User's Guide for
FileNet eForms for FileNet Web Services

August 2003

FileNet Corporation
3565 Harbor Boulevard
Costa Mesa, California 92626
800.FILENET (345.3638)

Outside the U.S., call:
1.7 1 4 .3 2 7 .3 4 0 0
www.filenet.com

Contents

Introduction

In this chapter:

Introduction

Welcome to FileNet eForms for FileNet Web Services. This guide provides information for the general user about how to fill out eForms in a web browser window. Information about designing *eForms web templates** is provided in the *eForms Designer Design & Graphics* and *eForms Designer Forms Automation* manuals.

eForms for FileNet Web Services

The eForms for FileNet Web Services solution is comprised of eForms web templates, *eForms web data documents* (forms that have been saved to Content Services), the eForms Step Processor, and eForms Designer. The eForms Step Processor allows eForms to be integrated with workflows.

Several options for working with eForms for FileNet Web Services are available:

- You can create new forms from eForms web templates from a *Content Services library.*
- You can open and edit saved forms (eForms web data documents) from a Content Services library.
- At any step in a *workflow*, you can fill out forms created from eForms web templates or data documents.

eForms eRouting Slips are special templates that form designers create using *eForms Designer.* Like eForms web templates and data documents, you can use them at any step in a workflow. eRouting Slips can include workflow properties such as user-defined responses and workflow groups. They can also have *intelligence features* such as *lookups*.

*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.

Terminology

Term	Definition
User	Fills out forms in the FileNet Web Services environment.
Form designer	Creates and manages templates using FileNet eForms 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."

In 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 may 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 eForms appears in shaded boxes like this one.

Buttons and Control 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 instruction for printing an eForm looks like this:

To print an eForm:

1. Click the **Print** button on the form’s toolbar.

Names of tabs on forms are shown in double quotes (e.g., “Listing” and “Instructions”).

1 Overview

In this chapter:

1 Overview

The *form designer** can attach *eForms web templates* and *eForms web data documents* to *workflows*. When a workflow is launched, the forms are available at their assigned steps. When you open an attached eForm, fill it out, and save it, you've created an eForms web data document.

Many data *intelligence features* are supported in eForms for FileNet Web Services. 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 that a form designer can configure on an eForm:

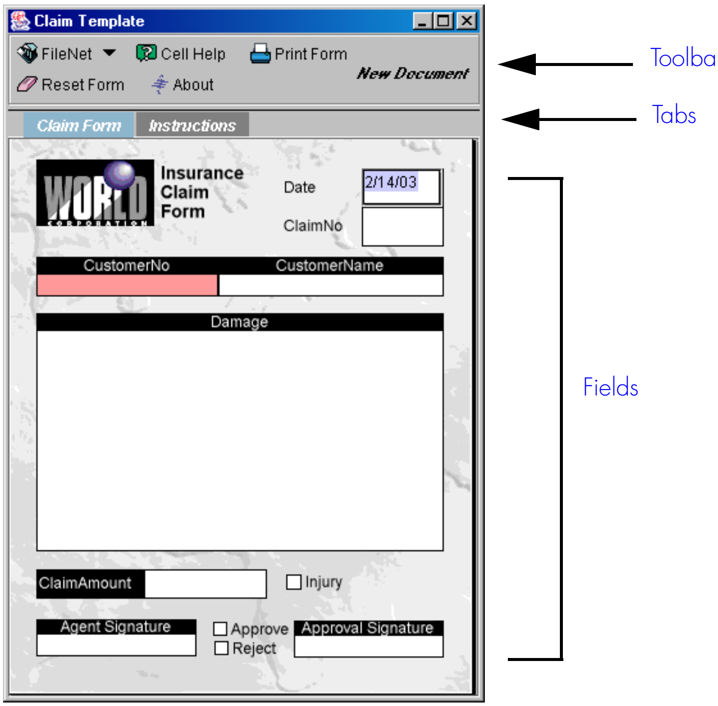
- *Auto-incrementing number* If your forms must be numbered, this feature retrieves the next number in the series.
- Automatic text formatting The values you enter can be displayed in any font that is installed on your system.
- Automatic calculations ..... Calculations can be done automatically (e.g., the expenses on a form can be totaled).
- *Choice lists* .... A *cell* can display a list of choices from which you can select the appropriate value. For example, you can select a shipping method from a set of options.
- *Digital signature* support .. You can sign forms electronically.
- *Error checking* .... A cell can display an error message if you enter the wrong type of information in a cell (e.g., if you enter text in a cell that requires numbers, an error message can appear).
- *Lookups* .... Information can be retrieved automatically from web servers and other data sources. This can reduce the amount of data that you must enter and ensure its accuracy.
- *Submits* .... Information can be sent automatically to web servers and other data sources. This eliminates the need to enter information in more than one place and ensures data accuracy.

In this chapter, we explain what forms look like in the eForms environment and how to access them.

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

What eForms Look Like

When you open an eForm, it is displayed in a browser window. Here's an example:



eForm Buttons

The eForm shown above has a set of buttons at the top. Although the FileNet button is always displayed on an eForm, the form designer can configure forms to display other buttons. You can use these buttons to perform actions such as clearing the eForm data (**Reset Form**) and printing.

With the **FileNet** button commands, you can perform the following actions:

- Add to Library .... Uses the Save Form dialog box to add the eForm to the *Content Services library.*
- Check In .... Checks in an eForm that you opened and checked out from a Content Services library or a workflow.

- Check Out .... Checks out an eForm that you opened from a Content Services library or a workflow.
- Cancel Checkout.................. Cancels the checkout of an eForm that you checked out from a Content Services library or a workflow.
- Copy Document................... Uses the Save Form dialog box to add a copy of the eForm to a different folder in the Content Services library.
- Send Document Reference .. Creates an email message that contains a link to the form.
- Show Properties................... Click to display the eForm's properties.

Fields on an eForm

The areas where you enter information are called *fields*. In the sample form shown above, the fields include 'CustomerNo,' 'Damage,' and 'Approval Signature.' See "Filling Out eForms" on page 2-2 for more information.

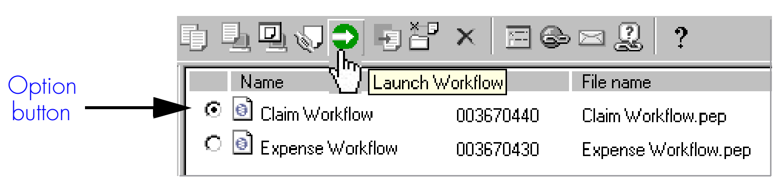
Opening eForms

An eForm can be configured to open automatically in the step processor window. However, if a form doesn't open automatically, there are several ways to open it:

- Open the work item from your Inbox in the Personal Work Manager (see the FileNet user documentation for more information).
- Launch the required workflow.
- Open the form from a Content Services library.

To open a form that is attached to a workflow:

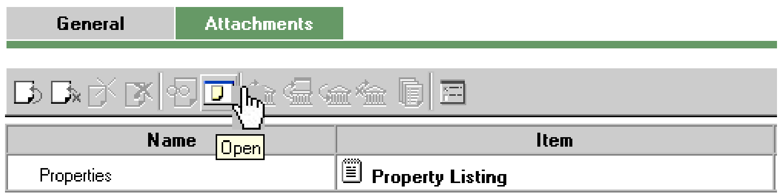
1. In the Content Services library, navigate to the folder that contains the workflow that you want.
2. Click the option button to the left of the workflow icon. Click **Launch Workflow** on the toolbar.



3. The Launcher window is displayed.

4. If there is only one form in the step, the form opens in the browser window. If there are two or more forms, they are displayed on the Attachments tab.

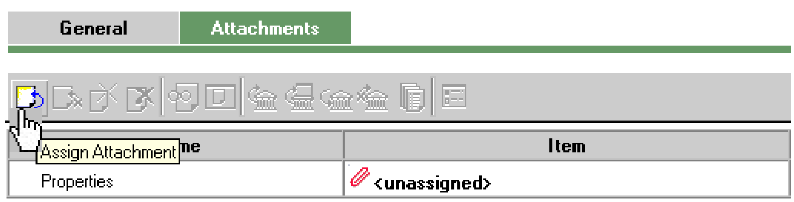
   In the Item column on the Attachments tab, click the name of the eForm. Then click **Open**.



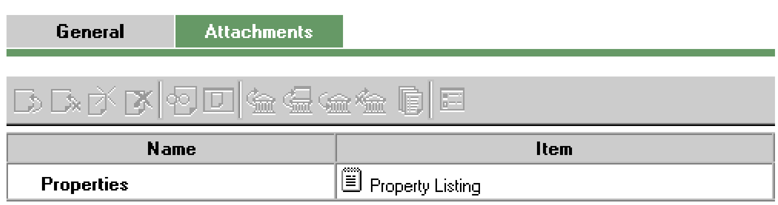
5. The eForm is displayed in a new browser window.

To open a form when the attachment is not specified in the workflow:

1. In the Launcher window, click the Attachments tab.
2. In the Item column, click “Unassigned” and then click **Assign Attachment** on the toolbar.



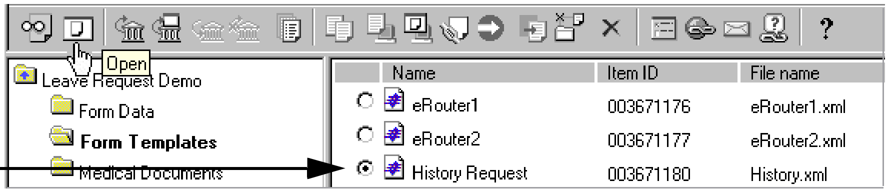
3. The Browsing FileNet Neighborhood window is displayed. Browse to the folder that contains the attachment you need.
4. Select the document by clicking its option button. Click **OK**.
5. The document replaces “Unassigned” in the Item list.



To open a form from Content Services:

1. In the Content Services library, navigate to the folder that contains the form that you need.
2. Click the option button to the left of the form icon. Click **Open** on the toolbar.

Option button



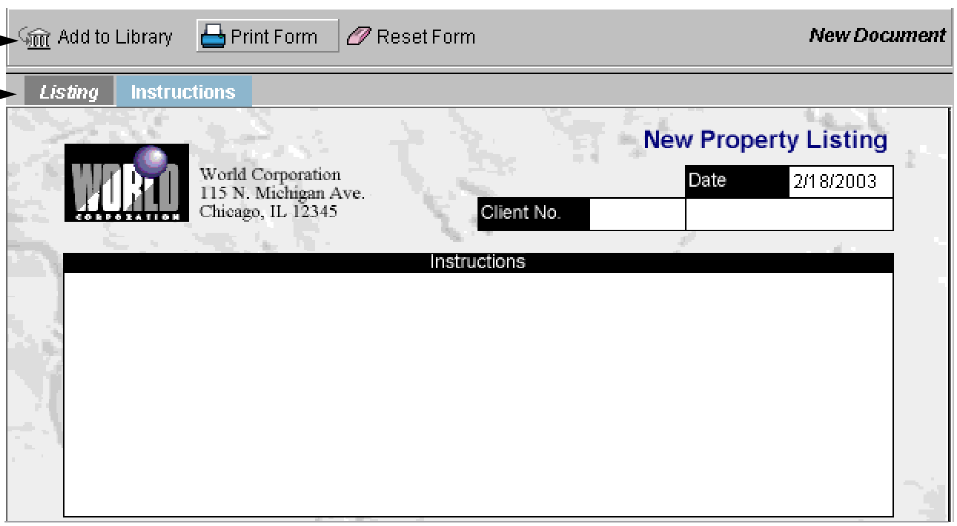
3. The form is displayed in a browser window.

Moving from Page to Page

If an eForm has more than one page, a tab is displayed for each page. The tabs are located under the eForm's toolbar. In the example that follows, the tabs are labeled “Listing” and “Instructions.”

Toolbar

Tabs



To move from page to page:

1. Click the tab for the page that you want.

   If there are more tabs than can be displayed in the form window, click the last page tab to bring the next page tabs into view. To display previous page tabs, click the first page tab.

You can move to the next page by tabbing out of the last field on the current page.

In Chapter 2, we explain procedures such as filling out, signing, and saving eForms.

2 Working With eForms

In this chapter:

2 Working With eForms

With the form open, it can be filled out. Then you'll follow the next steps in your business process. Business process steps could include the following:

- Signing the form.
- Sending the form to the next step in the workflow.
- Submitting data to another department.
- Saving the form to a *Content Services library*.*

Other actions you may take include the following:

- Editing eForms web data documents.
- Importing data.

This chapter explains these procedures.

Filling Out eForms

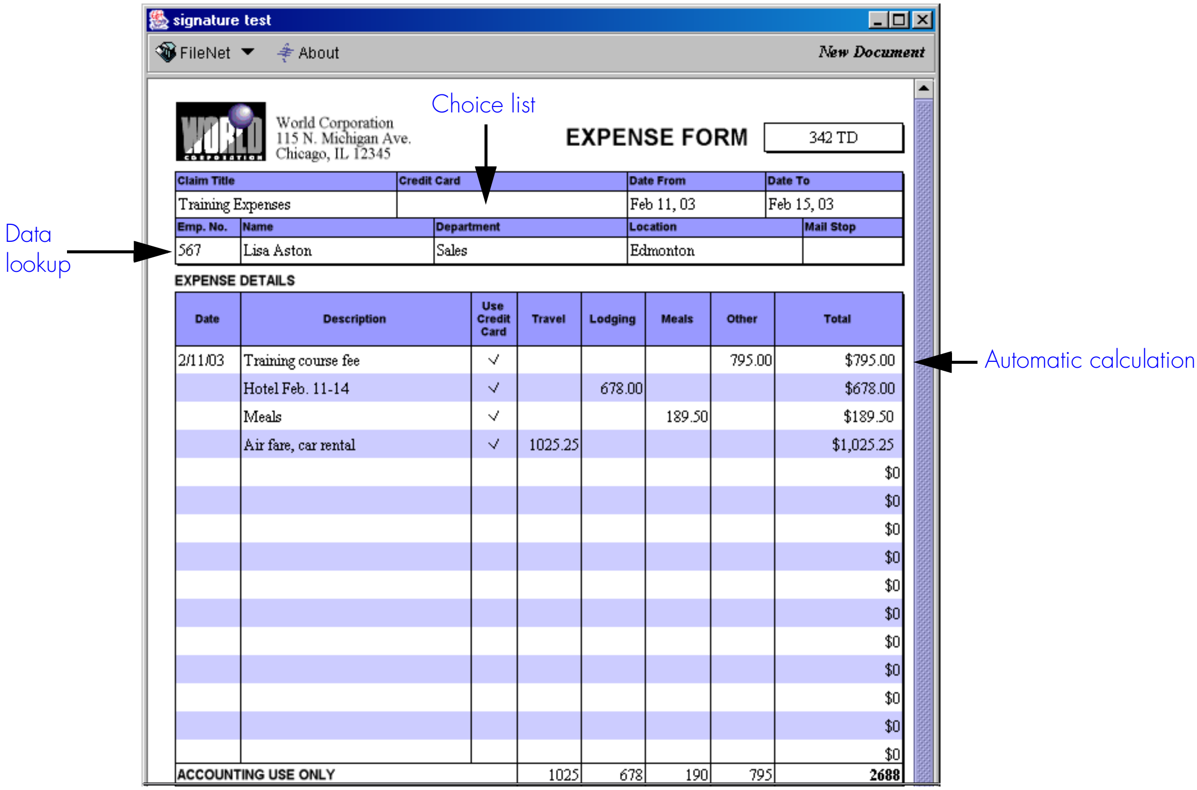
When you fill out an eForm, you benefit from data entry and *intelligence features* such as automatic formatting, calculations, *error checking*, data *lookups*, and choice lists. These features, configured by the *form designer*, make entering information fast and accurate.

The areas where you enter information are called *fields*. A blinking cursor in a field indicates that the field is active. You can move from field to field by pressing the Tab key on your keyboard or by clicking a field with the mouse. To move to a previous field, press Shift + Tab.

You can enter information by typing, by selecting values from *choice lists*, or by clicking a l*ookup* field. A lookup field automatically retrieves information from a web server or other data source and enters it for you on the form.

The illustration that follows shows an example of a form being filled out.

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



Claim Title	Credit Card	Date From	Date To
Training Expenses		Feb 11, 03	Feb 15, 03

Emp. No.	Name	Department	Location	Mail Stop
567	Lisa Aston	Sales	Edmonton	

EXPENSE DETAILS

Date	Description	Use Credit Card	Travel	Lodging	Meals	Other	Total
2/11/03	Training course fee	√				795.00	$795.00
	Hotel Feb. 11-14	√		678.00			$678.00
	Meals	√			189.50		$189.50
	Air fare, car rental	√	1025.25				$1,025.25
							$0
							$0
							$0
							$0
							$0
							$0
							$0
							$0
							$0
							$0
							$0
ACCOUNTING USE ONLY			1025	678	190	795	2688

Time Fields

Entering a value in a time cell can be as simple as entering a single number. For example, if you want the cell to show six o'clock, type the number 6 and tab to the next cell. The time cell displays 6:00 AM or 6:00 PM depending on how the form designer has designed the cell. In the same way, if you enter 3:15 pm and tab to the next cell, 3:15 PM is displayed. To specify AM or PM when you enter the time, enter the numbers, a space, and then the letters (for example, enter 9 pm). Do not use periods between the letters. Uppercase, lowercase, or mixed case letters can be entered.

Picture Fields

The form designer can configure fields to contain pictures. Pictures that you insert must be in JPEG or GIF format.

To insert an image in a picture field:

1. Double-click the picture field. The Select Picture dialog box appears.
2. Browse to the location of the picture and select it.
3. Click **Open**.

To delete an image from a picture field:

1. Click the picture cell.
2. Press the Delete key on your keyboard.

Help Messages for Fields

If the form designer configured fields on an eForm to display messages that will help you enter the correct information, you'll see a Help button.

To display a Help message:

1. Click or tab to a field.
2. Click the Help button on the form's toolbar. If a Help message has been configured, it appears.

Printing eForms

If the form designer configured the eForm for printing, you will see a Print button on the form's toolbar.

To print an eForm:

1. Click the **Print** button on the form's toolbar.
2. In the Print dialog box, specify the print options you want (e.g., the number of copies).

Signing eForms

You can sign an eForm with any of the signing services that your organization makes available to you. Once fields have been signed, you can't edit them unless you delete your signature first.

To sign an eForm:

1. Double-click the signature field.
2. If necessary, log in to your organization's signature service. Enter your user name, password, and group name (if required).

3. Your digital signature appears in the signature field.

To delete your signature:

1. Click the signed field.
2. Press the Delete key on your keyboard. Your name is cleared from the signature field.

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 verify another person's signature:

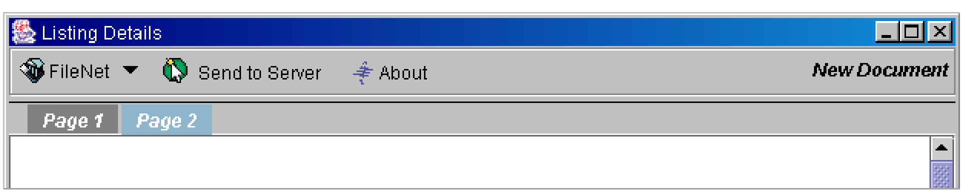
1. Double-click the signed field. A message displays information about the person who signed the field.

Sending eForms to the Next Step

If you've filled out a form that's attached to a workflow, you can send it to the next step in the workflow by clicking the **Launch** button in the Launcher window. For more information about workflows, see the FileNet user documentation.

Submitting Data

If the form designer has set up the form for data submission, you'll see a button on the form with a label indicating a post action, for example, **Post Entries**, **Send to Server**, or something similar. A submit button is configured to take data from the form and forward it to an external data source such as a database.



To submit form data:

1. When you've finished filling out the form, click the submit button.
2. Continue with the steps in your business process.

Saving eForms

Once you've saved your eForm to a Content Services library, it is called an *eForms web data document* and has the file extension "ixl." You can save a form that you've opened from Content Services or one that you've opened from a workflow.

The form designer can configure a form so that you can also save its data locally or to your network drive.

To save eForms web data to Content Services:

1. On the form toolbar, click **FileNet > Add to Library**. The eForms: Save Forms dialog box appears.
2. Enter a title for the document and browse to the folder where you want to save the document.
3. Click **Save**. An eForms web data document is created.

If the form has a Save button on the toolbar, you can save the form locally. Later, you can import the form data into a new form that you create from the same template. See "Importing Form Data" on page 2-7.

To save eForms web data locally:

1. On the form toolbar, click the **Save** button. The Save to File dialog box is displayed.
2. Enter a title for the document.
3. Browse to the folder on your local or network drive where you want to save the document.
4. Click **Save**. The document that contains the form's data has an xml extension.

Editing eForms Web Data Documents

There may be times when you want to edit an eForms web data document that you've saved to a Content Services library. For example, you may fill out and save the same time sheet form every day for a month; at the end of the month, you may submit the form for approval.

To edit an eForms web data document:

1. From a Content Services library, check out and open the data document.
2. Make the necessary changes.
3. On the form toolbar, click **FileNet > Add to Library**.
4. Click **Check in**. Close the form.

Importing Data

If you've saved a form's data locally or on your network drive (see "Saving eForms" on page 2-6), you can import the data to a new form created from the same template. To allow you to import data, the form designer must configure the form with an Import button.

To import data:

1. In a Content Services library, create a new form from the appropriate template.
2. Click the **Import** button. The Load from File dialog box appears.
3. Browse to the data file you want to import and select the file.
4. Click **Open**. The fields on the form are filled with the data from the selected file.

Glossary

Glossary

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

Auto-incrementing number	A unique value (usually a number) on an eForms web data document that automatically increases by a specified value.
Choice list	In a field, a list of values that the user selects from.
Content Services library	FileNet's document management system. You can search for, check out, edit, and check in documents using a Content Services library.
Data document	Contains only a form's data. When a user fills out a form, the data that is entered is stored in a data document. A form's framework, intelligence, and graphic elements are derived from the template that is associated with the form. See also *eForms Web Data (.ixl)*.
Digital signature	An electronic signature that is used to sign fields on a form. A user ID and password are required for signing.
eForms eRouting Slip	A custom template created with eForms Designer; includes routing slip characteristics such as workflow groups and user-defined responses. Can be displayed at any step in a workflow.
eForms Web Data (.ixl)	When a form is saved, an eForms Web Data (.ixl) document is created. Also see *data document*.
eForms Web Template (.xml)	A file format for templates. You create new forms from eForms web templates that are stored in a Content Services library or that are attached to workflows.
Error checking	Cells can be configured to check that data is present and has been entered in the correct format. If the data is invalid or missing, an error message is displayed.
Field	An area 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 cell. Also see *Intelligence features*.
FileNet eForms Designer	The software application that form designers use to create eForms web templates.

Form	Displayed in a browser window when you click an eForms web template or data document in a Content Services library. Or displayed in a workflow step when an eForm is automatically launched or when you open the eForm from the Attachments tab.
Form designer	The person who creates and manages templates using eForms Designer.
Intelligence features	Include calculations, choices, lookups, auto-incrementing numbers, and submits configured for fields on eForms.
Lookup	An action that gets information from another form or from a source such as a database or an information system.
Submit	Allows the user to transfer form data to an information system or database.
Workflow	Specifies the steps and other elements you need to complete a business process.

Index