



Informed Quadra™ eForms Workplace User's Manual

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Introduction

In this chapter:

- Informed Quadra eForms Workplace i-2
- Features of the eForms Workplace i-3
- Downloading Informed Desktop eForms i-3
- Informed Quadra Manuals i-4
- Conventions Used in This Manual i-5

Introduction


Welcome to the Informed Quadra eForms Workplace. In this manual, you'll find information about how you, as a general user, can carry out tasks in the eForms Workplace.


Note

Although this manual is made available in PDF (Portable Document Format), it's not designed to be viewed online. Printing a copy gives you the best viewing results. If you choose to view the manual online, bookmarks have been included for easy navigation. You may want to increase the magnification of the pages to make viewing easier.

Informed Quadra eForms Workplace

The Informed Quadra eForms Workplace is a repository of eForms (templates and browser forms) that are available from your organization's web server. The Workplace allows you to work with *Informed XML templates** and with *Informed desktop templates*. Your company will determine whether you will use one or both types of templates.

XML templates are identified with the Informed XML template icon . When you click an XML template's icon, a blank form opens in a browser window. You save *browser forms* to the My Forms page of the eForms Workplace.

Desktop templates are identified with the Informed desktop template icon . When you click a desktop template's icon, a blank form opens in Informed® Desktop eForms and a copy of the template is automatically placed in your local Templates folder. You save *desktop forms* to your local or network drive.

The Workplace also allows you to access a variety of other *non-Informed files*. These include Microsoft Word, Adobe Acrobat, and Microsoft Excel files, among others.

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

Features of the eForms Workplace

You can take advantage of the many important features of the eForms Workplace. Here are the highlights:

(Some of the following features are available only if the Workplace is configured to support them.)

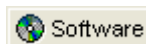
- Create your own user account and manage user account information.
- Manage personal information.
- Pre-fill *fields* on forms, automatically, based on user personal information.
- Save and manage completed or partly-completed forms.
- Manage saved forms in a hierarchical *folder* system.
- Send templates, non-Informed files, and forms to other users.
- Receive forms sent by other users (Inbox).
- Store copies of forms sent to other users (Sent Forms).
- Open previously-saved forms (My Forms).
- View the *properties* of any item in the Workplace.
- *Track* the status of forms (sent and received)

Downloading Informed Desktop eForms

In order to use Informed desktop templates in the eForms Workplace, you must have Informed Desktop eForms installed on your local machine.

When you click a desktop template's icon in the Workplace, three scenarios are possible:

- If Informed Desktop eForms opens, you already have the application and can go ahead and fill out the form.
- If Informed Desktop eForms does not open and the **Software** button is **not** available on the navigation bar of the eForms Workplace, contact your administrator.
- If Informed Desktop eForms does not open and the **Software** button is available, you can download the application yourself.



Note

For information about how to navigate in the Workplace, please see “The eForms Workplace Interface” on page 1-8.

To download the Informed Desktop eForms software:

1. Click the **Software** button on the navigation bar.
2. Click **Download Informed Desktop eForms for Windows** or **Download Informed Desktop eForms for Macintosh** to download the appropriate installer for your system.
3. If you want to install Informed Desktop eForms automatically, in the **File Download** dialog box, click **Open**. Then follow the instructions on the installation screens to install Informed Desktop eForms.

If you prefer to save a copy of the installer on your computer, in the **File Download** dialog box, click **Save**. Then select a location in which to save the installer. Click **Save**. Navigate to the location in which you saved the installer. If you're using Windows, double-click *InstallerWin.exe*. If you're using Macintosh, double-click *InstallerMac.exe*. Then follow the instructions on the installation screens.

Informed Quadra Manuals

The *Informed Quadra eForms Workplace User's Manual* is designed to provide you with a complete reference to the features and capabilities of the eForms Workplace. The manual combines text and graphics to thoroughly document every aspect of the software.

Informed Quadra is an integrated solution that includes Informed Designer®, Informed Quadra Server, the Informed Quadra eForms Workplace, and Informed Desktop eForms. In addition to your *eForms Workplace User's Manual*, other manuals you may need are provided in PDF (Portable Document Format) on the installation CD-ROM.

The Workplace administrator may have made some of the following manuals available for viewing or printing from the Workplace:

- Informed Quadra Manuals:
 - *Informed Quadra eForms Workplace User's Manual* (intended for general users).
 - *Informed Quadra HTML eForms User's Manual* (for general users).
 - *Informed Quadra eForms Workplace eForms Designer's Manual*.
 - *Informed Quadra eForms Workplace Account Administrator's Manual*.
 - *Informed Quadra Tutorial* (intended for account administrators and eForms designers).
 - *Informed Quadra Getting Started Guide* (intended for network administrators).
 - *Pre-Installation Guide* (intended for network administrators).
- Informed Designer Manuals (intended for eForms designers):
 - *Informed Designer Design & Graphics*.
 - *Informed Designer Forms Automation*.
- Informed Desktop eForms Manual:
 - *Informed Desktop eForms User's 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 perform specific tasks with Informed Quadra.

Terminology

Term	Definition
User	Fills out forms using a web browser and/or Informed Desktop eForms.
eForms designer	Creates and manages templates using Informed Designer.

Finding Information

You will find a table of contents at the beginning of this manual and an index at the back. In addition, you'll find a table of contents at the beginning of each chapter that lists the main sections in that chapter. The example below shows the table of contents for Chapter 1, "Overview of the eForms Workplace."

- Accessing the eForms Workplace 1-2
- The eForms Workplace Interface 1-8
- Account and Personal Information 1-12

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

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 chapter, it appears in *italicized* text. A note is included at the beginning of each chapter that refers you to the glossary for definitions of italicized terms.

Notes

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

Note

Important information about Informed Quadra appears in shaded boxes like this one.

Commands and Control Names

When instructions for how to perform a certain task are given in this manual, the commands and button names are shown in a bold typeface. The name of the menu where the command is found is also given in each instance. For example, the instructions for adding a new folder to the My Forms page in the Workplace looks like this:

To add a folder:

1. On the toolbar, click **Add Folder**.

In dialog boxes, the names of controls such as options, fields, and drop-down lists are shown in single quotes. Items that are selected from a drop-down list are shown in double quotes. For example:

Select "Informed XML Template (*.itx)" from the 'Save as type' option.

Cross-platform Notes

Quadra Server must be installed on a Windows system. However, users can access the Workplace from a Windows or a Macintosh computer.



Overview of the eForms Workplace

In this chapter:

- Accessing the eForms Workplace 1-2
- The eForms Workplace Interface 1-8
- Account and Personal Information 1-12



Overview of the eForms Workplace

This chapter describes how to access the eForms Workplace in accordance with your system's *authentication method*.^{*} Also included is a description of the Workplace interface.

Quadra Server can be configured and customized to meet the needs of your organization. Throughout this chapter, you may find references to choices that you do not have in the Workplace because of the way your system was configured and customized.

Accessing the eForms Workplace

You access the Workplace using a procedure that depends on how your system has been set up.

To access the Workplace:

1. Open your web browser.
2. In the 'Address' field, enter the Workplace URL specified by your company. If you don't know the URL, contact your Workplace administrator.

Example: <http://www.worldcorp.com/eformsworkplace>

You will see one of the following three things:

- The Home page of your eForms Workplace. No further steps are required to access the Workplace.
- An Enter Network Password dialog box.
- One of three types of welcome pages that include links for accessing the Workplace.

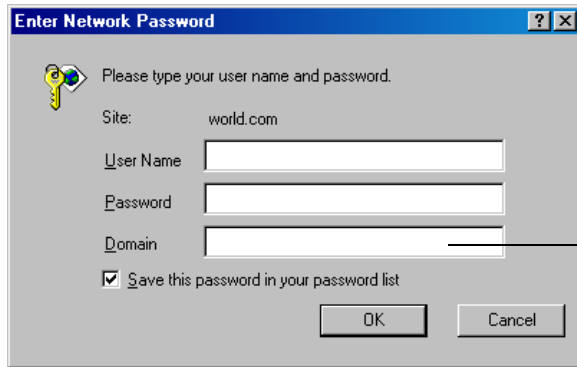
Entering the Workplace with a Login

If you are required to enter the Workplace with a login, you will see an Enter Network Password dialog box. It may or may not include a domain field.

To enter the Workplace if a login is required:

1. In the Enter Network Password dialog box, enter your user name, password, and, if required, domain. If you see the domain field and you don't know your domain, contact your Workplace administrator.

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



2. If you want to avoid having to enter your user name and password each time you log in, select the ‘Save this password in your password list’ checkbox.
3. Click **OK** to continue.

Entering the Workplace from a Welcome Page

After you enter the Workplace URL in your browser’s address field, you may see one of three types of welcome pages that include links for accessing the Workplace. Compare the sample welcome pages shown below to your welcome page to help you determine which set of instructions you need next.



Welcome Page A

If you see the above welcome page, please see “Welcome Page A” on page 1-4 for instructions.



Welcome Page B

If you see the above welcome page, please see “Welcome Page B” on page 1-5 for instructions.



Welcome Page C

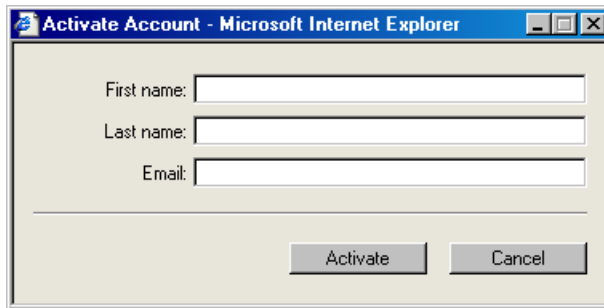
If you see the above welcome page, please see “Welcome Page C” on page 1-7 for instructions.

Welcome Page A

On this welcome page, you must activate your user account before you can access the Workplace the first time.

To activate your user account:

1. On the eForms Workplace authentication page, click “Activate my user account” to display the Activate Account dialog box.



2. Enter your first name, last name, and email address.
3. Click **Activate** to enter the Workplace.

The next time you log in to the Workplace, the Enter Network Password dialog box appears, unless your system administrator has set up your server so that no login is required.

To log off the Workplace:

1. On any Workplace page, close the browser window.

Welcome Page B

For this welcome page, you must log in every time you access the Workplace. You can also create a new account and request a forgotten user name or password.

To log in to the Workplace:

1. On the welcome page, click **Log into my user account**. The Enter Network Password dialog box appears.
2. Enter your user name and password.

To avoid having to enter your user name and password each time you log in, select the 'Save this password in your password list' checkbox.

3. Click **OK** to continue.

To create a new user account:

1. On the welcome page, click **Create a new user account**.
2. In the Add Account dialog box, enter your user information. The user name and the email address must be unique.

First name:

Last name:


Email:

User name:

Password:

Confirm:

3. Click **Add** to continue.
4. If you created a new account, a confirmation dialog box appears.

 Your user account was successfully created. Click the "Log into my user account!" link to log into your new user account.

5. Click **Log into my user account** on the welcome page and follow the login procedure described on the previous page.

To request a forgotten user name or password:

1. On the welcome page, click **I forgot my user name or password**. The Send Account Information dialog box appears.

Enter your email address so that your user account information may be sent to you.

Email Address:

2. Enter your email address.
3. Click **Send** to continue.

When you request account information, a new password is automatically assigned. When your user name and new password arrive by email, you can use them to log in. You may change your password after logging in. See “Account and Personal Information” on page 1-12 for information about changing the new password.

To log off the Workplace:

1. On any Workplace page, close the browser window.

Welcome Page C

If you see this welcome page, you can access the Workplace without logging in or having a user account. Workplace administrators, however, are required to log in to the workplace. A link is provided on the page to allow administrators to log in.

To enter the Workplace as a general user:

1. On the welcome page, click **Enter Sample eForms Workplace**.

To log off the Workplace:

1. On any Workplace page, close the browser window.

Access to the eForms Workplace Denied

If you see the following page, you do not have access to the Workplace. Please contact your account administrator for more information.



Workplace
access is
denied.

Welcome to Sample eForms Workplace

You are not authorized to access Sample eForms Workplace. Please contact your workplace administrator for more information.

The eForms Workplace Interface

The eForms Workplace interface is made up of three components, each of which is described in the pages that follow.

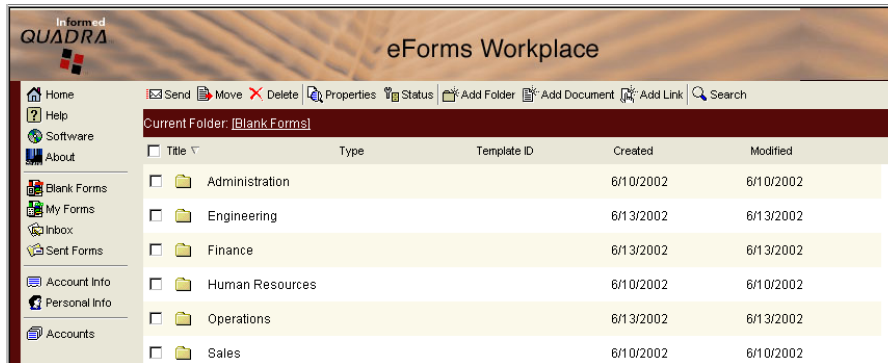
- The banner
- The navigation bar
- The content area

The content area displays information pages and list pages. On list pages, the content area also has a toolbar, a status bar, and a column header.

The graphic below illustrates what you, as a general user, may see on the Blank Forms list page. Because an eForms Workplace can be configured in various ways during installation, your Workplace might look different than the one below. You may see differences in the banner, the navigation bar, the toolbar, and the Workplace colors.



The following graphic illustrates what an eForms designer or an account administrator may see on the Blank Forms list page. These users see more buttons on the toolbar and may see an Accounts button on the navigation bar.



Banner

The banner resides at the top of the Workplace. It may contain your company logo, the name of your Workplace, and a background image. The banner can be customized during the installation of the Workplace.

Navigation Bar

The navigation bar contains a set of buttons and resides at the left side of all the pages except the welcome page. You can click the buttons on the navigation bar to navigate to the pages in the Workplace. The permissions that have been set for general users determine which of the supplied buttons you will see.

Content Area

The content area displays two types of pages:

- Information pages
- List pages

If you've displayed an information page (Home, Help, Software, or About), the content area contains information about the Workplace.

If you've displayed a list page (Blank Forms, My Forms, Inbox, or Sent Forms), you'll see a list of *folders* and *documents (templates, non-Informed files, links, and saved forms)*. On list pages, the content area also has a toolbar with buttons that you can use to work with folders, templates, and forms, a status bar that displays the path to the folder you're viewing, and a column header for sorting items.



Information Pages

There are four information pages in the Workplace:

- Home
- Help
- Software
- About

You can display these pages by clicking the corresponding buttons on the navigation bar. For example, to display the Home page, click the **Home** button.

The information pages are intended to help you understand the Workplace and to provide details about your company and/or its procedures for processing eForms. Your administrator may customize the content on the Home, Help, and Software pages.

Home Page

The Home page may include details about your company and instructions for processing the eForms you'll use. For example, if all purchase requisition forms must be routed to the Purchasing department, that information could appear on the Home page.

Help Page

The Help page describes what the Workplace is and explains the purpose of the icons. It may also contain links to online files. For example, you may be able to click a link to display a copy of this manual.

Software Page

If necessary, you can use the Software page to download the Informed Desktop eForms software. See "Downloading Informed Desktop eForms" on page i-3 for instructions.

About Page

The About page displays the Quadra software version number.

List Pages

The documents and folders that are available in the Workplace are displayed on five list pages:

- Blank Forms
- My Forms
- Inbox
- Sent Forms
- Accounts (available to administrators only)

You can display these pages by clicking the corresponding buttons on the navigation bar. For example, to display the Blank Forms page, click **Blank Forms**.

Note

Your eForms Workplace may not be set up to allow you to save *browser forms*. In this case, you won't see the My Forms, Inbox or Sent Forms buttons.

Blank Forms

The Blank Forms page contains all the *Informed desktop templates*, *Informed XML templates*, non-Informed files, and links that your company provides in the Workplace. Some or all of the items may be stored in folders. If you don't see the template you need, you can search for it. See "Finding Workplace Items" on page 2-3 for instructions.

My Forms

You can use the My Forms page to save and organize your completed or partly-completed browser forms. If you don't see the form you need, you can search for it. See "Finding Workplace Items" on page 2-3 for instructions.

Inbox

Inbox is a folder that stores the browser forms that you've received from other users. This folder is displayed on the My Forms page, but you can also access it by clicking **Inbox** on the navigation bar.

Sent Forms

Sent Forms is a folder that stores browser forms that you've sent to other users. This folder is displayed on the My Forms page, but you can also access it by clicking **Sent Forms** on the navigation bar.

If you send a form to more than one user, the 'To' column sums up the list of names as "multiple recipients." To display the names of the users to whom you sent the form, move your mouse pointer over "multiple recipients."

Current Folder: [My Forms] [Sent Forms]					
<input type="checkbox"/>	Title ^	Template ID	To	Sent	Modified
<input type="checkbox"/>	Untitled	WC-Expense	Stewart, James	1/31/2002	1/31/2002
<input type="checkbox"/>	Untitled	WC-Invoice #1	Stewart, James	1/31/2002	1/31/2002
<input type="checkbox"/>	Untitled	WC-Personnel Record	multiple recipients	1/31/2002	1/31/2002
<input type="checkbox"/>	Untitled	WC-Simple Calendar	multiple recipients	1/31/2002	1/31/2002

Stewart, James; Frederiksen, Michael

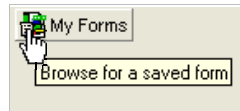
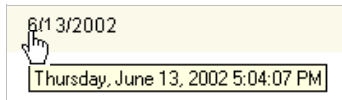
Display multiple recipients on the Sent Forms page.

Tooltips

Tooltips provide quick, additional information about the components of the Workplace.

To display a tooltip:

1. Move the mouse pointer over the item. When the pointer changes to a hand, a tooltip appears.



2. Move the pointer off the item to close the tooltip.

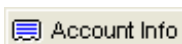
Account and Personal Information

Depending on the security and permissions that have been configured for your system, you may see the following buttons on the navigation pane of the Workplace window:

- Account Info**
- Personal Info**

Account Info Button

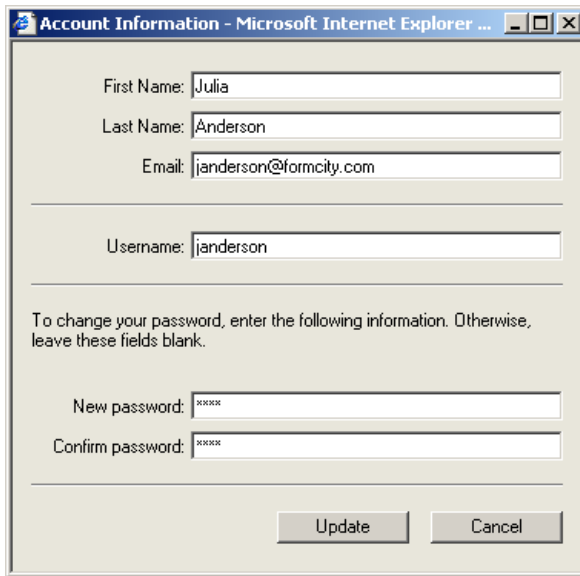
If you see the **Account Info** button on the navigation pane of the Workplace window, you can use it to view or edit your account information and change your password.



Account Info button - eForms Workplace

To edit your account profile:

1. On the navigation pane, click **Account Info**. The Account Information dialog box appears.



Account Information - Microsoft Internet Explorer ...

First Name:

Last Name:

Email:

Username:

To change your password, enter the following information. Otherwise, leave these fields blank.

New password:

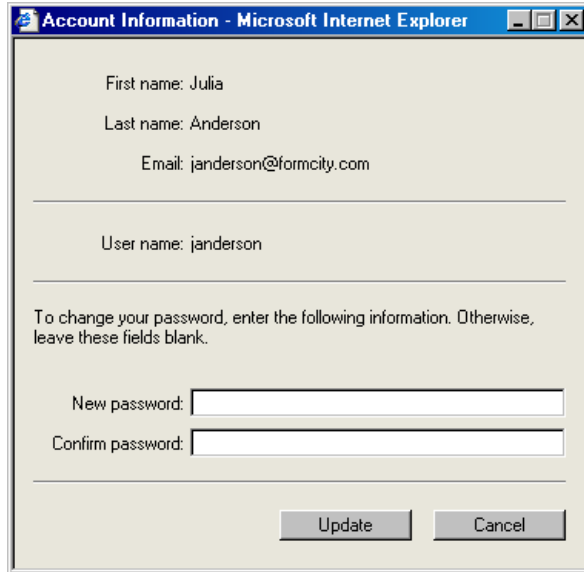
Confirm password:

2. Edit the 'Name' and 'Email' fields as appropriate.
3. In the 'New password' field, enter your new password.
4. In the 'Confirm password' field, enter your new password again.
5. Click **Update** to continue or click **Cancel** to close the dialog box without changing your account information.

If your system has **not** been configured to allow you to update accounts, you can change only your password.

To change your password:

1. On the navigation pane click **Account Info**.



Account Information - Microsoft Internet Explorer

First name: Julia
Last name: Anderson
Email: janderson@formcity.com

User name: janderson

To change your password, enter the following information. Otherwise, leave these fields blank.

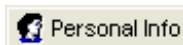
New password:
Confirm password:

Update Cancel

2. In the 'New password' field, enter your new password.
3. In the 'Confirm password' field, enter your new password again.
4. Click **Update** to continue or click **Cancel** to close the dialog box without changing your account information.

Personal Info Button

If you see the **Personal Info** button on the navigation pane of the Workplace window, you can use it to view and edit your personal information profile in your browser window. Note that your Personal Information form may not look the same as the sample shown below.



[Personal Info button - eForms Workplace](#)

To edit your personal information profile:

1. Click **Personal Info** on the navigation bar. The Personal Information form appears.

Employee Information

Last Name:

First Name:

Employee ID:

Job Title:

Department:

Manager:

E-mail:

Phone:

Extension:

Branch:

Building:

Floor Number:

Personal Information

Home Address:

City:

2. Edit the fields as necessary.

If the Workplace has been configured to allow you to update your personal information and your account information, changes that you make to some fields on the Personal Information form are reflected in the Accounts Information dialog box. The reverse is also true. For example, changing the 'First Name,' 'Last Name,' and 'Email' fields in the Account Information dialog box updates the same fields on the Personal Information form.

When you click some XML templates on the Blank Forms page, the forms will open with certain fields prefilled with the information you entered in the Personal Information form. This is set up by the eForms designer.

3. Click **Update** to save your changes.

You can print the current page of the Personal Information template by clicking **Print** on the toolbar. You can also generate and print a PDF version of the entire template by clicking **PDF**.



Using the eForms Workplace

In this chapter:

- Toolbars 2-3
- Finding Workplace Items 2-3
- Viewing Workplace Item Properties 2-5
- Opening a New Form in a Browser Window 2-9
- Filling Out Forms 2-10
- Sending Forms and Templates 2-10
- Tracking Forms 2-12
- Non-Informed Files and Links 2-13
- Managing Workplace Items 2-15



Using the eForms Workplace

The information in this chapter tells you how to find, work with, and manage items in the eForms Workplace.

Your company will provide some or all of the following items on the Blank Forms page in the Workplace:

- *Informed XML templates* - used for *browser forms*.
- *Informed desktop templates* - used for *desktop forms*.
- *non-Informed files* such as PDF files, GIF images, Excel spreadsheets, etc.
- *Links* to documents that reside on other web servers.

When you click an XML template on the Blank Forms page, a blank form opens in your browser window. These forms are saved to the My Forms page in the eForms Workplace. This chapter provides complete instructions for managing browser forms in the Workplace. For information about filling out, saving, and printing browser forms, please see the *Informed HTML eForms User's Manual*.

Note

Only forms that you fill out in a browser window can be saved to the My Forms page in the Workplace. No other type of file can exist on this page, including the Inbox and Sent Forms folders.

When you click a desktop template, a blank form opens on your desktop in the Informed Desktop eForms application. This kind of form cannot be saved to the Workplace. Instead, desktop forms are filled out using Desktop eForms and then saved to your local drive. This manual does not discuss filling out or managing desktop forms. For a complete reference to working with forms in Desktop eForms, please see your *Informed Desktop eForms User's Manual*.

This chapter begins with information on finding and viewing the properties of templates and other Workplace items. The rest of the chapter focuses on the ways you can manage browser forms, non-Informed files, and links in the eForms Workplace.

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

Toolbars

On your forms, you may see different buttons or toolbars than the ones described in this manual. This is because your administrator can modify the toolbars and their buttons. For example, the Send button could be called Submit to Manager and there may be an additional toolbar for printing.

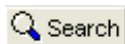
Finding Workplace Items

There are two main locations for items in the eForms Workplace. The items your company provides, such as templates, links, and *files*, are located on the Blank Forms page. Your completed or partially-completed forms are located on the My Forms page (including the Inbox and Sent Forms folders).

You can quickly find the template, file, or form you need by using the Search and Browse functions in Informed Quadra.

Searching

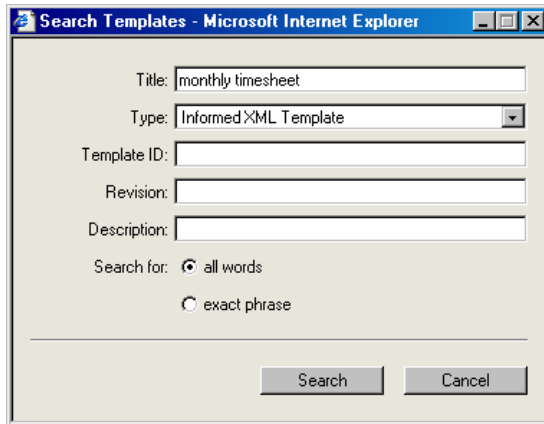
You can use the **Search** button to look for any item on the Blank Forms or My Forms page if you know at least part of its title or if you know another of its *properties*.



Search button

To search for a Workplace item:

1. On the toolbar, click **Search**. When you search for an item on the Blank Forms page, the Search Templates dialog box appears. On the My Forms page (including the Inbox and Sent Forms folders), the Search Data dialog box appears.



2. Enter the search criteria in the *fields*. To reduce the number of matches that are returned, enter more criteria. For example, if you know the title and the template ID, enter both. The search criteria are not case-sensitive; you can use upper or lowercase letters in your search. In the 'Type' field, you can select a type of document from the drop-down list.
 - Title The title of the item.
 - Type..... The type of item (e.g., Informed XML template).
 - Template ID..... The item's unique ID name or number.
 - Revision The item's revision number.
 - Description Text that was used by the designer to describe the item.

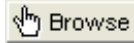
Note On the Blank Forms page, your company may provide multiple shortcuts (or links) to a template. Shortcuts to templates appear on the Blank Forms page with the label "Internal Shortcut." To search for shortcuts, you must select "Internal Shortcut" from the 'Type' drop-down list in the Search Templates dialog box. Otherwise, your search will return only the location of the original template rather than the links to the template.

3. Click **all words** to find every item that includes all the words or partial words entered in a field. For example, to find the Workplace items with "supplies," "supplier," or "supply" in the title, enter "supp" in the 'Title' field and click **all words**.

Click **exact phrase** to find all items that include that phrase. For example, to find the item "Supplier Invoice" but not "Market Suppliers," enter "supplier" in the 'Title' field and click **exact phrase**.
4. Click **Search** to continue or click **Cancel** to abandon the search.

Browsing

You're in *browsing* mode when you view any list page and the **Search** button is displayed. The **Browse** button is displayed on the toolbar after you've performed a search. You can use this button to return to browsing mode.

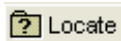


[Browse button - list page \(after searching\)](#)

To use the Browse feature:

1. After you perform a search, click **Browse** to return to a list page.

After you've performed a search, the **Locate** button is displayed on the toolbar. You can use this button to find the folder in which an item is stored.



[Locate button - list page \(after searching\)](#)

To find the folder in which the item is stored:

1. Select an item (click its checkbox) and then click **Locate**. The folder in which the item is stored is displayed.

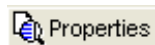
Viewing Workplace Item Properties

If you're not certain that a particular item is the one you want to use, you can get more information about it by viewing its properties.

You can view the properties of all items on the Blank Forms page: Informed XML templates, Informed desktop templates, non-Informed files, and links. You can also view the properties of forms on the My Forms page, including those located in your Inbox and Sent Forms folders. In addition, you can view the properties of folders on any list page in the Workplace.

Different kinds of *documents* have different properties. For example, an XML template shows the property type "ITX" on the Properties dialog box. A form derived from an XML template, on the other hand, shows the property type "IXL."

You view the properties of an item by clicking **Properties** on the toolbar.



[Properties button](#)

To view the properties of a Workplace item:

1. On a list page, select the checkbox next to the item.



Selected checkbox for an Informed XML template.

2. Click **Properties** on the toolbar. The example that follows shows the properties of an Informed XML template.



View the properties of an Informed XML template.

- Title Title of the document.
- Type..... Document type (e.g., “ITX” is displayed for an Informed XML template).
- Filename..... Filename used when downloading the document.
- Document ID..... Unique document ID number.
- Created Date the document was created.
- Modified..... Date the document was last modified.
- Template ID..... Unique name or number that identifies the template.
- Author Name of the person responsible for designing and/or maintaining the document.
- Description Information about the document’s intended use or purpose.
- Revision Revision number for the document.
- Organization..... Company or department responsible for the document.
- Help URL..... URL of the web-based Help page for the document.

Sample Properties Dialog Boxes

Depending on the type of item you have selected, clicking **Properties** causes different Properties dialog boxes to display. The following examples show the dialog boxes associated with various Workplace items.

Informed Desktop Template

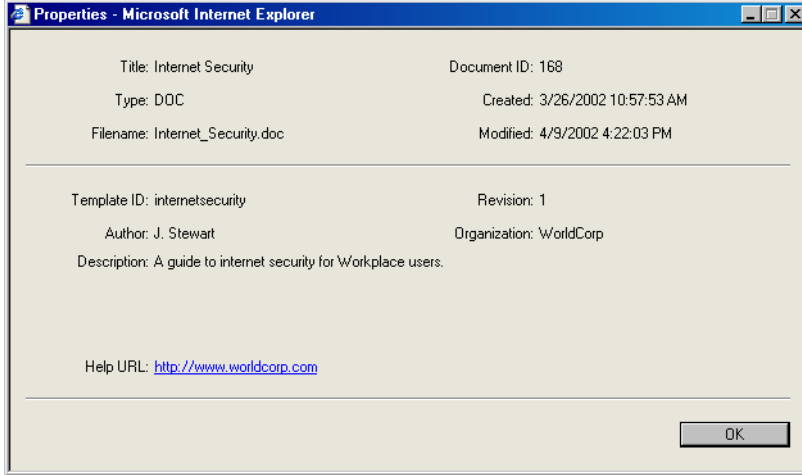
When you view the properties of a desktop template on the Blank Forms page, you'll notice the Properties dialog box looks very similar to the one shown on the previous page for an XML template. Next to 'Type,' however, you'll see "ITP" for a desktop template.



View the properties of an Informed desktop template.

Non-Informed File

The same style of Properties dialog box is also displayed for a non-Informed file. Depending on the type of file, you'll see various property types (e.g., "DOC" for an MS Word file).

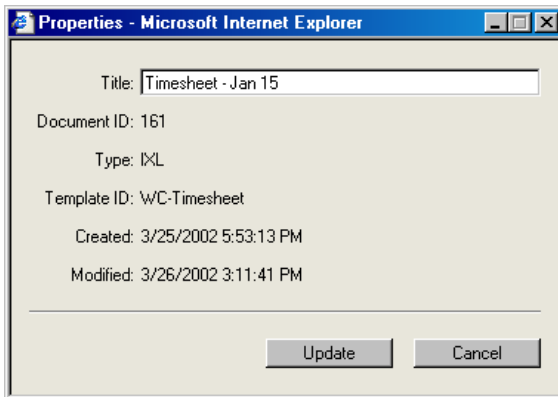


View the properties of a non-Informed file.

Browser Form

You can view the properties of a browser form (a form that you have filled out and saved or that you have received from another user) by clicking **Properties** on the toolbar of the My Forms page, the Inbox folder, or the Sent Forms folder.

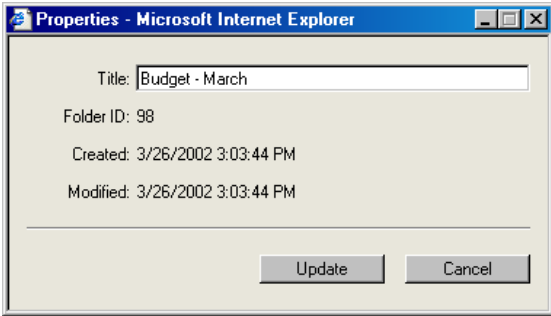
You can rename browser forms in the Properties Dialog box. For more information, see “Renaming Forms and Folders” on page 2-19.



View the properties of a browser form.

Folder

In the example that follows, the properties of a folder on the My Forms page are shown.



View the properties of a folder on the My Forms page.

You can rename a folder on the My Forms page using the Properties Dialog box. For more information, see “Renaming Forms and Folders” on page 2-19.

Note The title in the Properties dialog box of a folder on the Blank Forms page cannot be changed. As a general user, you cannot modify the properties of any item on the Blank Forms page.

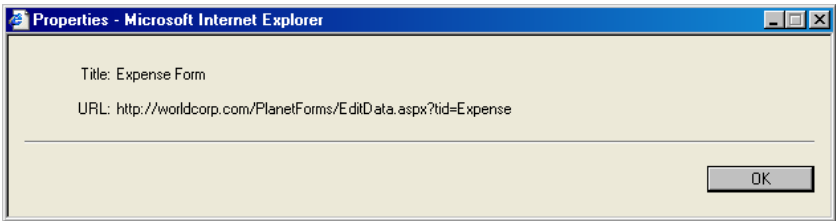
Link

Your company can provide two kinds of links on the Blank Forms page: external links to documents on other web servers and internal links (shortcuts) to other templates in the Workplace.



Selected checkbox for an internal link (shortcut) to another template in the Workplace.

The example below shows the Properties dialog box for a link.



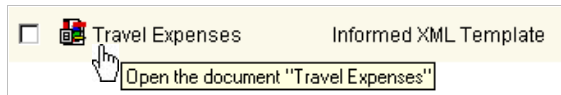
View the properties of an internal link (shortcut).

Opening a New Form in a Browser Window

Once you have found the template you are looking for on the Blank Forms page, you can use it to open a new blank form in a browser window. In order to open a browser form, you must use the template type, “Informed XML Template.”

To open a new blank form:

1. On the Blank Forms page, move your mouse pointer over the name of an Informed XML template or its icon.
2. When the pointer changes to a hand, click the template’s icon or its name. A new blank form opens in your browser window.



[Click an Informed XML template to open a form in a browser window.](#)

Filling Out Forms

With your form open in the browser window, you can fill it out using the data entry and intelligence features that have been configured by the eForms designer. For a complete guide to filling out, saving, and printing browser forms, please see your *Informed HTML eForms User’s Manual*.

Sending Forms and Templates

After you fill out a form in the browser window and save it to the My Forms page, you can send a copy of the form to other users by clicking **Send** on the eForms Workplace toolbar. You can also send XML and desktop templates to other users from the Blank Forms page in the Workplace.

Note

It is also possible to send a form while it is open in the browser window. Please see “Sending a Form” in Chapter 2, “Working With Forms” in the *Informed HTML eForms User’s Manual* for more information.

Sending Forms

When you send a form from the My Forms page in the Workplace three things occur:

- The recipient receives email notification that includes a link to the form in the Workplace.
- A copy is posted in the recipient's Inbox folder in the Workplace.
- A copy is posted in your Sent Forms folder in the Workplace.

To send a form from the My Forms page:

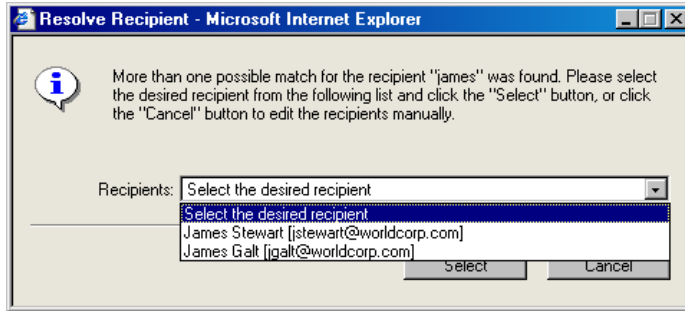


Send button

1. On the My Forms page, select the checkbox next to the form you want to send.
2. On the toolbar, click **Send** to display the Send dialog box.

A screenshot of a "Send" dialog box from Microsoft Internet Explorer. The dialog box has a title bar that says "Send - Microsoft Internet Explorer". It contains three input fields: "Recipient:" with the text "Stewart, James" and a "Check" button to its right; "Subject:" with the text "Time Off template"; and "Message:" with the text "As we discussed, I've updated section 3. Please review and return with your comments." Below these fields are "Send" and "Cancel" buttons.

3. Enter the recipient's name and (optionally) a subject and message. You can enter part of a first or last name, or part of the email address. To enter multiple recipients, enter a semicolon and a space after each name or address or partial name or address. The application matches any user(s) whose name or address starts with those letters. You can click **Check** to make sure the application has matched your text with the right user(s). If more than one match is found for the name you entered in the 'Recipient' field, the Resolve Recipient dialog box appears.



Select the desired recipient from the list and click **Select**.

4. On the Send dialog box, click **Send** to continue or click **Cancel** to close the dialog box without sending the document.

Sending Templates

Both types of Informed templates—XML and desktop—reside on the Blank Forms page. You can send desktop templates and XML templates to other users from the Blank Forms page by clicking **Send** on the Workplace toolbar.

When you send desktop templates or XML templates from the Blank Forms page, the recipient receives email notification that includes a link to the templates in the Workplace. If the recipient clicks a link to an XML template, a blank form opens in a browser window. Clicking a link to a desktop template causes a blank form to open in Desktop eForms on the recipient's desktop.

To send a template from the Blank Forms page:



1. On the Blank Forms page, select the checkbox next to the template(s) that you want to send.
2. On the toolbar, click **Send** to display the Send dialog box.
3. Follow the instructions in steps 3 and 4 for “Sending Forms” on page 2-11.

Tracking Forms

If the eForms designer has configured an XML template for tracking, you can view a record of who has sent and who has received the form.

You can view the tracking status for a form by clicking the **Tracking Status** button on the My Forms page toolbar. A record is displayed that contains sender and recipient names, dates the form was sent, and the tracking value on the form the last time it was sent (e.g., a purchase order number).

Note You can also view the tracking status of a form when it is open in your browser window. Please see, “Viewing a Form’s Tracking Status” in Chapter 2 of the *Informed HTML eForms User’s Manual* for more information.

Three things must be in place for tracking to work:

- The template must have a cell on it that has been configured for tracking. The tracking cell usually contains an auto-incrementing number, such as a purchase order, that changes every time the form is used.
- There must be some data in the tracking cell.
- The form must have been sent.

To view a form’s tracking status from the My Forms page:



1. On the My Forms page, select the checkbox next to the form.
2. On the toolbar, click **Tracking Status** to display the Tracking Status dialog box.

 A screenshot of a web browser window titled "Tracking Status - Microsoft Internet Explorer provided by Shana Corporation". The window displays a tracking status dialog box with a table of records. The table has columns for "Sent", "From", and "To". The first row shows a record sent on 7/18/2002 from Stewart, James to Anderson, John. The second row shows a record sent on 7/18/2002 from Anderson, John to Frederiksen, Michael. The dialog box also shows the template name "Supplier Invoice" (WC-SupplierInvoiceA02) of Inventory Management Workplace and the tracking value "SI-982".

Sent	From	To
7/18/2002	Stewart, James	Anderson, John
7/18/2002	Anderson, John	Frederiksen, Michael

3. Click the close button to close the dialog box.

Non-Informed Files and Links

Your company can store various types of non-Informed files on the Blank Forms page in the Workplace including PDF files, GIF images, MS Word documents, Excel spreadsheets, and others. You can open, save, and send non-Informed files.

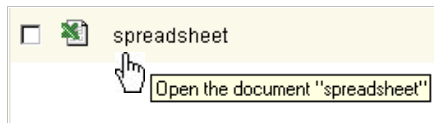
The Blank Forms page can also store two types of links: external links to documents that reside on other web servers and internal links (shortcuts) to other templates that reside in the Workplace. You can open links and you can send them to other users.

Opening Non-Informed Files and Links

When you open a non-Informed file, a copy is created in your browser window in the file's original application. For example, a Microsoft Excel spreadsheet opens in Microsoft Excel in the browser window and a PDF file opens in Adobe Acrobat in the browser window.

To open a non-Informed file:

1. On the Blank Forms page, move your mouse pointer over the name of a non-Informed file or its icon.
2. When the pointer changes to a hand, click the file's icon or its name. The document opens in your browser window in its original application.



[Open a non-Informed file on the Blank Forms page.](#)

To open a link:

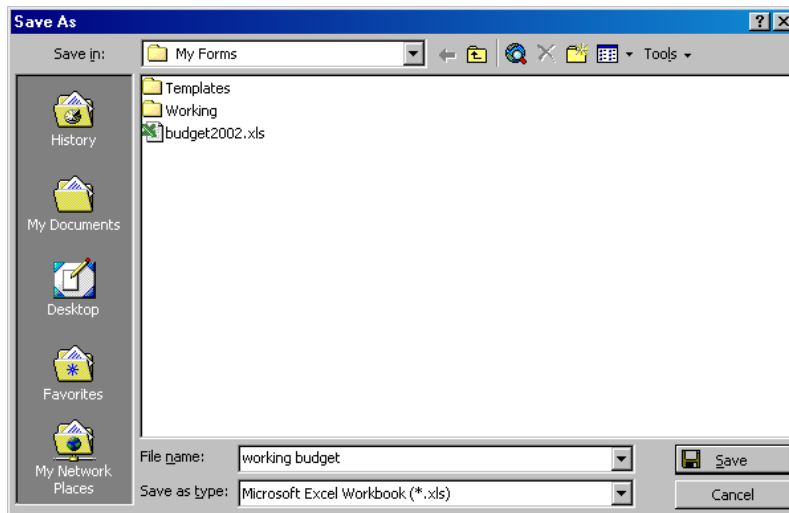
1. On the Blank Forms page, move your mouse pointer over the name of the link or its icon.
2. When the pointer changes to a hand, click the link's icon or name. The document or web site that the link refers to open in your browser window.

Saving Non-Informed Files

When you open a non-Informed file, a copy is created in your browser window in the file's original application. You can save the non-Informed file according to the commands for that application.

To save a non-Informed file:

1. On the application's toolbar, choose **File > Save As**. The Save As dialog box for your system appears.



2. In the 'File name' field, enter a name for your non-Informed file and select a location to store it.
3. Click **Save** to continue or click **Cancel** to close the dialog box without saving the non-Informed file.

Sending Non-Informed Files and Links

You can send non-Informed files and links to other users from the Blank Forms page by clicking **Send** on the Workplace toolbar.

When you send one or more non-Informed files from the Blank Forms page, the recipient (or multiple recipients) receive email notification that includes a link for each non-Informed file that you sent. When the recipient clicks the link, a copy of the non-Informed file opens in a browser window in its original application.

When you send a link, the recipient receives email notification that includes the link. When the recipient clicks the link, the document or web site opens in a browser window.

To send a non-Informed file or link:

Send button

1. On the Blank Forms page, select the checkbox next to the non-Informed file(s) and/or link that you want to send.
2. On the toolbar, click **Send**.
3. Follow the instructions in steps 3 and 4 for “Sending Forms” on page 2-11.

Managing Workplace Items

There are a number of things you can do to manage items stored in the eForms Workplace. You can open, select, and sort templates, non-Informed files, links and folders on the Blank Forms page. To help you keep your My Forms page organized, you can add, move, rename, and delete your forms and folders.

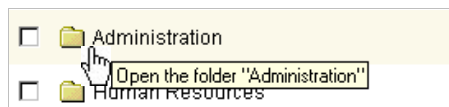
Opening Folders

We have already discussed how to open items in the Workplace such as templates, non-Informed files, links, and forms. You can also open folders on the Blank Forms and My Form pages in the Workplace.

A folder is used to store various items in the Workplace. When you open a folder, you can view its contents. For example, on the Blank Forms page, there could be an Expenses folder, with a sub-folder for Travel Expenses. In the Travel Expenses folder, there could be several XML templates and/or desktop templates that relate to travel expenses.

To open a folder:

1. Move the mouse pointer over the folder you want to open.
2. When the pointer changes to a hand, click the folder or its name to display the contents of the folder.



Open a folder.

A folder can contain other folders. The status bar shows the path to the current folder. You can click the status bar to view the contents of any folder in the path, or you can use the parent directory icon to go to the parent (top-level) folder.

To open a folder in the path:

1. On the status bar, point to the name of the folder whose contents you want to display (e.g., Expenses) and use the hand icon to click the folder name.



Open a folder in the path.

To return to the parent folder:

1. Select the parent directory icon from the right side of the window, under the toolbar. If the icon is not available, the root folder is already displayed.



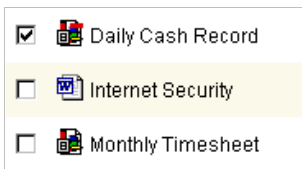
Click the icon to return to the parent directory.

Selecting Workplace Items

Before you can perform an action on a document or folder, you must select it using the checkbox next to the item. For example, before you send a template to another user, you must select the template's checkbox.

To select a checkbox:

1. Move the pointer over the checkbox next to the item you want to select.
2. Click the checkbox.

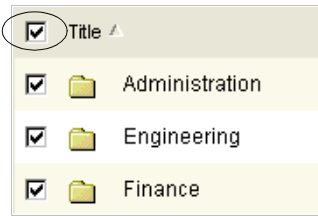


Select a checkbox.

3. To clear the checkmark, click the checkbox again.

To select all the items on the page:

1. Click the Select All checkbox (in the column header next to 'Title'). All the items on the list page are selected.



Click the Select All checkbox to select all the items on the page.






2. To clear all the checkmarks, click the Select All checkbox again.

Sorting Workplace Items

You can use the column header on any list page to sort items according to the column headings. Depending on the heading you choose, sorting is done in alphabetical, alphanumeric, or chronological order.

To sort items on any list page in the Workplace:

1. Click the heading that corresponds to the way you want to sort the items. The Workplace marks the heading with an arrow. In the graphic below, items on the Blank Forms page have been sorted alphabetically by type. You can see the arrow to the right of the 'Type' heading.

<input type="checkbox"/> Title	Type 	Template ID
<input type="checkbox"/>  Incidental Expenses	Sort by type desktop Template	WC-Incidentalexpense
<input type="checkbox"/>  Supplies Expenses	Informed XML Template	WC-Suppliesexpense
<input type="checkbox"/>  Training Expenses	Informed XML Template	WC-Trainingexpense
<input type="checkbox"/>  Travel Expenses	Informed XML Template	WC-Travelexpense

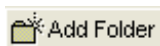
column header

Sort items alphabetically by Type.

2. Click the heading again to reverse the sorting order.

Adding Folders

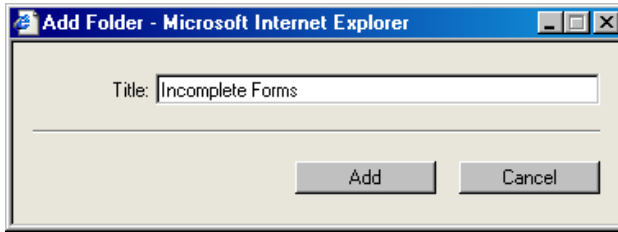
You can add new folders to the My Forms page to help you keep your forms organized.



Add Folder button - My Forms page

To add a folder:

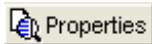
1. On the toolbar, click **Add Folder** to display the Add Folder dialog box.



2. In the 'Title' field, enter a name for the folder.
3. Click **Add** to continue or click **Cancel** to close the dialog box without adding a folder.

Renaming Forms and Folders

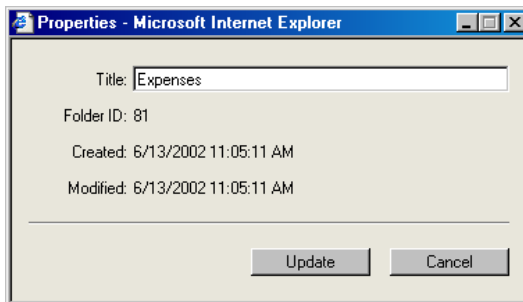
You can change the name of any form or folder on the My Forms page.



[Properties button - My Forms page](#)

To rename a form or folder:

1. Select the form or folder.
2. Click **Properties** on the toolbar to display the Properties dialog box.



3. In the 'Title' field, enter the new name for the item.
4. Click **Update** to continue or click **Cancel** to close the dialog box without renaming the item.

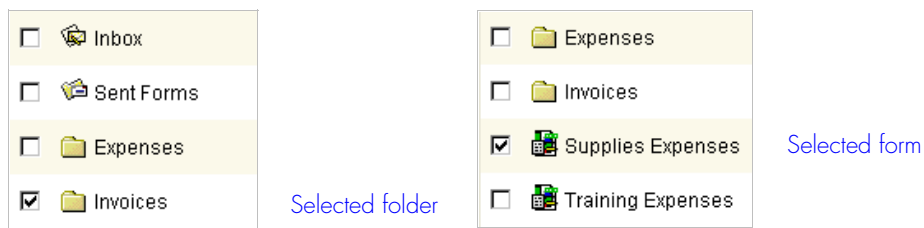
Moving Forms and Folders

You can move forms into folders. You can also move folders into other folders so you have a hierarchy. This will help you keep the contents of the My Forms page organized.

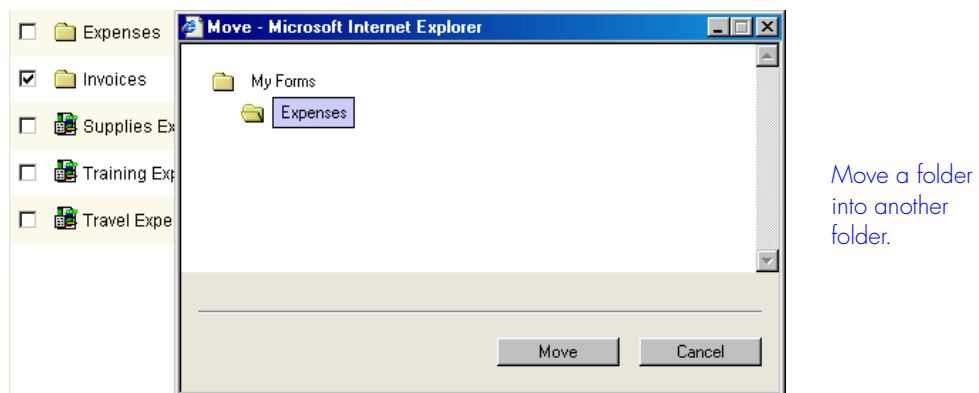


To move a form or folder:

1. Select the item(s) you want to move.



2. On the toolbar, click **Move**. Then click the destination folder. In the following example, the Invoices folder moves into the Expenses folder.



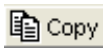
3. Click **Move** to continue or click **Cancel** to close the dialog box without moving the item.

Copying Forms and Folders

You may want to make a copy of a form or folder. The copies are named according to the following rules:

- If you copy the item to a different folder, it keeps its original name.
- If you copy the item to the same folder, it's named "Copy of ..."
- If you copy the first copy to the same folder, it's named "Copy of Copy of ..."

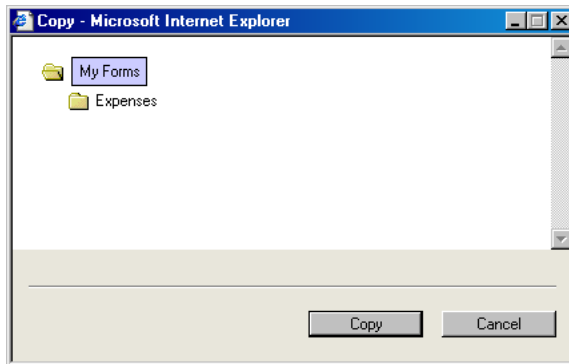
To avoid confusion, you may want to rename the form or folder. See "Renaming Forms and Folders" on page 2-19.



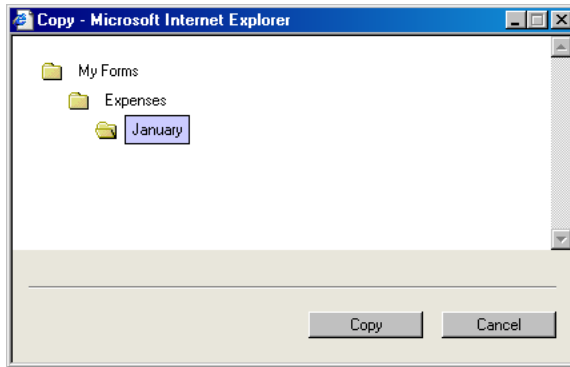
Copy button - My Forms page

To copy a form or folder:

1. On the My Forms page, select the checkbox next to the form or folder.
2. On the toolbar, click **Copy** to display the Copy dialog box.



3. Navigate to the folder in which you want to place a copy of the item. When you click the destination folder, its icon changes to an open folder.



The January folder is selected.

4. Click **Copy** to continue or click **Cancel** to close the dialog box without making a copy of the item.

Note You cannot copy, move, or save items to your Inbox or Sent Forms folders.

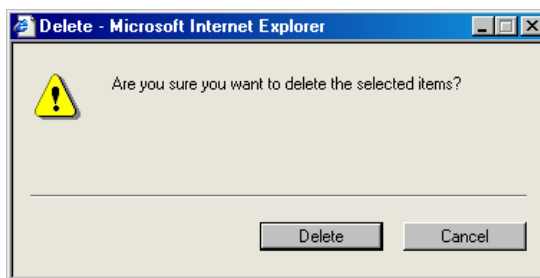
Deleting Forms and Folders

If you no longer need a form or folder, you can delete it from the My Forms page.



To delete a document or folder:

1. On the My Forms page, select the form or folder. Then click **Delete** on the toolbar. A confirmation message appears.



2. Click **Delete** to continue or click **Cancel** to close the message box without deleting the item.



Glossary

Glossary

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

Account permissions	A way of granting access to the eForms Workplace based on user accounts. Each user account is assigned a permission level by the account administrator. The permission level depends on whether the account belongs to a general user, an eForms designer, or an administrator.
Authentication method	A process of identifying an individual, usually based on a user name and password. Authentication is one part of a computer's or server's security system.
Auto-incrementing	A feature that allows a number on a form to automatically increase by a specified amount each time it is used. Auto-incrementing is used when a company wants certain forms (e.g., purchase orders) to be numbered uniquely for identification purposes.
Browser forms	When you click an Informed XML template's icon, a blank form opens in a browser window. You save browser forms to the My Forms page of the eForms Workplace. In this manual, browser forms are usually referred to as "forms."
Browsing mode	The viewing mode that allows you to see the contents of a list page in the Workplace. After you perform a search on a list page, you can use the Browse button to return to the list page.
Desktop forms	When you click an Informed desktop template's icon, a blank form, called a desktop form, opens in Informed Desktop eForms and a copy of the template is automatically placed in your local Templates folder. You save desktop forms to your local or network drive.
Desktop template	See <i>Informed Template (.itp)</i> .
Distribution center	A folder or directory on a file server, FTP server, or Quadra server that contains your distributed templates.
Distribution center profile	A file that contains information that identifies a distribution center. For an eForms Workplace, the distribution center profile is created automatically.

Document	A generic term that includes all items (except folders) on list pages in the Workplace. This includes XML templates, desktop templates, non-Informed files, links, and browser forms.
Field	An area in a dialog box or on a form in which you enter information. Every field has a name that describes the kind of information you enter.
File	A generic term that includes all types of non-Informed files.
Folder	An object that stores templates, non-Informed files, links, and other folders on the Blank Forms page. Folders can also be used to manage browser forms stored on the My Forms page in the Workplace.
Informed Template (.itp)	A file format for templates created in Informed Designer. The itp format allows eForms designers to open and modify templates in Informed Designer. In the eForms Workplace and the Informed Quadra manuals, this template is called an <i>Informed desktop template</i> . When you click a desktop template's icon in the Workplace, a blank form, called a <i>desktop form</i> , opens in Informed Desktop eForms.
Informed XML Template (.itx)	A file format for templates for use in the eForms Workplace. When you click an XML template's icon in the Workplace, a blank form, called a <i>browser form</i> , opens in a browser window. In this manual, a browser form is usually called a "form."
Link	An object in the eForms Workplace that represents a document that resides on a different web server. Links can be provided on the Blank Forms page.
Non-Informed file	A file that is created with software other than an Informed application. Examples include Adobe Acrobat and Microsoft Excel files. Non-Informed files reside on the Blank Forms page in the Workplace.
Properties	The characteristics of a desktop template, XML template, desktop form, browser form, non-Informed file, link, or folder. Some examples of an item's properties include title, template ID, type, revision number, author, and status.

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Status	A way of defining a Workplace item's availability to different user groups. Templates, files, and links on the Blank Forms page are assigned a status by the eForms designer to make them available to general users, to eForms designers and administrators, or to both groups.
Template	A file containing graphic elements and intelligence features such as tables, fields, and buttons. In the Workplace, there can be two types of templates: Informed XML templates and Informed desktop templates.
Template ID	A unique name or number assigned to a template by the eForms designer. Informed Quadra uses the template ID to link a desktop template to its corresponding desktop form, or an XML template to its browser form.
Tracking	A feature that allows a user to view a record of who has sent and who has received a form. The tracking feature must be configured for the template by the eForms designer.
XML template	See <i>Informed XML template</i> .

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