking, and tabbing.
Lookup	An action that looks up information that exists in another data source such as a database or information system.
OC eForms Data document	A document that is created when you save a form that is displayed in the Open Client environment or in a browser window.

OC eForms Template	A template that is created in FileNet eForms Designer and saved as an .itx file. When you open an OC eForms Template, you create a new form that you work with in the Open Client environment or in a browser window.
Signature field	A field configured by the form author to allow digital signing. See <i>Digital signature</i> .
Submit	An action that allows you to transfer data from your form to an information system or database.
Tab Order	The order that you move through the fields on your form when you press the Tab key. Tab order is determined by the form author.
Template	A generic term for a file that contains the graphic elements and intelligence features of a form. See <i>OC eForms Template</i> .

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