*flash*FORM Designer™

User's Guide

Electronic Form - Check Design Designer Software

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SECOND EDITION

FORMation mg, Inc.
15540 Rockfield Boulevard, Suite A
Irvine, CA 92618
USA

*(949) 598-8890 *** (949) 598-8899 FAX*
*www.formationmg.com *** info@formationmg.com*

Product Excellence Award, Year 2000
Best AS/400 Form – Check Processing Software

Product Excellence Award, Year 2000
Best AS/400 Email Solution

"Stunning accuracy and intuitive recognition of form elements" PC Computing, July 1998

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Technical Contacts: _____

Address 1/Address 2: _____

City/ST/Zip: _____

Voice Phone Number: _____

Fax Number: _____

Email Address: _____

PC Host Model/AS/400: Host _____

Operating System Level: _____

AS/400 Serial Number: _____

Product(s) Ordered: _____

Comments: _____

_____

_____

The undersigned acknowledges that he has read and agrees to be bound by the terms and conditions of the FORMation mg Software License Agreement.

_____ _____

Signed Date

Please make a photocopy for your records and FAX or MAIL to:

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Table of Contents

Forms Design User's Guide

Welcome

Welcome to flashFORM Designer™ and flashFORM400™ AS/400 electronic form integration software. flashFORM is the easiest way to convert your paper forms to electronic forms. Use flashFORM to edit, design, merge AS/400 spool data, fill forms, manage information databases, and print and mail forms among other functions. The following documentation has been provided to help you learn about flashFORM Designer and flashFORM400 AS/400 form integration software.

FORMation* mg** endeavors to combine a powerful **fully *automatic forms conversion product with a flexible, innovative integration software. flashFORM has a powerful automatic form conversion ("vectorization") capability that enables you to automatically create electronic forms from scanned in pre-printed forms. It recognizes lines, text, circles and graphics with great accuracy and even creates data fields where they are appropriate. In addition, it has all the tools necessary to design, from scratch, new forms or edit converted forms.

How to Use this Manual

This manual is laid out into two User's Guides: flashFORM Designer User's Guide and flashFORM400 AS/400 Form Integration User's Guide.

flashFORM Designer User Guide

The first User's Guide covers all aspects of initiating the forms recognition, forms design, generating AS/400 overlay and spool field mapping files, advanced features, filling forms, managing databases, troubleshooting, etc..

flashFORM400 AS/400 Electronic Form Integration User Guide

The second User's Guide covers all the steps to integrate your designed forms and graphics to your AS/400 application environment. Including, electronic form definition, spool data mapping operations, MICR Security check printing operations (if this option was ordered), advanced functions, and auto-engine definition. Documentation for flashMAIL400 (AS/400 email system), flashVIEW400 (AS/400

archive and retrieve), flashFAX400 (AS/400 automated fax system) and Positive Pay will come under separate cover when those products are ordered.

Generating AS/400 Form Overlay ("macros) and AS/400 Field Mapping Files

… two important steps to AS/400 form integration

The flashFORM Designer User's Guide will provide instruction for basic forms design operations. However, there are three important components you need to refer to for AS/400 Form integration. These are "**Generating an AS/400** form overlay ("macro") "on page 38. "**Generating an AS/400** field mapping file"on page 40 and "**Creating AS/400** Field Mapping Fields" on your form, page 68. The flashFORM400 User's Guide will cover the integration of macros and field files on the AS/400 side.

flashFORM Designer's Online Help

flashFORM Designer's online help contains information on features, settings, and procedures. The online help conforms to Windows online help conventions and has been designed for quick and easy information retrieval. Please see information on using the online help.

Scanner Setup Notes

The *Scanner Setup Notes* contains information about supported scanners and related issues. To open this PDF file, click Start in the Windows taskbar and choose *Programs*, *FORMation*, *FORMation Documents*, *Scanner Setup Notes* after flashFORM has been installed.

Using This Manual

This manual is written with the assumption that you know how to work in the Windows environment. Please refer to your Windows documentation if you have questions about how to use dialog boxes, menu commands, scroll bars, drag and drop functionality, shortcut menus, and so on.

The following conventions are used in the flashFORM Designer User's Guide section:

Convention	Purpose
Italicized text	• Emphasizes menu commands, dialog box options, and labeled buttons For example: "Choose *Open...* in the File menu." • Emphasizes new terms the first time they are used • Emphasizes important words in a sentence
 Note symbol	Introduces a tip or an item of note
 Warning symbol	Introduces important information
Courier font	AS/400 Commands and user entry
	AS/400 screen shots are captioned for easy reference

Getting Online Help

In addition to using this manual, you can use flashFORM's online help topics to learn about features and procedures. Online help is available after you install flashFORM.

flashFORM's online help follows the conventions of Microsoft Windows 95 Help. Choose *How to Use Help* in flashFORM's Help menu to get information on using Help.

Help menu

Use the commands in the Help menu to find information about flashFORM topics.

Select *flashFORM Help* to obtain flashFORM's main Help topics. Select *Getting Started* to begin flashFORM's tutorials. Select *How to Use Help* to get Microsoft Windows Help topics that explain how to use and customize Help. Select *Product Support* to find out how to get product support services for flashFORM. Select *Tip of the Day... (*if a form is open) to obtain tips to help you use flashFORM. Select *About flashFORM* to get information about your version of flashFORM.

flashFORM Tutorials

flashFORM has four online tutorials to step you through the basics. If you have never used flashFORM before or you need to review some of the procedures, please go through these tutorials.

- In the first tutorial, Load and Fill a Form, you will scan (or import) and fill a Sample form (included in the flashFORM package) by using the Form Assistant.
- In the second tutorial, Edit and Design a Form, you will scan or import the Sample form into flashFORM again and learn to use the basic buttons and menu commands, verify and correct OCR, and modify the form.
- In the third tutorial, Design Your Own Form, you will create a form and learn how to create objects, define calculations, customize the form, set the tab order, and add a graphic.
- In the fourth tutorial, The flashFORM Database, you will use the form that you created in the third tutorial and learn some basics about flashFORM's database as well as how to create

and manipulate database records.

Context-Sensitive Help

You can get on-the spot information about a particular flashFORM command, toolbar button, or dialog box option in the following ways:

-  Click the Help button in the flashFORM design/fill toolbar to turn your cursor into a question mark icon. Click any command, button, or portion of the window to open context-sensitive help for that topic.
-  Click the question-mark button in the upper-right corner of a dialog box and then click an item in the dialog box to get a pop-up explanation for that item.
-  Some dialog boxes have a Help button. Click Help to get information about that dialog box.

Product Support

For the fastest and easiest way to get help, please look for solutions in this manual or in the online Help. See " General Troubleshooting" troubleshooting tips.

If you need additional help, please use the following resources:

- FORMation mg's World Wide Web site
  Go to FORMation mg's World Wide Web site for common questions and answers, updates, patches, troubleshooting procedures, and product information. FORMation mg's Web site address: http://www.formationmg.com
- Scanner Setup Notes
  Read the Scanner Setup Notes document to learn about supported scanners and related issues. This document has been provided to you as an electronic document in PDF format. To open this document, click Start in the Windows taskbar and choose Programs… FORMation… FORMation Documents… Scanner Setup Notes.

You must have Adobe Acrobat Reader 3.01 or greater installed if you want to read the *Product Support* and *Scanner Setup Notes* PDF documents. To install the Reader, click *Start* in the Windows taskbar and choose *Programs… FORMation Applications… FORMation Documents… Acrobat Reader.*

Installation and Setup

This chapter describes how to install flashFORM and begin using it.

For technical and troubleshooting information, please see "Technical Information."

This chapter contains the following sections:

- System Requirements
- Installing flashFORM Designer and flashFORM Filler
- Registering flashFORM
- Starting flashFORM

System Requirements

To install and run flashFORM, you need the following setup:

- Computer with an 80486 or higher processor
- VGA or SVGA monitor (24-bit display adapter recommended for color forms)
- Windows-compatible mouse
- CD-ROM drive
- A minimum of 25MB hard disk space for flashFORM and up to a maximum of 45MB
- A minimum of 10MB hard disk space for flashFORM Filler and up to a maximum of 20MB
- A compatible scanner if you plan to scan documents
- Please see Scanner Setup Notes, which are included on your flashFORM CD-ROM, for a list of tested scanners
- Total system memory of at least 16MB RAM (32MB recommended) for Windows 95 or 98, and Windows NT 4.0.

flashFORM 5.0 for Windows 95 or 98 and Windows NT 4.0 is a 32-bit application and will not run on earlier versions of Windows.

Installing flashFORM Designer

This section describes how to install flashFORM and MacMaker on Windows 95, 98, or NT 4.0. If you have an older version of flashFORM Designer, you might want to uninstall it before you install the latest version.

Close all applications — including screen savers, virus checkers, and mail applications — before installing flashFORM.

To install flashFORM and flashFORM Filler:

Start Windows.

Insert flashFORM's CD-ROM in the CD-ROM drive.

- Run Setup.exe
- Follow all the instructions in the dialog boxes that appear. During installation, you will be prompted to enter a serial number. You can find the serial number on the label of the CD-ROM.
- It is recommended to install the two modules Scan Manager and Print to OmniForm Support. The MacMaker module will automatically install.
- flashFORM installs by default to the location `c:\Program Files\FORMation\flashFORM`. You can select another location if you wish.
- Installation instructions for flashFORM400 AS/400 Electronic Form Integration Software can be found in the AS/400 User's Guide "Installing and Updating flashFORM400".

flashFORM Designer 5.0 comes with a 25 usage license

Registering flashFORM Designer 5.0

Register your copy of flashFORM with FORMation mg Corporation to receive notification of special offers and the best prices on product upgrades. fashFORM Designer comes with a registration, but will only generate the AS/400 overlay files 25 times.

Once the software has been purchased, contact FORMation mg for the registration code to continue usage (800) 693-3933. Anyone in sales or tech can give you the registration code upon confirmation the purchase with Accounting. Can also reach FORMation mg by email at info@formationmg.com.

After registration is complete, you will be given a registration number. Be sure to write that number down and keep it handy in case you need to use it for reinstallation. If you reinstall flashFORM using your registration number on the same computer, you will not have to go through the entire registration process again to reregister it.

Starting flashFORM

This section describes how to launch flashFORM after it is installed.

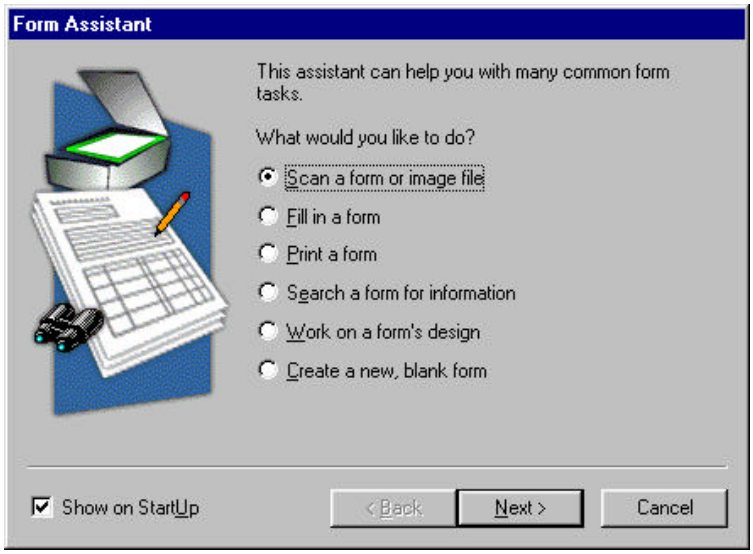
Install your scanner and test it in Windows before using it with flashFORM. Consult your scanner documentation or the scanner manufacturer to resolve any scanner problems that may occur.

To start flashFORM:

1. Click Start in the taskbar and choose

Programs, FORMation, flashFORM 5

The Form Assistant dialog box appears. It contains six options. Each is a basic flashFORM procedure.



2. Select an option and click Next>.

Proceed to "flashFORM Procedures," for detailed information on the basic flashFORM procedures. Or, if you are new to flashFORM try the online tutorials. Click Getting Started in the Help menu to access the tutorials.
Click Cancel to close Form Assistant if you do not want to choose a particular option.

Form Usage

This chapter describes basic flashFORM concepts you should know before scanning, importing or designing a new form. It includes the following sections:

- Using Form Assistant
- Form Usage Options
- International Settings

Using Form Assistant

Form Assistant is a dialog box that appears when launching flashFORM. If you are new to flashFORM, you might prefer to use the Form Assistant, which makes decision-making easy when processing a form. Later, you might choose to use the commands in the design toolbar or menu. See "flashFORM Procedures," for more information about using the commands.

This section contains the following topics:

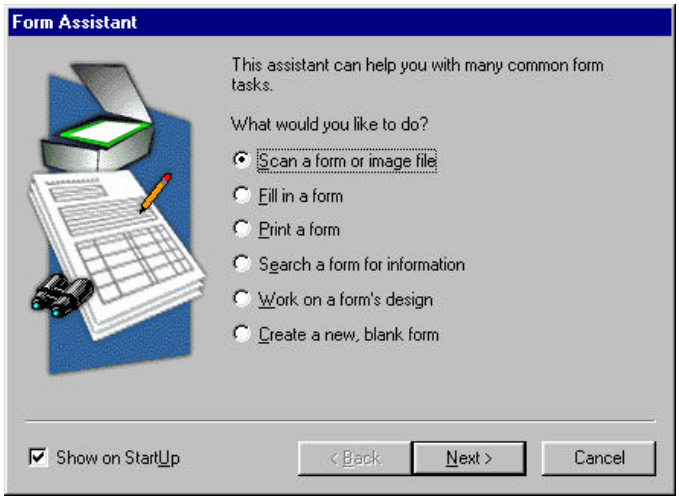
- Opening Form Assistant
- Form Assistant Options

Opening Form Assistant

There are several ways to open Form Assistant.

- Form Assistant opens automatically the first time you open flashFORM.
  Click Start in the Taskbar and choose Programs FORMation flashFORM 5.0.
-  If Form Assistant is not open, you can either click the Form Assistant button in the design toolbar at the top of the window, or choose Form Assistant... in the File menu.

The Form Assistant dialog box contains six options for basic flashFORM procedures as described in the next section. You can also select or deselect the option *Show on StartUp*, which determines whether the Form Assistant dialog box appears on startup.


Form Assistant
This assistant can help you with many common form tasks.
What would you like to do?
Scan a form or image file
Fill in a form
Print a form
Search a form for information
Work on a form's design
Create a new, blank form
Show on StartUp
< Back
Next >
Cancel

Form Assistant Options

This section gives a brief description of each option in Form Assistant. Through a series of dialog boxes, Form Assistant easily steps you through the process of converting your form into an electronic form.

Scan a Form or Image File

Select *Scan a form or image file* to scan a paper form or import an image file and to determine how you will work with the form in flashFORM.

Fill in a Form

Select *Fill in a form* to fill the currently open form or to open a form and fill it. See "Filling a Form," for more information.

Print a Form

Select *Print a form* to print the currently open form or to open a form and print it. You can also generate the AS/400 overlay file and field mapping file from the Print Menu. (The AS/400 field mapping file is automatically generated when a macro is generated.)

Search a Form for Information

Select Search a form for information to search the currently open form for information or to open a form and search it.

Work on a Form's Design

Select Work on a form's design to redesign the currently open form or to open a form in design view. See "Designing a Form," for more information.

Create a New, Blank Form

Select Create a new, blank form to open a blank page in design view.

Form Usage Options

Form usage affects the way you can use a form once it is in flashFORM. This section contains the following topics:

- Choosing a Form Usage Option
- Where to Select Form Usage Options
- Changing Form Usage

Decide how you will use a form in flashFORM before you scan or import it: as a designed form, as an original form, or as a nondesigned form image as described below.

Choosing a Form Usage Option

The following table provides the three usage options — designed, original, and nondesigned form — and recommendations for your choice.

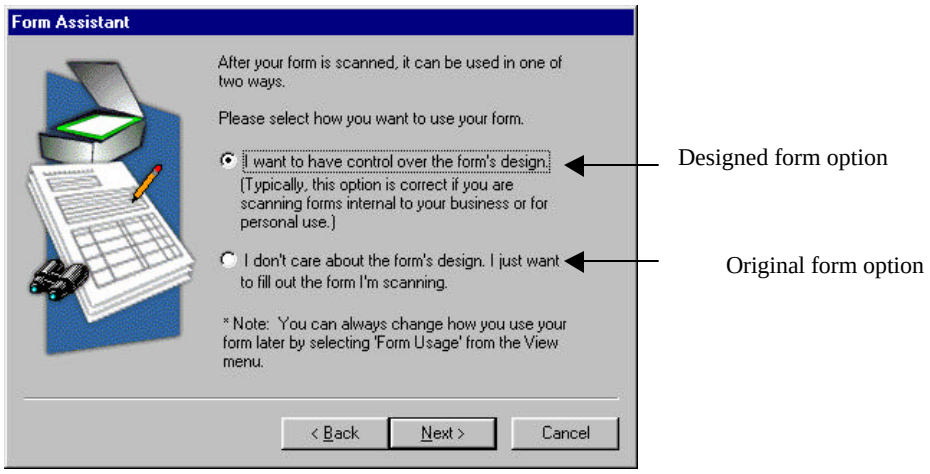
Choose Designed Form when you want:	Choose Original Form when you want:	Choose Nondesigned Form when you want:
full control over a form's design	partial control over a form's design	to input a form of such poor quality that it would cause recognition problems
to edit all form elements in design view	to maintain a form's origi-nal look	to draw new fillable objects on the form in design view
to create new objects in design view	to create new fillable objects on the form in design view	print or mail the form only
to fill fields in fill view	to fill fields in fill view	

Where to Select Form Usage Options

Different form usage options are available depending on whether you open Form Assistant or choose *Scan Form...* in the File menu.

Form Assistant

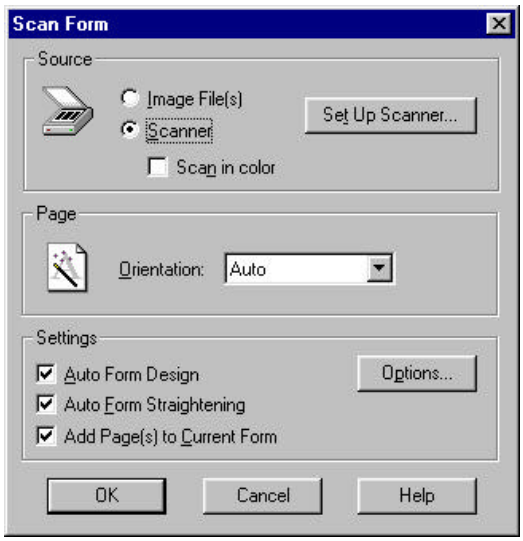
You can choose to scan in or import either a designed form or an original form in Form Assistant.



This dialog box is one of several in Form Assistant and appears during the scanning or import process. See "Form Assistant Options" for more information.

Scan Form Dialog Box

You can choose to scan in or import either a designed form or a non-designed form in the Scan Form dialog box after choosing *Scan Form...* in the File menu.



Changing Form Usage

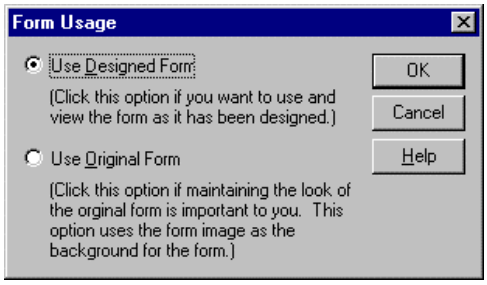
Choose *Form Usage...* in the View menu to change the way you can use a form. For example:

- If you have an original form but decide to change the design, then you would change the form to a designed form.
- If you have a designed form that you have edited but want to mail the original form to someone, then you would change the form to an original form.

There is no original view for a form that you design yourself in flashFORM.

To change form usage:

1. Choose Form Usage...in the View menu.
2. The Form Usage dialog box appears.



3. Select a form usage option.
   - Select *Use Designed Form* to view the form as it was designed by flashFORM on import along with any changes you have made to the form's design.
     You can edit all text and fields, and add graphics to the form.
   - Select *Use Original Form* to view the form as it looked originally, before you scanned or imported it to flashFORM. You can create, resize, move, delete, define, or change the appearance of the spool data mapping or fillable fields with this option. Changes you make to text, graphics, and nonfillable objects are not visible until you select *Use Designed Form.*
4. Click OK.
   Your form changes to reflect the selected option.

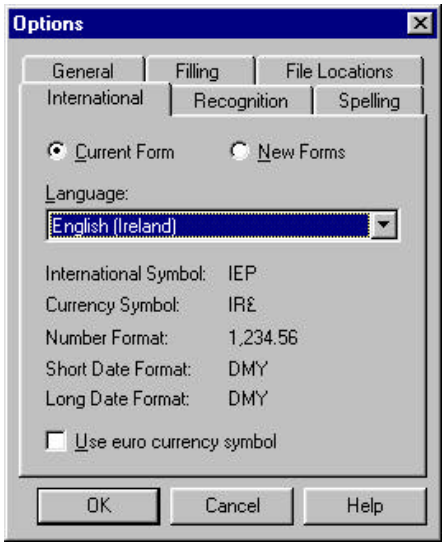
You can change the form usage from a *non-designed* form to a designed form. However, the form will be blank except for any fillable objects you may have added.

International Settings

flashFORM supports different language and cultural conventions. You can choose from 45 different *locales* in the *International* tab in the Options dialog box. A locale — as defined for flashFORM usage — is a combination of a language and a region. The language you select for a particular region affects how your form displays currency, numbers, and dates.

To Select a Language for Your Form:

1.  If you are in fill view, click the Design button in the design toolbar or choose Design in the View menu.
2. Choose Options... in the Tools menu.
3. Click the International tab.
   Two options are Current Form and New Forms.



4. Click Current Form.

The *Language* drop-down list displays the language being used for the currently open form. If you have the International English, French, or German versions of flashFORM or if you have multiple dictionaries, a dictionary in this language will also be used during a spell check.

You can only change the language for this option if you open the Options dialog box in design view.

5. Select a language for the current form.
6. Click New Forms.
   The Language drop-down list displays the default language that will be used for the next form you open, scan, or import.
   The language selected for a new form will also become the *Current Form* selection when that form opens in flashFORM.
7. Select a language for new forms.
8. Click OK.

How flashFORM Uses Language Selections

The *Current Form* language selection affects:

- The formatting of currency, number, and date entries in the currently open form.
- Which dictionary is used for spell checking.
- The international symbol that appears in the status bar when a form is currently open.
- The *New Form* language selection affects:
- The formatting of currency, number, and date entries in new forms you create by scanning or importing, or by choosing New in the File menu.
- The international symbol that appears in the status bar when a form is not open.

Control Panel Selections

Selections made in the *International* tab do not affect selections made in the *Regional Settings* control panel.

Only the *List Separator* option in these control panels affects how data is displayed in flashFORM.

The Options Dialog Box Readouts

Below the Language selection, flashFORM displays readouts: the international symbol for the selected language (which appears in the status bar); and currency, number, and date conventions specific to that language

The readouts show:

- How flashFORM expects data to be entered in fill view.
- How flashFORM will format data in fill view if it is not entered correctly. (Formatting takes place after you move the cursor out of a field.) See the next section for formatting examples.

Formatting Examples

Currency

If you select *German (Austrian)* as the *Current Form* language, the numbers `123456` entered in an appropriately defined currency field would display as öS `1.234,56`.

If you select *German (Liechtenstein)* as the *Current Form* language, the numbers would display as `CHF 1'234.56`.

Date

If you select *English (United States*) as the *Current Form* language, the date 2/5/96 entered in an appropriately defined date field would display as February 5, 1996.

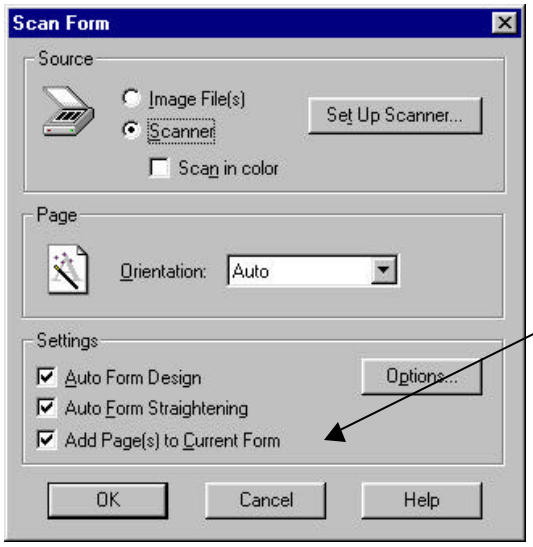
If you select *German (Standard)* as the *Current Form* language, the date would display as 2. Mai 1996.

Euro Currency Symbol

Select the *Use euro currency symbol* to format currency fields with the euro currency symbol. You can use this feature if your system supports the euro currency symbol, that is, it can be entered via the keyboard, displayed on your screen, and printed.

The Scan Form Dialog Box

The *New Form* language selection appears in the Options dialog box, which is selected from the Scan Form dialog box.



You cannot change the New Forms language if you select this option.

Click Options… to view the current language for your form or to change the language selection.

- Click Options... to view the language of your current form and to change the language for your new form.
  You cannot change the New Form language selection if Add Page(s) to Current Form is checked because a language is already associated with the current form. A form can have only one language.
- If you select Add Page(s) to Current Form, the Language display changes to reflect the Current Form language if it is different.

The Object Definition Dialog Box Options

The Current Form language selection affects available formatting options for fillable objects defined as Number, Date, or Currency in the Object Definition dialog box. For example, the long-date format for English (United States) is MMMM dd, yyyy. The long-date format for German (Standard) is d.MMMM yyyy.

The Allow Multiple Languages Option

How it Works

You can select Allow Multiple Languages in the Scan Form dialog box (by first clicking Options... in this dialog box and then selecting the Recognition tab) for multiple-language forms. flashFORM then recognizes all characters in all languages that it supports. The setting does not affect the language(s) selected for your form in the Options dialog box and vice versa.

When you select Allow Multiple Languages, flashFORM turns off dictionaries during optical character recognition (OCR) so that all recognizable characters are allowed. If dictionaries were on, special characters such as umlauts might be discarded or questionable words in one language could be mistaken for words in another language.

Do not select *Allow Multiple Languages* for a single-language form. OCR may not be as efficient with dictionaries turned off.

Selecting the New Forms Language

Determine which language composes the majority of your form and select that as the *New Form*s language before scanning. To do so, click *Options...* in the Scan Form dialog box.

Remember that the selected language affects sort order and how dates, numbers, and currency are formatted in fill view. See " Spell Checking Multiple Languages"

for information on spell-checking for information on spell-checking a form with multiple languages.

flashFORM Procedures

This chapter describes basic flashFORM procedures, including the following sections:

- Scanning a Paper Form
- Importing an Image File
- Proofing a Form
- Filling a Form
- Printing a Form
- Generating an AS/400 form overlay ("macro")
- Generating an AS/400 field mapping file
- Importing an Existing Electronic Form
- Searching a Form
- Creating a Form
- Opening a Form
- Mailing a Form
- Saving a Form
- Publishing a Form to the Web

Scanning a Paper Form

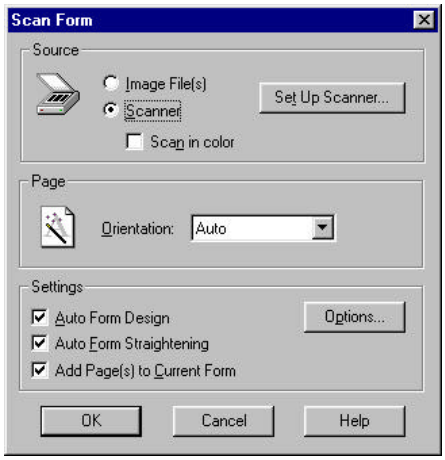
This section describes how to use the *Scan Form...* command to turn your paper form into an electronic form. You can also use the Form Assistant dialog box to scan a form. See " Using Form Assistant" .

You can scan paper forms directly into flashFORM if you have a scanner. Forms should be blank with crisp, dark text for best results. flashFORM can scan black-and-white and color forms.

You can use the Sample Form included with your flashFORM package as a test page.

To scan a paper form:

1.  Place your form in your scanner.
2. Click the Scan button in the design toolbar or choose *Scan Form...* in the File menu.
   The Scan Form dialog box appears.



3. Select Scanner in the Source box.
4. If you are scanning a form that contains color (text or background) and you want the color to be recognized, then select the Scan in color check box.

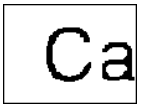
flashFORM will not scan or convert forms in grayscale. The scan must be black and white, line art, 300 dpi, *PCX or *TIF images only.

5. Click Set Up Scanner... to choose a page size and adjust scanning brightness.

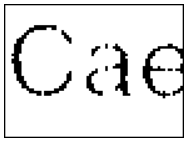
   - Select an option under *Page Size*.
     Select *Letter* if the form is 8.5 by 11 inches.
     Select *Legal* if the form is 8.5 by 14 inches.
     Select *A4* if the form is 21 by 29.7 centimeters (European).
   - Select how light or dark the scanned image will be under *Brightness.*
     Select *Lighten* if the form has very thick or run-together text, or if the background is smudged, shaded, or colored.
     Select *Normal* if the form has crisp, black text and objects are on a white background.
     Select *Darken* if the form has very thin or broken text such as a poor- quality fax or a copy of a copy.

Text on a shaded background. Select *Auto (AccuPage).*

Thick, dark text. Select Lighten



Crisp, black text. Select Normal.



Thin, broken text. Select Darken.

6. Click OK to return to the Scan Form dialog box.
7. Select an option in the Orientation drop-down list.
   - Select Auto to have flashFORM determine orientation automatically.
   - Select Portrait for a vertically oriented page.
   - Select Landscape for a horizontally oriented page.
   - Select Flipped to automatically rotate a portrait page 180 degrees during the scan.
   - Select Flipscape to automatically rotate a landscape page 180 degrees during the scan.

The *Flipped* and *Flipscape* options are useful for scanning pages in a book that needs to be turned upside down or sideways.

8. Select import options under the Settings options.

    - Select Auto Form Design to use Logical Form Recognition in order to recognize text and fillable fields in the form.
    - This gives you full control over a form's design.
    - Deselect Auto Form Design to scan a form without recognizing form design. Text and fillable fields are not recognized. This is useful if you just want to print or mail a form, or if the form is of such poor quality that it would cause recognition problems.
    - Select Auto Form Straightening to have flashFORM automatically straighten a crooked page. This is useful if you scan a page in a large, unevenly cut, or thick document that is difficult to position correctly.

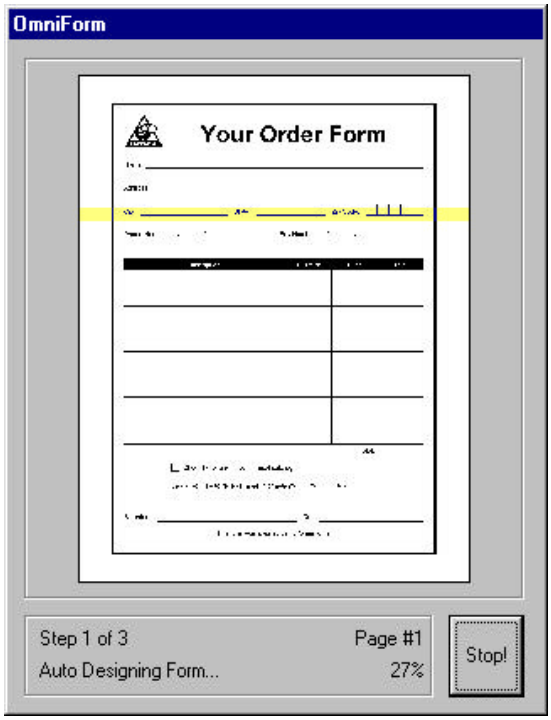
    Select Add Page(s) to Current Form to make the newly scanned page the next page in the current form.
    This option is only available if a form is open.

9. Click Options... in the Scan Form dialog box and then click the Recognition tab to set recognition options for your form.

    - Select Allow Multiple Languages if you have a form with multiple languages and you want flashFORM to recognize more than one language. This setting does not affect the language setting in the International tab. Do not select this setting for a single language form because optical character recognition (OCR) may not be as efficient.
    - Select Find Calculations automatically if your form has calculations and you want flashFORM to recognize the calculations.
    - Select Find Hyperlinks automatically if your form contains hyperlinks and you want flashFORM to recognize the hyperlinks. This option is only available if you are importing a form.
    - Select Detect paper color automatically if your form's background has color and you want flashFORM to recognize the color during OCR. If you deselect this option, the form's background will be detected as white.

- Select Show Proofreader after recognition to open the Proofreader After your form has been recognized. See " Proofing a Form" for more information.
- Click *Font Mapping...* to open the Font Mapping dialog box. In this dialog box you select options to retain the font characteristics of your form during OCR.
  Select the fonts you want mapped to each font type and click *OK* when you are done.

10. Click Options... in the Scan Form dialog box and then click the International tab to make sure the appropriate language is selected. If you need to change the language for your new form, select an option in the Language drop-down list.
    See "International Settings" for more information on international options.
    Click OK to return to the Scan Form dialog box.
11. Click OK in the Scan Form dialog box to begin scanning.
    flashFORM scans the form. The flashFORM window displays the scanning, designing, and straightening progress if you selected those options.
    If your scanner does not allow you to stop the scanning process, then the Stop button will be grayed out.



How your form appears depends on whether or not you chose Auto Form Design in the Scan Form dialog box.

12. Click the Save button in the design toolbar or choose Save... in the File menu to name and save your file.

Color forms generally use more memory than black-and-white forms. If you are scanning a color form and are concerned about the amount of memory you might use, do not save your color form image with the file. Choose *Save As...* in the file menu, name your file, and deselect *Save original form(s) with form file*. Click *Save* to save your file.

If you have selected *Show Proofreader after recognition*, the Proofreader window appears to the left of the main window. For more information, please see "Proofing a Form" .

13. Begin to edit or fill your form.

See "Designing a Form," for detailed information on defining, moving, resizing, and creating fields, as well as other design functions

See "Filling a Form," for detailed information on the kinds of fields you may find on a form and how to fill them.

Importing an Image File

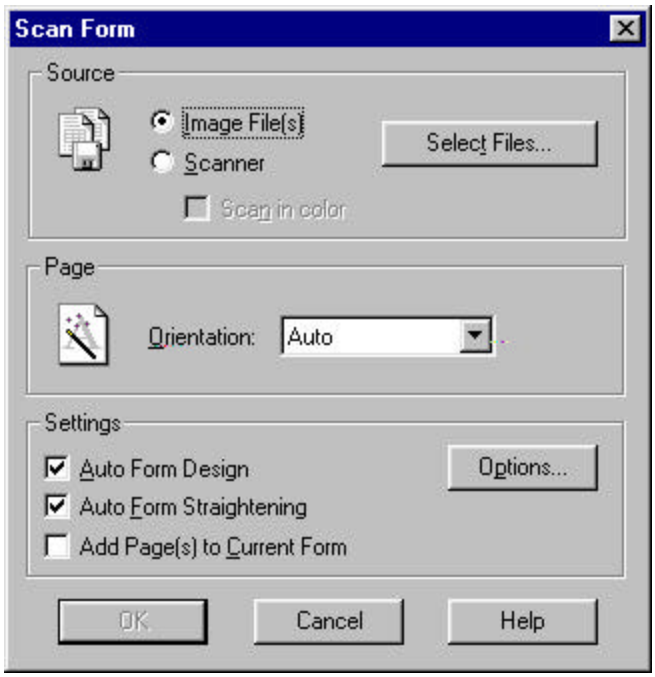
This section describes how to use the *Scan Form...* command to import an image file as a recognized flashFORM form. You can also use the Form Assistant dialog box to import a form. See " Using Form Assistant".

flashFORM can import and recognize black-and-white and 24-bit color forms in either PCX or TIFF format. Image resolution must be 200, 300, or 400 dots per inch (dpi) for black-and-white forms, and 300 dpi for color forms. If you have a fax modem, for example, you can receive a faxed form and use the fax program's software to save the file in PCX or TIFF format. flashFORM offers the same import options for image files as it does for scanned forms.

flashFORM automatically detects color/black-and-white forms when processing an image file.

To Import an image file as a form:

1.  Click the Scan button in the design toolbar or choose Scan Form... in the File menu.
   The Scan Form dialog box appears.
2. Select Image File(s) in the Source box to recognize a form in a supported image format.



3. Click Select Files.

The Select Files dialog box appears.

- Locate and select a file. This could be a form created in another program or one received as a fax file.
- Click Add File to add the file to the Files to Process list box.
- Click OK to return to the Scan Form dialog box when you are done.

4. Follow steps 5 through 8 in the preceding section, "To scan a paper form:"
5. Click OK.
   flashFORM imports the form. The flashFORM window displays the scanning, designing, and straightening progress if you have selected these options.

How your form appears depends on whether you chose to have flashFORM design the form during import.

6.  Click the Save button in the design toolbar or choose Save... in the File menu to name and save your file.

7. If you have selected Show Proofreader after recognition, the Proofreader window appears to the left of the main window. For more information, please see " Proofing a Form".

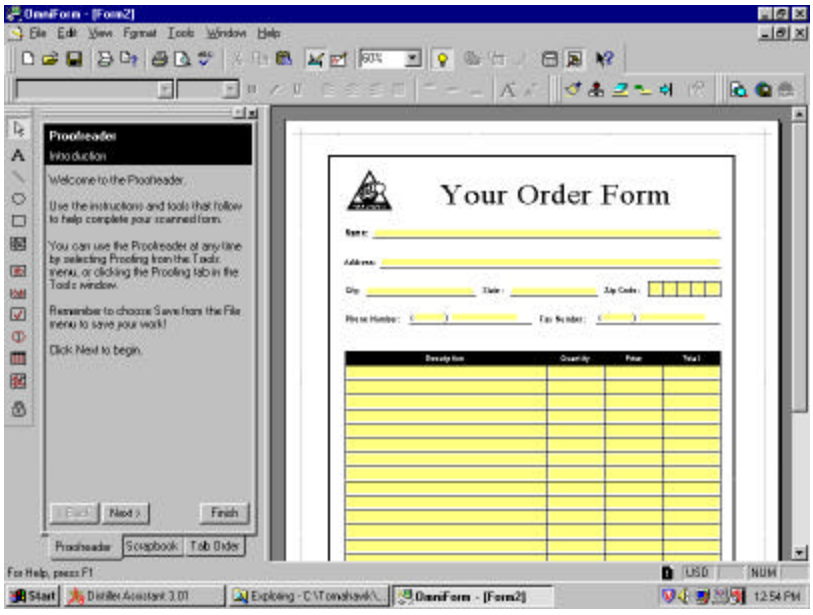
8. Begin to fill or edit your form.

See "Designing a Form," for detailed information on defining, moving, resizing, and creating fields, as well as other design functions.

See "Filling a Form," for detailed information on the kinds of fields you may find on a form and how to fill them.

Proofing a Form

After you scan or import an image file, you can use the Proofreader option to make improvements to your form. If you have selected *Show Proofreader after recognition*, the Proofreader window appears to the left of the main window immediately after you scan or import a form.



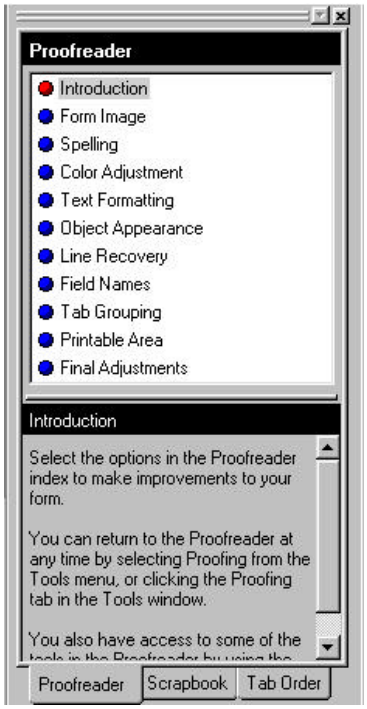
If the Proofreader does not appear, choose *Proofreader* in the Tools menu.

If you do not want the Proofreader window to appear, you can turn it off. Choose *Options...* in the Tools menu and click the *Recognition* tab. In the *Recognition* tab, deselect *Show Proofreader after recognition*.

To begin proofing:

1. Click Next> in the Proofreader window and follow all instructions in the panels that appear.
2. Click Finish to display the Proofreader Index panel.

   The following Proofreader window appears



Proofreader Index panel: The red bullet indicates what will be displayed in the Proofreader Instruction panel.

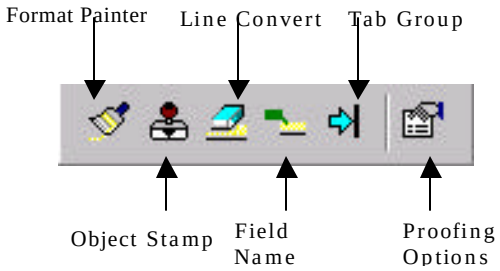
Proofreader Instruction panel: This panel displays all the options in the Proofreader.

This window displays all the options in the Proofreader. Click a bulleted topic in the Proofreader Index panel to display that section in the Proofreader Instruction panel.

 To close the Proofreader window, click the Tools button in the design toolbar. Or, click the X button in the upper-right corner of the Proofreader window.

The Proofing Toolbar

Use the proofing toolbar to edit your form. To view the proofing toolbar, select Toolbars in the View menu and then select Proofing in the drop-down menu. Or, click the Toolbar button in the Final Adjustments Instruction panel.



If you would like to keep this toolbar on your desktop, see " Customizing Toolbars" for more information. See the online help or the panels in the Proofreader for more information about how to use this toolbar.

Filling a Form

This section describes how to fill a form. You can also use the Form Assistant dialog box to fill a form. See " Using Form Assistant".

To fill a form:

1.  If you have a form open and are in design view, click the Fill button in the design toolbar or choose *Fill* in the View menu.
2. Click in a field to place the cursor in the first field.
3. Type the information you want to enter.
4. Press the Tab key to move to the next field.
   Press Shift-Tab to move to the previous field.
5. Continue to fill fields in this way.

See "Filling a Form," for more information.

Printing a Form

This section describes how to print a form, how to generate an AS/400 overlay file, and how to print to flashFORM (import forms from other applications). You can also use the Form Assistant dialog box to print a form. See "Using Form Assistant".

Before you Print Your Form

Before you print your form, you can use the Page Setup dialog box to select the paper size, margins, orientation, and color. To change the color of your form, see " Adding Color to a Form". You can print forms with different page sizes, margins, orientations (portrait and landscape) and color.

To set up your form for printing:

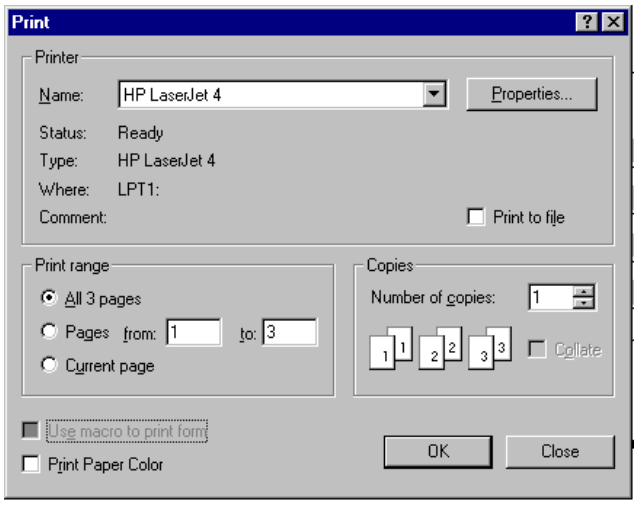
1. Choose Page Setup... in the File menu.

The Page Setup dialog box appears.

2. In the Page Setup dialog box select/fill in your options for Paper, Orientation and Margins.
3. Select an option in the Apply to drop-down list.
    - Select *Current page only* to have your selections apply to only the current page.
    - Select *Current page forward* to have your selections apply to the current page of your form and all subsequent pages.
    - Select *All pages* to have your selections apply to all the pages of your form.
4. Click *OK* to apply your options and close the dialog box.

To Print a blank Form

1.  Click the Print button in the design toolbar or choose *Print...* in the File menu. This is how the dialog box look.



See "Generating an AS/400 form overlay file ("macro")"

2. Select Print Paper Color if you want to print the background color of your form.

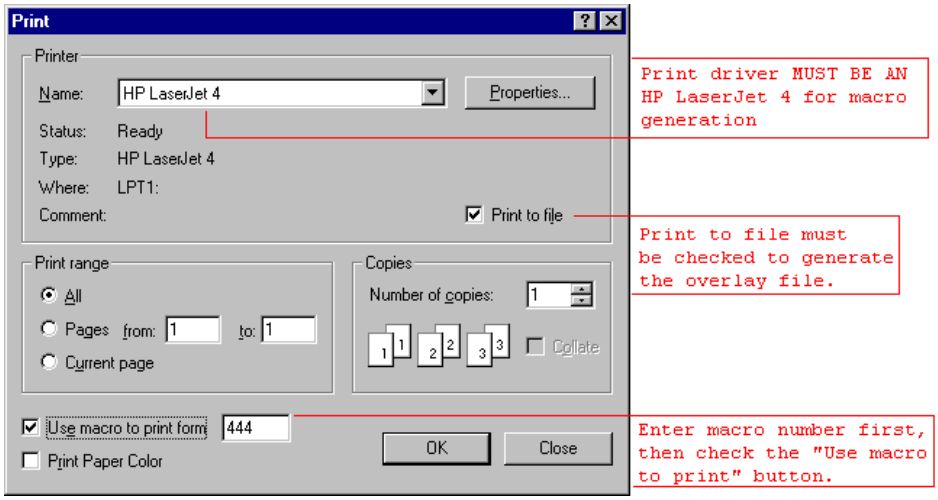
3. Select any other print options desired.

4. Click *OK*.
   flashFORM prints your form with the selected settings.The Print to File dialog box appears after you click *OK* if you have selected the *Print to file* option in the Print dialog box. Select a location for the file, type a file name in the *File name* text box, and click *OK*.

Generating an AS/400 form overlay ("macro")

This is a very important step to integrating your form to the AS/400 environment. Once your form is designed, you'll need to generate an AS/40 form overlay ("macro") which will be dragged and dropped to your AS/400 FORMFMG directory. See the flashFORM400 User's Guide on Moving designed forms to the AS/400 in the second section on AS/400 electronic form integration, once you've generated your overlay macro.

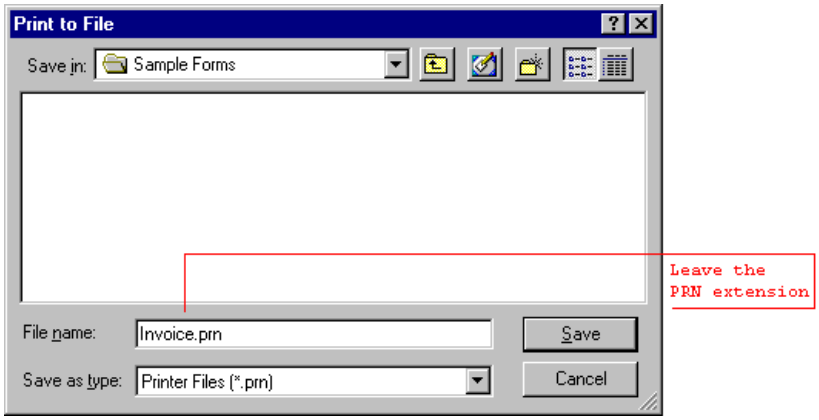
1.  Click the Print button in the design toolbar or choose *Print...* in the File menu. The dialogue box is the same as the Print dialogue above, as shown below.



2. You must use THE ***HP LaserJet 4*** driver for the Printer selection. This is a standard driver included with all the Windows operating systems.

3. Check the Print to file button.

You will be prompted for the name and path of the file.



Make sure the *.PRN extension stays with the name and path or the MacMaker will not be able to convert the file to a macro.

4. Enter any desired macro number between 1 and 5 digits long.

5. Click ok, and flashFORM will generate an overlay file to the desired location.

See "Moving Electronic Forms to the AS/400" in the second section on AS/400 electronic form integration, once you've generated your overlay macro.

To print your macro to the printer versus to an overlay file

Printing a macro is useful to see what the actual macro form looks like versus the regular Windows driver. I you print using the regular Windows driver, the form could alter somewhat from the overlay macro. The reason is flashFORM uses some compression and font decision algorithms to make a compressed file for AS/400 overlay operations.

1. Launch flashFORM and open the form that you want to print.
2. Choose *Print...* in the File menu to open the Print dialog box.
3. Set your Printer Driver to be a LaserJet 4
4. Select Use macro to print form.
5. Do not select the Print to file button
6. Select any other options that you want and click *OK.* This output will replicate exactly what the AS/400 form will look like.

Generating an AS/400 field mapping file

flashFORM400 on the AS/400 side gives you screens to map your AS/400 spool data to your designed form. This field mapping file is an optional method to drag 'n' drop selected portions of spool data to selected locations on the designed form. Before choosing this approach it is recommended to review the AS/400 Chapter on Configure Data Map, section "Two Mapping Techniques" for more information on which mapping approach will be best for your application.

This field file contains fields inputted in your form design, which allows you to re-map AS/400 spool file data to the inputted field locations (yellow boxes) on the form. See "**Creating AS/400** Field Mapping Fields" on page 68 for information on how to input fields. flashFORM400 will read this file for instructions to map the AS/400 spool file data. The PCL macro overlay file will join the field mapping in the FORMFMG folder.

Steps to create the AS/400 field mapping file:

1. This is a simple operation. When you generate the AS/400 form overlay file (shown above), the field mapping file is automatically created and saved in the same location as the macro with an *.fld extension.

Importing an Existing Electronic Form

flashFORM has a useful feature to import documents from other programs within Windows. Using Print to OmniForm driver, you can print an electronic form (created from any Windows application) to flashFORM. flashFORM adds the OmniForm driver as a printer to the Windows Printer Group during installation. If

you do not have this feature, reinstall flashFORM and make sure that the *Print to OmniForm Support* option is selected in the Additional Components dialog box. Then, use the following instructions:

To print your form to flashFORM:

1. Open the form in the application in which it was created.
   Remove any colored or shaded background from the form.
2. Choose *Print* in the File menu.
3. Select *OmniForm* in the *Name* drop-down list.
4. Click OK.

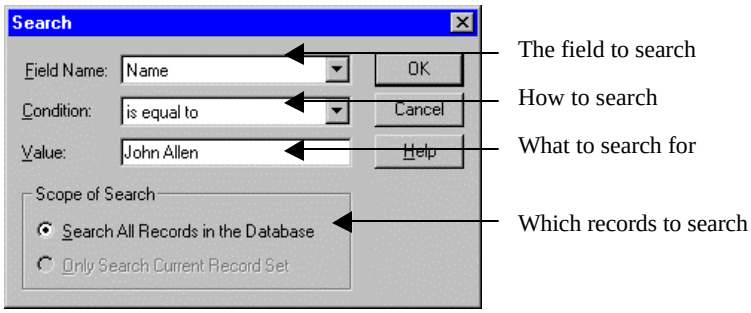
flashFORM automatically scans in the form. The flashFORM window displays the scanning progress of the form. Your form opens in flashFORM. To make any corrections to the form, see "Designing a Form."

Searching a Form

This section describes how to perform a search on a form. You can also use the Form Assistant dialog box to search a form. See " Using Form Assistant".

To search a form:

1.  If you have a form open and are in design view, click the Fill button in the design toolbar or choose *Fill* in the View menu.
2. Choose *Search...* in the Records menu.
   The Search dialog box appears



3. Select the field to search in the *Field Name* drop-down list.
4. Select how to search for the information in the *Condition* drop-down list.
5. Type the information to find in the *Value* text box.

6. Select which records to search.
   - Select *Search All Records in the Database* to search all records in the current database.
   - Select *Only Search Current Record Set* to search the current found set of records. This option is only available after a search.
7. Click *OK*.
   flashFORM searches the records and finds any that contain the information you specified.

See " Searching Record for Information" for detailed information on searching.

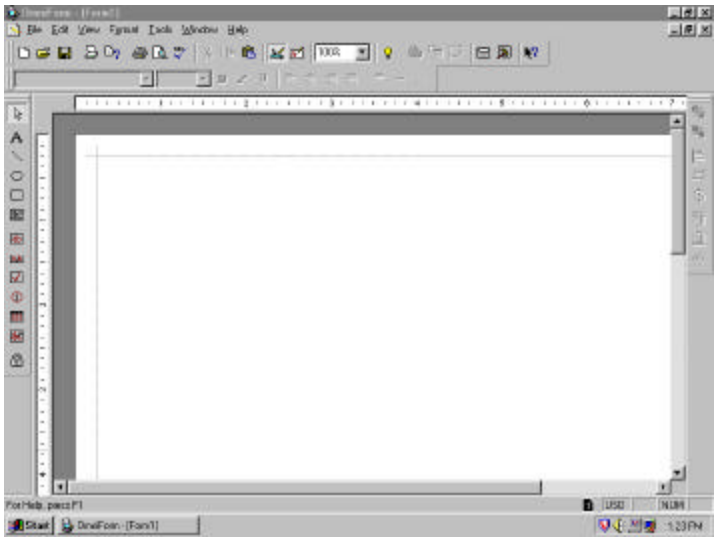
Creating a New Form

This section describes how to create a new form. You can also use the Form Assistant dialog box to create a new form. See " Using Form Assistant".

See "Designing a Form" for detailed information on form design.

To create a new form:

1.  Click the New button in the design toolbar or choose *New* in the File menu.
   flashFORM opens a blank form in design view.



2. Use the design view tools to create fields and objects on your new form.

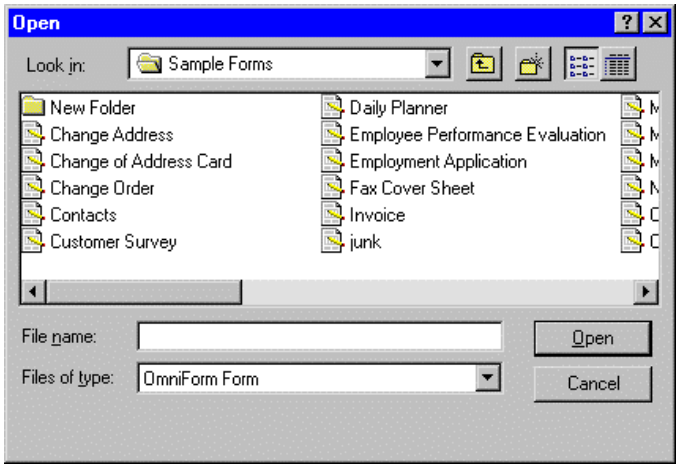
Opening a Form

This section describes how to open a form.

To open a form:

1. Click *Start* in the Taskbar and choose *Programs* ▸ *FORMation* ▸ *flashFORM 5.0*. Click *Cancel* in the Form Assistant dialog box if it appears.

2.  Click the Open button in the design toolbar or choose *Open...* in the File menu.
   The Open dialog box appears.



3. Make sure *flashFORM Form* is selected in the *Files of type* drop-down list.

4. Locate and select a file.

5. Click *Open*.

The form opens in the last view in which it was saved: design or fill. You can switch the view if you wish.

6.  If you are in design view and want to switch to fill view, click the fill view button on the design toolbar. See "Designing a Form," for detailed information on defining, moving, resizing, and creating fields, as well as other design functions.

7.  If you are in fill view and want to switch to design view, click the design view button on the fill toolbar. See "Filling a Form," for detailed information on the kinds of fields you may find on a form and how to fill them.

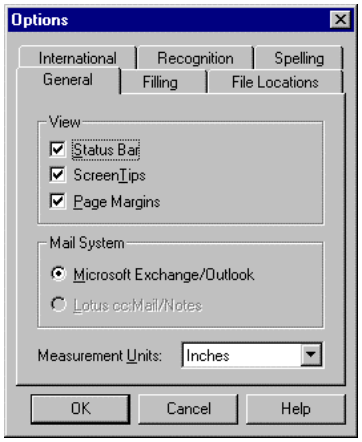
Mailing a Form

This section describes how to select a mail system and mail a form from flashFORM.

You must have either Lotus cc:Mail (2.0 and above)/Lotus Notes or Microsoft Exchange/Outlook installed to mail a form.

To select a mail system:

1. Choose Options... in the Tools menu in either fill or design view. The Options dialog box appears.



2. Click the General tab and select an option under Mail System.
   Select either Lotus cc: Mail/Lotus Notes or Microsoft Exchange/ Outlook. flashFORM selects your installed mail application by default if you have only one installed.

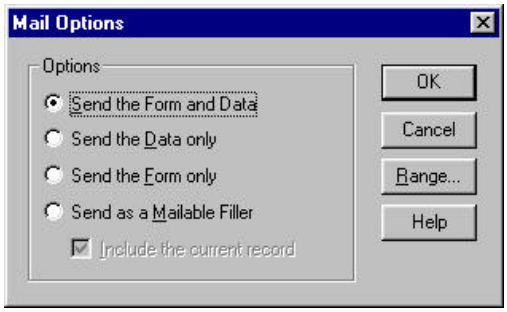
3. Click OK.

To send a form:

1. Open or scan in the form that you want to send.

2.  Click either the design or fill view button in the design toolbar. (You can also choose Design or Fill in the View menu.) In design view you have two options: you can send only the form or send the form as a mailable filler. In fill view you have several options: you can send only the form, only the data, form and data, or send the form as a mailable filler.

3. Choose *Send* in the File menu.
   The following Mail Options dialog box is for fill view.

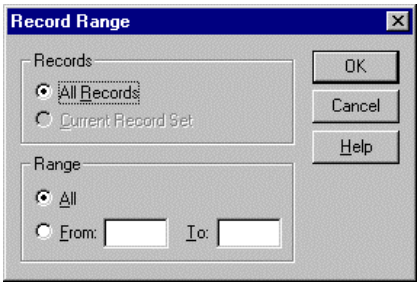


4. Select an option.

   - Select *Send the Form and Data* to send all text, graphics, and any information in fillable fields. This option is available only in fill view.
   - Select *Send the Data only* to send just the information you have typed in the fillable fields. This option is available only in fill view.
   - Select *Send the Form only* to send the form as it would appear in design view, without any information in the fillable fields.
   - Select *Send as a Mailable Filler* to send the current form and have it filled out by a user who does not have flashFORM.
   - Select *Include the current record* to include the current record that you have open. This option is available only in fill view.

5. If you are in design view or you are sending a mailable filler, proceed to step 8.

6. If you are in fill view and not sending a mailable filler, you can also specify a range of records to send.
   Click Range... to open the Record Range dialog box and specify a range of records to send.



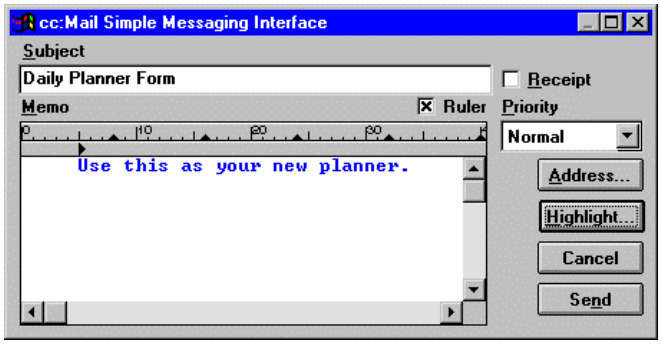
If you do not specify a range, flashFORM will send all records by default.

7. Specify a range.

- Select *All Records* to send all records in the current database.
- Select *Current Record Set* to send the current found set of records. This option is available after a search.
  Type the first record number to send in the *From* text box and the last record number to send in the *To* text box to specify a range of records.
- Click *OK* to return to the Mail Options dialog box.

8. Click *OK* in the Mail Options dialog box.
   A dialog box with your mail application program (either Lotus CC: Mail/Notes or Microsoft Exchange/Outlook) appears.

9. Enter the information in your mail program's dialog box. Refer to your mail program's documentation for more information.
   The following box shows the Lotus CC: Mail application dialog box.



10. Click *Send* to mail your message and form as specified.

Adding a Routing Slip

Microsoft Exchange/Outlook users can add a routing slip to mail. See the Microsoft Exchange/Outlook documentation for detailed information.

To add a routing slip:

1. Open or scan in the form to send.
2. Choose *Add Routing Slip...* in the File menu. The Add Routing Slip dialog box appears.
3. Select the recipients and other routing information.
4. You can either send the document now or later.
   - Click *Route* to route the document.
   - Click *Add Slip* to close the dialog box without routing the form.

Saving a Form

This section explains how to save your form and how to use the *Save As...* and *Save As Mailable Filler...* commands. You can save your form in a variety of formats.

To save your form:

1.  Click the Save button or choose *Save* in the File menu. You can save your form at any time in either fill or design view.

flashFORM saves your form in the default format: flashFORM Form.

To save your form in various formats:

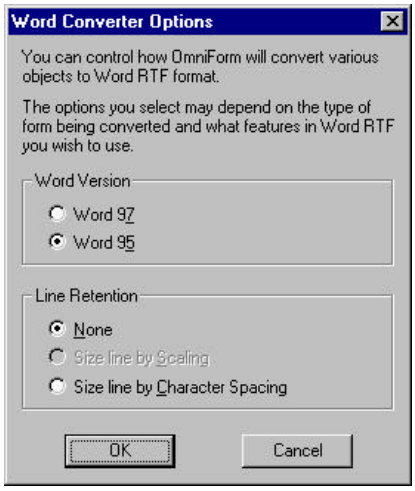
1. Choose *Save As...* in the File menu.
   The Save As dialog box appears.
2. Select an option from the *Save as type* drop-down list.
   - Select *flashFORM Form* to save to flashFORM's default format.
   - Select *flashFORM 3.0 Form* to save to flashFORM's 3.0 version.
   - Select *flashFORM 2.0 Form* to save to flashFORM's 2.0 version.

- This is useful if you have users with a 16-bit Filler. You save your form in 2.0 so that users of the 16-bit Filler can access the form. However, some features available in flashFORM 5.0 may not be displayed or printed in the 2.0 version.
- Select *OFML 2.0* to save to FORMation mg's flashFORM Markup Language (OFML), version 2.0.
- Select *OFML 1.0* to save to FORMation mg's flashFORM Markup Language (OFML), version 1.0. OFML 1.0 is compatible to flashFORM Internet Publisher, version 2.02.
- Select *HTML* to save the form to Hyper Text Markup Language (HTML).
- You can see how a form looks in HTML before you convert it to HTML. Open a form and choose *Preview in Browser...* in the File menu. The Preview in Browser dialog box appears. Select a browser and click *Preview*. Your form appears in the selected browser.
- Select *PDF* to save to a Portable Document Format.
- Select *Microsoft Word (RTF)* to save the form in the Microsoft Word rich text format.

3. Type the name of your file in the *File name* text box if necessary.
4. Click *Add to PageKeeper* if you would like to link the saved form in PageKeeper's default folder. This setting only appears if you have PageKeeper installed on your system.
5. Depending on the *Save as type* option you have selected, do one of the following:
   - If you have selected *flashFORM Form*, *flashFORM 3.0 Form*, *flashFORM 2.0 Form*, *OFML 2.0*, or *OFML 1.0*, click *Save* and flashFORM saves the form to your chosen format.
   - If you have selected *Microsoft Word (RTF*), click *Options...* and proceed to page 45
   - If you have selected *HTML*, click *Options...* and proceed to page 46.
   - If you have selected *PDF*, click *Options...* and proceed to page 47.

To set your options for Word conversion:

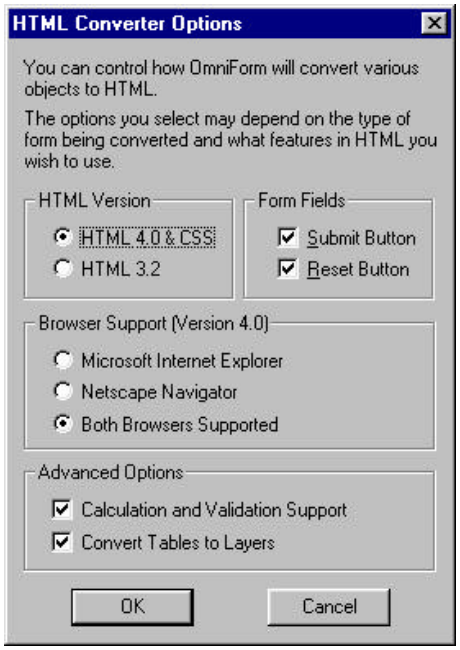
1. Select an option under *Word Version*.



2. Select an option under *Line Retention*.
   - Select *None* if you do not want the converter to change the text to fit the lines.
   - Select *Size line by Scaling* (Word 97 only) to change the width of the characters to fit the lines.
   - Select *Size line by Character Spacing* in order to change the amount of space between the characters to fit the lines.
3. Click *OK* to close the dialog box.
4. Click *Save* to save your form to your chosen format. flashFORM converts your form to the Microsoft Word format. Open the converted form in Microsoft Word and select *Page Layout* in the View menu. You can now modify the form's design. To fill in the form's fields, you must protect your form. To do so, first select *Protect Document* in the Tools menu, and then select *Forms* in the *Protect Document For* text box. If you decide to modify the protected form's design, you must select *Unprotect Document* in the Tools menu before you can modify the form. Please refer to your Microsoft Word documentation for more information.

To set your options for HTML conversion:

1. Select an option under *HTML Version*.



- Select *HTML Version 4.0 & CSS* to support HTML version 4.0 and cascading style sheets, which provide the exact placement of objects on a form.
- Select *HTML Version 3.2* to support HTML versions earlier than 4.0.

2. In the option under *Form Fields,* select whether you want to add a submit button, a reset button, or both.
   - Select *Submit Button* to add a submit button to the bottom of your form. This will allow you to submit your form to a Web address after your form has been converted. To do so, first type the Web address in the *Submission* tab of the Properties dialog box. See " Setting Submission Information" on page 136 for more information.
   - Select *Reset Button* to add a reset button to the bottom of your form. This will allow you to clear the information from the form's fields after your form has been converted to HTML.
3. If you have selected HTML *Version 4.0 & CSS*, select an option under *Browser Support (Version 4.0)*. You can select *Microsoft Internet Explorer* or *Netscape Navigator*.
   You can also choose to have both browsers supported. If you select *Both Browsers Supported* the file will contain HTML for both browsers and will double the file size, increase download times and decrease performance.

4. Select Calculation and Validation Support if you want calculations, validation, and field formatting options to be converted.

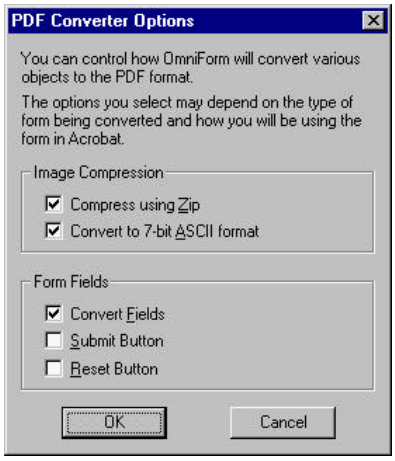
5. Select Convert Tables to Layers if you have tables and other objects on your form and you want to maintain the position of the objects.

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

7. Click *Save* to save your form to your chosen format.
   flashFORM converts your form to HTML with your selected options.

To set your options for PDF conversion:

1. Select an option under the *Image Compression* box.



2. Select *Compress using Zip* if your file is large and you want to compress it. If you have selected the compression option, you can also select the *Convert to 7-bit ASCII format*. This option converts your compressed file back to an ASCII format.

3. In the option under *Form Fields,* select whether you want your form's fields converted and if you want to add a submit button, a reset button, or both.

   - Select *Convert Fields* so that you will be able to fill all the fields on the form after your form has been converted to a PDF. The form retains the field's definition. For example, if the form's field has been defined as a text field, you will be able to fill that field with text. Likewise, if the form's field has been defined as a check box, you will be able to fill that box with a check mark.

   - Select *Submit Button* to add a submit button to the bottom of your form. This will allow you to submit your form to a Web address after your form has been converted. To do so, first

type the Web address in the *Submission* tab of the Properties dialog box. See " Setting Submission Information" on page 136 for more information.

- Select *Reset Button* to add a reset button to the bottom of your form. This will allow you to clear the information from the form's fields after your form has been converted to a PDF.

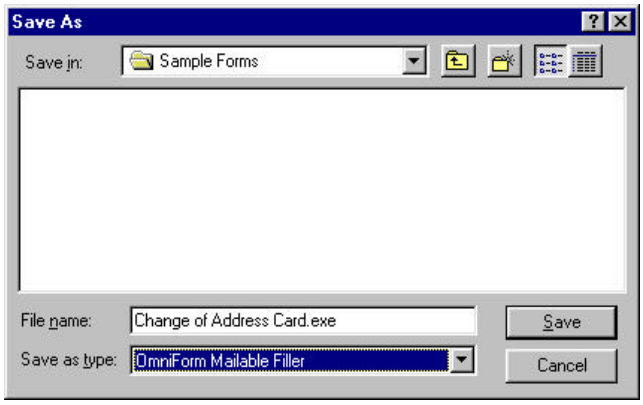
4. Click *OK* to close the dialog box.
5. Click *Save* to save your form to your chosen format. flashFORM converts your form to a PDF with your selected options.

To save as a Mailable Filler:

The mailable filler option is a *limited* function filler that allows other users, who do not have flashFORM installed, to receive and fill out flashFORM forms. This option

is also a limited license usage, that is, you can use it for up to 100 licenses (and each license can be used once for a specific form).

1. Choose Save As Mailable Filler... in the File menu. The Save As dialog box appears.



2. Select flashFORM Mailable Filler in the Save as type text box.
3. Type the name of your file in the File name text box if necessary.
4. Click Save. flashFORM saves the form as a mailable filler. You can then send it electronically to a user to fill out and have the user return it to you in the same manner.

Publishing a Form to the Web

flashFORM can easily publish your forms on intranets and to the Internet.

To publish forms to the Web you will need Microsoft's Web Publishing Wizard installed on your system. If your system does not have Microsoft Web Publishing Wizard installed, you can obtain this Wizard by 1) installing the full application of Internet Explorer 4.0 and above, 2) downloading the Web Publishing Wizard from Microsoft's Web site, or 3) installing the Web Publishing Wizard from the Windows 98 installation CD if you are running Windows 98.

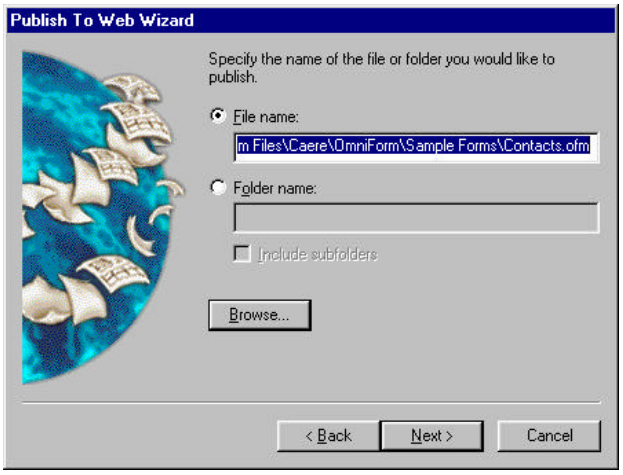
To publish a form to the Web:

1. Do one of the following:
   - Scan a paper form
     See "Scanning a Paper Form".
   - Import an existing PCX or TIFF form file.
     See "Importing an Image File".
   - Open an existing flashFORM (OFM) or flashFORM Markup Language (OFML) form. See " Opening a Form".
   - Create your own design.
     See "Designing a Form."
2. After you have your form ready to publish, choose *Publish To Web...* in the File menu. The following dialog box appears.

3. Select whether you want to publish the current form or previously saved forms.
   - Select *Publish the current form* to publish the form you have open.
   - Select *Publish previously saved forms* to publish saved forms.

4. Click *Next*>.

   - If you have selected *Publish the current form*, proceed to step .
   - If you have selected *Publish previously saved forms*, enter the file name or folder name in the dialog box that appears and proceed to step 8.



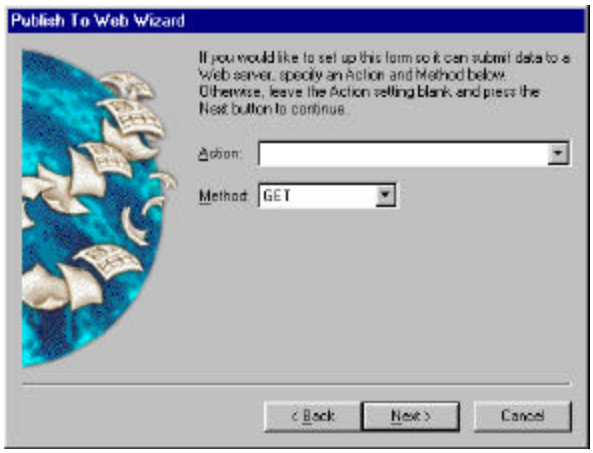
   - If you have entered a folder name, all files in that folder will be published to the Web. If you have also selected *Include subfolders*, all subfolders in that folder will be published to the Web.

5. Select the type of file you would like to publish in the dialog box that appears.

You can select *flashFORM Form*, *flashFORM 3.0*, *flashFORM 2.0*, *OFML 2.0*, *OFML 1.0*, *HTML*, *PDF* or *Microsoft Word (RTF)*.

- If you have chosen *HTML*, *PDF*, or *Microsoft Word (RTF)*, click *Options...* to set specific formatting options.
- If you have selected flashFORM Form, flashFORM 3.0, flashFORM 2.0, or Microsoft Word (RTF), proceed to step .
- If you have selected *OFML 2.0*, *OFML 1.0*, *HTML* or *PDF*, click *Next>*, and proceed to step .

6. Enter an action (that is, where your data will be sent after it is submitted) in the *Action* text box.
   It will be saved in the drop-down list for selection the next time you open this dialog box.

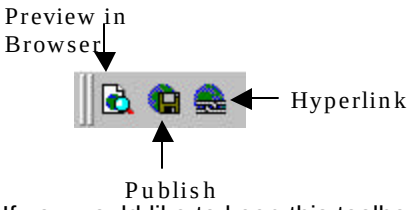


- The action could point to a Common Gateway Interface (CGI) script on a Web server; for example:
  http://www.formationmg.com/location-bin/script.pl
  This would tell flashFORM to submit data to a script on FORMation mg's Web server.
- The action could also be an e-mail address; for example:
  mailto:name.othername@company.com
  The form data would be submitted to that e-mail address.

7. Select a means of submitting data in the *Method* drop-down list.
   - Select *GET* to append text to the Universal Resource Locator (URL) specified in the Action drop-down list.
   - Select *POST* to notify the Web server to open the CGI application and pass the data to it.
8. Click *Next>*. Microsoft's Web Publishing Wizard appears. Follow all the dialog boxes in this wizard to publish your form to the Web.

The Web Toolbar

Use the web toolbar to preview your form in a browser, to access the Publish Wizard, and to access the Hyperlink options. To view the web toolbar, select *Toolbars* in the View menu and then select *Web* in the drop-down menu.



If you would like to keep this toolbar on your desktop, see " Customizing Toolbars" on for more information. See the online help for more information about each button in this toolbar.

flashFORM Internet Filler

After you publish a form to an intranet or the Internet, you can have users fill in your form by using flashFORM Internet Filler. The Internet Filler is an easy-to- use version of flashFORM that has a fill view but no design view. Therefore, Filler users cannot edit the form's design in any way.

flashFORM Internet Filler can operate within a Web browser or on its own. When it runs within a browser, you can hyperlink to an OFML form and fill it out online. When it runs on its own, you can work with OFML forms off-line.

Installing flashFORM Internet Filler

flashFORM Internet Filler is included on your CD-ROM.

Close all applications — including screen savers, virus checkers, and mail applications — before installing flashFORM.

To install flashFORM Internet Filler:

1. Start Windows.
2. Insert flashFORM's CD-ROM in the CD-ROM drive.
3. Click *Start* in the Taskbar and choose *Programs* ▸ *Windows Explorer* (if you have Windows 95 or 98) or *NT Explorer* (if you have Windows NT).
4. Locate *InetFill* on the CD-ROM.
5. Select *Oif32.exe* (to install the 32-bit version) or *Oif16.exe* (to install the 16-bit version).
6. Follow all the instructions in the dialog boxes that appear.
   flashFORM Internet Filler installs by default to the location `C:\Program`

`Files\flashFORM Internet Filler`. You can select another location if you wish.

See "Filling a Form," for more information about filling a form.

Designing a Form

This chapter discusses how to design new forms and edit existing ones in flashFORM. flashFORM contains numerous tools in design view that let you create fields and objects, define calculations, and decide how your form will look.

This chapter contains the following sections:

- The Design Process
- The Design View Window
- The Design View Toolbars
- Creating Objects on a Form
- Defining Objects on a Form
- Changing Object Appearance on a Form
- Editing a Form

The `flashFORM\Sample Forms` folder contains several sample forms that you can use or redesign for your needs.

The Design Process

This section gives a brief overview of how to design a new form. A form can be as simple as you need or as complex as flashFORM allows. Although the steps below are not required, they are recommended.

See " Editing a Form" for information on how you can change existing forms.

To design a new form:

1. Choose *New* in the File menu to open a new, blank form.
2. Choose *Page Setup...* in the File menu.
3. Select page size, orientation, and margins, and click *OK.*
4. Choose *Save As...* in the File menu.
5. Assign a name and location for your form, and then click *OK.*
   Remember to save periodically so you do not lose any work.
6. Use the drawing toolbar to create objects on the form. See "Creating objects on a Form" for more information on creating objects.
7. Choose *Object Definition...* in the Format menu to define the objects that you have created.
   You can assign unique names, filling, and validation properties for each object.
8. Choose *Object Appearance...* in the Format menu to set the new object's appearance if necessary.
   You can set borders, background color, and other properties.
9. Use the font/text toolbar to format both text objects and fillable objects. Text entered in fill view will take on the formatting that you specify in design view.
10. Drag the objects where you want them on the form and use the arrange toolbar to align them.
11. Choose *Tab Order* in the Tools menu to set a logical tabbing order for filling the form when it is in fill view.
12. Test your form in fill view.

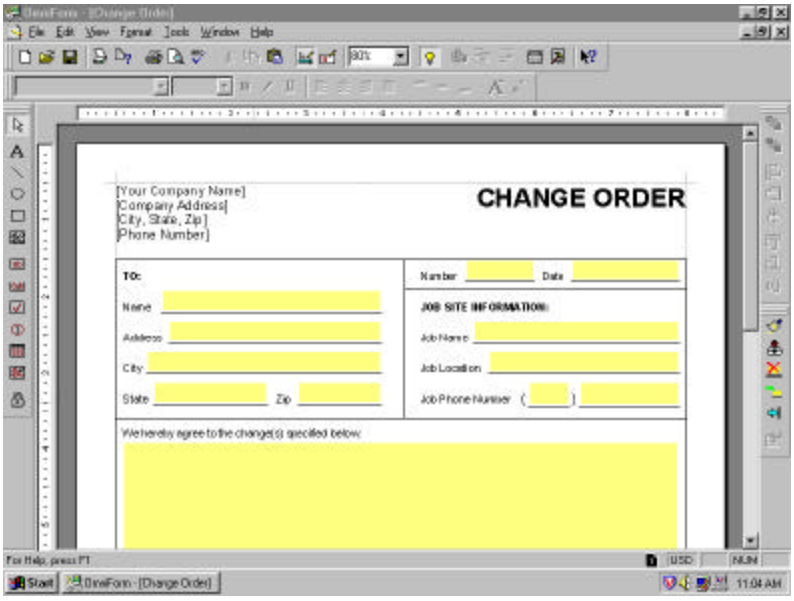
The Design View Window

This section provides an overview of the design view window.

 If a form is open in fill view, click the Design button in the fill toolbar or choose Design in the View menu to switch to design view.

To open a shortcut menu, click the right mouse button and choose Design in this menu.

The design view window (after registration) contains five toolbars and seven menus. If you have not registered your product with FORMation mg, the window will have eight menus, including one for registration.



The design view window also contains the calculation toolbar. Choose Calculation in the Tools menu to display this toolbar.

Use design view to edit and create fields on an existing form or to create an entirely new form.

The Design View Toolbars

This section describes each toolbar in design view and defines its buttons. There are seven toolbars:

- The design toolbar

- The font/text toolbar
- The drawing toolbar
- The arrange toolbar
- The proofing toolbar (See " Proofing a Form" for information on this toolbar and its functions.)
- The calculation toolbar (See "Using Calculations," for information on this toolbar and its functions.)
- The web toolbar (See " The Web Toolbar" for more information about this toolbar and its functions.)

You can drag these toolbars to any other location in the flashFORM window. The toolbars remain where you last positioned them, even when you close and reopen the program.

You can also move the toolbars from a horizontal position to a vertical position. In this case, some of the icons may change. See the specific toolbars for information on which icons may change.

Customizing Toolbars

There are several ways to customize the toolbars.

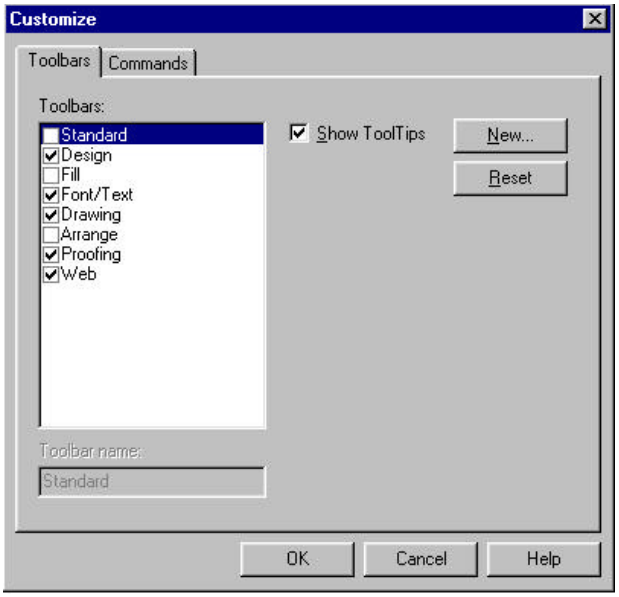
- To move toolbar buttons to other toolbars, simply drag the button you want (by holding down the ALT key and clicking on a button) to the desired location on another toolbar.
- You can toggle the visibility of the toolbars on your desktop by selecting the *Toolbars* command in the View menu. In the popup menu that appears, select the toolbars that you want displayed on your desktop; or, deselect those that you do not want displayed on your desktop.
- You can right-click on the perimeter of the main window to get a shortcut menu for toggling the visibility or customizing the toolbars.
- You can customize the toolbars by using the *Customize...* command in the Tools menu. See the next sections "To customize toolbars using the *Toolbars* tab:" and "To customize toolbars using the *Commands* tab."

To customize toolbars using the *Toolbars* tab:

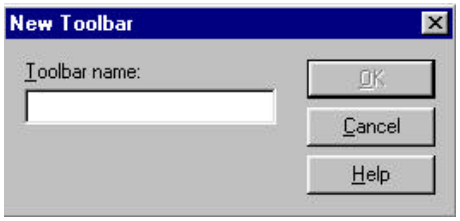
In the *Toolbars* tab, you can:

- select and deselect the toolbars that you want displayed on your desktop,
- select or deselect the *Show ToolTips* option,
- create a new toolbar,
- reset a toolbar to its original state, or
- delete a toolbar that you have created.

1. Choose *Customize...* in the Tools menu. The Customize dialog box appears.



2. Click the Toolbars tab if it is not selected.
3. Select the toolbars that you want displayed on your desktop. Deselect those toolbars that you do not want displayed on your desktop.
4. If you want ToolTips to appear, select the Show ToolTips option. Likewise, if you do not want ToolTips to appear, make sure Show ToolTips is deselected.
5. Click *New* if you want to create a new toolbar. The New Toolbar dialog box appears.



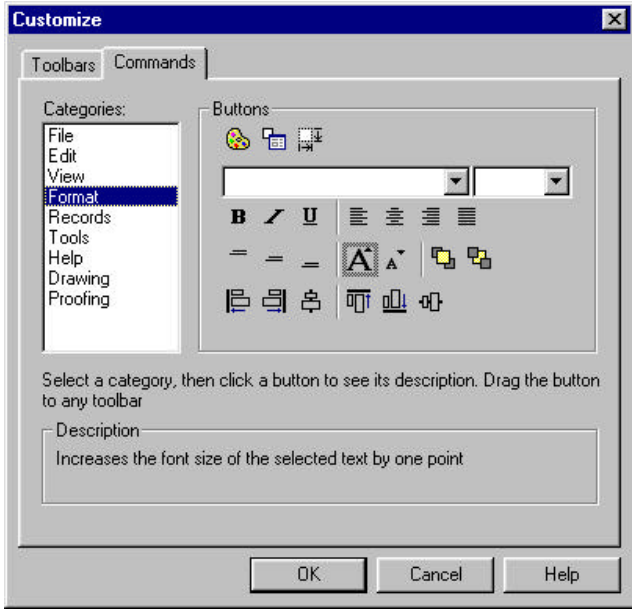
- Type the name of your new toolbar in the *Toolbar name* text box.
- Click *OK* to apply your name.
  Your new toolbar appears on your desktop. If you want, you can drag the new toolbar to another location on your desktop.
- To add buttons to your new toolbar, drag the buttons of other toolbars to your new toolbar.

6. Click *Delete* if you want to delete a toolbar that you have created. Select the toolbar you want to delete in the *Toolbars* list box and then click *Delete*.
7. Click *Reset* if you want to return a toolbar to its original state.
   For example, suppose you have created a new toolbar and have dragged some buttons from the design toolbar. To return the design toolbar to its original state with all its buttons, select the *Design* toolbar in the *Toolbars* window and then select *Reset*.
   The design toolbar will return to its original state.
8. Click *OK* to close the dialog box and apply your selections.

To customize toolbars using the *Commands* tab:

In the *Commands* tab, you can customize the toolbars by selecting a toolbar and then dragging its button or buttons to another toolbar.

1. Choose Customize... in the Tools menu. The Customize dialog box appears.
2. Click the *Commands* tab in the Customize dialog box.



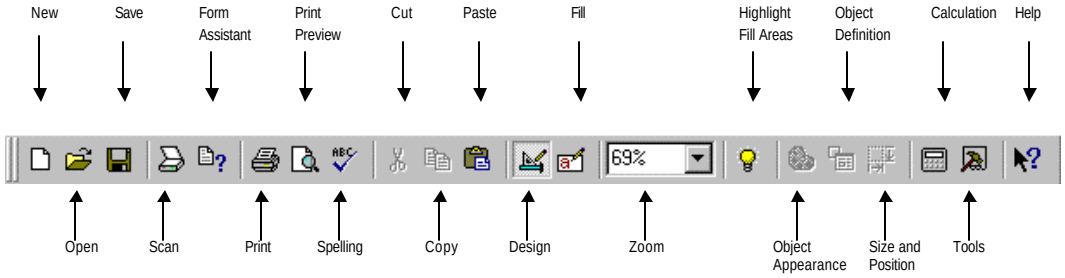
- Select a toolbar from the *Categories* list box. The corresponding buttons for that toolbar are shown in the *Buttons* box.
- Click the button that you want and drag it to another toolbar on your desktop. The button now appears in the other toolbar.
- Keep clicking and dragging buttons to another toolbar until you have finished customizing the toolbar.

3. Click OK to close the dialog box and apply your selections.

The Design Toolbar

Use the design toolbar for basic file operations such as saving and printing. Use it also to define and format the fields you create.

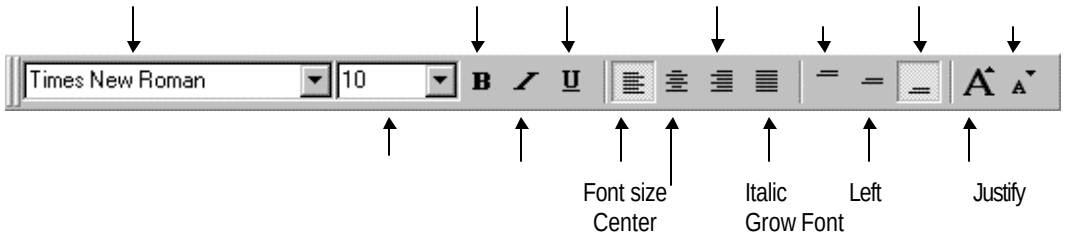
All buttons correspond to menu commands of the same name. Note how the *Zoom* button changes in the vertical position. Refer to the online help for an explanation of each button/menu command.



Zoom button in Vertical position

The Font/Text Toolbar

Use the font/text toolbar to format text. This toolbar is only active when a fill text, comb, comb element, circle text, or table cell object is selected.



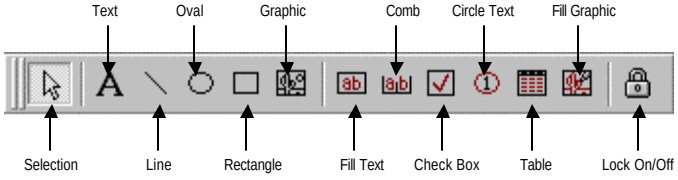
The drop-down lists and buttons correspond to options in the Font or Text dialog boxes (choose *Font...* or *Text...* in the Format menu). Note how the *Font drop-down list* and *Font Size drop-down list* buttons change in vertical position. Each button displays a thumbnail example of how it formats text.

Text entered in fill view displays the formatting that you specify in design view.

Refer to online help for an explanation of each button/menu command. See " Formatting Text" for detailed information on each formatting option.

The Drawing Toolbar

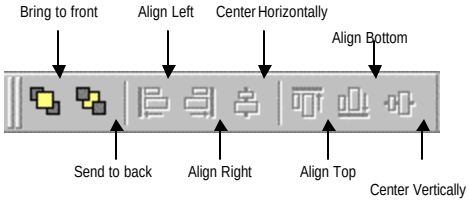
Use the drawing toolbar to create and select objects. See the online help for an explanation of each tool's function. See "Creating Objects on a Form" for detailed information on using the drawing tools.



The Arrange Toolbar

Use the arrange toolbar to arrange and align objects on a form. Refer to the online help for a brief explanation of each button's function. These buttons correspond to the *Align, Bring to Front,* and *Send to Back* commands in the Format menu.

The last six buttons on the toolbar are only active when multiple objects are selected. Each button gives a thumbnail example of how it aligns objects.



Creating Objects on a Form

This section explains how to create objects on your form. You can create AS/400 spool file mapping objects, fillable objects that a user fills in fill view, and non-fillable objects such as lines and rectangles that contribute to a form's design.

This section discusses general creation guidelines and then lists all objects in the same order as they appear in the drawing toolbar. All instructions assume that you are in design view using either a new form or a designed form.

See "Defining Objects on a Form" for information on how to define objects after you create them.

See "Filling a Form," for detailed information on how to fill objects (fields) in fill view.

General Creation Guidelines

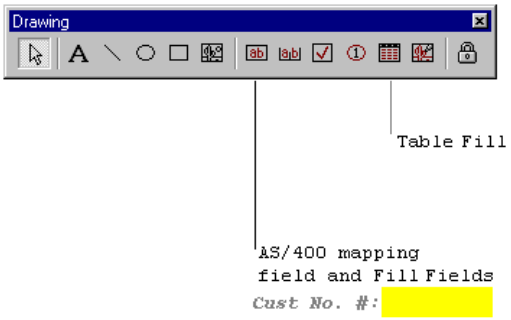
Use the same basic steps to create most objects. Some require more steps as described in the following sections.

To create an object:

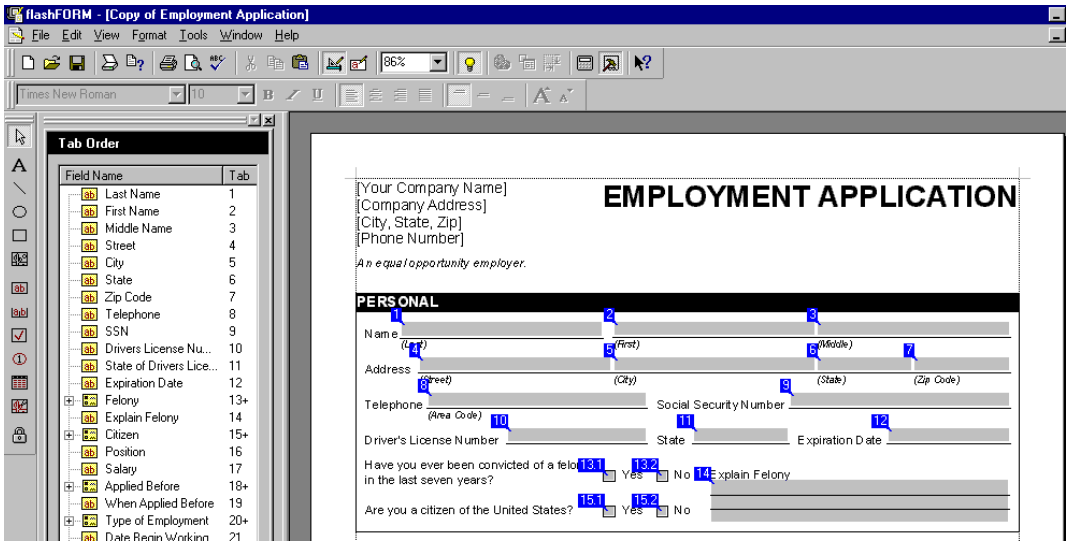
1. Click a tool in the drawing toolbar.
2. Click anywhere on the form to create an object of a default size, or hold down the mouse button and drag the tool to make the object the size that you want.
3. While drawing, hold down the Shift key to:
   - Make a rectangular object a square.
   - Make an oval object a circle.
   - Make a horizontal, vertical, or 45-degree angle line object.
4. With the object still selected, you can:
   - Type text if it is a text or a circle text object.
   - Choose *Object Definition...* in the Format menu to define the object. See "Defining Objects on a Form" for detailed information.
   - Choose *Object Appearance...* in the Format menu to set the object's appearance. See "Changing Object Appearance on a Form" for detailed information.
   - Hold down the Ctrl key and drag the object to copy it.
5. Drag the object where you want it on the form. When the object is complete and no longer selected, the drawing tool reverts to the Selection tool unless the Lock On/Off is on.

Creating AS/400 Field Mapping Fields

The same fields created for the "Filling a Form" operations can be used for dragging 'n' dropping AS/400 spool file data to your form. The only two field objects you should use for this operation are the **Fill Text** object and **Table field** object (primarily Fill Text). Below we will describe how to add the fields to the form, view the field numbers, and transfer the field file to the AS/400. See the flashFORM400 User's Guide, section on "Configure Data Map" for information on how to link the spool data to the mapped fields.



1. Select the Fill Text or Table field tool (again the Fill Text should be your primary choice)
2. Drag a field box in the appropriate location on your form.
   - After drawing the field box, you can select the fill object, right click with your mouse and select Object Appearance to define properties of the field. Lines or rectangles can surround the field, thus no need to draw boxes or lines around fields. See "Defining a Fill Text Object" for information on defining fields for PC filling operations.
   - Once your fields are laid out on the form, you'll need to view the field numbers in order to know what field number to map the AS/400 data to. The AS/400 spool data mapping screens ask for the field number for that selected portion of spool file data, thus the numbers to the fields are important to you.
3. Under Tools menu, select Tab order. This will display the fields, field numbers and locations of each field.



- For AS/400 mapping, you **should not** renumber, rename, or reorder these fields – nor should you. Each field has a unique number associated to it… that number is what we will map AS/400 spool data to.

4. When a form overlay macro (*.mac) file is generated the *.fld file is saved with the same name and path.

   - The *fld file will be moved to the AS\400's FORMFMG directory along with the form overlay macro (*.mac). When the design is complete. See flashFORM400 User's Guide, "

When you save the form with the field boxes, flashFORM Designer automatically creates a field file (*.fld) in the same directory as flashFORM's saved form (*.ofm).

Creating a Text Object

A text object is most often used as a title, label, or header.

Text object used as label → State ← the State mapping field or fill text field

To create a text object:

1. Click the Text tool in the drawing toolbar.
2. Draw the text object.
3. With the object still selected, type the text that you want to replace the word *Label.*

Creating a Line Object

Use a line object to separate sections of a form or as a design element.

To create a line object:

1. Click the Line tool in the drawing toolbar.
2. Draw a line.

To make sure a line is horizontal or vertical, hold down the Shift key while you draw.

To rotate a line:

1. Click the Selection tool and select the line to edit.
   A handle appears on each end of the line.
2. Place the cursor over one handle.
3. When the cursor turns into a crosshair, hold down the mouse key and drag the end of the line where you want it.
   To rotate the line in 45-degree increments, hold down the Shift key while pulling one of the handles in the desired direction.

Creating an Oval Object

Use an oval object to highlight areas on a form or as a design element.

To create an oval object:

1.  Click the Oval tool in the drawing toolbar.
2. Draw an oval.

To create a circle, hold down the Shift key as you draw.

Creating a Rectangle Object

Use a rectangle object to highlight areas on a form or as a design element.

To create a rectangle object:

1.  Click the Rectangle tool in the drawing toolbar.
2. Draw a rectangle.

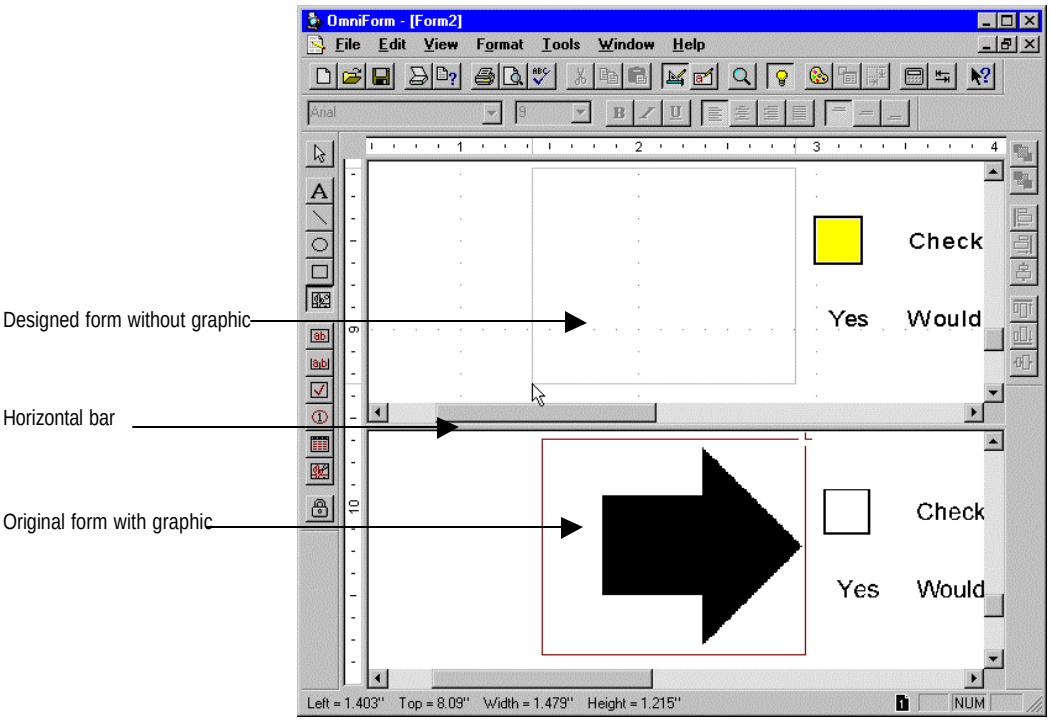
To create a square, hold down the Shift key as you draw.

Adding Graphics to Your Form

You can add graphics to your form by first creating a rectangular object by using the Graphics tool. Then copy, import, or scan graphics into this object. For example, use this feature when you want the same graphic (such as a company logo) to appear in every copy of your form.

To copy a graphic from your original scanned form to your designed form:

1. Scan in your form.
2. Choose Form Image in the View menu. The screen splits to show the form both as it was designed with Logical Form Recognition and as it was originally scanned.



Each view window has its own scroll bar so that you can scroll to the same place in each form.You can use the horizontal bar in-between the two windows to resize the view.Your cursor turns into a resize cursor over the bar.

3. Click the Graphic tool in the drawing toolbar.
4. Select the graphic that you want to copy (in the bottom window) by holding down the mouse button and slowly dragging the cursor across the graphic. Your cursor changes to a graphic tool shape in this window.
5. Let go of the mouse button and your graphic appears in your designed form (the top window) in the same place as in the original form (the bottom window).
6. The Graphic Definition dialog box automatically appears. Proceed to " To define attributes of your graphic object:" on page 68 to continue.

To import a graphic into your form:

1. Click the Graphic tool in the drawing toolbar.
2. Draw a graphic object.

To create a square graphic object, hold down the Shift key as you draw.

The Graphic Definition dialog box appears.

3. Select *Graphic File* in the *Source* drop-down list.
4. Type a file name in the *File Name* text box.
   Or, click *Browse...* if you need to locate a file.
   - Locate and select a file.
   - Click *OK* to return to the Graphic Definition dialog box.
     The name of the selected file appears in the *File Name* text box.
5. Proceed to " To define attributes of your graphic object" to continue.

To scan a graphic into your form:

1.  Click the Graphic tool in the drawing toolbar.
2. Draw a graphic object.

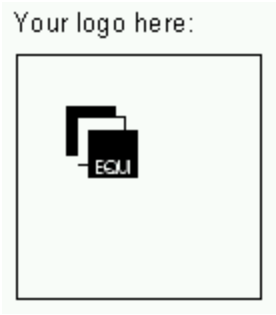
To create a square graphic object, hold down the Shift key as you draw.

The Graphic Definition dialog box appears

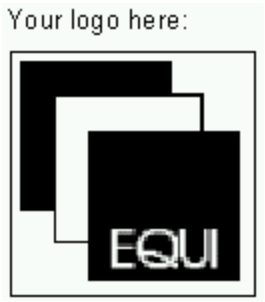
3. Select *Twain* in the *Source* drop-down list.
4. Proceed to the next section " To define attributes of your graphic object:" to continue.

To define attributes of your graphic object:

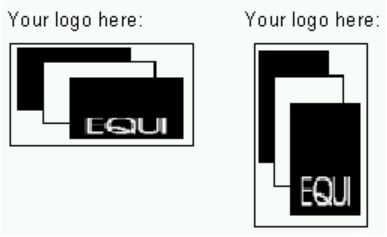
1. Select an option for the graphic.
   - Select *Maintain Original Size* to import the graphic exactly as it is.



   - Select *Scale Proportionally* to fit the graphic in the fill graphic field while maintaining its exact proportions.



- Select *Stretch to Fit* to change your graphic's original shape and size to fit in the fill graphic field.



- This option does not maintain a graphic's original proportions. Depending on the shape of the fill graphic field, your graphic may be stretched or compressed. You might want to use this for special effects.
- Select *Just Change the Options for this Graphic* if the graphic object already contains a graphic. This changes how the graphic appears without reimporting it.
- Select *Store a Copy of the Graphic with the Form* to place a copy of the graphic directly in the form. This increases form size depending on graphic file size. Otherwise, flashFORM loads the graphic each time you open the form. If you move the original graphic, flashFORM cannot load it and it will not appear in the form until you reimport it. This option only appears if *Graphic File* is selected in the *Source* drop-down list.

2. Click *OK*. flashFORM scans or loads the graphic, depending on the selected source. The graphic appears in the Graphic object box.

Creating a Fill Text Object

Use a fill text field wherever you want to enter text in fill view. Fill text fields are commonly used for information such as name, company, address, comments, and so forth.

To create a fill text object:

1.  Click the Fill Text tool in the drawing toolbar.
2. Draw the fill text object.

To create a square field, hold down the Shift key as you draw.

Creating a Comb Object

Use a comb field to separate information into separate groups of elements while maintaining the field as a whole. This object is used for PC fill applications only. For example, forms used in the United States typically require that you enter zip code numbers in five or nine separate boxes.

To create a comb object:

1.  Click the Comb tool in the drawing toolbar.
2. Either click anywhere on the form to create a four-element comb field, or move the cursor to anyplace on the form and hold down the mouse button as you slowly drag the cursor.
   The number of elements in the comb field increases as you drag the mouse. Let go of the mouse button when the comb field contains the number of elements that you want.

Many sample forms included with your flashFORM package, such as the Objects form, contain comb objects that you can copy and paste into your own form.

Creating a Check Box Object

Use check boxes for *Yes/No* questions and for selecting one or more choices on a form. This object is used for PC based fill applications only.

To create a check box object:

1.  Click the Check Box tool in the drawing toolbar.

2. Draw a check box.

To create a square check box, hold down the Shift key as you draw.

Creating a Circle Text Object

Use circle text objects for *Yes/No* questions and for selecting one or more choices on a form. This object is used for PC fill applications only.

To create a circle text object:

1. Click the Circle Text tool in the drawing toolbar.
2. Draw a circle text object.

To create a circle instead of an oval, hold down the Shift key as you draw.

3. With the object still selected, type the text that you want to replace the number in the object.

Creating a Table Object

Use a table to enter information for order forms, invoices, comparison charts, purchase orders, and so forth. This object is used for PC fill applications only.

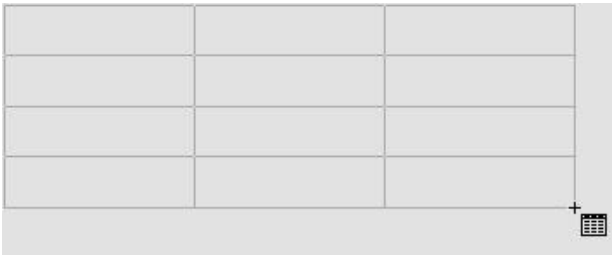
A table consists of cells. Each cell contains a fill text object by default, with the exception of the header. The header cells contain text objects by default.

You can convert these objects to any other kind of object. You can insert any object in a table cell. Cells can contain multiple objects.

See " Formatting a Table", " Placing Objects in Table Cells", and " Breaking a Table Apart" for more information on tables.

To create a table object:

1. Click the Table tool in the drawing toolbar.
2. Either click anywhere on the form to create a table, or move the cursor to anyplace on the form and hold down the mouse button as you slowly drag the cursor.
   The number of rows and columns in the comb field increase as you drag the mouse. Let go of the mouse button when the table contains the number of rows and columns that you want.



To create a square table, hold down the Shift key as you draw.

Creating a Fill Graphic Object

Use a fill graphic object to allow the person who fills in the form to add a graphic. This object is used for PC fill applications. For example, suppose you have designed a real estate form that requires a picture of the property. You place a fill graphic object on the form so that the person who fills in the form can add the picture of the property. If, instead, you want to add a graphic to the form, see " Adding Graphics to Your Form".

To create a fill graphic object:

1. Click the Fill Graphic tool in the drawing toolbar.
2. Draw the fill graphic object.

To create a square, hold down the Shift key as you draw.

Defining Objects on a Form

This section describes the options in the Object Definition command and how they affect a selected object. The dialog box that appears varies according to the selected object and form language. Each definable object is described in this section in the order it appears in the drawing toolbar.

When you define an object you can:

- Give it a unique name that is useful when sorting or searching records, arranging tab order, or defining calculations.
- Provide filling options such as a list of possible entries and help messages that appear in fill view.

- Set validation options such as whether a field must be filled or can be skipped.

See the previous section, "Creating Objects on a Form" to learn how to create objects. See "International Settings" for information on selecting a form language.

1. To define an object:
2. Select a fillable object on your form, a fillable object in a table cell, or a comb element in design view.
   You cannot define nonfillable objects such as lines.
3.  Click the Object Definition button in the design toolbar or choose Object Definition... in the Format menu.

To open a shortcut menu, click the right mouse button over the selected object. Choose *Object Definition...* in this menu.

The dialog box that appears varies depending on the selected object. See the following sections for descriptions of the definition options available for each type of fillable object in a form.

Defining a Graphic Object

Click the Object Definition button in the design toolbar (or choose *Object Definition...* in the Format menu) to open the Graphic Definition Dialog box when a graphic object is selected. This dialog box lets you select how you want the graphic object to appear in the fill graphic field. See " Adding Graphics to Your Form" 66 for detailed information.

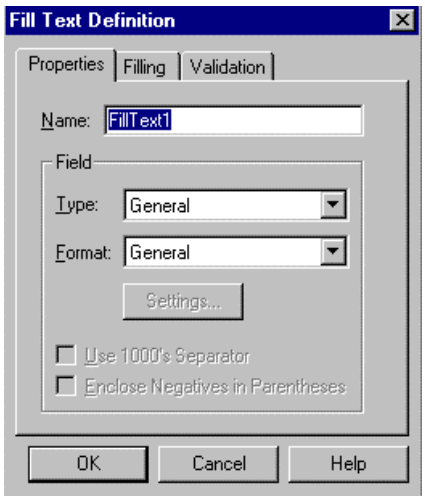
Defining a Fill Text Object

Click the Object Definition button in the design toolbar (or choose *Object Definition...* in the Format menu) to open the Fill Text Definition dialog box when a fill text object is selected. This dialog box allows you to set property, filling, and validation options. The properties tab allows you to:

- Provide a name for your field.
- Select a field type.
- Select a data format and define the format further.

To set property options for fill text objects:

1. Click the *Properties* tab.



2. Type a unique name in the *Name* text box.
   Each object must have a unique name. A descriptive name such as *Address* makes a field easy to find when sorting, searching, defining calculations, and so forth.

3. Select a field type in the *Type* drop-down list.
   The field type will be displayed in the status bar in fill view when the cursor is in that field. This information helps the user know what kind of entry is expected in each field. Field type also helps flashFORM match data when sorting records and when importing and exporting information.
   If you select *Serial Numbers* or *Signature* as a field type, please see the sections " Setting Serial Numbers" or "Adding Security to Your Forms".

4. Select a display format in the *Format* drop-down list.
   The format you select affects how field information is displayed in fill view. Options vary according to the *Type* selection.

   - If you select *Currency* as the *Type,* for example, you might select *$0.00* as the format. If you enter `7889` in the field, flashFORM would format the entry as `$7889.00`. Formatting takes effect in fill view after you move the cursor out of the field.

   - A *General* format leaves the field entry exactly as it is entered. In the previous example, `7889` entered in the field would be displayed as `7889`.

   - Field type also affects field validation. You can require that the field entry match the field type. See " To set validation options for fill text objects"for more information.

5. The next two options are enabled when *Number, Currency,* or *Percentage* is selected in the *Type* drop-down list.

   - Select *Use 1000's Separator* to separate a series of three digits with a separator specific to the form's language. See " International Settings" for detailed information on selecting a language for a form.
   - Select *Enclose Negatives in Parentheses* to display negative numbers within parentheses in the field; for example, `-123` would display as `(123)`.

To set filling options for fill text objects:

1. Click the *Filling* tab.

The Filling tab lets you:

- Enable the AutoFill Wizard to set up automated data entry.
- Designate whether a field can be filled.
- Set tab stops to allow the user to automatically move to the next field.
- Set the length of the allowable characters in a field.
- Enter help messages that will appear in the status bar in fill view.

2. Deselect or select *Enable AutoFill*. See "Setting up a Form for Automated Data Entry" for more information.
3. Deselect or select *Can be Filled*.

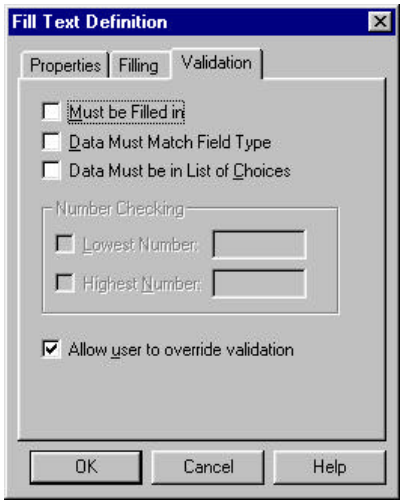
- If you deselect *Can be Filled*, then an empty field cannot be filled and a filled field cannot be changed in fill view. This option is particularly useful for fields such as calculations where you do not want the person who fills out the form to be able to change it.
- If you select *Can be Filled,* then an empty field can be filled and a filled field can be changed in fill view.

The *Can be Filled* option, when deselected, overrides the *Must be Filled in* option when it is selected in the *Validation* tab.

4. You can either select or deselect the *Tab Stop*.
   - Select *Tab Stop* so that the cursor automatically moves to the selected field when the user presses the Tab key.
   - Deselect *Tab Stop* so that the cursor tabs past the selected field.
5. Select a *Maximum Length* option from the drop-down list. This option lets you set the length of allowable characters in a field. You can set the length from 5 to 100, or select *Unlimited*.
6. Select *Help Message* and type a message in the field box if you wish. This message will appear in the status bar in fill view when the cursor is in that field. A help message can be up to 100 characters long.

To set validation options for fill text objects:

1. Click the *Validation* tab.
   The validation option allows you to:
   - Select whether a field must be filled in.
   - Select whether the data must match the field type.
   - Select whether the data must be in the list of choices.
   - Select the highest and lowest number to specify the highest and lowest number that a user can enter.



2. Select *Must be Filled in* to display a prompt in fill view if the user does not fill the field.

The *Can be Filled* option in the *Filling* tab, when deselected, overrides the *Must be Filled in* option when it is selected.

3. Select *Data Must Match Field Type* to display a prompt in fill view if the user enters incorrect information in the field.
   If the selected field type is *Number,* for example, the user cannot enter text in the field; *5* is acceptable but *five* is not.

4. Select *Data Must be in List of Choices* to force the user to enter a choice from the field's drop-down list. (Use the *Filling* tab to create a List of Choices.)

5. Select the options under *Number Checking* to set parameters for lowest and highest allowable numbers in a field.
   flashFORM displays a prompt in fill view if a user enters numbers outside the set range.
   Number Checking is enabled when *Number, Currency,* or *Percentage* is the selected type in the *Properties* tab.

   - Select *Lowest Number* and enter a number in the text box. Numbers entered in the selected field must be equal to or greater than this number.
   - Select *Highest Number* and enter a number in the text box. Numbers entered in the selected field in fill view must be equal to or lesser than this number.

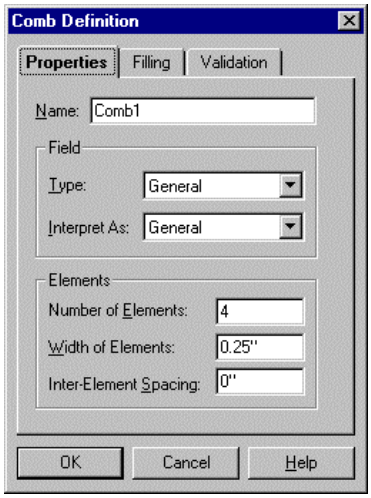
6. Select or deselect *Allow user to override validation.* If you deselect this option then you force the user to enter data in the selected field. Otherwise, users can

choose to override the warning that appears if they enter either no or inappropriate information in a field (such as *five* instead of *5* in a Number field).

7. Click *OK* to apply the changes and close the dialog box.

Defining a Comb Object

Choose *Object Definition...* in the Format menu to open the Comb Definition dialog box when a comb object is selected.



This dialog box contains most of the same options as the Fill Text Definition dialog box, but with these additions:

- It contains an *Interpret As* drop-down list in the *Properties* tab instead of a *Format* drop-down list.
- It contains an *Elements* section in the *Properties* tab.
- It contains a *Fill Right to Left* option in the *Filling* tab.

These options are described in this section. See " Defining a Fill Text Object" for detailed information on the other options.

Interpret As drop-down list

The Interpret As selection determines the way information entered in the comb field will be used when searching, sorting, importing, and exporting. Available options vary according to the Type selection.

For example, suppose you select Number in the Type drop-down list and 0.00 in the Interpret As drop-down list. If you enter 1234 in the field in fill view, flashFORM would interpret this number as 12.34 even if the comb did not contain a decimal point as a prefill element. A search for 12.34 would return this record.

A specific Interpret As setting is not necessary when you define the correct prefill elements in a comb object, such as a decimal point. flashFORM would know the entry in this case is a decimal number even if you select the General option in the Interpret As drop-down list.

Element Options

You have three element options: number of elements, width of elements, and inter-element spacing.

To set the Element options:

1. Click the *Properties* tab.
2. Type a number in the *Number of Elements* text box.
   A zip code field for the United States, for example, would have either five or nine elements.
3. Type a number in the *Width of Elements* text box to set how wide all comb elements will be.
   You can resize individual elements later if you want to change their width.
4. Type a number in the *Inter-Element Spacing* text box to set the amount of space between each comb element.
   You can resize individual elements later if you want to change inter- element spacing.

Fill Right to Left Option

The Fill Right to Left option allows you to designate whether you want the user to fill the comb elements from right to left.

To set the Fill Right to Left option:

1. Click the Filling tab.
2. Select Fill Right to Left if you want the first character in the comb field to appear in the rightmost element and move left as other characters are added. You would still read this entry from left to right.
   This is useful for entering decimal numbers, such as percentage and currency amounts, in fields with a prefill decimal point element. When entering $598.07 in a field, for example, 07 would always appear after the decimal point. This would not always happen if the numbers were entered from left to right.
3. Click *OK* to apply the changes and close the dialog box.

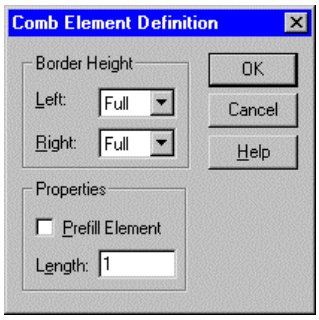
See "Defining a Comb Element Object" in the next section for information on prefill elements.

Defining a Comb Element Object

Choose *Object Definition...* in the Format menu to open the Comb Element Definition dialog box when a comb element is selected.

This dialog box allows you to:

- Designate the border height of the element.
- Create a prefill element.
- Enter a number to designate the amount of allowable numbers for each element.



To define a comb element:

1. Select left and right border measurements under *Border Height.*
   This sets the left and right border height of each element. You might, for example, select *1/2* to use the popular half-border height often seen on forms. See " Changing Object Appearance on a Form" for more information.

2. Select *Prefill element* to place a hyphen (the default character) or other characters, such as a period, comma, or parenthesis in the selected element. You will need to delete the hyphen and type the character that you want. This is useful for phone numbers and other hyphenated numbers. You can select this element in design view and change it to another character such as a parenthesis.
3. Type a number in the *Length* text box.
   This tells flashFORM how many characters to allow in the selected element before moving to the next element. In some countries, for example, the length of the area code element in a phone number is 3.
4. Click *OK* to apply the changes.

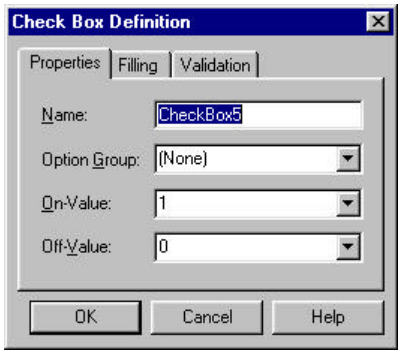
Defining a Check Box Object

Choose *Object Definition...* in the Format menu to open the Check Box Definition dialog box when a check box object is selected.

This dialog box allows you to set property, filling, and validation options for your selected check box.

To set property options for check boxes:

1. Click the *Properties* tab.



2. Type a unique name in the *Name* text box.
   Each object must have a unique name. A descriptive name such as *Yes Check Box* makes a field easy to find when sorting, searching, defining calculations, and so forth.

3. Type a group name in the *Option Group* drop-down list if the check box belongs to an option group.
   Creating an option group restricts you to one selection per check box group. Selecting a check box in an option group automatically deselects any checked box in the same group.
   The group name you enter automatically appears in the *Option Group* drop-down list of the next check box you create. Select this name to include the check box in the group.

4. Select or enter an option in the *On-Value* drop-down list.
   The on-value is stored in the database when the check box is selected. It is exported along with other information during export. It can also be used in calculations. Grouped check boxes must have unique on- values. You can let flashFORM create a unique on-value for each new check box added to a group.

5. Select or enter an option in the Off-Value drop-down list. The off-value is stored in the database when the check box is deselected. It is

exported along with other information during export. It can also be used in calculations. This option is not available for grouped check boxes.

To set filling options for check boxes:

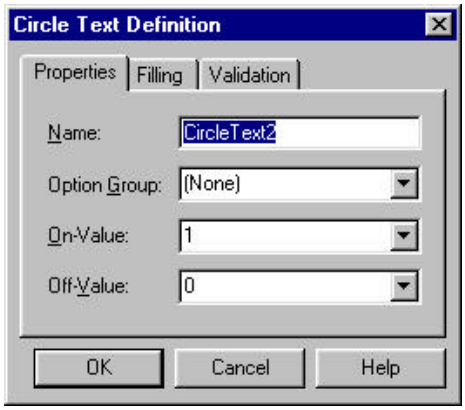
1. Click the *Filling* tab.
2. Select a mark for the check box: a check mark, an **X**, or a fill.
3. Deselect *Can be Filled* so an empty field cannot be filled and a filled field cannot be changed in fill view.
4. Select *Tab Stop* so that the cursor automatically moves to the selected field when the user presses the Tab key.
   Deselect *Tab Stop* so that the cursor tabs past the selected field.
5. Select *Help Message* to type a message that appears in the status bar in fill view when the cursor is in that field.
6. Click *OK* to apply the changes and close the dialog box.

To set validation options for check boxes:

1. Click the Validation tab.
2. Select *Must be Filled in* to require that the user fill in the check box.
3. Select or deselect *Allow user to override validation.* If you deselect this option then you force the user to enter data in the selected field.
   Otherwise, users can choose to override the warning that appears if they enter either no or inappropriate information in a field (such as *five* instead of *5* in a Number field).

Defining a Circle Text Object

Choose *Object Definition...* in the Format menu to open the Circle Text Definition dialog box when a fill circle object is selected.



This dialog box has the same options as the Check Box Definition dialog box. See " Defining a Check Box Object" for information.

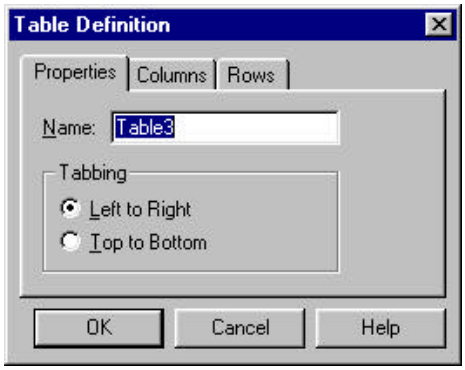
Defining a Table Object

Choose *Object Definition...* in the Format menu to open the Table Definition dialog box when a table object is selected. This dialog box lets you:

- Set tabbing properties so that you can tab either from left to right or top to bottom.
- Select the amount and width of columns.
- Select the amount and height of rows.

To define a table object:

1. Define the table object. Click the *Properties* tab and type a unique name in the *Name* text box.



Each table object must have a unique name. A descriptive name such as *Order Information* makes a field easy to find when sorting, searching, changing tab order, and so forth.

2. Select the *Tabbing* option that you want: *Left to Right* or *Top to Bottom*. Click *OK* to apply the option.
3. in the *Number of Columns* text box.
4. Set column width:
   - Type the column width in the *Width of Columns* text box.
   - If you have unequal column widths and would like them to be the same width, select *Make Columns Equal Width*. flashFORM resizes columns to an equal width without changing table size. If you had two columns, one four

centimeters wide and the other two centimeters wide, for example, each would be resized to three centimeters wide.

5. Click *OK* to apply the option.
6. Click the *Rows* tab. Type the number of rows that you want in the table in the *Number of Rows* text box.
7. Set row height: Type the row height in the Height of Rows text box. If you have unequal row height and would like all the rows to be the same height, then select Make Rows Equal Height. flashFORM resizes rows to an equal height without changing table size. If you had two rows, one four centimeters high and the other two centimeters high, for example, each would be resized to three centimeters high.
8. Click *OK* to apply the option.

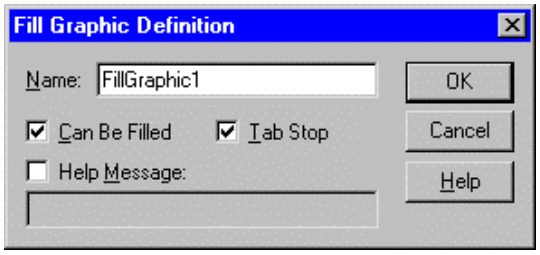
Defining a Table Cell

A table cell contains a fill text object by default. See "Defining a Fill Text Object" for more information. See any relevant entry in " Defining Objects on a Form" if the table cell contains another type of object.

A table cell can contain more than one object. It can also contain graphics. See "Placing Objects in Table Cells" for information.

Defining a Fill Graphic Object

1. Choose *Object Definition...* in the Format menu to open the Fill Graphic Definition dialog box when a fill graphic object is selected.
2. Type a unique name in the *Name* text box.



3. Each graphic object must have a unique name. A descriptive name such as *Logo* makes a fill graphic field easy to find when importing, exporting, and changing tab order.
4. You can either select or deselect the *Tab Stop*. Select *Tab Stop* so that the cursor automatically moves to the selected field when the user presses the Tab key. Deselect *Tab Stop* so that the cursor tabs past the selected field.

5. Select *Help Message* and type a message in the text box. This message will appear in the status bar in fill view when the cursor is in that field.

6. Click *OK* to apply the changes.

Setting Serial Numbers

You can keep track of your form by using serial numbers. You can set serial numbers for fill text objects and comb objects. You define serial numbers in design view and they appear in fill view. As a new record is created in fill view, serial numbers will automatically change by the increment you have entered. You can also use serial numbers in calculations. If you save your form to an older version of flashFORM, the serial number fields will convert to a *General* field type and *General* format.

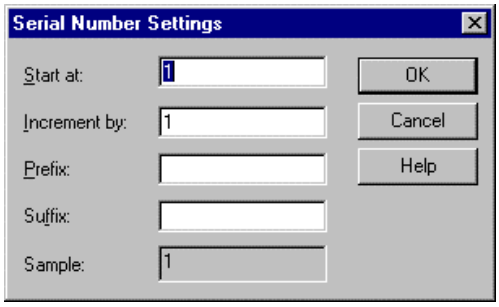
To set serial numbers:

1. Select either a fill text object or a comb object on your form.

2. Choose *Object Definition...* in the Format menu. Or, click the Object Definition button in the design toolbar.
   If you have selected a fill text object, the Fill Text Definition dialog box appears.
   If you have selected a comb object, the Comb Definition dialog box appears.

3. Select *Serial Number* in the *Type* drop-down list.

4. Click *Settings...*.
   The Serial Number Settings dialog box appears.



5. In the Serial Number Settings dialog box:

   - Enter a starting number in the *Start at* text box. You can enter any number from -99,999,999 to 999,999,999. The default is 1.
   - Enter an increment number in the *Increment by* text box. You can enter any number from -999 to 9,999. The default is 1.
   - Type a prefix, if you want, in the *Prefix* text box. You can enter up to 8 characters.

- Type a suffix, if you want, in the *Suffix* text box. You can enter up to 8 characters.
  The sample text box displays your first serial number, including, if applicable, a prefix and suffix.

6. Click *OK* in the Serial Number Settings dialog box to apply your settings.
7. Click *OK* in the Fill Text Definition dialog box to close the dialog box.

Changing Object Appearance on a Form

This section describes the options in the Object Appearance dialog box and how they affect a selected object. See the section " Creating Objects on a Form" to learn how to create objects.

To change object appearance:

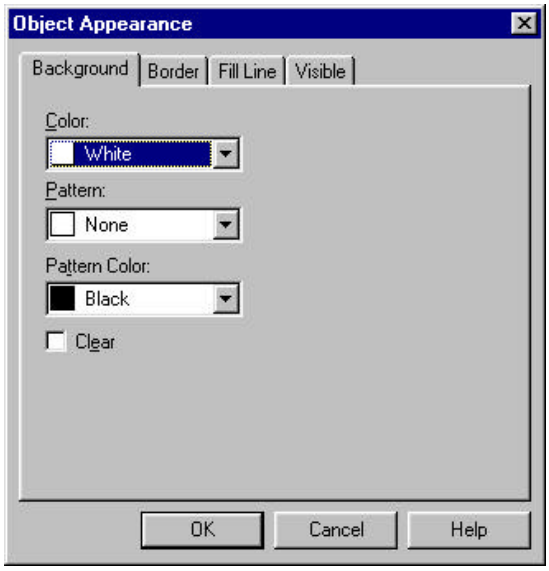
1. Select an object or objects in design view.
2.  Click the Object Appearance button in the design toolbar or choose Object Appearance... in the Format menu.

To open a shortcut menu, click the right mouse button over the selected object. Choose Object Appearance... in this menu.

3. Click each of the four tabs in the Object Appearance dialog box to change the background, border, fill lines, and visible options. Available options depend on the selected object.

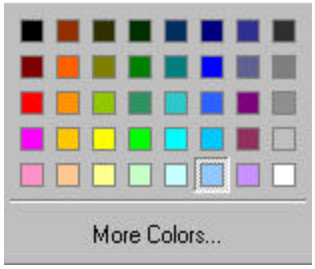
Background options

There are four options that affect the background of your form. These are *Color*, *Pattern*, *Pattern Color*, and *Clear*.



Color

For background color of the object, select a color from the Color drop-down palette.



For custom colors, click More Colors.... The Color dialog box appears. To customize a color, enter a number from 0 to 255 in the text boxes (Hue, Sat, Lum, Red, Green, and Blue). Or, drag the crosshair across the Color box.

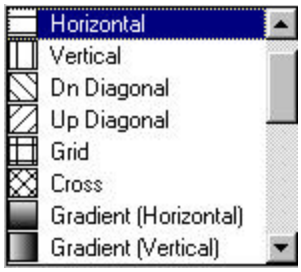
See " Adding Color to your form" for more information about the Color dialog box and how to add color to a form's background.

As long as your program is open, you can store up to eight custom colors in your Color drop-down palette. Each time you choose a custom color and click OK, the new custom color is stored in the area below the 40-color drop-down palette. This makes it easy to use a variety of custom colors in your form.

You can also change the colors of your object. See " Adjusting Colors" for more information.

Pattern

For background pattern of the object, select a pattern from the Pattern drop- down list.



Gradient

You can select from Gradient (Horizontal) and Gradient (Vertical).

- Select *Gradient (Horizontal)* to have the background color gradually change to the pattern color, from top to bottom.
- Select *Gradient (Vertical)* to have the background color gradually change to the pattern color, from left to right.

Pattern Color

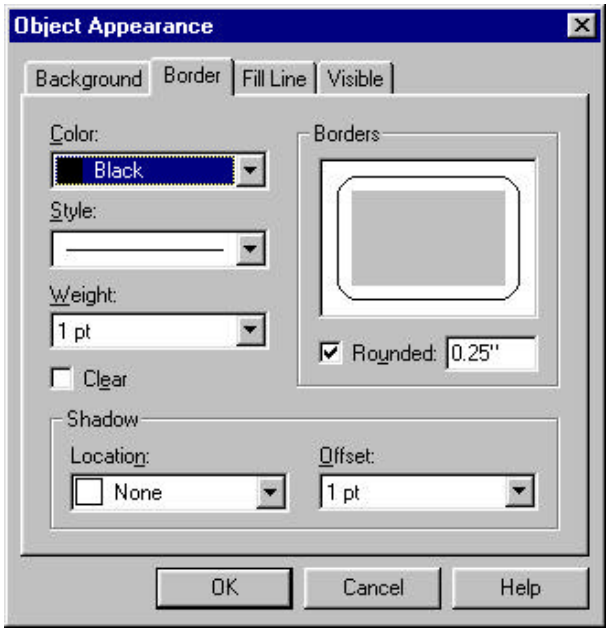
For a color for the background pattern, select a pattern color from the Pattern Color drop-down list.

Clear

Make sure that *Clear* is deselected so that your selected colors and pattern appear as the object's background.

See " Paint Order" for a description of how paint order affects color and pattern display Border Options

Border options affect the sides of your object. There are six Border options: *Color*, *Style*, *Weight*, *Clear*, *Borders*, and *Shadow*.



Color

For a border color, select a color in the *Color* drop-down palette. See "Color" for more information about how to choose color.

Style

To change a line style, select Style from the drop-down list. You can select from one continuous line to a variety of dotted line styles.

Weight

To change the border thickness, select Weight from the drop-down list. You can select from a 1- to 12-point thickness.

Clear

Select *Clear* to hide the border and flashFORM will display any paint layers beneath it.

See" Paint Order" for an explanation of how paint order affects border display.

Borders

The *Borders* section lets you remove borders from your object. The rectangle in the *Borders* section represents your object. With your object selected, click each side of the *Borders* rectangle that you want to remove.

- To round the corners of the border, select *Rounded*.
- To round or square individual corners, click the corners of the rectangle after selecting *Rounded.*
- To indicate the degree of border curve, enter a measurement from `0` to `14` in the *Rounded* text box.

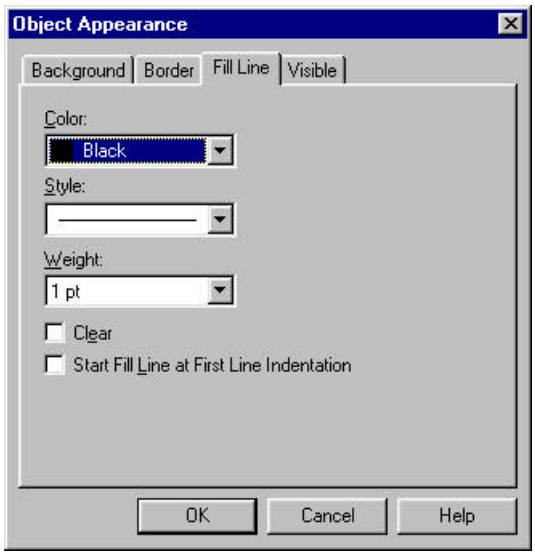
Shadows

For a shadow effect, select an option in the *Location* drop-down list in the *Shadow* section. To offset the shadow from the border, select the amount of points in the *Offset* drop-down list.

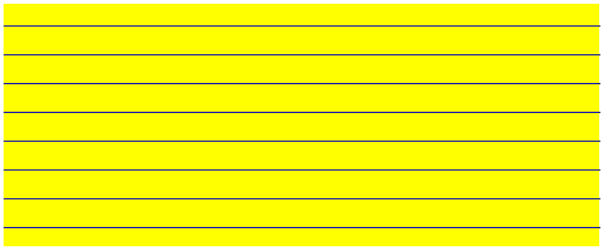
Fill Line Options

Fill Line options affect fill lines inside an object. There are four Fill line options: *Color*, *Style*, *Weight*, *Clear*, and *Start Fill Line at First Line Indentation*.

Options in this tab are only active for selected fill text objects. Text alignment must be set to Top or Exactly in the Text dialog box before fill lines can be set. See " Formatting Text" for information.



Fill lines appear inside the object much like lines appear on writing paper.



Color

Select a color for the fill lines in the Color drop-down palette. See " Color" for more information about how to choose **color.**

Style

Select a line style in the Style drop-down list. See "Style" for more information.

Weight

Select line thickness in the Weight drop-down list. See " Weight" for more information.

Clear

Deselect Clear to display the fill lines.

See " Paint Order" for information on how paint order affects fill line display.

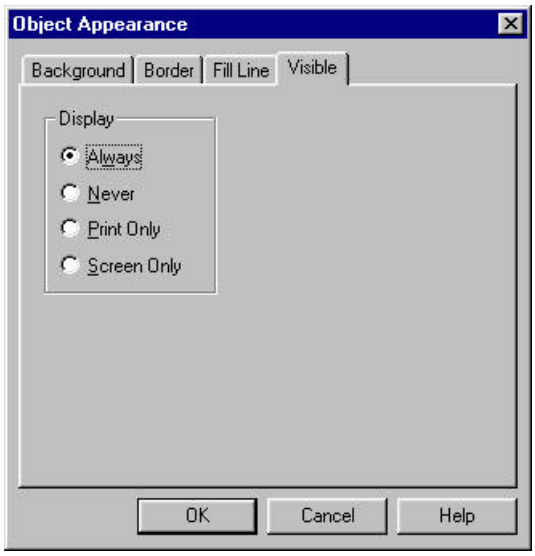
Start Fill Line at First Line Indentation

Select Start Fill Line at First Line Indentation to indent the first fill line the same amount as the first line of text entered in the field.

See " To format the placement of text objects" for more information.

Visible Options

Visible options pertain to how you want the selected object to appear to the user.



Display

- Select how you want the selected object to appear to the user.
- Select *Always* if you want the field/object to always appear on screen and when printed.
- Select *Never* if you do not want the field/object to appear in fill view. However as the designer of the form, you can see the object in design view.
- Select *Print Only* if you want the field/object to appear on the printed form, but not on the screen.
- Select *Screen Only* when you want the field/object to appear on the screen, but not when printed.

Paint Order

flashFORM uses a specific paint order. For example, a table object itself is painted first, then the cells inside the table, and then objects inside the cell. This makes it possible to have three layers of paint. The last layer painted in an object overrides all other layers. Because objects inside a cell are painted last, they will cover up the cells and portions of the table.

If an object's background or border is *Clear,* however, then that part of the object is transparent and an object painted below can show through. You can use the *Send to Back* and *Bring to Front* commands in the Format menu to change paint order.

Adding Color to a Form

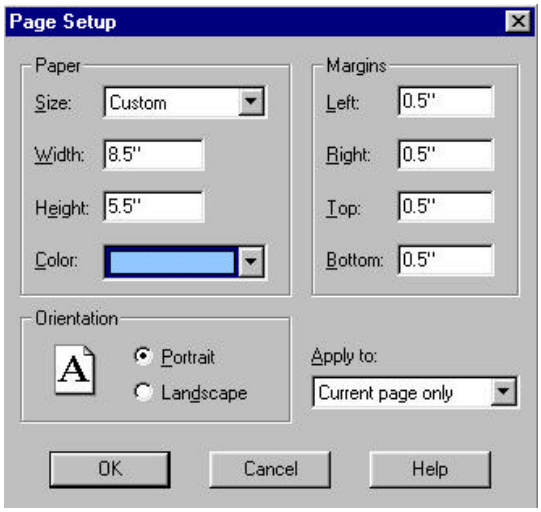
You can add color to the background of your form. You can add it to one page or to all pages of your form.

You can also add color to an object on your form. For information about adding color to an object, see " Changing Object Appearance on a Form" .

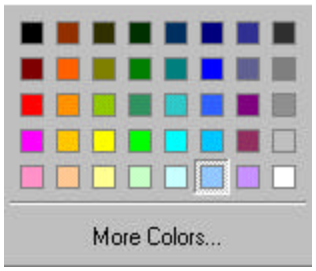
You can adjust the color of the background of your form, the selected objects, or the background of your form.

To add background color to your form:

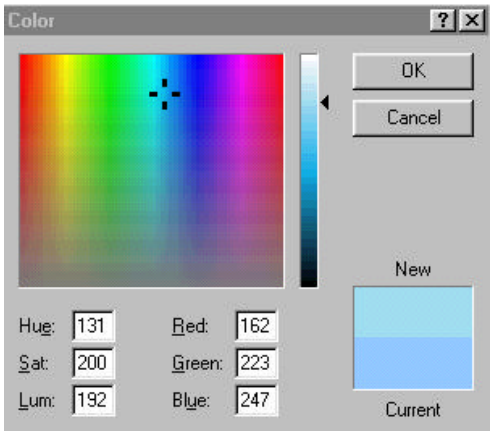
1.  Open a form in design view.
2. Choose *Page Setup...* from the File menu.
   The Page Setup dialog box appears.



3. Select the color you want from the *Color* drop-down palette.



4. Click *More Colors...* to customize colors.
   The following Color dialog box appears.



5. Customize a color and click *OK*.

6. To customize a color, enter a number in the boxes; or, drag the crosshair across the Color box.

   - Hue is the color itself. Enter a number from 0-225 in the *Hue* box, or drag the crosshair horizontally in the Color box.
   - Saturation is the intensity of the color. The higher the number, the more intense the color. Enter a number from 0-255 in the *Sat* box, or drag the crosshair vertically in the Color box.
   - Luminance is the brightness of the color, or the amount of black or white added to the color. The larger the number, the lighter the color. Enter a number from 0 to 255 in the *Lum* box, or drag the slider on the vertical Color bar.
   - In the *Red* text box, enter a number from 0 to 255 to adjust the amount of red in the color. The larger the number, the more red the color contains.
   - In the *Green* text box, enter a number from 0 to 255 to adjust the amount of green in the color. The larger the number, the more green the color contains.
   - In the *Blue* text box, enter a number from 0 to 255 to adjust the amount of blue in the color. The larger the number, the more blue the color contains.

The smaller window in the bottom right corner will display your current color (bottom), which is the existing background color of your form, and new color (top), which is the color you have selected in this dialog box.

7. Select an option in the *Apply to* drop-down list of the Page Setup dialog box.

- Select *Current page only* to apply the color changes to the current page of your form.
- Select *Current page forward* to apply the color changes to the current page of your form and all subsequent pages.
- Select *All pages* to apply the color changes to all the pages of your form.

As long as your program is open, you can store up to eight custom colors in your *Color* drop-down palette. Each time you choose a custom color and click *OK*, the new custom color is stored in the area below the 40-color drop-down palette. This makes it easy to use a variety of custom colors in your form.

8. Click *OK* to apply your changes and close the dialog box.

See "Paint Order" for a description of how paint order affects color and pattern display.

Adjusting Colors

You can change the existing colors on your form to new colors. You can change the background color as well as the color of selected objects.

To adjust the colors:

1. Choose *Adjust Colors...* in the Format menu.
   The Adjust Colors dialog box appears.
2. Select whether you want to change the background color of the current page, the selected objects on the form, or the background color of all the pages of the form.
3. Select a color from the drop-down color palette. For more information about the drop-down color palette, see the previous section.
4. Click *OK* to apply your changes and close the dialog box.

Editing a Form

This section describes how to edit a form using the design view tools and commands. Once you have created objects, you may want to move, resize, or convert them. You may also want to make changes to a newly scanned or imported form.

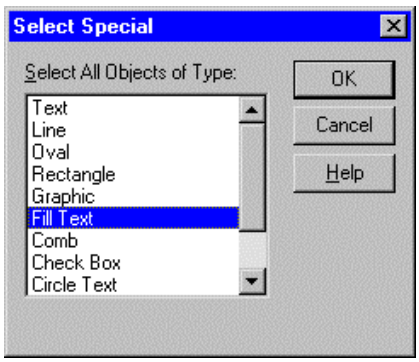
This section contains the following topics:

- Selecting an Object
- Moving an Object
- Resizing an Object
- Deleting an Object
- Formatting Text
- Merging Text
- Formatting a Table
- Breaking a Table Apart
- Aligning Objects on a Form
- Sending Objects Front or Back
- Changing Tab Order on a Form
- Placing Objects in Table Cells
- Converting an Object to Another Type of Object

Selecting an Object

You can select one or more objects in several ways.

- Click an object to select it.
- Shift-click to select multiple objects.
- Click an object such as a table once to select it, and then click again to select an individual table cell. Do the same to select an individual comb element.
- Hold down the mouse button and drag the cursor around or through all objects to select them.
- Choose *Select All* in the Edit menu to select all objects on a form.
- Choose *Select Special...* in the Edit menu to select all objects of the same type.



Moving an Object

You can move a selected object or objects in several ways.

- Hold down the mouse button and drag the selected object to another location.
- Choose *Size and Position...* in the Format menu to position the selected object precisely on the form.
- Use the *Align* commands in the Format menu or the corresponding button in the arrange toolbar to align selected objects.
- Use the *Bring to Front* and *Bring to Back* commands in the Format menu or the corresponding buttons in the arrange toolbar to layer overlapping objects.
- Hold down the Shift Key and drag a line handle to rotate it in 45-degree increments.
- Use the nudge/arrow keys to move the object(s).

Resizing an Object

You can resize a selected object in the following ways.

- Click any handle on the selected object, hold down the mouse button and resize the object as needed.
- Hold down the Shift key before clicking a handle to:
  Constrain an oval or a fill circle object to a circle shape.
  Keep a line object straight.
  Constrain any other object to a square shape.
- Or, choose *Size and Position...* in the Format menu to enter exact measurements for an object's size.

Deleting an Object

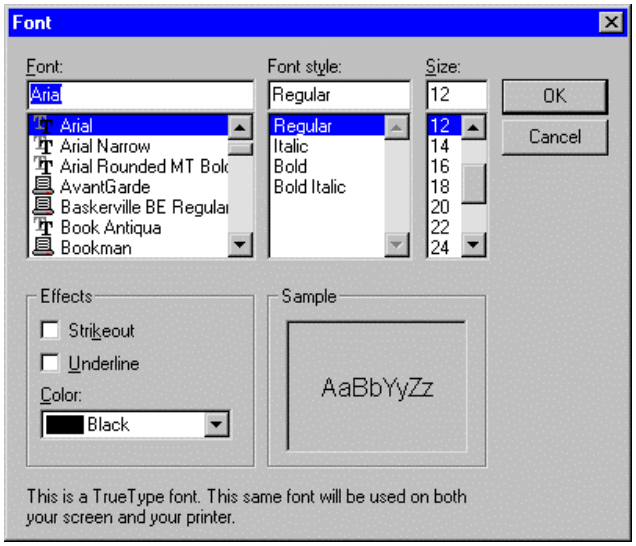
Choose *Delete* in the Edit menu or press Delete on your keyboard to delete one or more selected objects.

Formatting Text

Use the *Font...* and *Text...* commands in the Format menu or the corresponding buttons in the font/text toolbar to format text in selected objects. See "The Font/Text Toolbar" for information about each button in the toolbar.

To format fonts:

1. Select the text/fill objects that you want to format. Text entered in fill view takes on formatting assigned to fill objects in design view.
2. Choose *Font...* in the Format menu.
   The Font dialog box appears.



3. Select a font in the *Font* list.
4. Select a style for the selected font in the *Font style* list.
5. Select a point size for the selected font in the *Size* list.
6. You can also select three options in the *Effects* box.
   - To place a line through all characters, select *Strikeout*.
   - To underline all characters, select *Underline*.
   - To choose the color of the text, select a color in the *Color* drop-down palette. For more information about the *Color* drop-down palette and custom colors, see " Adding Color to a Form".

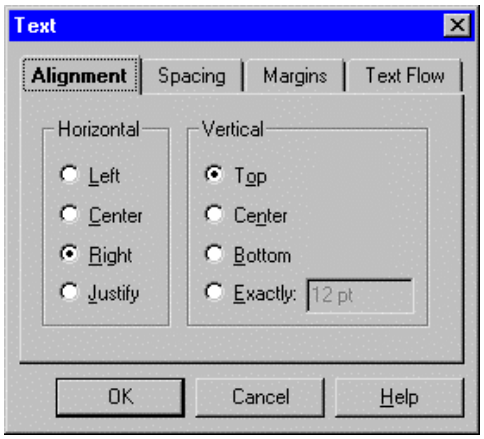
A preview of your choices appears in the *Sample* box.

7. Click *OK* to apply the formatting.

To format the placement of text objects:

1. Select the text/fill objects that you want to format.
   Text entered in fill view takes on formatting assigned to fill objects in design view.

2. Choose Text... in the Format menu.
   The Text dialog box appears.



3. Click the Alignment tab.

4. Select a horizontal alignment option: *Left*, *Center*, *Right*, or *Justify*.

5. Select a vertical alignment option: *Top*, *Center*, *Bottom*, or *Exactly*.

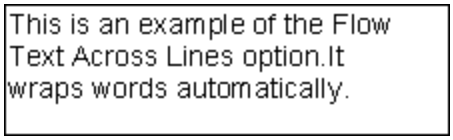
6. Click the Spacing tab and select a line-spacing option: Single, 1.5 Lines, Double, or Exactly.
   You can change the vertical spacing between paragraph lines. Vertical spacing is dependent on selected font size. A single-spaced paragraph with 12-point text, for example, would have 12 points between each line in the paragraph.

7. If you want to indent the first line of each paragraph, type a measurement in the Paragraph Indentation text box.

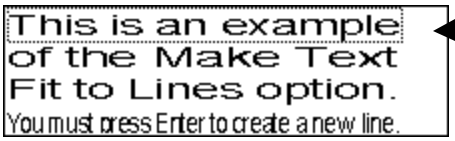
8. Click the Margins tab and enter margin measurements in the Left, Right, Top, and Bottom text boxes.
   This measurement is the amount a paragraph will be offset within its bounding box. You may want to use margins if you have field borders that would interfere with reading the text.

9. Click the *Text Flow* tab and select how you want text to flow within the set margins of a field.
   This option is available only for text and circle text objects.

   - Select *Flow Text Across Lines* to enter text in a field with automatic word-wrapping.



   - Select *Make Text Fit to Lines* to fit text to the size of the line.
     This can alter the appearance of text.



Each line can be selected separately and resized.

Press Enter to create a new line of text. Each new line can be resized separately from other lines.

flashFORM uses the *Make Text Fit to Lines* option to design forms during scanning and importing. Generally, you would want to use the *Flow Text Across Lines* option when formatting your text and circle text objects.

   - In the *Orientation* box, select how you want the text positioned:
     Select the first box to position the text from left to right.
     Select the middle box to position the text from bottom to top.
     Select the last box to position the text from top to bottom.

10. Click *OK* to apply the changes.

Merging Text

You can merge text objects by choosing *Merge Text* in the Format menu. This option is useful if you want to combine text from different locations on your form.

To merge text:

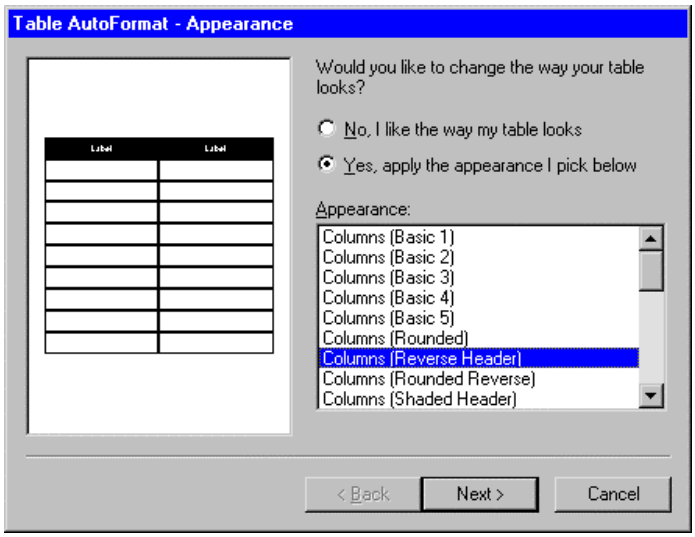
1. Shift-click each text object that you want to combine.
2. Choose *Merge Text* in the Format menu.
   Your selected text merges. The merged text will acquire the attributes of the top-left selected text (except for the font type and size).

Formatting a Table

Use the *Table AutoFormat...* command in the Format menu to format a selected table.

To format a table:

1. Select a table.
2. Choose Table AutoFormat... in the Format menu.
   The Table AutoFormat dialog box appears.
3. Select the Yes option to enable the Appearance list box.
4. Select an appearance option for your table.



5. Click Next> if it is available to open the Naming window.
   Depending on your appearance selection, the Naming window may not be available. In that case, click Finish.
6. Select Yes, change the column names if it is available and you want to change the column names.
   - Select a column name, click *Rename,* and type in a new name.
   - Repeat these steps for each column name to change.
7. Select *Yes, change the row names* if it is available and you want to change the row names.
   - Select a row name, click *Rename,* and type in a new name.
   - Repeat these steps for each row name to change.

8. Click *Finish* to apply the changes to your table.

See "Placing Objects in Table Cells" for additional information on tables.

Breaking a Table Apart

Use *Break Table Apart* in the Format menu to break a selected table in sections. This option is useful if you need to rearrange the elements of your table.

You cannot regroup the objects once you break them apart. For this reason, you might want to save your table before you break it apart; and if you do not like what you have created, you can always revert to the saved copy.

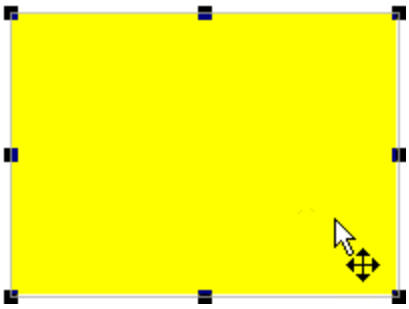
To break a table apart:

1. Select a table in your form.
2. Choose *Break Table Apart* in the Format menu.
   You can now select and drag sections of your table to rearrange in the order that you want.

Aligning Objects on a Form

Use the Align commands in the Format menu or the corresponding buttons in the arrange toolbar to move and align multiple selected objects. See " The Drawing Toolbar" for information about each button in the toolbar.

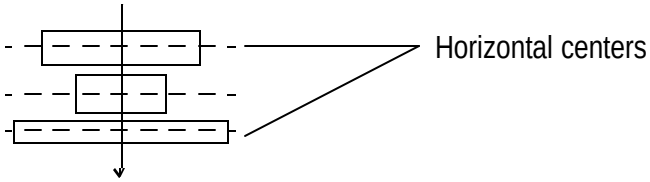
Each selected object aligns to the edge of its bounding box, the imaginary box that surrounds all objects. A bounding box appears when you select an object and hold down the mouse button. Objects align to the outermost selected object.



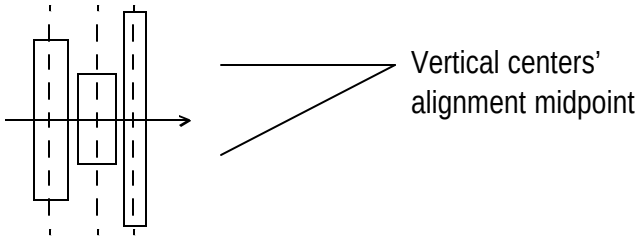
To align objects:

1. Select the objects to align.
2. Choose Align in the Format menu and an alignment command in its cascading menu, or click the appropriate button in the align toolbar.
   - Select *Left* to align all selected objects by their left edges.

- Select *Right* to align all selected objects by their right edges.
- Select *Center Horizontally* to align the selected objects by their horizontal centers.



- Select *Top* to align all selected objects by their top edges.
- Select *Bottom* to align all selected objects by their bottom edges.
- Select *Center Vertically* to align the selected objects by their vertical center.



The objects align according to the chosen command.

Sending Objects Front or Back

You can use the *Bring to Front* or *Send to Back* commands in the Format menu to layer overlapping objects.

Choose *Bring to Front* to move one or more selected objects in front of all objects on a form.

Choose *Send to Back* to move one or more selected objects behind all objects on a form.

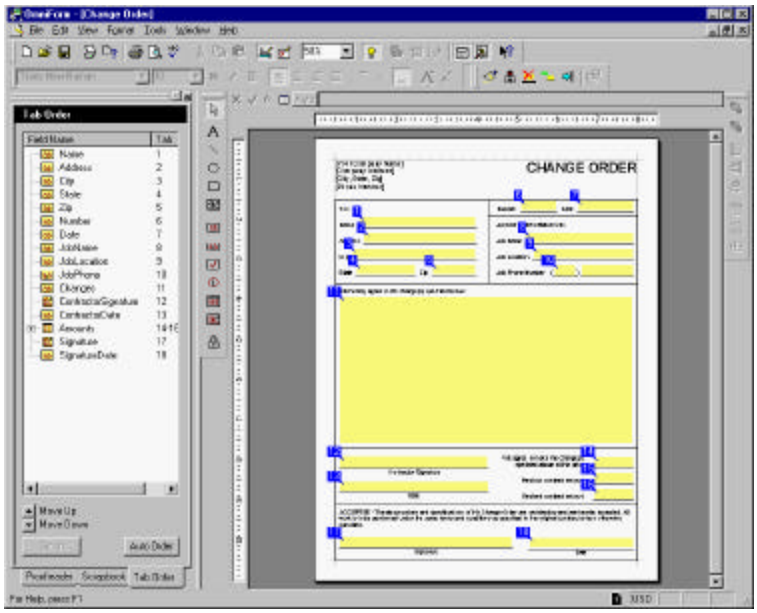
Changing Tab Order on a Form

Tab order is the order in which the cursor moves from field to field on a form in fill view. You should check the tab order on all the forms you design or scan. Remember, to not modify the tab order if you are using the fields for AS/400 field file mapping.

To change tab order:

1.  Click the Tools button in the design toolbar or choose *Tab Order* in the Tools menu.
   The Tools window appears to the left of the form.

2. Click the *Tab Order* tab in the Tools window if either the *Proofreader* or *Scrapbook* window appears.
   The Tab Order window appears and tab numbers appear by each field in this window and on the form. These indicate current tab order.



3. Select the fields to reorder in the Tab Order window or on the form. The fields will be selected on both the Tab Order window and the form.
   Reorder the fields in one of the following ways:

   - Drag the fields up or down in the Tab Order window to change their tab order.
   - Select the tab numbers on the form and enter a new order number.
   - Click the Move Up button in the Tab Order window to move the selected fields up. Click as many times as needed to move the fields into place.
     Or, you can right-click your mouse button to get a shortcut menu to move the selected fields up.
   - Click the Move Down button in the Tab Order window to move the selected fields down. Click as many times as needed to move the fields into place.

- Or, you can right-click your mouse button to get a shortcut menu to move the selected fields down.
- Click Auto Order to reorder all the fields on the form. flashFORM uses "smart" auto ordering, and generally reorders fields from top to bottom and left to right.

4. Click the Tools button in the design toolbar or choose *Tab Order* in the Tools menu to close the Tab Order window.

Reordering Fields Not in a Sequential Order

You can select fields that are not in a sequential tab order on the form and group them together.

To reorder fields not in a sequential order:

1.  Click the Tools button in the design toolbar or choose Tab Order in the Tools menu.
   The Tools window appears to the left of the form.
2. Click the Tab Order tab in the Tools window if either the Proofreader or Scrapbook window appears.
3. Select the fields (on the form or in the Tab Order window) that you want to group.
4. Click Group in the Tab Order window. The corresponding fields are now grouped in the tabbing order, that is, from top to bottom and from left to right. Or, you can right-click your mouse button to open a shortcut menu to group the selected fields.
5. Click the Tools button in the design toolbar or choose Tab Order in the Tools menu to close the Tab Order window.

Grouping Check Boxes or Circle Text Objects

You can group check boxes or circle text objects into an option group.

Alternatively, you can group check boxes and circle text objects by choosing *Object Definition...* in the Format menu. See "Defining a Check Box Object" and "Defining a Circle Text Object" for more information.

To group check boxes or circle text objects:

1.  Click the Tools button in the design toolbar or choose *Tab Order* in the Tools menu.
   The Tools window appears to the left of the form.
2. Click the *Tab Order* tab in the Tools window if either the *Proofreader* or *Scrapbook* window appears.
3. Select the check boxes or circle text objects on the form or in the Tab Order window.
4. Right-click your mouse button in the Tab Order window to open a shortcut menu.
5. Select *Option Group...* in this menu and enter a name for the option group.
6. Click the Tools button in the design toolbar or choose *Tab Order* in the Tools menu to close the Tab Order window.

Reordering Tables:

Tables can be ordered from left to right or top to bottom.

To reorder tables:

1.  Click the Tools button in the design toolbar or choose *Tab Order* in the Tools menu.
   The Tools window appears to the left of the form.
2. Click the *Tab Order* tab in the Tools window if either the *Proofreader* or *Scrapbook* window appears.
3. Select the table in the Tab Order window.
4. Right-click your mouse button in the Tab Order window to open a shortcut menu and reorder your table from this menu.
5. Click the Tools button in the design toolbar or choose *Tab Order* in the Tools menu to close the Tab Order window.

Changing the tab order within a table cell

You can also change the tab order within a cell if it contains multiple fillable fields.

To change the tab order within a table cell:

1.  Click the Tools button in the design toolbar or choose *Tab Order* in the Tools menu.
   The Tools window appears to the left of the form.
2. Click the *Tab Order* tab in the Tools window if either the *Proofreader* or *Scrapbook* window appears.
3. Click a field in the *Field Name* list (one that has a plus sign in front of it) to display its list of contained fields.
4. Select and drag the fields within the group, or use the *Move Up* or *Move Down* buttons (either in the Tab Order window or right-click your mouse button to get a shortcut menu).
5. Click the Tools button in the design toolbar or choose *Tab Order* in the Tools menu to close the Tab Order window.

Alternatively, you can select a tab number on the form (one that has a decimal point; for example, 10.3) and type a new order number.

Placing Objects in Table Cells

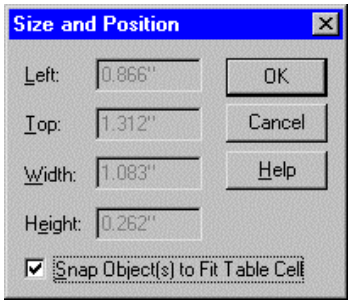
Each table cell contains one fill text object by default (except for column headers which contain a text object). A cell can contain more than one object, fillable or nonfillable.

To place objects in a table cell:

1. Select a tool in the drawing toolbar.
2. Your cursor changes to reflect that object.
3. Move the cursor over the cell to fill so that it highlights the cell.
4. Click to place the object in the cell, or hold down the mouse button and draw an object to the size that you want.

To resize an object to fit a cell exactly:

1. With the object in the table cell still selected, choose Size and Position... in the Format menu.
   The Size and Position dialog box appears.
2. Select Snap Object(s) to Fit Table Cell.



3. Click OK.
   The object resizes to fit the cell exactly.

Converting an Object to Another Type of Object

You can convert any selected object to another type of object. You might, for example, want to convert objects in table cells to check boxes.

Task	Assigned To	Done
Tune piano	John C.	✓
Paint walls	Jerry G.	✓
Groom horses	Tina G.	
Make deliveries	Pat G.	✓
Milk cows	Colman M.	
Collect recycling	Andrew A.	

Be careful when converting objects in an existing form. If the old object contained information, you will permanently lose that object's information in every record.

You can also convert objects that were not defined properly during import; for example, flashFORM might define a line with space above it as a fill text field. You could convert this to a line.

To convert a selected object:

1. Choose *Convert...* in the Edit menu.
   The Convert dialog box appears.
2. Select an object type in the *Convert Object(s) To* list and click *OK.*
   The object is converted.

Use the *Select Special...* command in the Edit menu to select all objects of a specific type.

Advanced Features

This chapter discusses how to use some of the advanced features in flashFORM. Although these are advanced features they are not hard to learn. After you have become familiar with some of the basic form design options in flashFORM, try some of these features. These features can really enhance the design of your forms. For a description of flashFORM's basic design features, see "Designing a Form."

This chapter contains the following sections:

- Setting up a Form for Automated Data Entry
- Setting Attributes for a Form
- Adding Security to Your Forms
- Adding Hyperlinks to Your Forms
- Using the Scrapbook
- Inserting OLE Objects in a Form

The `flashFORM\Sample Forms` folder contains several sample forms that you can use or redesign for your needs.

Setting up a Form for Automated Data Entry

Using the AutoFill Wizard, you can set up a form for automated data entry. You can create or use an AutoFill list to provide a drop-down list of possible entries for the person who fills in a form or to provide an automatic filling of specific fields on a form. You can create a new AutoFill list, use a list from another field, use a previously defined list, create a list from an ODBC source, or create a list from a flashFORM form or database.

This section describes how to:

- create a new AutoFill list
- create an AutoFill from another source
- automatically fill fields on a form
- create an AutoFill list and automatically fill fields
- create an AutoFill list and/or automatically fill fields in a table
- create a replacement list

Before you begin using the AutoFill Wizard, please read all the sections of "Setting up a Form for Automated Data Entry" to get an idea of how the Wizard works and to become familiar with some of the Wizard's dialog boxes.

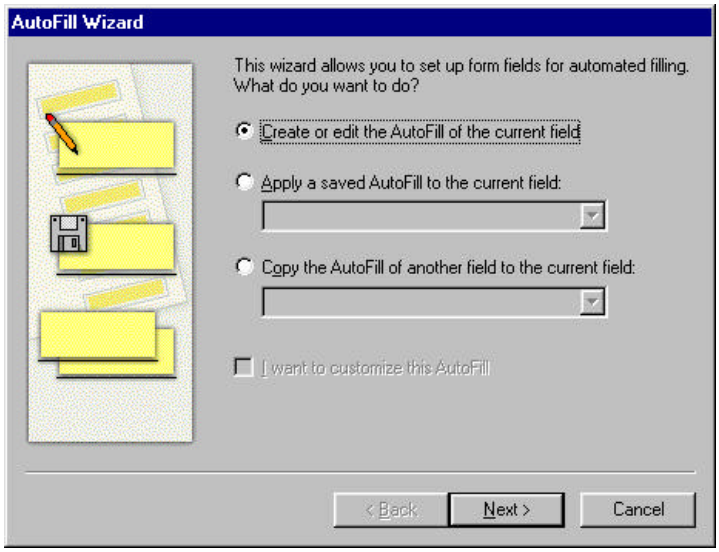
Creating a New AutoFill List

This section explains how to create a new AutoFill list. By creating a new AutoFill list, you create a drop-down list of choices for the person who fills in the form, including the information for this new list.

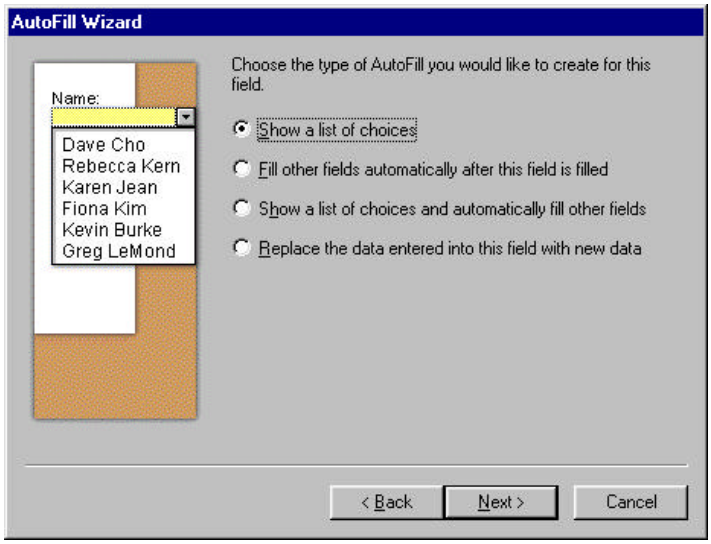
To create a new AutoFill list:

1. Open a form and select a field (either Fill Text or Comb objects) where you want to create a drop-down list.
2. Choose *Object Definition...* in the Format menu.
   The Fill Text Definition dialog box appears.
3. Click the *Filling* tab in the Fill Text Definition dialog box.
4. Select Enable AutoFill and click AutoFill Wizard....

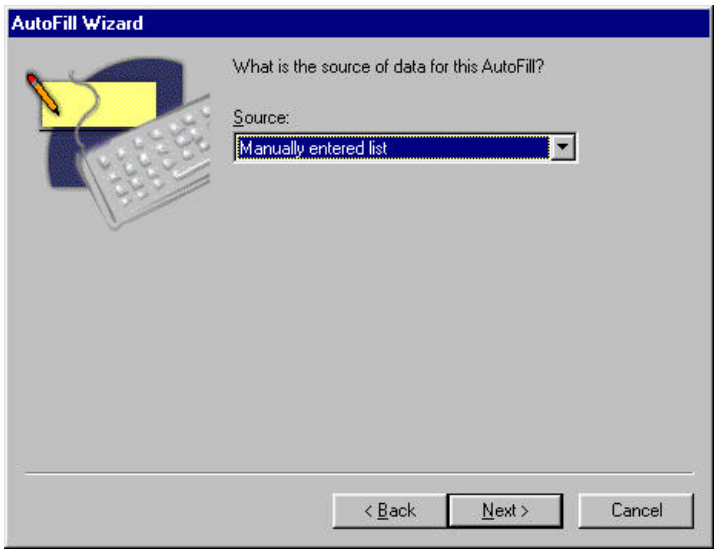
The following AutoFill Wizard dialog box appears.



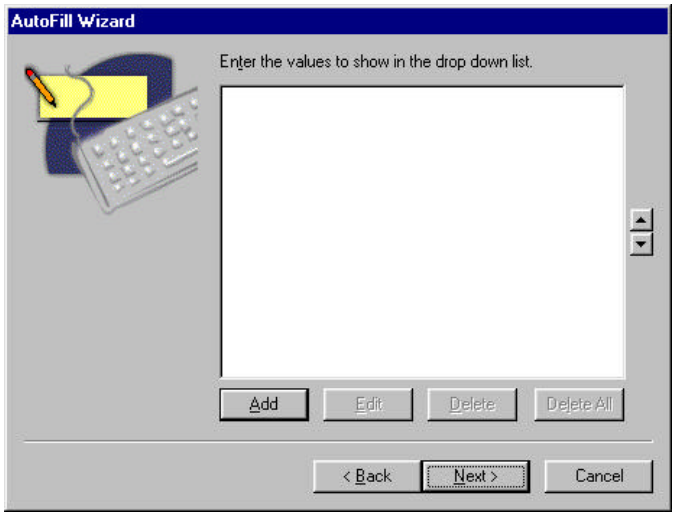
1. Select *Create or edit the AutoFill of the current field* to create a list for your selected field and click *Next>*.
   The following dialog box appears.



2. Select Show a list of choices and click Next>.
   The following dialog box appears.



3. Select *Manually entered list* to create the information for your AutoFill list and click *Next>*.
   The following dialog box appears.



4. Click *Add* and type the information that you want to include in your list in the provided text box. Each item in a column can have a maximum of 100 characters.
   After each entry, press Enter. Continue adding information to your list and, when you are finished, click *Next>*.

5. Select whether you want to save your list in the dialog box that appears. If you are saving your list, type a name.
   flashFORM saves your list as a `.txt` file.

6. Click *Finish* to close the AutoFill Wizard and, if selected, to save your list. The Fill Text Definition dialog appears.

7. Click *OK* to apply your settings and close the dialog box.

Create or Use an AutoFill List From Another Source

You can create or use an AutoFill list from a variety of sources, such as a previously saved AutoFill list, an AutoFill list from another field, an AutoFill list from an ODBC source, and an AutoFill list from a flashFORM Form or Database.

Use a Previously Saved AutoFill List

You can use a previously saved AutoFill list and apply it to your current field. This can save you time if you have already created a list that could be used again. For example, you may have created a list containing the names of all your customers and would like to use that information for your current field.

To use a previously saved AutoFill list:

1. Open a form and select a field where you want to use another AutoFill list.

2. Choose *Object Definition...* in the Format menu.
   The Fill Text Definition dialog box appears.

3. Click the *Filling* tab in the Fill Text Definition dialog box.

4. Select Enable AutoFill and click AutoFill Wizard....

5. Select Apply a saved AutoFill to the current field.

6. Select the AutoFill list that you want to use for your form from the drop-down list.

   - If you are not customizing your list, you are finished. Click *Finish* to close the Wizard, and *OK* to apply your settings and close the dialog box.

   - If you want to customize or make changes to your list, select *I want to customize this AutoFill* check box and click *Next>*.

7. Select *Show a list of choices* in the next dialog box to display your list and make your changes. Each item in a column can have a maximum of 100 characters.

   - To add an entry to the list, click *Add* and type the new entry in the provided text box.

   - To make a change to the list, select the entry and then click *Edit*. Type your changes in the provided text box.

- To remove an entry, select the entry and then click *Delete*.
- To remove all entries from the list, click *Delete All*.
  Click *Next>* when you are finished customizing the list.

8. Select whether you want to save your list. If you are saving your list, type a name. flashFORM saves your list as a `.txt` file.
9. Click *Finish* to close the AutoFill Wizard and, if selected, to save your list.The Fill Text Definition dialog box appears.
10. Click *OK* to apply your settings and close the dialog box.

Use an AutoFill List From Another Field

You can use an AutoFill list from another field and apply it to your current field. For example, you may have created an AutoFill field (for example, a *State* field) for all 50 states and would like to use that field's list and apply it to your current field.

To use an AutoFill list from another field:

1. Open a form and select a field where you want to use an AutoFill list from another field.
2. Choose *Object Definition...* in the Format menu.
   The Fill Text Definition dialog box appears.
3. Click the *Filling* tab in the Fill Text Definition dialog box.
4. Select Enable AutoFill and click AutoFill Wizard....
5. Select Copy the AutoFill of another field to the current field.
6. Select the AutoFill list that you want to use in the drop-down list.
   - If you are not customizing your list, you are finished. Click *Finish* to close the Wizard, and *OK* to apply your settings and close the dialog box.
   - If you want to customize or make changes to your list, select *I want to customize this AutoFill* check box and click *Next>*.
7. Make any changes to your list in the dialog box that appears. Each item in a column can have a maximum of 100 characters.
   - To add an entry to the list, click *Add* and type the new entry in the provided text box.
   - To make a change to the list, select the entry and then click *Edit*. Type your changes in the provided text box.
   - To remove an entry, select the entry and then click *Delete*.

- To remove all entries from the list, click *Delete All*.
  Click *Next*> when you are finished customizing the list.

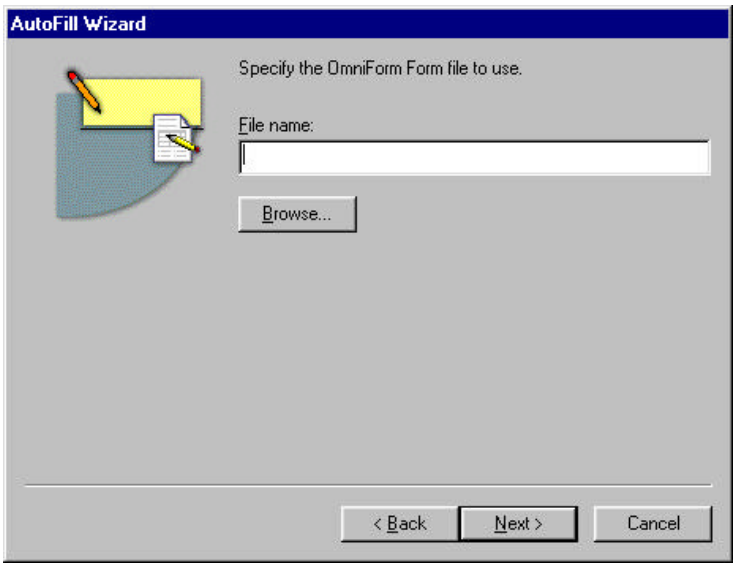
8. Select whether you want to save your list. If you are saving your list, type a name. flashFORM saves your list as a `.txt` file.
9. Click Finish to close the AutoFill Wizard and, if selected, to save your list.
   The Fill Text Definition dialog box appears.
10. Click *OK* to apply your settings and close the dialog box.

Create an AutoFill List From a flashFORM Form or Database

You can create an AutoFill list from a flashFORM form or database for your current field. For example, you may have a flashFORM database containing all Zip codes. You can use that information as an automatic data entry for your current field.

To create an AutoFill list from a flashFORM form or database:

1. Open a form and select a field where you want to use the information from another form or database.
2. Choose *Object Definition...* in the Format menu.
   The Fill Text Definition dialog box appears.
3. Click the *Filling* tab in the Fill Text Definition dialog box.
4. Select Enable AutoFill and click AutoFill Wizard....
5. Select Create or edit the AutoFill of the current field and click Next>.
6. Select Show a list of choices and click Next>.
7. Select the type of source you want to use.
   Each item in a column can have a maximum of 2000 characters.
   - Select *flashFORM Form* to use information from another flashFORM form.
   - Select *flashFORM Database* to use information from a flashFORM database, that is, a file with an `.ofd` extension.
8. Click *Next*>.
   The following dialog box appears if you have selected flashFORM Form.



9. Type the file name of the flashFORM form (or flashFORM database) you will be using in the *File name* text box.
   Or, click *Browse...* to locate your file.
   - Locate and select a file.
   - Click *OK* to return to the AutoFill Wizard dialog box.

   The name of the selected file appears in the *File name* text box.

10. Click *Next>*.

11. Specify the columns (or fields) that you want to use in your drop-down list. Also, select the field that you want to appear first in your drop- down list. You can have a maximum of 10 columns displayed in your drop-down list.
    - Select the columns in the *Available columns* list and click the right- arrow button. The columns you have chosen appear in the *Columns to show* list box. All the columns you choose will appear in the drop- down list. This is useful if you want more information to appear in the drop-down list.
    - In the *Columns to enter* text box, choose the field you want to appear first in the drop-down list. The information you choose from this column is what appears first in the field in fill view.

12. Click *Finish* to close the AutoFill Wizard.
    The Fill Text Definition dialog box appears.

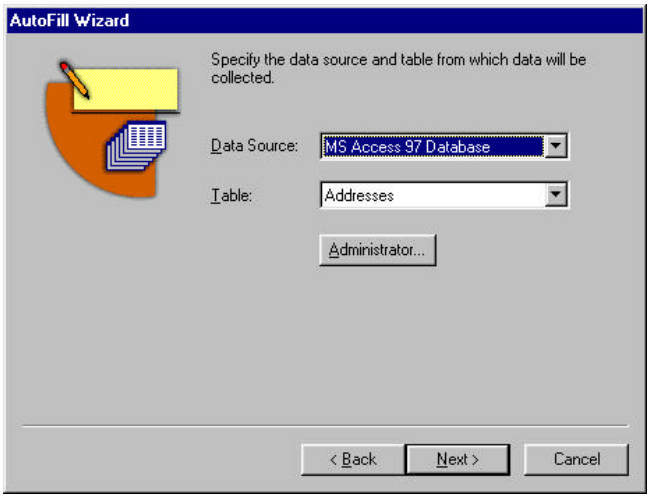
13. Click *OK* to apply your settings and close the dialog box.

Create an AutoFill List From an ODBC Source

You can create an AutoFill list from an ODBC source and use the information for your current field.

To create an AutoFill list from an ODBC source:

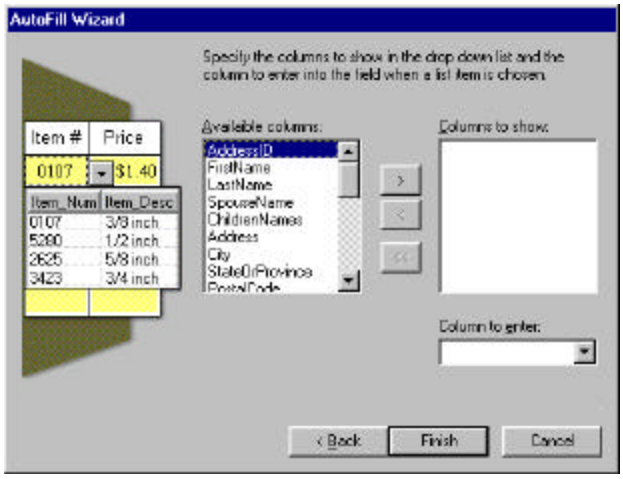
1. Open a form and select a field where you want to create on AutoFill list using information from an ODBC source.
2. Choose *Object Definition...* in the Format menu.
   The Fill Text Definition dialog box appears.
3. Click the *Filling* tab in the Fill Text definition dialog box.
4. Select Enable AutoFill and click AutoFill Wizard....
5. Select Create or edit the AutoFill of the current field and click Next>.
6. Select Show a list of choices and click Next>.
7. Select *ODBC Database* to use information from a database (such as, dBASE or Microsoft Access) and click *Next>*.
   Each item in a column can have a maximum of 2000 characters.
8. Specify the data source and table in the following dialog box.



If you have not set up your data source previously, click *Administrator...* and follow all the dialog boxes for your specific database. For more information about these dialog boxes, please see your specific database documentation.

- Select the data source you will be using from the *Data Source* drop- down list.
- Select a Table you would like to use from the *Table* drop-down list.

9. Click *Next*>.
   A dialog box similar to the one below appears.



10. Specify the columns (or fields) that you want to use in the drop-down list. Also, select the field that you want to appear first in the drop-down list. You can have a maximum of 10 columns displayed in your drop- down list.
    - Select the columns in the *Available columns* list and click the right- arrow button. The columns you have chosen appear in the *Columns to show* list box. All the columns you choose will appear in the drop- down list.
    - In the *Columns to enter* text box, choose the field you want to appear first in the drop-down list. The information you choose from this column is what appears first in the field in fill view.
11. Click *Finish* to close the AutoFill Wizard.
    The Fill Text Definition dialog box appears.
12. Click *OK* to apply your settings and close the dialog box.

Automatically Fill Fields on a Form

You can automatically fill fields on your form with AutoFill lists from a variety of sources. You can fill fields automatically using lists you create, or information from ODBC sources, flashFORM forms or databases.

This section describes how to create an automatic filling for your form. You create an automatic filling by allowing specific fields to be filled automatically after a certain field has been filled. For example, your form may have *Name*, *Address*, *City*, *State*, and *Zip* fields. In this case, you might want to set up the form so that once the *Name* field has been filled, the *Address*, *City*, *State*, and *Zip* fields will be filled automatically.

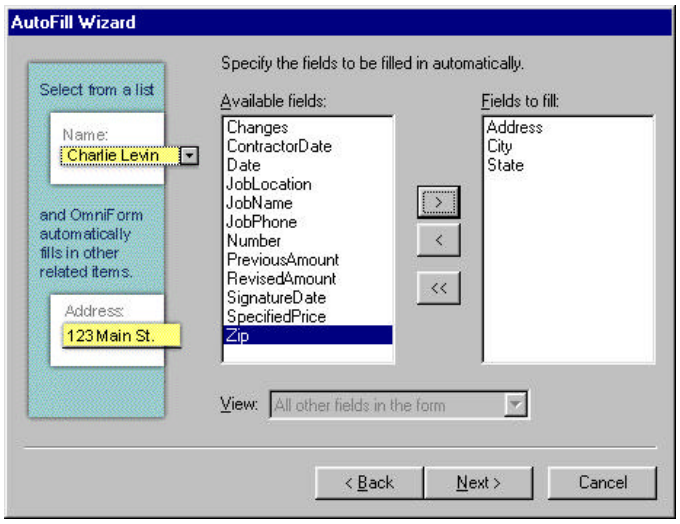
Automatically Fill Fields on a Form With an AutoFill List You Create

You can have fields on your form automatically filled with an AutoFill list you create. First specify a field so that once that field is filled other fields will be automatically filled. Next, create an AutoFill list. Finally, specify the fields on the form that you want automatically filled and then define the information that will be automatically filled in each field.

To automatically fill fields on a form with an AutoFill list you create:

1. Open a form and select a field where you want to create an automatic filling using an AutoFill list.
2. Choose *Object Definition...* in the Format menu.
   The Fill Text Definition dialog box appears.
3. Click the *Filling* tab in the Fill Text Definition dialog box.
4. Select Enable AutoFill and click AutoFill Wizard....
5. Select Create or edit the AutoFill of the current field and click Next>.
6. Select *Fill other fields automatically after the field is filled* to create an automatic filling for your form, and click *Next*>.
7. Select *Manually entered list* to use an AutoFill list for your form, and click *Next*>.

A dialog box similar to the one below appears.

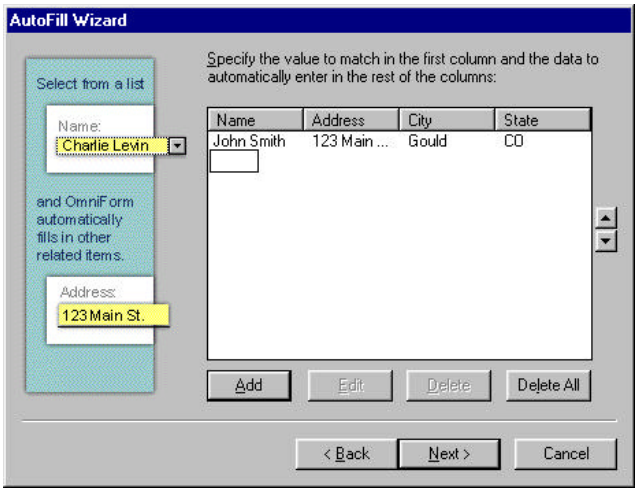


8. Specify the fields that you want to be filled automatically.

   - Select the fields in the *Available fields* list and click the right-arrow button. The fields you choose appear in the *Fields to fill* list. The *Available Fields* list displays all the fields on your form. The *Fields to fill* list displays all the fields on the form that you want filled automatically.

   - To remove the fields from the *Fields to fill* list, select the fields from the *Fields to fill* list and then click the left-arrow button. The fields you have chosen return to the *Available fields* list.

9. Click *Next>*.
   A dialog box similar to the one below appears.



10. Type the entries that you want in the columns. The first column, the *Name* field is the selected field on your current form. Once the *Name* field (or *John Smith*)

is filled, the other fields on the form, that is, *Address (*or in this case, *123 Main St.*), *City* (that is, *Gould*), and *State* (that is*, CO*) fields, will be filled automatically.
Click *Next>* when you are finished.

11. Click *Finish* to close the AutoFill Wizard.
    The Fill Text Definition dialog box appears.

12. Click *OK* to apply the settings and close the dialog box.

Automatically Fill Fields on a Form With a flashFORM Form or Database

You can have fields on your form automatically filled with information from a flashFORM form or database. First, specify the field so that once it is filled other fields on the form will be automatically filled. Next, select the flashFORM form or database that you want to use. Finally, specify the fields on the form that you want automatically filled and then define the information that will be automatically filled in each field.

To automatically fill fields on a form with information from a flashFORM Form or Database:

1. Open a form and select a field where you want to create an automatic filling using a flashFORM form or database.

2. Choose *Object Definition...* in the Format menu.
   The Fill Text Definition dialog box appears.

3. Click the *Filling* tab in the Fill Text Definition dialog box.

4. Select Enable AutoFill and click AutoFill Wizard....

5. Select Create or edit the AutoFill of the current field and click Next>.

6. Select *Fill other fields automatically after the field is filled* to create an automatic filling for your form and click *Next>*.

7. Select the flashFORM form or database that you want to use. Each item in a column can have a maximum of 2000 characters.

   - Select *flashFORM Form* to use information from another flashFORM Form and click *Next>*.

   - Select *flashFORM Database* to use information from another flashFORM database (that is, a file with an `.ofd` extension) and click *Next>*.

8. Type the file name of the flashFORM form or database you will be using in the *File name* text box.
   Or, click *Browse...* to locate your file.

   - Locate and select a file.
   - Click *OK* to return to the AutoFill Wizard dialog box.
   - The name of the selected file appears in the *File name* text box.
     Click *Next*>.

9. Select, in the *Column/field* drop-down list, the column (or field) from your database that you want to match against the data in the current selected field on your form.
   Click *Next*> when you are finished matching the data with the field on your form.

10. Specify the fields that you want filled automatically.

    - Select the fields in the *Available fields* list and click the right-arrow button. The fields you have chosen appear in the *Fields to fill* list. The *Available Fields* list displays all the fields on your form. The *Fields to fill* list displays all the fields on the form that you want filled automatically.
    - To remove the fields from the *Fields to fill* list, select the fields from the *Fields to fill* list and then click the left-arrow button. The fields you have chosen return to the *Available fields* list.

Click *Next*> when you are finished specifying the fields you want automatically filled.

11. Specify the links between the fields to be automatically filled in the form and the columns in the database. By linking the fields to the columns, you tell flashFORM what database information needs to be placed in what field on your form.

    - Select an entry from *Fields in form* and then an entry in *Columns in database*. Click <<*Link*>>. Your selection appears in the *Links* box.
    - You can let flashFORM automatically link fields with columns. Click <<*Auto*>>. flashFORM automatically matches fields with columns of the same name and displays the linkage in the *Links* box.
    - To remove an entry from the Links box, select the entry that you want and click *Unlink*. If you want to remove all entries in the *Links* box, click *Unlink All*.

12. Click *Finish* to close the AutoFill Wizard.
    The Fill Text Definition dialog box appears.

13. Click *OK* to apply your settings and close the dialog box.

Automatically Fill Fields on a Form With an ODBC Source

You can have fields on your form automatically filled with information from an ODBC source. First specify a field so that once it is filled other fields will be automatically filled. Next, select the ODBC source that you want to use. Finally, specify the fields on the form that you want automatically filled and then define the information that will be automatically filled in each field.

To automatically fill fields on a form with information from an ODBC source:

1. Open a form and select a field where you want to create an automatic filling using information from an ODBC source.

2. Choose *Object Definition...* in the Format menu.
   The Fill Text Definition dialog box appears.

3. Click the *Filling* tab in the Fill Text Definition dialog box.

4. Select Enable AutoFill and click AutoFill Wizard....

5. Select Create or edit the AutoFill of the current field and click Next>.

6. Select *Fill other fields automatically after the field is filled* to create an automatic filling for your form and click *Next*>.

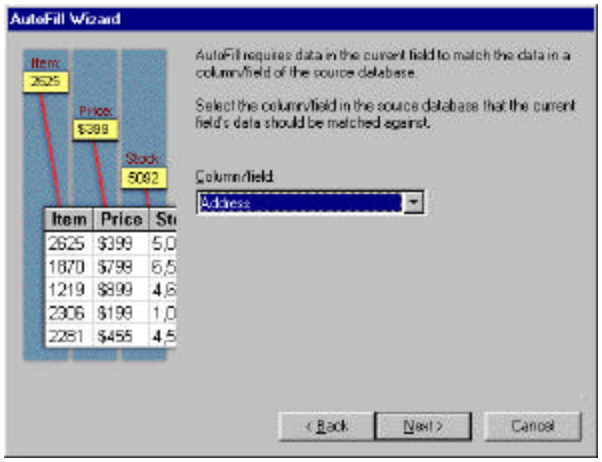
7. Select *ODBC Database* to use information from a database (such as dBASE or Microsoft Access) and click *Next*>.
   Each item in a column can have a maximum of 2000 characters.

8. Specify the data source and table.

   - Select the source of your data from the *Data Source* drop-down list.
   - Select the table from the *Table* drop-down list.

If you have not set up your data source previously, click *Administrator...* and follow all the dialog boxes for your specific database. For more information about these dialog boxes, please see your specific database documentation.

9. Click *Next*>.
   A dialog box similar to the one below appears.



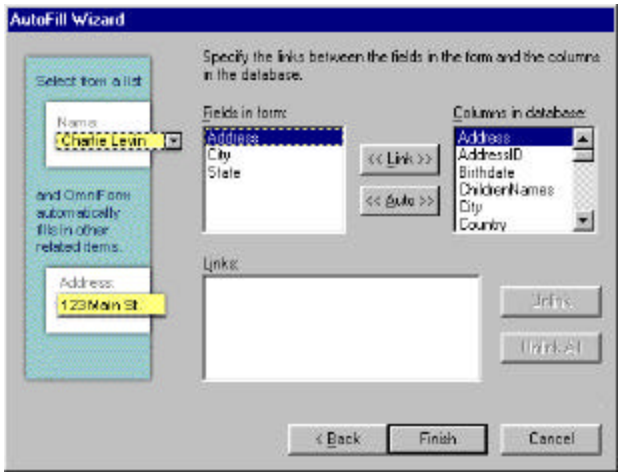
10. In the *Column/field* drop-down list, select the column (or field) from your database that you want to match against the data in the current selected field on your form.
    Click *Next>* when you are finished matching the data with the field on your form.

11. Specify the fields that you want filled automatically.

    - Select the fields in the *Available fields* list and click the right-arrow button. The fields you have chosen appear in the *Fields to fill* list. The *Available Fields* list displays all the fields on your form. The *Fields to fill* list displays all the fields on the form that you want filled automatically.
    - To remove fields from the *Fields to fill* list, select the fields from the *Fields to fill* list and then click the left-arrow button. The fields you have chosen return to the *Available fields* list.

12. Click *Next>* when you are finished specifying the fields you want automatically filled.

    A dialog box similar to the one below appears



13. Specify the links between the fields to be automatically filled in the form and the columns in the database. By linking the fields to the columns, you tell flashFORM what database information needs to be placed in what field on your form.

    - Select an entry from the *Fields in form* and then an entry in *Columns in database*. Click <<*Link*>>. Your selection appears in the *Links* box.
    - You can let flashFORM automatically link fields with columns. Click <<*Auto*>>. flashFORM automatically matches fields with columns of the same name and displays the linkage in the *Links* box.
    - To remove an entry in the Links box, select the entry that you want and click *Unlink*. If you want to remove all entries in the *Links* box, click *Unlink All*.

14. Click *Finish* to close the AutoFill Wizard.
    The Fill Text Definition dialog box appears.
15. Click *OK* to apply your settings and close the dialog box.

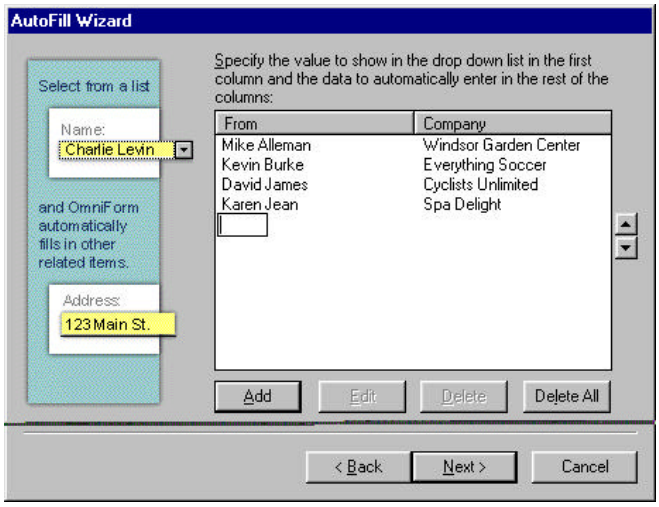
Creating an AutoFill List and Automatically Fill Fields

You can create both an AutoFill list and have fields automatically filled for your form. You can automatically fill fields by using a list you create, information from an ODBC source, flashFORM form, or database. The AutoFill Wizard can easily do both.

To create an AutoFill List and automatically fill fields:

1. Open a form and select a field where you want to create an AutoFill list and automatically fill fields.
2. Choose *Object Definition...* in the Format menu.
   The Fill Text Definition dialog box appears.
3. Click the *Filling* tab in the Fill Text Definition dialog box.
4. Select Enable AutoFill and click AutoFill Wizard....
5. Select Create or edit the AutoFill of the current field and click Next>.
6. Select Show a list of choices and automatically fill other fields in the dialog box that appears and click Next>.
7. Select *Manually entered list* to use information created with the AutoFill Wizard and click *Next*>.
8. Specify the fields that you want to be filled automatically.
   - Select the fields in the *Available fields* list and click the right-arrow button. The fields you have chosen appear in the *Fields to fill* list. The *Available Fields* list displays all the fields on your form. The *Fields to fill* list displays all the fields on the form that you want filled automatically.
   - To remove the fields from the *Fields to fill* list, select the fields from the *Fields to fill* list and then click the left-arrow button. The fields you have chosen return to the *Available fields* list.
9. Click *Next*>.

   A dialog box similar to the one below appears.



10. Type the entries in the appropriate columns. For example, the first column in this dialog box, the *Company* field, is the selected field on your current form; that is, the field that contains the drop-down list. The second column, the *From* field, is the field that will be automatically filled once the *Company* field is filled.
11. Click *Next*>.
12. Select whether you want to save your list. If you are saving your list, type a name.
13. Click *Finish* to close the AutoFill Wizard.
    The Fill Text Definition dialog box appears.
14. Click *OK* to apply the settings and close the dialog box.

To create an AutoFill list and automatically fill fields with an ODBC source:

1. Open a form and select a field where you want to create an AutoFill list and automatically fill fields using information from an ODBC source.
2. Choose *Object Definition...* in the Format menu.
   The Fill Text Definition dialog box appears.
3. Click the *Filling* tab in the Fill Text Definition dialog box.
4. Select Enable AutoFill and click AutoFill Wizard....
5. Select Create or edit the AutoFill of the current field and click Next>.
6. Select Show a list of choices and automatically fill other fields and click Next>.
7. Select *ODBC Database* to use information from a database (such as dBASE or Microsoft Access) and click *Next*>.
   Each item in a column can have a maximum of 2000 characters.
8. Specify a data source and table.

If you have not set up your data source previously, click *Administrator...* and follow all the dialog boxes for your specific database. For more information about these dialog boxes, please see your specific database documentation.

- Select the data source you will be using from the *Data Source* drop- down list.
- Select the table you would like to use from the *Table* drop-down list.
- Click *Next*>.

9. Specify the columns (or fields) that you want to use in the drop-down list. Also, select the field you want to appear first in the drop-down list. You can have a maximum of 10 columns displayed in a drop-down list.

    - Select the columns in the *Available columns* list and click the right- arrow button. The columns you have chosen appear in the *Columns to show* list box. All the columns you choose will appear in the drop- down list. This is useful if you want more information to appear in the drop-down list.

    - In the *Columns to enter* text box, choose the field you want to appear first in the drop-down list. The information you choose from this column is what appears first in the field in fill view.

10. Click *Next*>.

11. Specify the form's fields that you want to be filled automatically.

    - Select the fields in the *Available fields* list and click the right-arrow button. The fields you have chosen appear in the *Fields to fill* list. The *Available Fields* list displays all the fields on your form. The *Fields to fill* list displays all the fields on the form that you want filled automatically.

    - To remove fields from the *Fields to fill* list, select the fields from the *Fields to fill* list and then click the left-arrow button. The fields you have chosen return to the *Available fields* list. Click *Next*>.

12. Specify the links between the fields to be automatically filled in the form and the columns in the database. By linking the fields to the columns, you tell flashFORM what database information needs to be placed in what field on your form.

    - Select an entry from the *Fields in form* and then an entry in *Columns in database*. Click <<*Link*>>. Your selection appears in the *Links* box.

    - You can let flashFORM automatically link fields with columns. Click <<*Auto*>>. flashFORM automatically matches fields with columns of the same name and displays the linkage in the *Links* box.

    - To remove an entry in the *Links* box, select the entry and click *Unlink*. If you want to remove all entries in the *Links* box, click *Unlink All*.

13. Click *Finish* to close the AutoFill Wizard.
    The Fill Text Definition dialog box appears.

14. Click *OK* to apply the settings and close the dialog box.

To create an AutoFill list and automatically fill fields with a flashFORM Form or Database:

1. Open a form and select a field where you want to create an AutoFill list and automatically fill fields using information from a flashFORM form or database.
2. Choose *Object Definition...* in the Format menu.
   The Fill Text Definition dialog box appears.
3. Click the *Filling* tab in the Fill Text Definition dialog box.
4. Select Enable AutoFill and click AutoFill Wizard....
5. Select Create or edit the AutoFill of the current field and click Next>.
6. Select Show a list of choices and automatically fill other fields and click Next>.
7. Choose the flashFORM form or database that you want to use. Each item in a column can have a maximum of 2000 characters.
   - Select *flashFORM Form* (to use information from a flashFORM form) and click *Next>*.
   - Select *flashFORM Database* (to use information from a flashFORM database, that is, a file with an `.ofd` extension) and click *Next>*.
8. Type the file name in the provided text box.
   Or, click *Browse...* to locate your file.
   - Locate and select a file.
   - Click *OK* to return to the AutoFill Wizard dialog box.
     The name of the selected file appears in the *File name* text box.
     Click *Next>*.
9. Specify the columns (or fields) that you want to use in the drop-down list. Also, select the field you want to appear first in the drop-down list. You can have a maximum of 10 columns displayed in a drop-down list.
   - In the *Columns to show* text box, specify all the fields you want to use from the *Available columns* list. All the columns you specify will appear in the drop-down list. This is useful if you want more information to appear in the drop-down list.
   - In the *Columns to enter* text box, specify the field you want to appear first in the drop-down list. The information from this column is what appears first in the field in fill view.

10. Click *Next*>.

11. Specify the form's fields that you want to be filled automatically.

    - Select the fields in the *Available fields* list and click the right-arrow button. The fields you have chosen appear in the *Fields to fill* list. The *Available Fields* list displays all the fields on your form. The *Fields to fill* list displays all the fields on the form that you want filled automatically.

    - To remove fields from the *Fields to fill* list, select the fields from the *Fields to fill* list and then click the left-arrow button. The fields you have chosen return to the *Available fields* list. Click *Next*>.

12. Specify the links between the fields to be automatically filled in the form and the columns in the database. By linking the fields to the columns, you tell flashFORM what database information needs to be placed in what field on your form.

    - Select an entry from the *Fields in form* and then an entry in *Columns in database*. Click <<*Link*>>. Your selection appears in the *Links* box.

    - You can let flashFORM automatically link fields with columns. Click <<*Auto*>>. flashFORM automatically matches fields with columns of the same name and displays the linkage in the *Links* box.

    - To remove an entry in the *Links* box, select the entry and click *Unlink*. If you want to remove all entries in the *Links* box, click *Unlink All*.

13. Click *Finish* to close the AutoFill Wizard.
    The Fill Text Definition dialog box appears.

14. Click *OK* to apply your settings and close the dialog box.

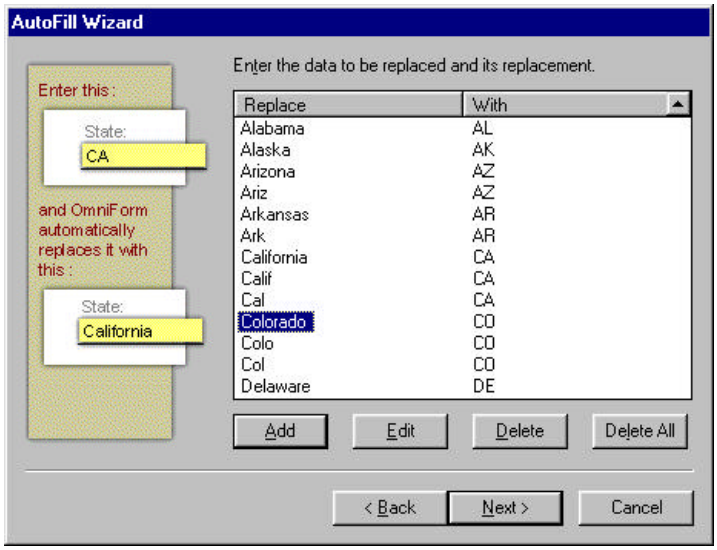
Replacing Data Entered in a Field With New Data

This section describes how you can set up a field to replace entered data with data you have specified in a replacement list. This is useful if you want to standardize an entry in a field. For example, suppose your form contains a *State* field and you want the user to enter the state's two-letter abbreviation. You can create a field that will allow the user to enter only the specified information. So, anytime the user enters a variant of the state name in fill view, the replacement feature will change it to your specified version.

To create a replacement list:

1. Open a form and select a field where you want to create a replacement list.
2. Choose *Object Definition...* in the Format menu.
   The Fill Text Definition dialog box appears.
3. Click the *Filling* tab in the Fill Text Definition dialog box.
4. Select Enable AutoFill and click AutoFill Wizard....
5. Select Create or edit the AutoFill of the current field and click Next>.
6. Select *Replace the data entered into this field with new data* and click *Next>*.

   A dialog box similar to the one below appears.

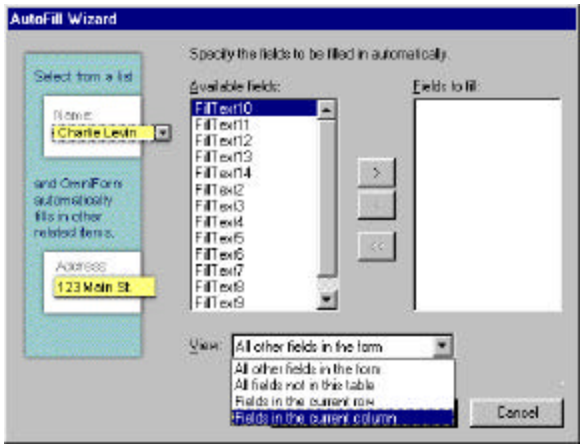


7. Type the entry to be replaced in the *Replace* column and type the replacement in the *With* column.
8. Click *Next>* when you are finished.
9. Select whether you want to save your list. If you are saving your list, type a name.
10. Click *Finish* to close the AutoFill Wizard and, if selected, to save your list.
    The Fill Text Definition dialog appears.
11. Click *OK* to apply your settings and close the dialog box.

Creating AutoFills for Tables

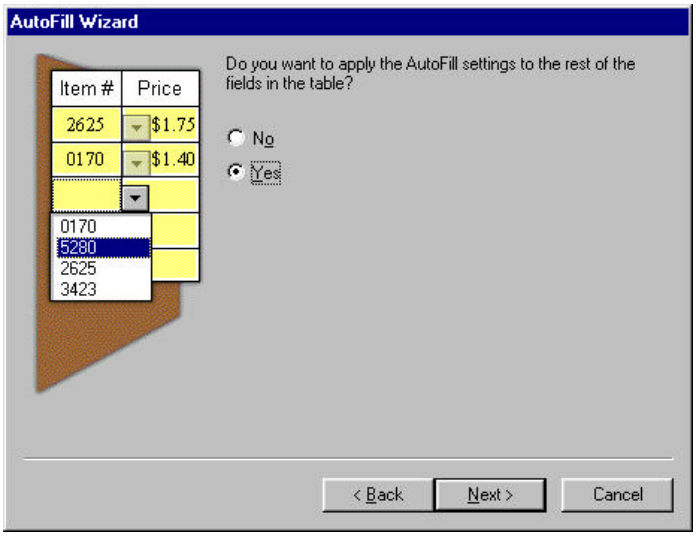
You can create an Autofill list for your table as well as have fields in your table filled automatically. The procedure is similar to " Creating a New AutoFill List" on page 110 . Therefore, before you begin, please review all the sections in "Setting Up a Form for Automated Data Entry." The following is a brief description of the selections in two of the dialog boxes unique to tables.

The following dialog box appears when you have chosen to fill fields automatically.



- Select *All other fields in the form* to show all the available fields on the form.
- Select *All fields not in this table* to show just the fields outside of the table.
- Select *Fields in the current row* to display just the fields in the current row of the table.
- Select *Fields in the current column* to display just the fields in the current column of the table.

The following dialog box appears after you have applied all your settings to the table.



- Select *No* if you do not want the AutoFill settings to apply to the rest of the fields in the table.
- Select *Yes* if you want the AutoFill settings to apply to the rest of the fields in the table.

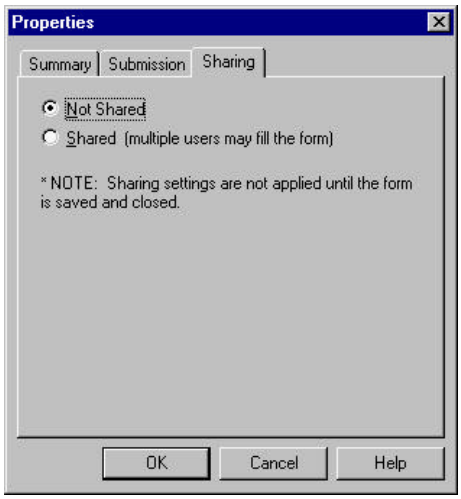
Setting Attributes for a Form

Setting Up a Shared Form

You can set up a shared form whenever you need to do so. By creating a shared form, you allow other users to have access to the form. You also allow multiple users to open and fill the form at the same time.

To set up a shared form:

1. Open a form to design view.
2. Choose *Properties...* from the File menu.
   A Properties dialog box appears.
3. Click the *Sharing* tab and select *Shared*



4. Click *OK* to apply the change.

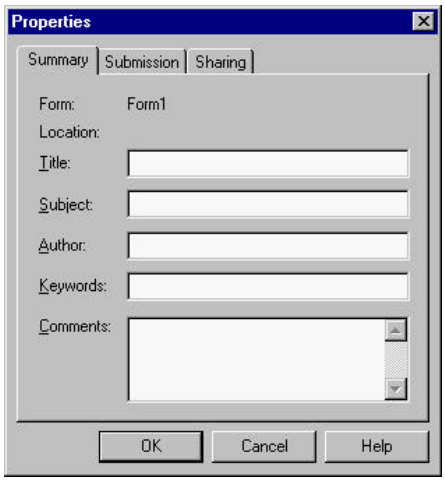
The shared form settings are not applied until the form is saved and closed.

Setting Summary Information

Using the *Summary* tab, you can enter pertinent information about the form.

To set summary information:

1. Choose *Properties* in the File menu.
   The Properties dialog box appears



2. Click the *Summary* tab.
3. Enter information appropriate to your form.

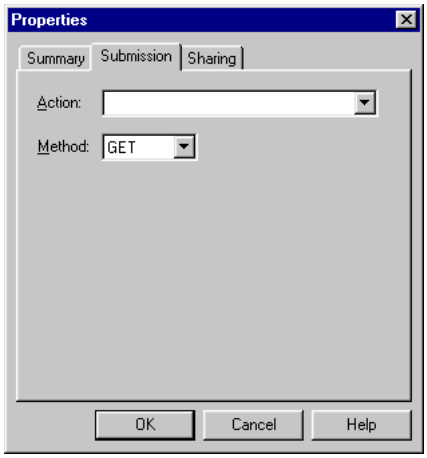
4. Click *OK* to apply your settings.

Setting Submission Information

Using the *Submission* tab, you can set how you will submit your form and where you will send your form after you submit it.

To set submission information:

1. Choose *Properties* in the File menu.
   The Properties dialog box appears.



2. Click the *Submission* tab.
3. Type an action in the *Action* text box. It will be saved in the drop-down list for selection the next time you open this dialog box.
   An action describes where form data will be sent after submission from flashFORM Filler, a Web browser, or Adobe's Acrobat software.
   - The action could point to a Common Gateway Interface (CGI) script on a Web server; for example:
     http://www.formationmg.com/location-bin/script.pl
     This would tell flashFORM Filler to submit data to a script on FORMation mg's Web server.
   - The action could also be an e-mail address; for example:
     mailto:name.othername@company.com
     The form data would be submitted to that e-mail address.
4. Select a means of submitting data.
   - Select *GET* to append text to the Universal Resource Locator (URL) specified in the *Action* drop-down list.

- Select *POST* to notify the Web server to open the CGI application and pass the data.

Adding Security to Your Forms

If your work environment contains several work groups, you might want to add security properties to your forms. Security properties can protect both the user who fills out the form and the user who processes the filled out form.

To add security properties to a form:

- First create a user database.
  This is a place to store the names of the users and their passwords.
- Next, create a signature field or fields on the form.
  A signature field contains settings that allow users to lock fields on a form. In locking other fields, only the user with the correct password can change the locked fields.
- Finally, track and verify who has signed the form.

For example, suppose you have an Expense report that requires an employee's signature and supervisor's approval. For this form you might want to create an employee's signature and have this signature field lock fields that the employee fills out. Once the employee's signature field is signed (that is, filled), no one can change the locked fields unless that user has the correct password and unsigns the field.

You might also want to create a supervisor's signature field and have this signature field lock the employee's signature field. Once the supervisor's signature field is signed (that is, filled), no one can change any of the fields without the correct passwords. The supervisor's password is required to unsign the supervisor's signature field. The employee's password is required to unsign the employee's signature field, which will unlock the rest of the locked fields on the form.

This section describes how to create a user database, how to set up signature fields, and how to verify the signature fields.

Creating a User Database

This section should be performed by your Work Group Administrator. A user database contains information about the members of your work group, such as, user names, passwords, and descriptive full names. It is the basis for form signing and signature verification in the work group. The database should be located where all work group members can access it; such as, the network drive. For

added security, the user database may be made read-only to everyone but the administrator.

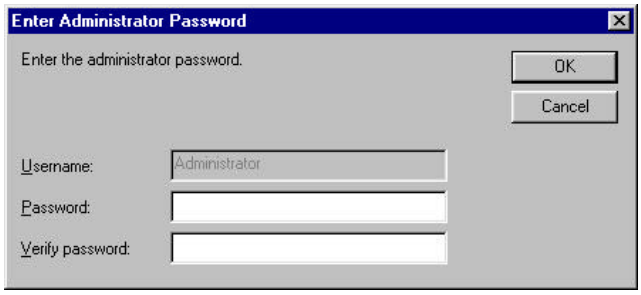
To create a user database:

1.  If you are in fill view, click the Design button in the fill toolbar or choose *Design* in the View menu to switch to design view.

2. Choose *Security...* in the Tools menu. The Security Database dialog box appears.

3. Type the name of your database file in the *File name* text box.
   Or, click *Browse...* to locate your file.
   - Locate and select a file.
   - Click *OK* to return to the Security Database dialog box.

4. Click *OK* when you are finished
   The Enter Administrator Password dialog box appears



If an administrator password has not been defined, you will be prompted to enter one and verify it; otherwise just enter the password to continue.

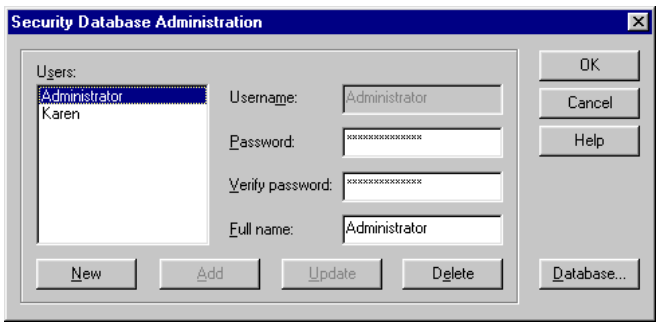
If you lose or forget your password it cannot be recovered. Do not use the following characters in your user name or full name: "/\ [ ] ; : | = , + * ? < >

5. Click *OK* to return to the Security Database dialog box.

6. Click *OK* in the Security Database dialog box to close the dialog box.

To add a user to the database:

1.  If you are in fill view, click the Design button in the fill toolbar or choose *Design* in the View menu to switch to design view.
2. Choose *Security...* in the Tools menu.
   The Enter Administrator Password dialog box appears.
3. Enter your password in this dialog box.
4. Click *OK*.
   The Security Database Administration dialog box appears. In the *Users* list box, all the current users are displayed.



5. Click the *New* button to add a new user, and enter:
   - the user's name in the *Username* text box. The user's name can contain up to 20 characters.
   - the password for that user in the *Password* text box. The password can contain up to 14 characters and will appear as asterisks in the text box.
   - the password again in the *Verify password* text box.
   - the user's full name in the *Full name* text box. The full name can contain up to 50 characters. The full name is the name that will be displayed in the signature field in fill view.

If you lose or forget your password it cannot be recovered. Do not use the following characters in your user name or full name: "/\ [ ] ; : | = , + * ? < >

6. Click *Add* to add the new user.
7. Click *OK* to close the dialog box.

To update a password or full name:

1. In design view, choose Security... in the Tools menu.
   The Security Database Administration dialog box appears. In the Users box, all the current users are displayed.
2. In the Users list box, select the user that you want to update.

   Updating a user's password will cause all records previously signed by this user to become unverified. The user will no longer be able to unsign those records.

   - Type a new password in the *Password* text box, and then type the password again in the *Verify password* text box to update the password.
   - Type the new user's full name in the *Full name* text box to update the user's full name.

3. Click *Update* to update the password/user's full name.
4. Click *OK* to close the dialog box.

To delete a user:

1. In design view, choose Security... in the Tools menu.
   The Enter Administrator Password dialog box appears. Enter your password in this dialog box.
2. Click OK.
   The Security Database Administration dialog box appears. In the Users box, all the current users are displayed.
3. Select the user that you want to delete in the Users box.
4. Click Delete. You will be warned that you are about to delete the user and will be prompted to continue. Click OK in this dialog box. The user is deleted.
5. Click OK to close the Security Database Administration dialog box.

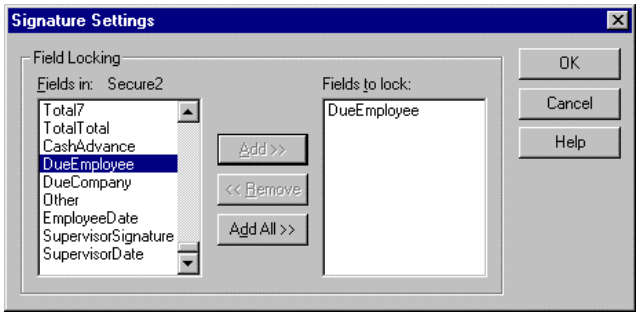
Creating Signature Fields

You create signature fields from fill text fields. Signature fields can lock other fields on a form. And once a signature field is signed (that is, filled) no one can change the locked fields unless that user has the correct password and unsigns the field.

To create a signature field on a form:

1. In design view, select a fill text field on the form where you want to create a signature field.

2. Choose *Object Definition...* in the Format menu.
   Or, open a shortcut menu by clicking the right-mouse button over the selected object. Choose *Object Definition...* in this menu.
3. Click the *Properties* tab in the Fill Text Definition dialog box.
4. Select *Signature* in the *Type* drop-down list.
5. Click the *Settings* button.
   The Signature Settings dialog box appears.



- In the *Fields in* list box, select the fields that you want to lock with the signature field and click *Add*>> to add the fields.
- To add all the fields on the form, click *Add All*>>.
- To remove fields from the *Fields to lock* list box, select those entries that you want removed and then click <<*Remove*.

6. Click *OK* when you are finished.
   If *Field Security* has been turned on in fill view, signed fields will appear with an icon in fill view: a red icon if the signature is not verified and a green icon if the signature is verified. The fields that are locked will have a blue border in fill view.

Filling/Signing Signature Fields

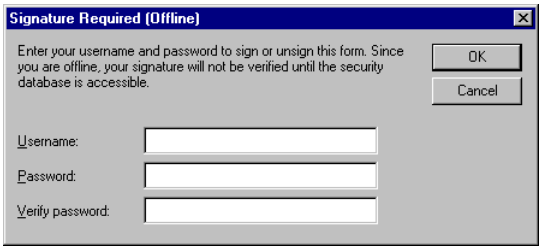
A form is signed if a user has filled out a signature field. If online, the user must enter a valid user name and password. A form is considered online if the security database can be found and opened. When online, signatures can be verified.

If offline a user can enter any user name and password. A form is considered offline if a security database file name has not been specified, or if an error occurred when opening the database. When offline, signatures cannot be verified.

To sign a signature field:

1. Click the signature field.

- If you are online, the Signature Required dialog box appears. You will be prompted for a valid user name and password.
- If you are offline, the Signature Required (Offline) dialog box appears. You will be prompted for a user name and password.



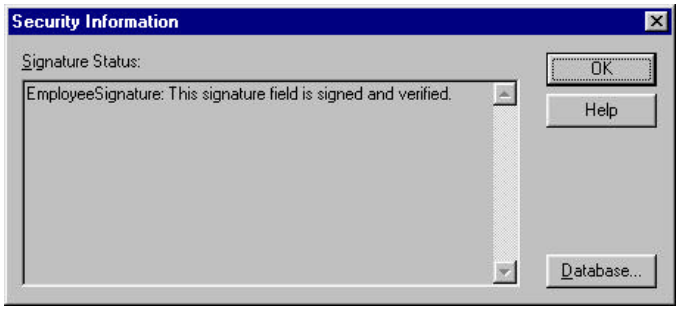
2. Enter your user name and password.
3. Click OK.

Verifying Signature Fields

A form with signature fields is only of value if you can verify that the filled signature fields are valid and if the signed data has changed. You cannot verify a signature when you are offline. And if a form is signed offline, the user database cannot be accessed to verify the user information.

To verify a signature:

1.  If you are in design view, click the Fill button in the design toolbar or choose Fill in the View menu to switch to fill view.
2. Choose Security... in the Tools menu. The Security Information dialog box appears.
   flashFORM tracks whether a signature field is currently verified or if it has ever been verified.



3. Click OK to close the dialog box.

Adding Hyperlinks to Your Forms

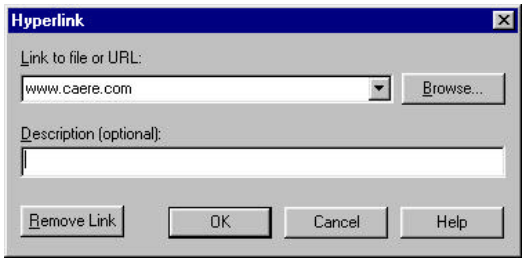
You can easily set up hyperlinks on your forms. A hyperlink is a connection from a place on your form to a file or Web site. For example, the person who fills out the form can link from a place on the form to your company's Web site.

To add hyperlinks to your forms:

1.  If a form is open in fill view, click the Design button in the fill toolbar or choose *Design* in the View menu to switch to design view.

2. Select an object on your form where you want to add a hyperlink. You can add hyperlinks to rectangle objects, oval objects, graphic objects, text objects and inside a text object (embedded within the text).

3. Choose Hyperlink... in the Format menu. Or, click Hyperlink in the web toolbar. See "The Web Toolbar" for more information about this toolbar. The Hyperlink dialog box appears.



4. Select one of the options in the Link to file or URL drop-down list.
   - If you want to link to a specific Web site, select *http://* and type the rest of the site address in the provided text box.
   - If you want to link to an FTP address, select *ftp://* and type the rest of the address in the provided text box.
   - If you want to link to an electronic mail address, select *mail to:* and type the rest of the mail address in the provided text box.
   - Or, click *Browse...* if you need to locate a file. Locate and select a file.

5. If you want, type a description of your hyperlink in the Description text box.

6. Click OK to apply your settings and close the dialog box.

7. Choose Options... in the Tools menu if you would like to be able to view the link address. The Options dialog box appears. Select ScreenTips. When in fill view, if you place your cursor over the hyperlink area, a pop-up window appears displaying the link address.
8. Click OK to apply your settings and close the dialog box.
9. Right-click your mouse button over the hyperlink object to check your hyperlink while in design view. Select Follow Hyperlink. Or, you can hold down the Ctrl key and click it as you are over the hyperlink object.

Using the Scrapbook

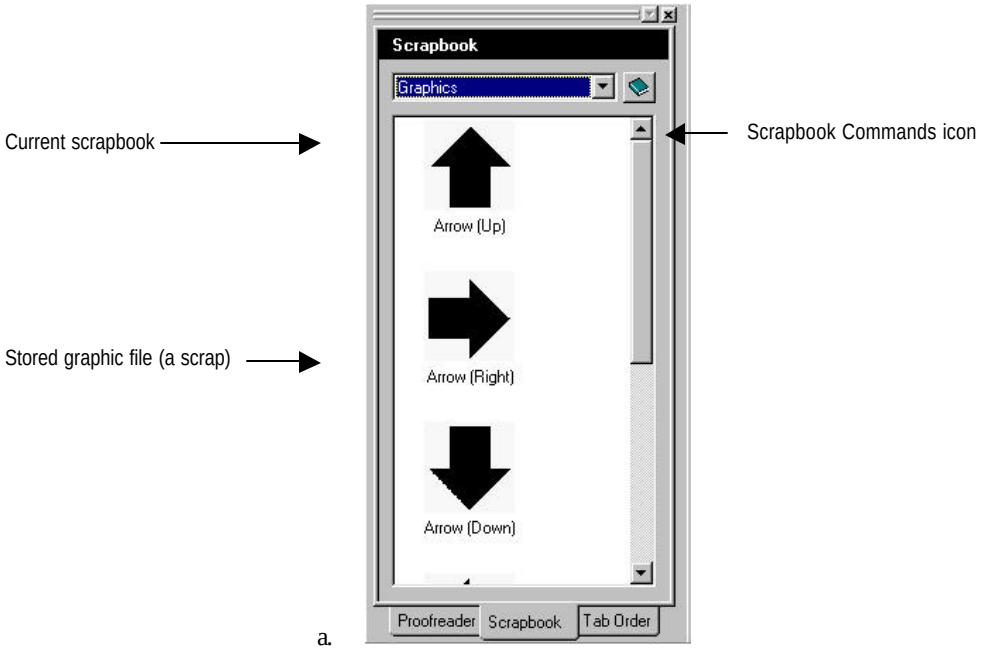
This section describes the flashFORM scrapbook and how to use it.

What Is the Scrapbook?

The scrapbook is a convenient place to store frequently used or complex objects. Objects stored in the scrapbooks are called *scraps.* You can copy these scraps into any form. You can use one of the several scrapbook files provided with flashFORM or create your own.

To open a scrapbook:

1. Choose Scrapbook in the Tools menu. The scrapbook opens to the left of the flashFORM window in the Tools window.



a.

2. Select a scrapbook to view in the *Scrapbook* drop-down list, or create your own.
   See " To create a new scrapbook" for information.

To copy objects to the scrapbook:

1. Open the desired scrapbook.
2. Select one or more objects on your form and drag them into the scrapbook. Or, select one or more objects and choose Paste Scrap in the Scrapbook Commands icon menu.

Small thumbnail sketches of the objects appear as Scrap 1, Scrap 2, and so forth in the scrapbook.

You cannot store an OLE object in the scrapbook.

To place scraps in a form:

1. Open the desired scrapbook.
2. Select a scrap and drag it into your form. Or, select a scrap and choose Copy Scrap in the Scrapbook Commands icon menu.

You can select only one scrap at a time. The selected scrap appears as the original object in your form.

To rename a scrap:

1. Select a scrap.
2. Choose Rename Scrap in the Scrapbook Commands icon menu.
3. Type a new name for the scrap and press Enter to accept the name.

Press Esc to cancel the command and leave the name as it is.

To delete a scrap:

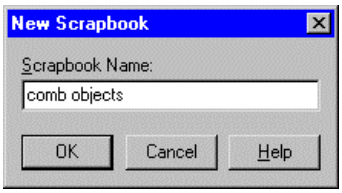
1. Select a scrap.
2. Choose Delete Scrap in the Scrapbook Commands icon menu. You can also press Delete to delete a selected scrap.

You cannot undo the *Delete Scrap* command.

flashFORM prompts you to confirm your choice.

To create a new scrapbook:

1.  Choose *New Scrapbook...* in the Scrapbook icon drop-down list. The New Scrapbook dialog box appears.
2. Type a name in the Scrapbook Name text box.



3. Click OK.

A new, empty scrapbook appears.

To rename a scrapbook:

1. Open the scrapbook to rename.
2. Choose Rename Scrapbook... in the Scrapbook Commands icon menu.
3. The Rename Scrapbook dialog box appears.

4. Type a name in the New Name text box.
5. Click OK.
   The new scrapbook name appears in the Scrapbook drop-down list.

To delete a scrapbook:

1. Open the scrapbook to delete.
2. Choose Delete Scrapbook in the Scrapbook Commands icon menu.

You cannot undo the *Delete Scrapbook* command.

3. flashFORM prompts you to confirm your choice.

You can also delete a scrapbook file directly from the hard drive. Scrapbook files are stored in the location c:\flashFORM\Scrapbooks. Always close flashFORM before deleting any flashFORM files from the hard drive.

To change the scrapbook view:

1. Choose View in the Scrapbook Commands icon menu.
2. Select a view in its cascading menu.

- Choose *Icons* to view the scraps as thumbnail sketches of the stored objects.
- Choose *List* to view the scraps as a list.
- Scraps are listed in the order they were created in both *Icon* and *List* views.

Inserting OLE Objects in a Form

This section describes how to use *object linking and embedding* (OLE) to insert objects in a form.

Inserting objects is a convenient way to place information from other sources in flashFORM. flashFORM supports objects created in a variety of applications.

For example, instead of scanning a page of text into flashFORM, you could create a Microsoft Word Document object and insert it in the form either as fully displayed text or as a launchable icon. This saves you scanning and editing time. An OLE object displayed as an icon also saves form and disk space.

Linking and Embedding

You can either link or embed an object when you insert it. This section describes both methods.

Object Linking

A linked object retains a connection, or *link,* to the source file. The source file is the file you select to insert as an OLE object.

The source file stores the linked data. The flashFORM form stores the location of the source file and displays the linked object. Changes to the source file are reflected in the linked object.

Use linking when:

- The source file is likely to change.
- The source file is on a network or needs to be accessed by others.
- The source file is shared by more than one document.
- The source file is very large and you do not want to increase your form's file size significantly.

Object Embedding

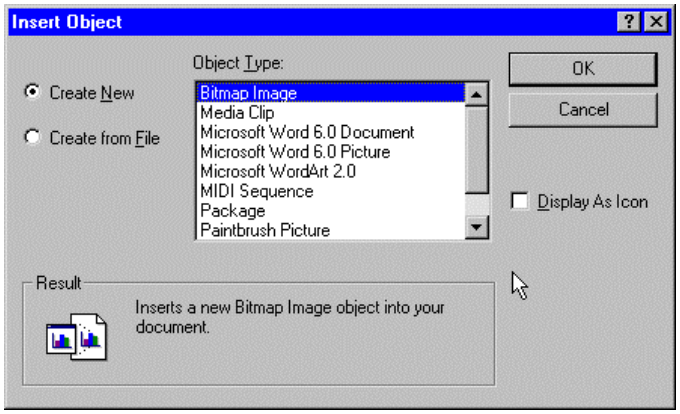
An embedded object becomes part of the flashFORM form. It is not linked to the source document.

Use embedding when:

- It is unlikely the object will need to be changed or updated.
- The source document is unavailable for linking.
- You are not concerned about the file size of your flashFORM form.

How to Insert OLE Objects

1. Choose Insert New Object... in the Edit menu. The Insert Object dialog box appears.



2. Select an object type in the Object Type list box.
3. Select one of the following.
   - To create a new object of the type selected and embed it in your form, select *Create New*. Proceed to step 4.
   - To import a file of the type selected and either embed it or link it to your form, select *Create From File*. The dialog box changes. Proceed to "Creating an OLE Object From a File" on page 151.
4. Select Display As Icon to display the object as an icon, rather than displaying its actual content.
   The Change Icon... button appears when Display As Icon is selected. Click it to select a new icon for the object or to change the icon's name. By default, an object appears with the object type name if it is unlinked and the source file name if it is linked.

5. Click OK.
   How the object appears depends on the options that you selected. See " Creating a New OLE Object" for detailed information.

You cannot store an OLE object in the scrapbook.

Creating a New OLE Object

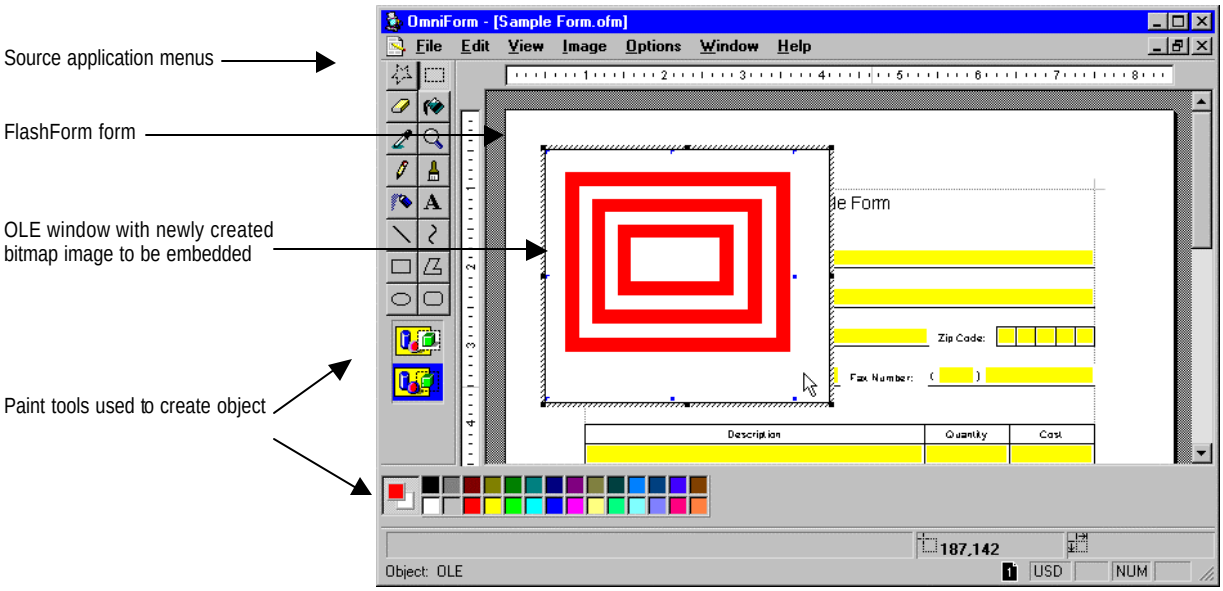
See the previous section, " How to Insert OLE Objects" if you need to insert an object. How your object appears depends on the options you selected in the Insert Object dialog box.

If you selected *Display As Icon* in step 4 in the previous section, the source application launches. Use its commands and tools to create your object. Choose *Exit* in the File menu to insert the object as an icon.

If you did not select *Display As Icon,* an OLE window appears (some applications do not support OLE windows and the object will launch in the application itself). The flashFORM window changes to reflect the application window for the selected object type:

- The name in the title bar changes to that of the source application.
- The embedded object appears as an empty OLE window within the application window. Create your object here.
- All menus but the File and Windows menus change to those of the source application.
- All toolbars change to those of the source application.

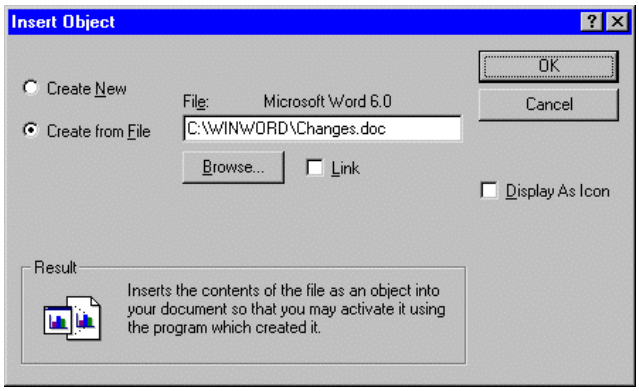
If you selected *Bitmap Image,* for example, you can use the Microsoft Paint menu commands and tools and some flashFORM commands.



Create your object in the available window. Click outside the window or press Esc to embed the object in your form when you are done.

Creating an OLE Object From a File

See steps 1–3 in the section " How to Insert OLE Objects" if you need to create an object. The Insert Object dialog box changes when you select *Create from File.*



1. Type a file name in the File text box.
   Or, click Browse... to locate a file. Select a file, and click OK to return to the Insert Object dialog box.

2. Select Link if you want to link the object to its source file.
   Otherwise, the object will be embedded.

3. Select Display As Icon to display the object as an icon, rather than displaying its actual content.
   The Change Icon... button appears when Display As Icon is selected. Click it to select a new icon for the object or to change the icon's name. By default, an object appears with the object type name if it is unlinked and the source file name if it is linked.

4. Click OK.
   The object appears in your form.

Pasting a Linked OLE Object

You can paste information from another application into flashFORM as a linked OLE object. For example, you could copy cells from an Excel spreadsheet to the Clipboard. When you open flashFORM, the *Paste Link* command in the Edit menu will be active. The object, once pasted, is linked to the copied cells.

To paste a linked OLE object:

1. Open a document in an application that supports links to its documents.

2. Select the portion to link and leave it selected.

3. Open a form in flashFORM.

4. Choose Paste Link in the Edit menu.
   flashFORM pastes the information as a linked OLE object.

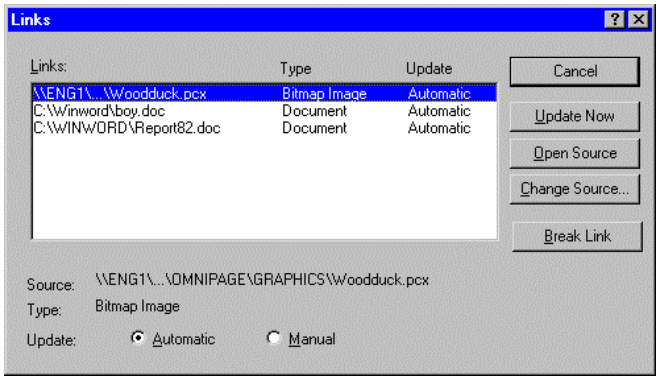
Use the *Links...* command in the Edit menu to set linking options for any linked object. See the next section for information.

Setting Up Linking Options

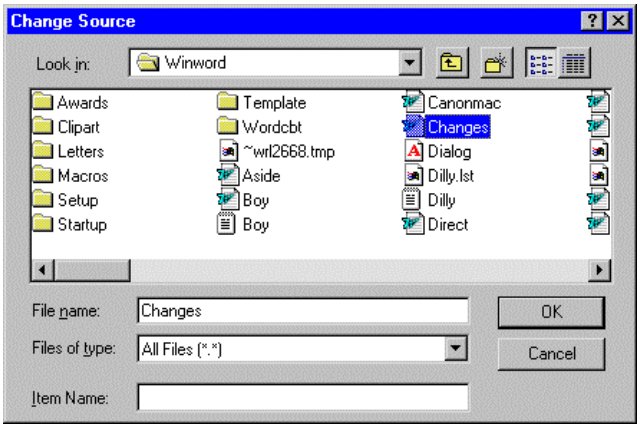
This section describes the *Links...* command. This command is only active if you have linked objects in the current form. Use the *Links...* command to update or break links, open an OLE object, or change an OLE source file.

To use the *Links...* command:

1. Choose Links... in the Edit menu.
2. The Links dialog box appears.



3. Select a link and click Automatic or Manual.
   - Select Automatic to update the selected link automatically each time you open a form.
     This is useful if the source file is updated frequently by you or other users and you want to keep the linked object current.
   - Select Manual to update only the selected link by using the Update Now button in the Links dialog box.
     This is useful if you do not want the linked object to reflect all changes made to the source file.
4. Select a link and click a button to perform a linking procedure:
   - To update the selected link to reflect any changes made to its source file, click *Update Now*.
   - To launch the selected link in its source application, click *Open Source*.
   - To change the source file to which the object is linked, click *Change Source*. The Change Source dialog box appears.



Select a new source file for the object and a file type in the *Files of type* drop-down list. *Item Name* is assigned automatically by the server application, if one exists.

Click *OK* to return to the Links dialog box. You can use the *Convert...* command to assign a new name to the object after its source has changed. See "Convert…".

- To permanently unlink an object from its source file and convert it to a static OLE object, click *Break Link*.

An object converted to a static OLE object cannot be edited, opened, reconverted, or played.

- The *Cancel* button changes to *Close* after you complete a linking procedure.

5. Click Close when you are done.

Using the Object Commands

The *Object* command in the Edit menu is only available when an OLE object is selected. It changes according to the selected object. The commands in its cascading menu change as well. This section describes each command.

Open

Choose *Open* in the Object cascading menu to view a selected OLE object in its source application.

- Linked objects and objects displayed as icons open in the source application. Choose *Exit* in the File menu when you are done.

- Unlinked objects not displayed as icons open in the window in which you created them. Click outside this window when you are done.

Edit

Choose *Edit* in the Object cascading menu to edit a selected OLE object in its source application or in the OLE window in which it was created.

Or, double-click the OLE object to open it.

- Linked objects and objects displayed as icons open in the source application. Edit the object and choose *Exit* in the File menu when you are done.
- Unlinked objects not displayed as icons open in the window in which you created them. Edit the object and click outside the window when you are done.

Convert...

Use the *Convert...* command to convert a selected OLE object to another type of object or to an icon, to choose a different icon, or to rename an icon.

1. Select the object and choose Convert... in the Object cascading menu.
   The Convert dialog box appears.

An object converted to a static OLE object cannot be edited, opened, reconverted, or played.

2. Select an option in the Object Type list box.
   The available options depend on the selected object. There may be no available options.
3. Select Display As Icon if you want to display the object as an icon, rather than displaying its actual content.
4. Click Change Icon... when Display As Icon is selected if you want to select a new icon or change its name.
   The Change Icon... button appears when Display As Icon is selected. Click it to select a new icon for the object or to change the icon's name. By default, an object appears with the object type name if it is unlinked and the source file name if it is linked.
5. Click OK.
   The object is converted.

Play

Choose *Play* in the Object cascading menu to play a selected OLE object in its source application or in the OLE window in which it was created.

This command is only available for video clip, media clip, and MIDI sequence objects.

- Linked objects and object displayed as icons open in the source application. Play the object and choose *Exit* in the File menu when you are done.
- Unlinked objects not displayed as icons open in the window in which you created them. Play the object and click outside the window when you are done. .

Filling a Form

This chapter describes how you or another user would fill out a form created in flashFORM.

This chapter contains the following sections:

- The Fill View Window
- Moving Through Fields
- Filling Fields
- Spell Checking
- Saving in Fill View

You must first open, scan, or import a form in order to fill it.

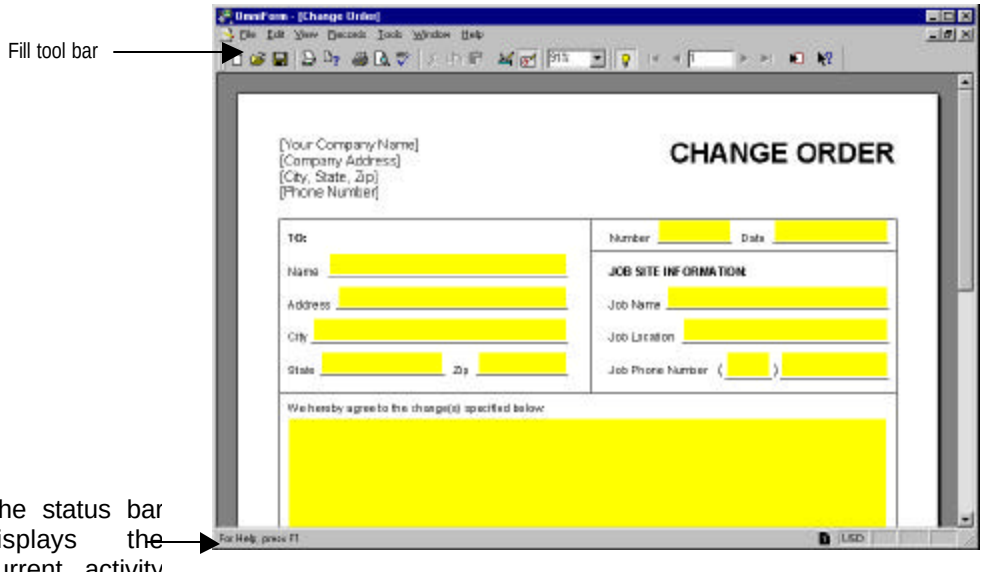
The Fill View Window

This section provides an overview of the fill view window.

If you are in design view, click the Fill button in the design toolbar or choose *Fill* in the View menu to switch to fill view.

To open a shortcut menu, click the right mouse button and choose *Fill* in this menu.

The fill view window contains a toolbar and seven menus.

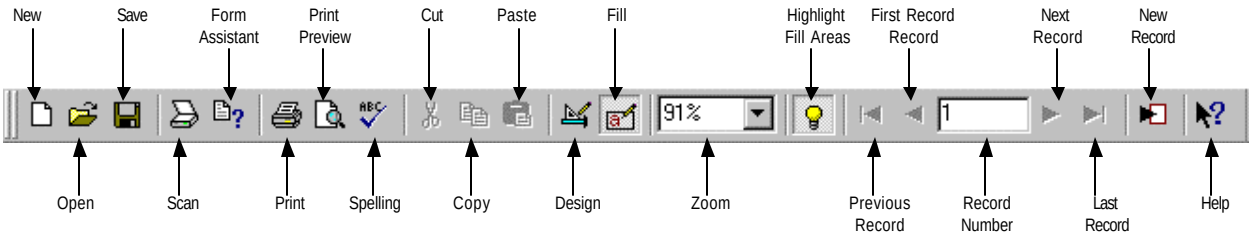


Use fill view to enter data in fields, create a records database, import and export information to and from records, and print or mail forms.

See "Managing a flashFORM Database" for detailed information on database creation and management.

The Fill Toolbar

Use the fill toolbar for basic file operations such as saving and printing. Use it also to move through records in a database.



All these buttons correspond to menu commands of the same name. Clicking a button is the same as choosing its corresponding menu command.

All corresponding menu commands are explained in online help or in various sections throughout this manual (see the index for exact locations). Processes such as scanning or opening a form are explained in the Chapter on "flashFORM Procedures."

You can also drag the fill toolbar to any other location in the flashFORM window.

Moving Through Fields

You can click in any field to place the cursor there or you can use the following keyboard commands to move the cursor within a form.

Action	Key Combination
Place the cursor in a field	When a form first opens, press Tab to place the cursor in the first field.
Next field	Press Tab
Previous field	Press Shift-Tab
Next line in a fill text field	Press Enter to move to the next line in a multiple-lin fill text field
End of a line in a fill text field	Press End
Beginning of a line in a fill text field	Press Home
End of all text in a fill text field	Press Ctrl-End
Beginning of all text in a fill text field	Press Ctrl-Home
Next word in a field	Press Ctrl-right arrow
Previous word in a field	Press Ctrl-left arrow

Filling Fields

This section describes each type of fillable field in flashFORM, how to fill it, and how to check spelling. It contains the following topics:

- Type Ahead
- Shrink Text to Fit Fields
- Fill Text
- Comb
- Check Box
- Circle Text
- Table
- Fill Graphic
- List Fields
- Fields Defined by a Calculation
- Field Validation

These instructions assume that the cursor is already in a field.

The way information is displayed in a field depends on the current form language selection and the object definition. See "International Settings" and "Defining Objects on a Form" for more information.

Type Ahead

As you begin to enter a word in a fill text object, flashFORM will automatically complete the word. This option works only when there is previously filled information that matches the word you are entering. It also works for dates, times, and pop-up lists.

To type ahead:

1. Choose *Options...* in the Tools menu.he Options dialog box appears.
2. Click the *Filling* tab.

- Select *Enable Type Ahead* if you want this option.
- Deselect *Enable Type Ahead* if you do not want this option.

3. Click *OK*.

Shrink Text to Fit Fields

When filling a form, the text you enter may not always fit in the fill text fields. You can make your text automatically fit your fields.

To shrink text to fit fields:

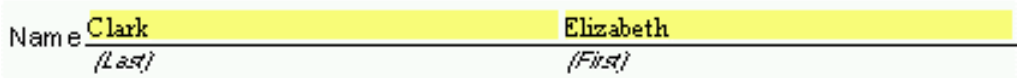
1. Choose Options... in the Tools menu.
   The Options dialog box appears.
2. Click the Filling tab.

- Select Automatically shrink text to fit within fields if you want this option.
- Deselect Automatically shrink text to fit within fields if you do not want this option.

3. Click *OK*.

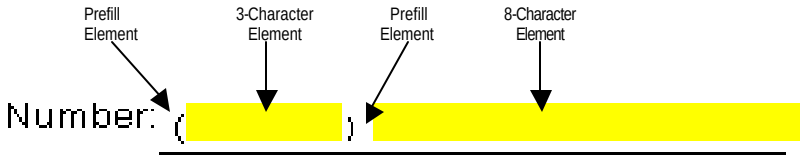
Fill Text

Enter characters in a fill text field: letters, numbers, symbols, dates, and so forth. Fill text fields can contain any sort of textual information. The example below shows *First Name* and *Last Name* fill text fields.



Comb

Enter characters in a comb field: letters, numbers, or symbols appropriate to the field. Phone numbers and zip codes are commonly used comb fields. A comb field consists of individual comb *elements.* Each element can contain a different number of characters.

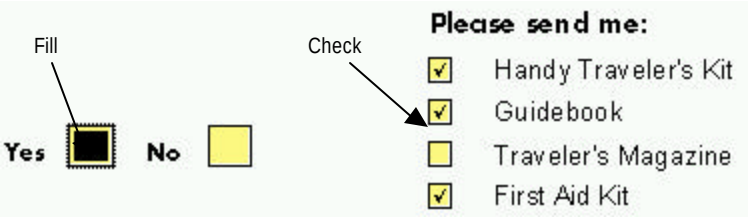


You do not have to tab from element to element in a comb field. Just type the required amount of information and flashFORM automatically moves the cursor to the next element as appropriate.

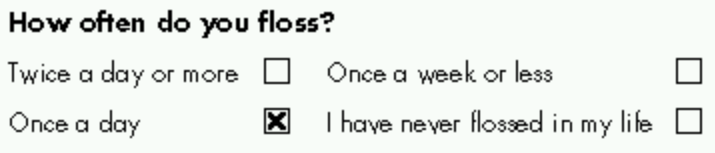
Check Box

Click a check box field to fill it. A check box field can contain one of three elements: a check mark, an **X**, or a fill. The default value of a check box is an **X**; but you can easily change it to a check mark or a fill.

Check boxes are commonly used for *Yes/No* questions and for selecting an item in a group, as in the two examples below:



Check boxes may be *grouped;* this means that only one can be selected. Selecting one check box automatically deselects another checked box in the group as in the example below.



To move through grouped check boxes, use the arrow key on your keyboard.

Circle Text

Click a circle text field to fill it. A border appears around the filled field. A circle text field can contain text and other characters, or it can function much like a check box (see the previous section "Check Box").

Table

A table field consists of individual *cells*. Table cells are fill text fields by default. Enter characters in these cells just as you would in fill text fields.

A table cell can also contain any other type of field, even multiple fields of the same or different types. In the example below, the table cells on the right contain check box fields.

Task	Assigned To	Done
Tune piano	John C.	✓
Paint walls	Jerry G.	✓
Groom horses	Tina G.	
Make deliveries	Pat G.	✓
Milk cows	Colman M.	
Collect recycling	Andrew A.	

The user clicks this cell to fill it in the same way as a check box field. See "Designing a Form," for information on tables, converting fields from one type to another, inserting objects in table cells, and so on.

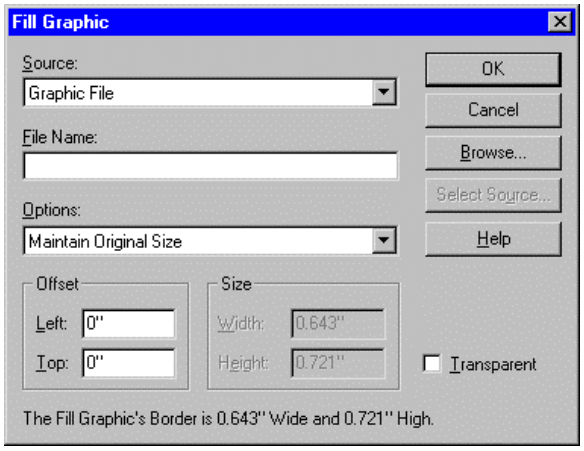
Fill Graphic

A fill graphic field contains a graphic you select. You can import an existing graphic or you can select a TWAIN-compatible scanner source and scan an image directly into the fill graphic field. This section describes both options.

To import an existing graphic:

1. Click the fill graphic field or tab to the field and press the Space bar.
   The Fill Graphic dialog box appears.

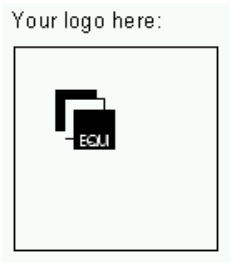
2. Select Graphic File in the Source drop-down list.



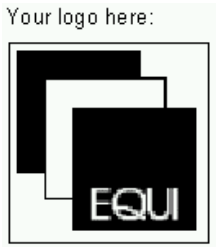
3. Enter a file name in the File Name text box.
   Or, click Browse... to locate a file. Select a file, and click OK to return to the Fill Graphic dialog box.
   The file name appears in the File Name text box.

4. Select an option in the Options drop-down list.

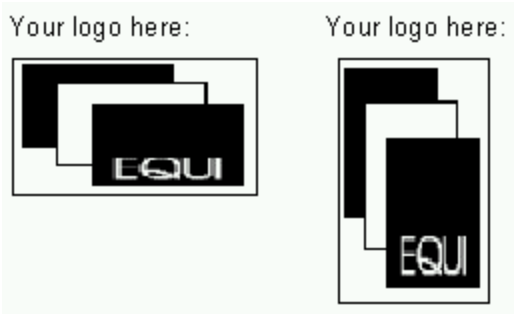
- Select Maintain Original Size to import the graphic without changes.



- Select *Scale Proportionally* to fit the graphic in the fill graphic field while maintaining its exact proportions.



- If you had a 2-inch by 2-inch graphic, for example, and the fill graphic field was 3 inches by 3 inches, the graphic would be enlarged to approximately a 3-inch by 3-inch size. It would fit in the field and maintain its 1:1 size ratio.
- Select *Stretch to Fit* to change your graphic's original shape and size to fit in the fill graphic field If you had a 2-inch by 2-inch graphic, for example, and the fill graphic field was 3 inches by 3 inches, the graphic would be enlarged to approximately a 3-inch by 3-inch size. It would fit in the field and maintain its 1:1 size ratio.



Depending on the shape of the fill graphic field, your graphic may be stretched or compressed. You might want to use this for special effects.

- If you had a 2-inch by 2-inch graphic, for example, and the fill graphic field was 3 inches by 3 inches, the graphic would be enlarged to approximately a 3-inch by 3-inch size. It would fit in the field and maintain its 1:1 size ratio.
- Select *Specify Width & Height* to specify the graphic's size. Enter measurements for your graphic in the *Width* and *Height* text boxes under *Size.* The size of the fill graphic field is displayed at the bottom of the Fill Graphic dialog box

If you enter a size larger than the fill graphic field, only part of the graphic will be visible.

5. Enter offset measurements under Offset.
   This is useful if you want to position a graphic exactly in the field, crop a large graphic, or move the graphic away from a field border that would interfere with its design.

- Enter a number in *Left* to specify how far away from the left side of the field to place the graphic.
- Enter a number in *Top* to specify how far away from the top of the field to place the graphic.

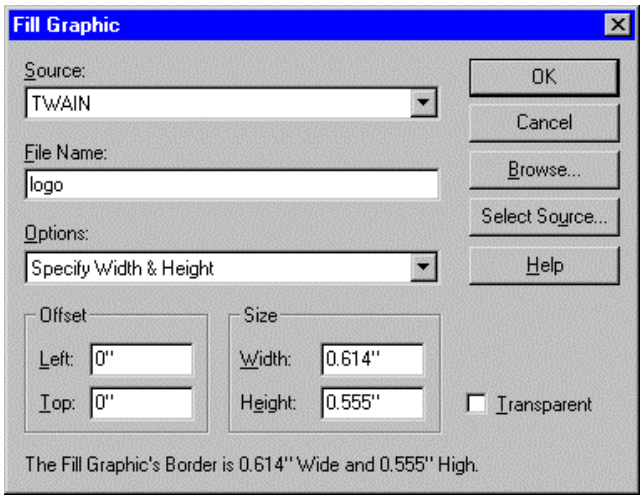
6. Select or deselect Transparent.

- Select Transparent if you want to be able to see information behind the graphic. Whether a graphic prints transparently depends on your printer driver. See your printer documentation for information.
- Deselect Transparent if you want the graphic to be opaque. You will not be able to see information behind the graphic.

7. Click OK.
   flashFORM imports the graphic and displays it in the fill graphic field.

To import a graphic from a TWAIN source:

1. Click the fill graphic field or tab to the field and press the Space bar.
   The Fill Graphic dialog box appears.
2. Select TWAIN in the Source drop-down list.
3. Click Select Source to open the Select Source dialog box.
4. Select your TWAIN source and click OK to return to the Fill Graphic dialog box.
5. Type a file name in the File Name text box.
   This is the file name the graphic will have after it is scanned and saved automatically by flashFORM.



- Click *Browse...* if you need to locate a path for the file.
- Set a path in the Browse dialog box, type a name for the file, and click *OK* to return to the Fill Graphic dialog box.

6. Follow steps 4 through 6 in " To import an existing graphic" on page 164 and then return to step 7 on this page.
7. Place the page with the graphic that you want in your scanner, making sure it is aligned correctly.
8. Click OK.
   flashFORM scans the graphic and displays it in the fill graphic field.

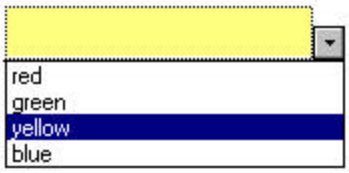
To delete a graphic from a fill graphic field:

Select *None* in the Fill Graphic dialog box to delete a graphic from the form and leave the fill graphic field empty.

List Fields

Fields can contain a list of selectable entries. A drop-down list arrow appears when the cursor is in the field.

Click the arrow to open the list

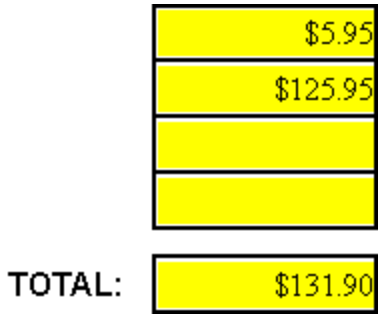


Select an entry. The entry appears in the field.

Fields Defined by a Calculation

The only time you would notice a calculation in fill view is when a field fills in automatically.

In the example below, the *TOTAL* field automatically added the amounts entered in the first and second fields. The *TOTAL* would increase if the third and fourth fields were filled as well.



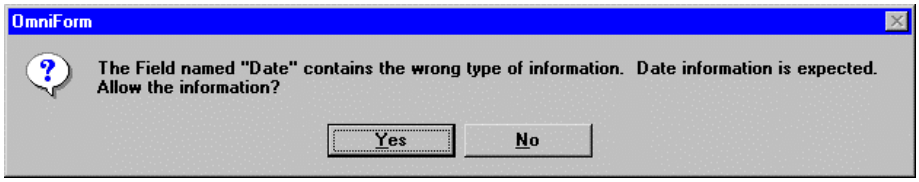
You define a calculation on a field in design view. See "Using Calculations," for detailed information on calculations.

Field Validation

Fill text fields can be configured by the creator to:

- Require that you enter information in a field and do not leave it blank.
- Require that you enter specific information in a field.
- Require both of the above.
- Require that you choose from a list of choices.

This is *field validation* and ensures that information entered in a form is consistent. For example, you may be required to enter a date in a validated *Date* field. You would receive a reminder prompt from flashFORM if you attempted to enter anything other than a date.



- Click *No* to return to the field and enter the expected information.
- Click *Yes* to override field validation.

See "To set validation options for fill text objects:" for detailed information on field validation.

Spell Checking

Use the spell-checking feature to verify that text field entries are correct.

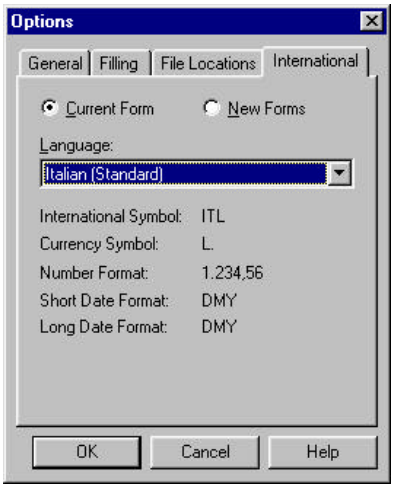
Before you check spelling make sure you have selected the correct language for your form in the Options dialog box as described below.

Proceed to " Spell Checking Your Form" on page 170 if you have a single-language form, or the *Current Form* language selection is correct, or you have a dictionary for that language.

To Check the *Current Form* Language Selection:

1. Choose Options... in the Tools menu.
   The Options dialog box appears.
2. Click the International tab.
3. Click Current Form.

The Language selection is grayed out but readable in fill view.



4. If the language selection for Current Form is incorrect, click Cancel and proceed to " To Select a Language for Your Form" on page 19.
5. Click OK if the language is correct.

Spell Checking Multiple Languages

You may have scanned in a form with the *Allow Multiple Languages* option selected. (See "The Allow Multiple Languages Option".) You have two choices for effective spell checking:

- Decide which language makes up the majority of your form and select that language as the *Current Form* selection.
  This is faster but less accurate.
- Spell check only the portion of the form that the *Current Form* selection matches. Change the *Current Form* selection to match another portion of the form, spell check that portion, and so on for each language in the form.

  This is more time-consuming but more accurate. Remember that changing the *Current Form* selection could cause flashFORM to reformat data already entered in fill view.

Dictionaries for Spell Checking

Dictionaries for all supported languages are included in the International English version of flashFORM. The United States version has a standard English dictionary. You can call 1-800-654-1187 to order additional dictionaries. You must have a dictionary that matches the language of a form to spell check it.

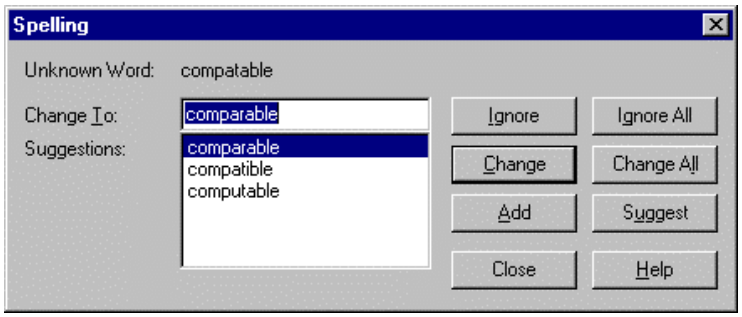
Spell Checking Your Form

flashFORM has two ways to spell check your form.

- flashFORM automatically places a red wavy line under misspelled words and double entries. You simply right-click the error and select the correction from the menu that appears.
  If you want to turn off this automatic spell checker, choose Options... in the Tools menu. In the dialog box that appears, select the Spelling tab. Deselect Check spelling automatically to turn off the automatic spell checker.
- You can also check the spelling of your form by using the Spelling dialog box.

  To spell check your form:

  1.  Click the Spelling button in the fill toolbar or choose Spelling... in the Tools menu.
     The Spelling dialog box appears with the first questionable word after Unknown Word.



- The suggested spelling, if there is one, appears in the *Change To* text box.
- Other suggested spellings appear in the *Suggestions* list box.

2. Click one of the following options: Ignore, Ignore All, Change, Change All, Add, or Suggest.
3. Click Close to end the spell check.
4. Click OK in the dialog box that tells you the spell check is done.

Saving in Fill View

flashFORM automatically saves in fill view. flashFORM saves after numerous user actions, such as, moving from one record to another, printing or closing a form, before importing or exporting data, and in many other situations. You would rarely need to use the *Save* command in fill view except to:

- Save changes to the entire form, both changes made in design view and data entered in fill view.
- Save information entered in the *Print offsets for data* option in the Print dialog box.

Use the *Save As...* command in fill view to save a form to another location or with a different file name.

Managing a flashFORM Database

This chapter introduces basic database concepts, including the following sections:

- What is a Database?
- Managing Database Records
- Protecting Your Database

See "Designing a Form," for detailed information on defining fields in a form so that all your records contain the proper information.

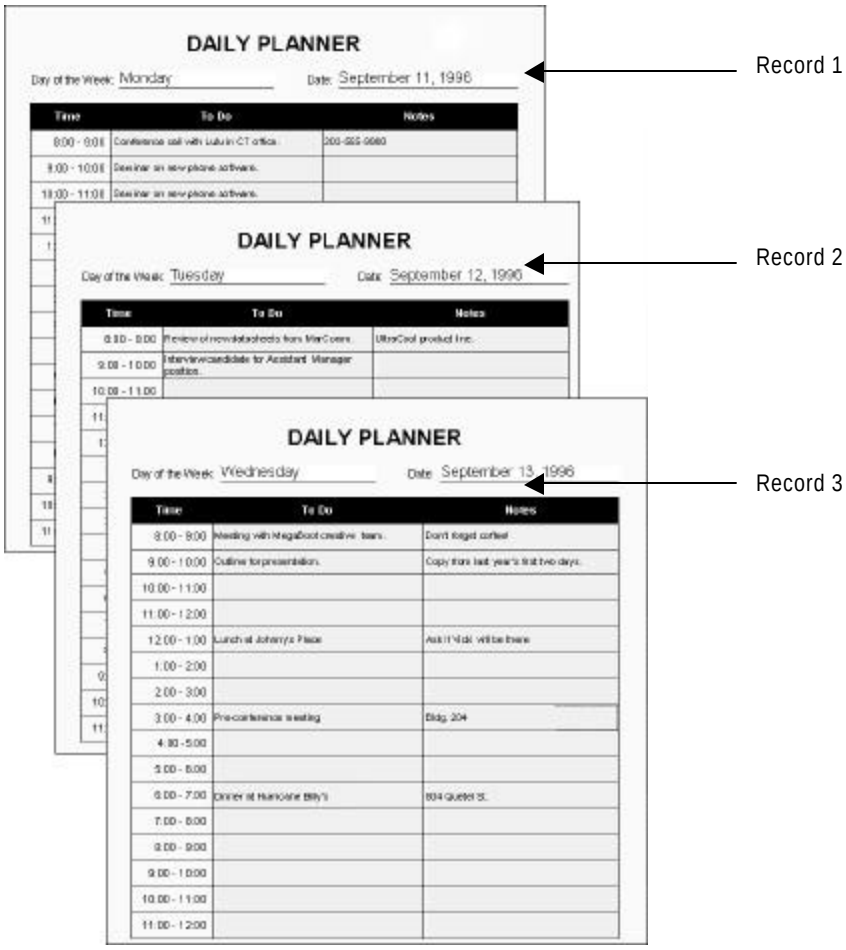
See "Using Calculations," for detailed information on using calculations. Calculations automate data entry and reduce potential user errors.

What Is a Database?

A database is a collection of information stored as individual *records.* Each record uses the same form design but can contain different information in its fields.

flashFORM automatically creates a database when you scan in or import a form. As soon as you fill in the form, it becomes the first record in a new database. Any user of this database can create a new, blank form using the record as a template and then filling in new information to create another record. This makes it possible to store a large amount of similar information and retrieve it quickly and easily.

The user who designed this daily planner creates a new record every day. So far, this user has a database containing three records.



Managing Database Records

This section tells you how to create a database of records and manage its information. It contains the following topics:

- Creating New Records
- Duplicating Records
- Moving Through a Database
- Searching Records for Information
- Sorting Records
- Recalculating Records
- Deleting Records
- Refreshing Records
- Saving Records
- Exporting Information
- Using flashFORM Data Files
- Importing Information

The form you open or scan in becomes the first record of a new database as soon as you fill in a field. You can then create new records with the same layout and fields and fill them with different information. See "flashFORM Procedures," if you do not know how to open or scan in a form.

For step-by-step instructions on creating a database and performing basic functions, see the online tutorials.

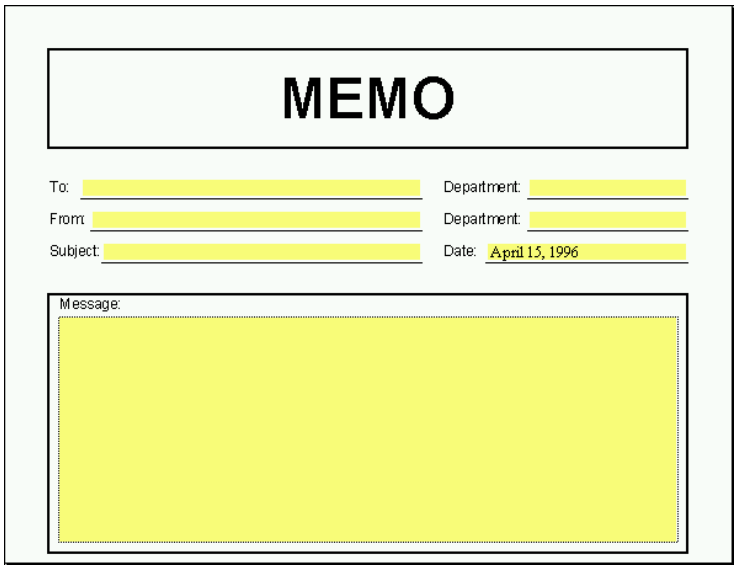
Creating New Records

As long as you have a form open and fill at least one field in the current record, you can create new records.

You cannot create a new record if data protection is turned on. See " Protecting Your Database" for more information.

To create a new record:

1.  Open or scan in a form.
2. If the form opens in design view, click the Fill button in the design toolbar or choose *Fill* in the View menu to switch to fill view.



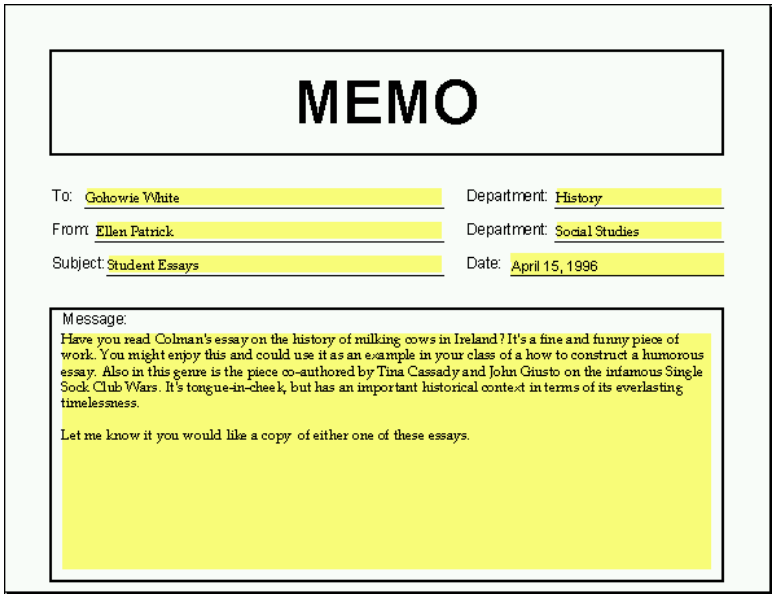
3. Click in a field with the cursor or press Tab to place the cursor in the first fillable field.

4. Enter information in the field.

flashFORM cannot create a new record until you fill at least one field in an empty form. A form with fields filled only by automatic calculations (such as a date field) is still considered empty by flashFORM. You must fill at least one field manually before you can create a new record.

5. Press Tab to move to the next field.
   Because a field is filled, you now have a database with one record in it.

6. Fill in as many fields as you like.



7.  Click the New button in the fill toolbar or choose Go To in the Records menu and New in its cascading menu.
   flashFORM creates and displays a new, empty record with the same form design as the first one.

8. Fill in this record with the appropriate information.

9. Continue to create new records in this way as necessary.

Duplicating Records

You can duplicate any record in a database as long as it has information entered in at least one field. This is useful if you want to create records that will contain much of the same information.

A form with fields filled only by automatic calculations (such as a date field) is still considered empty by flashFORM. You must fill at least one field manually before you can create a new record.

You cannot duplicate a record if data protection is turned on. See " Protecting Your Database" for more information.

To duplicate a record:

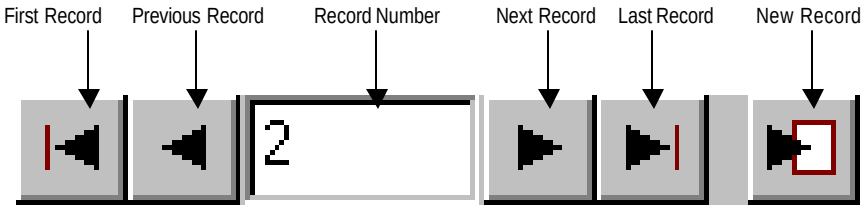
1. Open or scan in a form.

2.  If the form opens in design view, click the Fill button in the fill toolbar or choose Fill in the View menu to switch to fill view.
3. Fill in the information that you want duplicated.
4. Choose Duplicate Record in the Records menu.
   flashFORM duplicates and displays the new record.

To change an entry in a filled field, tab to a field or drag your cursor over the entry to highlight it and then type a new entry.

Moving Through a Database

Once you have multiple records, use the Record buttons in the fill toolbar or the commands in the Records menu to move through a database.



First Record

 Click the First Record button or choose *Go To* in the Records menu and *First* in its drop-down menu to move to the first record in your database.

Previous Record

 Click the Previous Record button or choose *Go To* in the Records menu and *Previous* in its drop-down menu to move to the record that is before the one you are viewing. If you are viewing record 3, for example, the previous record is record 2.

Record Number

The Record Number text box displays the number of the current record.

To move to another record:

1. Highlight the number in the Record Number text box.
2. Type a new number.
3. Press Enter to move to that record.

Next Record

 Click the Next Record button or choose *Go To* in the Records menu and *Next* in its drop-down menu to move to the record that is after the one you are viewing. If you are viewing record 3, for example, the next record is record 4.

Last Record

 Click the Last Record button or choose *Go To* in the Records menu and *Last* in its drop-down menu to move to the last record in your database.

New Record

 Click the New Record button or choose *Go To* in the Records menu and *New* in its drop-down menu to create and move to a new record.

Searching Records for Information

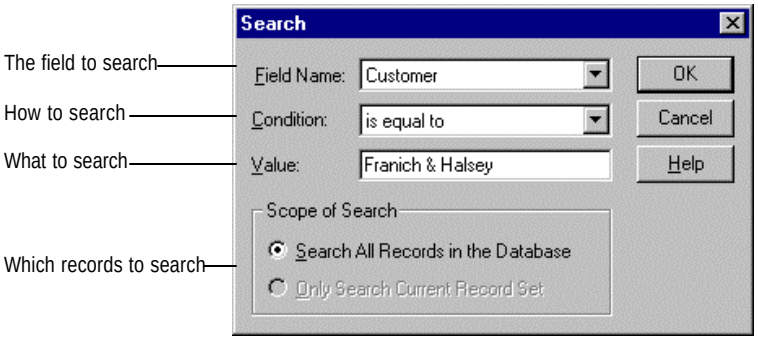
A database can contain a tremendous amount of information. If you had to search manually through hundreds of records in your database to find a particular record, it could take hours. A flashFORM search, however, can retrieve records with the information that you need in seconds.

These retrieved records are called a *found set.* You can print, mail, or export the found set if you wish.

To search for information:

1.  If you are in design view, click the Fill button in the fill toolbar or choose Fill in the View menu to switch to fill view.

2. Choose Search... in the Records menu.
   The Search dialog box appears.



3. Select a field name in the Field Name drop-down list.
   This is the field that contains the information you want to find. All the fields in your form are listed here.

To simplify searches, give each field a more descriptive name. Otherwise, you will have fields named *FillText1*, *FillText2,* and so forth, making it difficult to determine which fields contain what information. "Defining Objects on a Form" for detailed information.

4. Select a condition in the Condition drop-down list.
   A condition describes how to look for information entered in the Value text box. For example, suppose you entered the words Franich & Halsey in the Value text box.
   The following bulleted items show the results of a search using each available condition option.

   - is equal to: find an exact match of the Value entry.
     This finds records that have Franich & Halsey and nothing else in the Customer field. Make sure you have no extra spaces after your entry. If, for example, you typed in an extra space, then flashFORM would search for the Franich & Halsey entry plus a space.

   - is not equal to: find anything but the Value entry.
     This finds records that have anything but Franich & Halsey in the Customer field.

   - is greater than: find records of greater value than the Value entry.
     This finds records that have entries in the Customer field later in the alphabet than the entry, for example, Franklin or Gallatron, Inc.

   - is greater than or equal to: find records of equal or greater value than the Value entry.
     This search finds records that have entries in the Customer field beginning with the entry name itself up to the letter Z.

- is less than: find records of lesser value than the Value entry. This finds records that have entries in the Customer field beginning with a symbol, a number, or letters earlier in the alphabet than the entry, for example, France or Dharma Dogs.

- is less than or equal to: find records of equal or lesser value than the Value entry.
  This finds records that have entries in the Customer field beginning with a symbol, a number, or the letter A up to the entry name itself.

- begins with: find records that begin with the Value entry. This search finds records that have Franich & Halsey as the entry or at the beginning of an entry in the Customer field.

- does not begin with: find records that do not begin with the Value entry or that do not contain the value entry at all.
  This search finds records that do not have Franich & Halsey as the beginning of the entry in the Customer field or records that do not contain Franich & Halsey at all.

- ends with: find records that have the Value entry at the end of the selected field.
  This search finds records that have Franich & Halsey as the entry or at the end of an entry in the Customer field.

- does not end with: find records that do not have the Value entry at the end of the selected field or records that do not contain the value entry at all.

This search finds records that do not have Franich & Halsey at the end of an entry in the Customer field.

- contains: find records that contain the Value entry.
  This search finds records that have Franich & Halsey entered anywhere in the Customer field.

Be careful when selecting contains as one of your conditions. In a search for the value male, for example, your search would include any records that contained the word male. It would, therefore, also include records for female.

- does not contain: find records that do not contain the Value entry.
  This search finds records that do not have Franich & Halsey entered anywhere in the Customer field.

- is empty: find records that have no entry in the selected field.
  The Value text box is disabled if this is selected.

- is not empty: find records that have an entry of any sort in the selected field.
  The Value text box is disabled if this is selected.

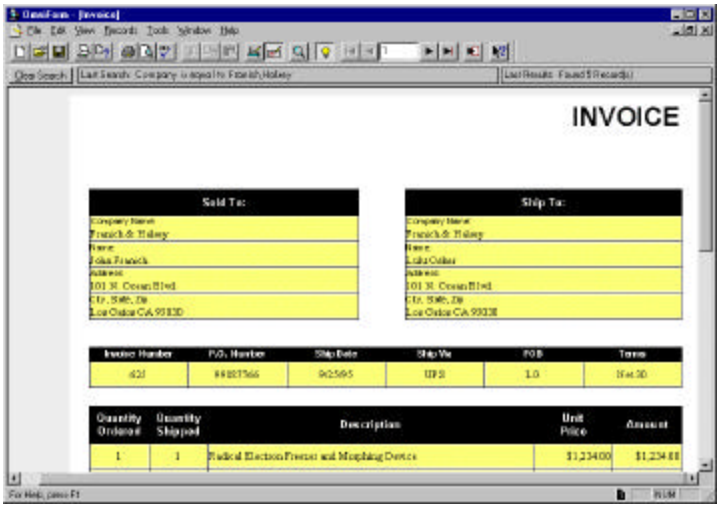
5. Type the text to find in the Value text box.

Information is not case-sensitive. Typing Los Gatos is the same as typing los gatos.

How flashFORM searches for the information in the Value text box depends on the selection in the Condition drop-down list as described in the previous step.

6. Select an option under Scope of Search.
    - Select *Search All Records in the Database* to search the entire record set.
    - Select *Only Search Current Record Set* to search a subset of records. This option is only available when you have a found set open from a previous search.
7. Click OK.

flashFORM searches for and retrieves all records that contain the information you specified in the Search dialog box.



Under the fill toolbar, flashFORM displays the search information and number of records in the found set. If you need to narrow the search further, choose Search... again.

You might, for example, want to search the Franich & Halsey record set for invoices from a specific month. You can search each new subset of records as many times as you need to find the specific information you want. flashFORM maintains the current found set if it retrieves no records during a search.

8. Click Clear Search under the fill toolbar to return to the full record set when you are done.

Sorting Records

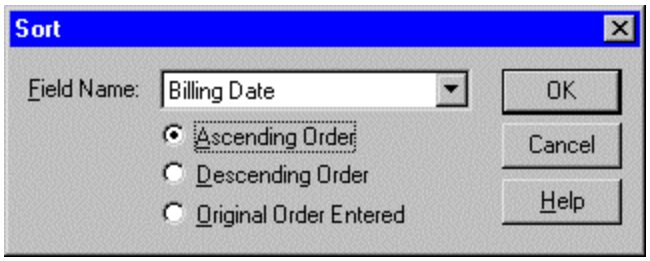
You can sort records in flashFORM in ascending, descending, or original order entry. This is useful for many situations. If you wanted to export mailing information, for example, you could sort records by postal code to reduce bulk mailing costs. Or, you might want to sort invoices by date to find the most delinquent accounts.

You can print, mail, or export this information in the order in which it is sorted.

To sort records:

1.  If you are in design view, click the Fill button in the design toolbar or choose Fill in the View menu to switch to fill view.

2. Choose Sort... in the Records menu.
   The Sort dialog box appears.



3. Select the field by which to sort in the Field Name drop-down list.
   All the fields in your form are listed here.

To make sorting as easy as possible, give each field a unique name after it is created. Otherwise, you could have fields named *FillText1*, *FillText2,* and so forth, making it difficult to figure out which fields contain what information. See " Defining Objects on a Form" for detailed information.

- Select a sort order.
- Select *Ascending Order* to sort records from least to greatest; for example, from A–Z or from 0–100. Symbols precede numbers which precede letters: $40, 40, Forty.
- Select *Descending Order* to sort records from greatest to least; for example, from Z–A or from 100–0. Letters precede numbers which precede symbols: Forty, 40, $40.

- Select *Original Order Entered* to sort records in the order in which you originally entered information in the selected field. This is useful to view the history of information entered.

4. Click OK.
   flashFORM sorts the records in the order indicated.

Recalculating Records

Recalculating records applies any new or changed calculations to selected records in a database. Until you use the *Recalculate...* command, new or changed calculations apply only to new records.

See "Using Calculations," for detailed information on creating calculations.

This command reapplies *all* existing calculations to the selected records. You may not always want this to happen.

For example, suppose you changed the mileage calculation in an expense form to reflect the latest rate. All new records would use the new calculation and reflect this rate. You do not want older records to use the new calculation because the original rate was correct at the time.

If you recalculated all records after adding the new calculation to the expense form, the mileage rates on your old records would also change. They would then be incorrect. To prevent this, you could search the records for those records newer than the date that you changed the mileage calculation, and apply the new calculation only to the newer records.

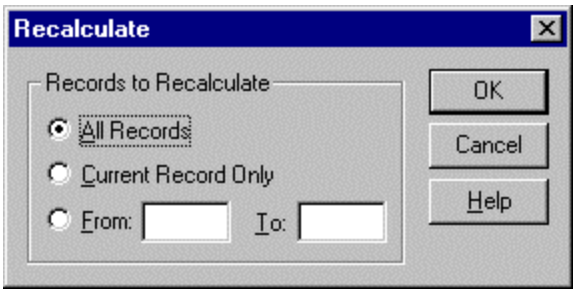
See " Searching Your Database" for information on searching.

You cannot recalculate records if data protection is turned on. See " Protecting Your Database" for information.

To recalculate records:

1.  If you are in design view, click the Fill button in the design toolbar or choose Fill in the View menu to switch to fill view.

2. Choose Recalculate... in the Records menu.
   The Recalculate dialog box appears.

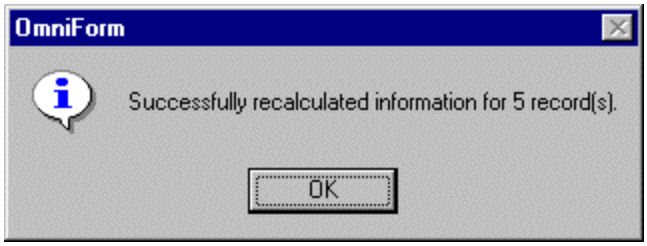


3. Select the records to recalculate.

   - Select *All Records* to apply the new or changed calculation to either the current found set or to every record in the database if the entire record set is open.
   - Select *Current Record Only* to apply the new or changed calculation to just the record you are viewing.
   - Select *From/To* to apply the new or changed calculation to a range of records.
     Enter a number in the *From* and *To* text boxes. If you entered `1` in the *From* text box and `5` in the *To* text box, for example, flashFORM would recalculate the first five records in your database or found set.


You cannot undo a recalculation.

4. Click OK. flashFORM recalculates the records according to your specifications.
5. Click OK in the dialog box that informs you how many records were recalculated successfully.



Deleting Records

This section describes how to delete one or more records in a database. Use this command to get rid of old, unwanted, or duplicate records.


You cannot undo a record deletion.

You can export information from a record first if you want to delete a record but save its data. See " Exporting Information" for instructions.

You cannot delete a record if data protection is turned on. See " Protecting Your Database" for information.

To delete the current record:

1.  If you are in design view, click the Fill button in the design toolbar or choose Fill in the View menu to switch to fill view.
2. Choose Delete Record in the Records menu.A warning dialog box appears.
3. Click Yes to delete the current record permanently.

To delete all records:

1.  If you are in design view, click the Fill button in the design toolbar or choose Fill in the View menu to switch to fill view.
2. Choose Delete All Records in the Records menu.
   A warning dialog box appears.
3. Click Yes to delete all the records permanently.

To delete a found set of records:

1.  If you are in design view, click the Fill button in the design toolbar or choose Fill in the View menu to switch to fill view.
2. To delete a found set of records instead of all records, click Search... in the Records menu to find the records to delete.
   See " Searching Records for Information" for more information.
3. Choose Delete All Records in the Records menu.
   A warning dialog box appears.
4. Click Yes to delete the found set of records permanently.

Refreshing Records

You refresh records to see if records have been updated. You can refresh records in a form that is currently open. This option is available only in fill view and when the form has sharing properties.

For more information about how to create a form with sharing properties, see " Setting Attributes for a Form".

To refresh a record or records:

1.  If you are in design view, click the Fill button in the design toolbar or choose Fill in the View menu to switch to fill view.
2. Choose Refresh Record or Refresh All Records in the Records menu.
   If you have chosen Refresh all Records, flashFORM automatically checks to see if any record has been updated and displays the freshest records. If you have chosen Refresh Record, flashFORM automatically checks to see if the record has been updated and displays the freshest record.

Saving Records

You can save your current record anytime during the filling-out process. This option is useful when you are filling out long forms. You do not need to finish filling out a form before you can save a record of it. Records are automatically saved when you move from record to record.

To save a record:

1.  If you are in design view, click the Fill button in the design toolbar or choose Fill in the View menu to switch to fill view.
2. Choose Save Record in the Records menu.
   flashFORM saves your record to the database.

Exporting Information

This section explains the benefits of exporting information, how to prepare for export, and how to export information from an open flashFORM form.

See " Importing Information" for information on how to import information into a database.

The Benefits of Exporting Information

Export information from records to:

- Share information with other flashFORM databases.
  Information exported as a database file takes up considerably less disk space than the database itself. It can be copied or mailed more quickly than the entire database.
- Share information from different databases.
  For example, you might have a FoxPro database and decide that you need information already entered in a flashFORM database. Simply export the needed information from flashFORM in the appropriate format and use FoxPro's commands to import it.

- Save other database users the time of entering data manually by sending them a flashFORM Data or other database file.

Preparing for Export

During import, you will *link* field names in the exported data file to field names in the import database. This tells flashFORM where to place the field information. If possible, try to:

- Match field names in the exported data to field names in the import database.
- Match field order in the exported data to field order in the import database.

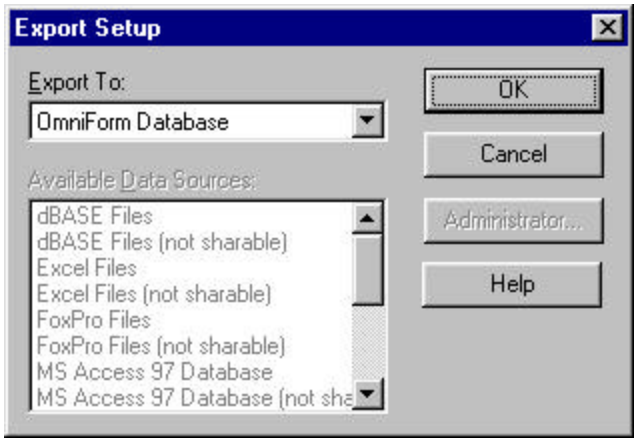
This makes it easier to figure out which information will go in which fields when you link the fields on import.

For example, suppose you export information in the fields *Customer, Title,* and *Product,* in that order. You have the same field information in the import database, but the fields are named *What Bought*, *Name,* and *Position,* in that order. You could link *Customer*‣*Name*/*Title*‣*Position*/*Product*‣*What Bought* easily but importing hundreds of fields with different names and field order would be difficult and time-consuming.

See "Designing a Form," for information on naming and reordering fields.

To export information:

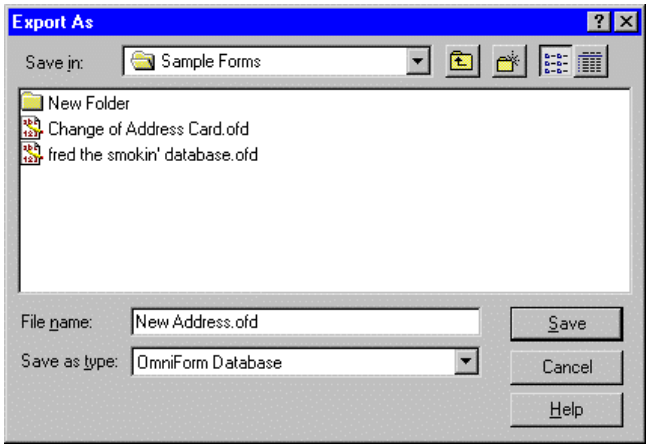
1.  If you are in design view, click the Fill button in the design toolbar or choose Fill in the View menu to switch to fill view.
2. Choose Export... in the File menu.
   The Export Setup dialog box appears.



3. Select a database file type in the Export To drop-down list.

   - Select flashFORM Database to export information to a flashFORM Data file.
   - Select ODBC Database to select a data source in the Available Data Sources list box.
     See " ODBC Database" for more information on this dialog box.

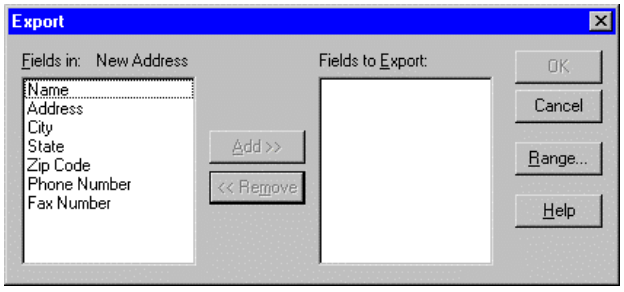
4. Click OK. The Export As dialog box appears.



   - A file name appears in the *File name* text box.
     The file is named by default with the name of the currently open database. You can change the file name if you want.
   - The database file type you selected in the previous dialog box appears in the *Save as type* drop-down list.

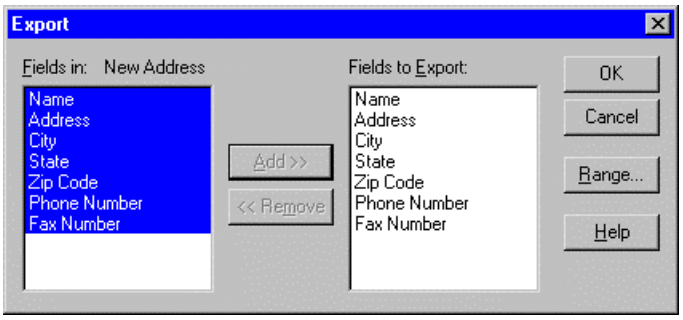
5. Use the Save in drop-down list to select a location for the file.

6. Click Save.
   The Export dialog box appears.



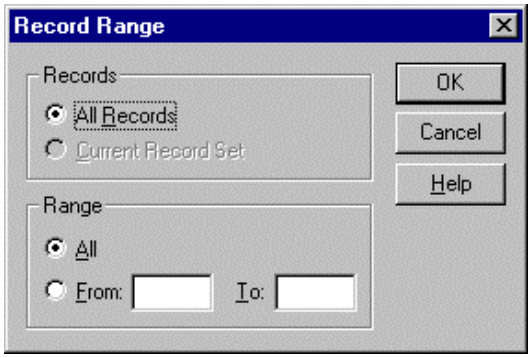
All the fields in your currently open database appear in the Fields in list box.

7. Select each field that contains the information to export and click Add>> to move it to the Fields to Export list box.



- Shift-click to select or deselect multiple adjacent records, or hold down the mouse button and drag the cursor over adjacent records.
- Ctrl-click to select or deselect multiple nonadjacent records.
- Select a field on the right and click *<<Remove* if you decide not to export its information.

8. If you want to specify a range of records to import, click Range... to open the Record Range dialog box.



Otherwise, flashFORM exports all records by default.

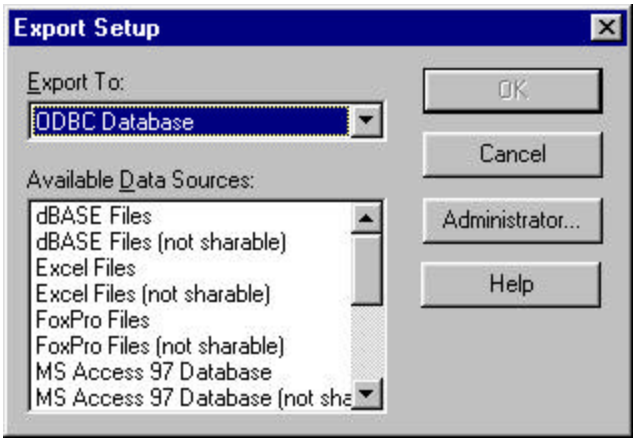
- Select *All Records* to export all records in the current database.
- Select *Current Record Set* to export the current found set of records. This option is available after a search.
  Type the first record number to export in the *From* text box and the last record number to export in the *To* text box.
- Click *OK* to return to the Export dialog box.

9. Click OK.
   flashFORM exports the information in the selected fields to the specified file.

10. Click OK in the dialog box that tells you how many records were successfully exported.

ODBC Options

Installed ODBC database drivers appear in the *Available Data Sources* list box when you select *ODBC Database* in the *Export To* drop-down list. Depending on your database driver, you can export up to 255 fields at a time.



To export your data to an available data source:

1. Choose Export in the File menu.
   The Export Setup dialog box appears.

2. Select ODBC Database in the Export To drop-down list.

3. Select a source from the Available Data Sources list box and click OK.
   An Export As dialog box appears.

4. Enter a file name in the File name text box if it does not appear automatically. The database file type that you selected in the previous dialog box appears in the Save as type drop-down list.

5. Follow steps 6 through 10 in the previous section "To export information."

Using flashFORM Data Files

This section explains how to use flashFORM Data files to open shared forms and how to set up a shared form location. A shared form is one other users can access.

When you export flashFORM data from a form, the form's file name is stored inside the Data file. flashFORM uses the file name information as well as pathway information in the Options dialog box to locate and open a copy of the original form. The form automatically imports information from the Data file. This is useful for sharing data, especially if you want to send another user just part of a database.

To set up the shared form location:

1. Select or create a folder for your shared flashFORM forms.
   You can make the form read-only so users can only open a copy of the form, not the original.
2. In flashFORM, choose Options... in the Tools menu.
   The Options dialog box appears.
3. Click the File Locations tab.
4. Select Shared Forms in the File Types drop-down list.
5. Type the path to your shared form(s) in the Location text box.
6. Click OK.

All flashFORM users must type the same pathway in the Options dialog box to use shared forms in that location.

To export the data:

- Use the *Export...* command in the File menu to create a flashFORM Data file. See " Exporting Information" for information.
- Use the *Send...* command in the File menu in fill view to mail data (as an attached flashFORM Data file) to another user. See " Mailing a Form" for more information.

To use a flashFORM Data file to open a shared form:

1. Locate the flashFORM Data file to use.
2. Double-click the file or select it and choose Open in its folder's File menu.
   A copy of the shared flashFORM Form from which the flashFORM Data file was exported opens. flashFORM automatically imports the information in the flashFORM Data file into the form.

Importing Information

This section explains how to import field data (information) into a flashFORM database from another database source. You can import data from four sources:

- Another flashFORM Form
  The selected form must be closed.
- A flashFORM Data file
  This contains information exported from a flashFORM database.
- Any supported database source, such as FoxPro
- Available sources depend on the installed database drivers.
- A flashFORM Mailable Filler

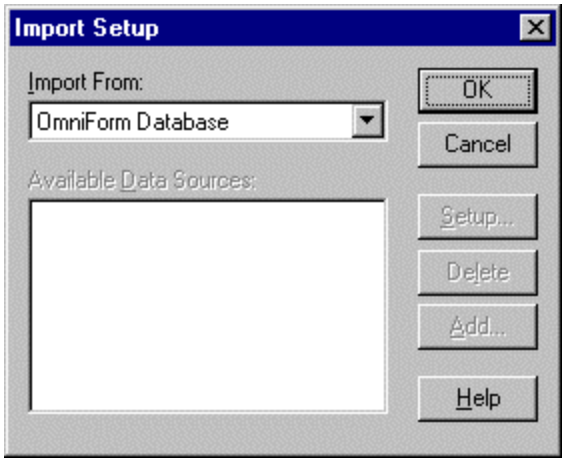
Data consists of information entered in fields, such as text, check marks, and calculations. Importing data saves you the time of entering the same data manually and allows you to share data with other database users.

You must first export data from another database in order to import it into flashFORM. See " Exporting Information" for information. See your database documentation if you are exporting from another database program.

You cannot import information if data protection is turned on. See " Protecting Your Database" for information.

To import field information:

1. Open or scan in a form.
2.  If you are in design view, click the Fill button in the design toolbar or choose Fill in the View menu to switch to fill view.
3. Choose Import... in the File menu.
   The Import Setup dialog box appears.

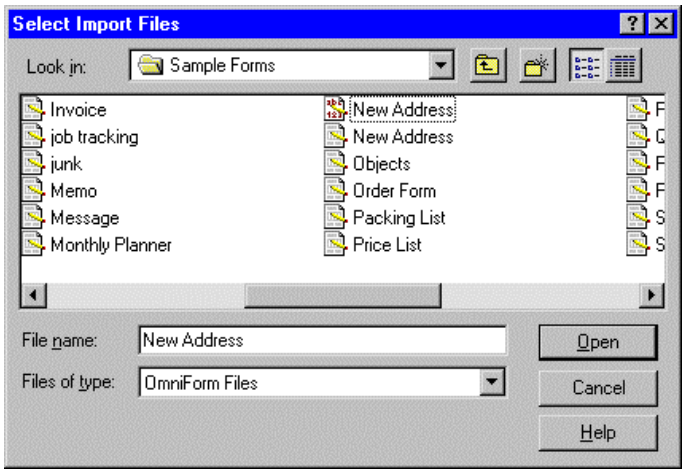


4. Select the type of database information to import in the Import From drop-down list.

   - Select *flashFORM Database* to import information from a flashFORM Form or from a flashFORM Data file.
   - Select a data source in the *Available Data Sources* list box to import files from another database source.
     You can also add, delete, and set up data sources.

5. Click OK.

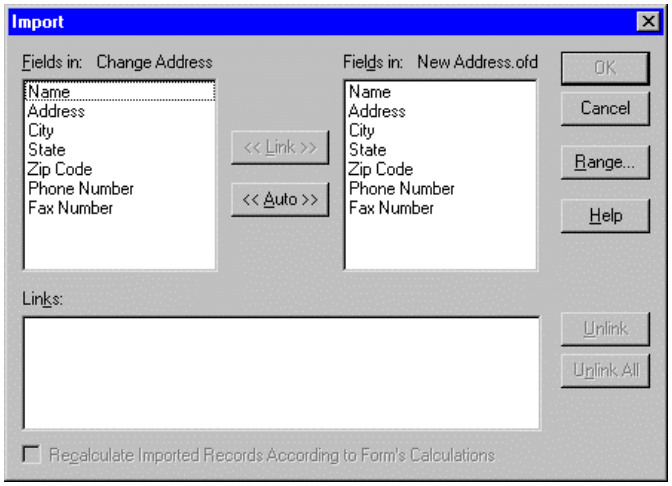
The type of dialog box that appears next depends on the type of database file you have selected. The Select Import Files dialog box appears if you have selected flashFORM Database.



A flashFORM Data (OFD) file has a different icon than a Form (OFM) file. The first New Address file in the picture above is a data file.

6. Locate and select a Data file to import.

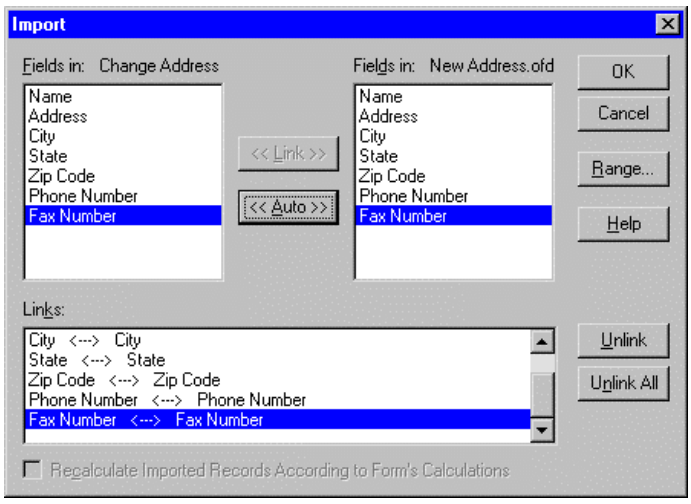
7. Click OK.
   Depending on the database source you have chosen, more dialog boxes may appear. Select the appropriate options.
   The Import dialog box appears after you select a file.



   - Fields in the open flashFORM database appear on the left.
   - Fields you can import from the other database appear on the right.

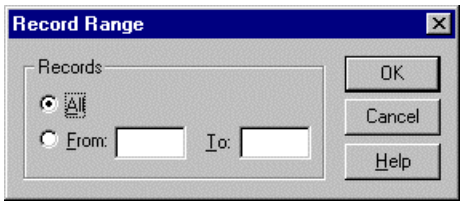
8. Link fields on the left to fields on the right.
   This tells flashFORM which field data to import from the other database and where to import it in the current database.

   - To link individual fields, select a field on the left, select its corresponding field on the right, and click *Link*.
   - Click *Auto* to automatically link all fields with the same name. Linked fields appear in the *Links* list box.



- Select a link in the *Links* list box and click *Unlink* to unlink it.
- Click *Unlink All* to unlink all fields.
- Select *Recalculate Imported Records According to Form's Calculations* when it is selectable to apply existing calculations to the imported records.

9. Click Range... to open the Record Range dialog box to specify a range of records to import. Otherwise, flashFORM imports all records by default.



- Type the first record number to import in the *From* text box and the last record number of the range to import in the *To* text box.
- Click *OK* to return to the Import dialog box.

10. Click OK when you are done linking fields.
flashFORM imports the information into the selected fields, creating as many new records as necessary in the process.

11. Click OK in the dialog box that tells you how many records were imported successfully.

Protecting Your Database

It is important to protect information and form design in your database. This section describes how to use the flashFORM protection options to protect both your data and form design from potential deletions or changes, as well as the benefits of using the flashFORM Filler program.

If your flashFORM database has an administrator, check with the administrator first before making any changes.

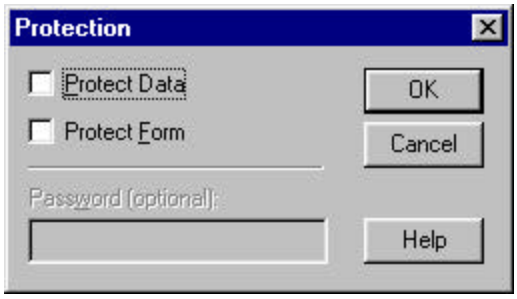
Protecting Data

Many databases have multiple users. Until a user is familiar with database concepts and how to use flashFORM, you may want to protect the information (data) entered in fill view from deletion or change.

To protect your data:

1.  If you are in fill view, click the Design button in the fill toolbar or choose Design in the View menu to switch to design view.

2. Choose Protection... in the Tools menu.
   The Protection dialog box appears.



3. Select Protect Data.

4. If you wish, type a password in the Password text box. Passwords are case sensitive. You will be prompted to reenter your password for confirmation. The next time anyone tries to change the data, a dialog box appears, informing the user of the form's protection status. The user will not be able to make any changes unless the user knows the password and can turn off the protection.

If you lose or forget your password, it cannot be recovered.

5. Click OK.
   Information in fill view is now read-only. All the commands and buttons associated with protected operations are grayed out.

6.  Click the Fill button in the fill toolbar or choose Fill in the View menu to switch to fill view.

7. Place your cursor in a fill text field and try to type text.
   A dialog box appears.

8. Click OK to close the dialog box.

Users can export data or copy text in protected mode but cannot alter form information in any other way such as by filling fields or importing data.

Repeat steps 1–4 in the preceding instructions but deselect *Protect Data* in the Protection dialog box to turn off data protection.

Protecting the Form

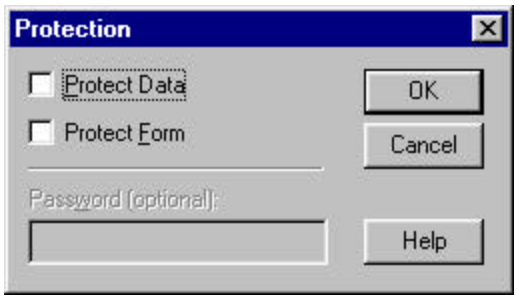
The form layout you create in design view is used by every record in a database. Any change made in design view affects *all* records in fill view. This is important to remember if the database has multiple users.

Deleting a fillable field in design view deletes *all* information entered in that field in fill view.

To protect your form:

1.  If you are in fill view, click the Design button in the fill toolbar or choose Design in the View menu to switch to design view.

2. Choose Protection... in the Tools menu.
   The Protection dialog box appears.



3. Select Protect Form.

4. If you wish, type a password in the Password text box. Passwords are case sensitive. You will be prompted to reenter your password for confirmation. The next time anyone tries to change the form's design, a dialog box appears, informing the user of the protection status. The user will not be able to make any changes unless the user knows the password and can turn off the protection.

If you lose or forget your password, it cannot be recovered.

5. Click OK.
   The drawing toolbar and many buttons in the design toolbar are now grayed out. All the menu commands associated with these buttons are grayed out as well.

6. Click anywhere on the form.
   A dialog box appears.

7. Click OK to close the dialog box.

Users can change viewing preferences and use most basic file commands such as *Print* and *Save* but cannot format or redesign the form in any way.

Repeat steps 2–4 in the preceding instructions but deselect *Protect Form* in the Protection dialog box to turn off form protection.

flashFORM Filler

flashFORM Filler is an easy-to-use version of flashFORM that contains a fill view but no design view. Therefore, flashFORM Filler users can open and fill forms created in flashFORM (without having flashFORM installed on their systems), but cannot edit the form's design in any way.

The data protection option, when set for a form in flashFORM, is also enabled for that form in flashFORM Filler. It cannot be turned off in flashFORM Filler.

See " Protecting Data" for detailed information on the data protection option.

flashFORM Filler is included on your flashFORM CD-ROM. However, before you can use flashFORM Filler you must purchase an unlock code. To obtain an unlock code in the U.S. or to purchase additional versions of flashFORM Filler, please call (800) 693-3933.

Using Calculations

This chapter describes how to use flashFORM's calculation features. flashFORM automatically performs calculations when you fill in the appropriate fields.

Use calculations to automate data entry and prevent errors. For example, the average person might find it time-consuming to add a column of 100 numbers, and easy to make an error, but flashFORM can return an error-free sum in a fraction of a second. All you have to do is define the calculation properly and flashFORM does the rest of the work.

This chapter contains the following sections:

- Calculation Overview
- Operators
- Functions

Calculation Overview

This section gives an overview of how to create calculations. It contains the following topics:

- Creating a Calculation
- Calculation Guidelines
- Using the Recalculate… Command
- Usage Conventions

See the online tutorial for step-by-step instructions on creating a simple calculation.

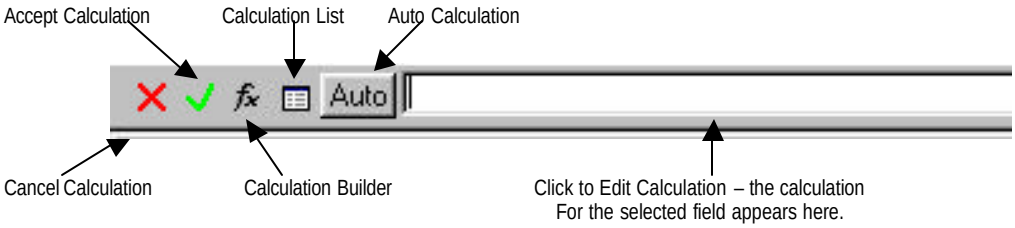
Creating a Calculation

Calculations are created in design view. You can create a calculation for fill text, comb, check box, and circle text objects.

You must open the calculation toolbar to begin.

To open the calculation toolbar:

1.  If you are in fill view, click the Design button in the fill toolbar or choose *Design* in the View menu.
2.  Click the Calculation button in the design toolbar or choose *Calculation* in the Tools menu.
   The calculation toolbar appears.



3. Select a fill text, comb, check box, circle text, or table object in your form to activate the toolbar.
   The calculation toolbar contains five buttons and a text box.

-  Cancel Calculation button
  Click this to revert to the last calculation accepted. The text box clears if no version was accepted.
-  Accept Calculation button
  Click this to accept the calculation in the text box.
-  Calculation List button
  Click this to open the Calculation List dialog box and view all your calculations.
-  Calculation Builder button
  Click this to open the Calculation Builder dialog box and create your own calculation.
-  Auto Calculation button
  Click this to have flashFORM attempt to define a calculation automatically. flashFORM can determine an auto calculation for an entire table in some circumstances.
- Calculation text box
  The calculation for the selected field appears here. Click in the text box to edit a calculation manually.

4. Create a calculation in one of three ways:

- Use the Calculation Builder to define a calculation.
  See "The Calculation Builder".
- Have flashFORM define a calculation automatically.
  See "Auto Calculations".
- Click in the calculation text box and type a calculation.Follow the guidelines in " Calculation Guidelines". See "Functions" examples.

You can also use the Calculation List dialog box to change your calculations.

The Calculation Builder

The Calculation Builder dialog box contains operators, a list of all the fields in your form, and functions for creating calculations.

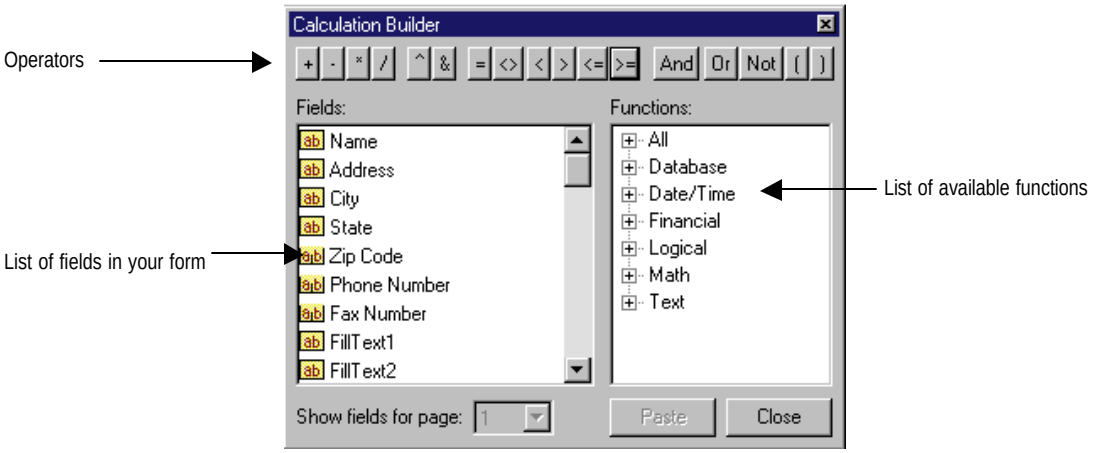
To define a calculation with the Calculation Builder:

1.  Click the Calculation Builder button in the calculation toolbar.
   The Calculation Builder dialog box contains the following:

- Operator buttons
  Each button represents an operator. Click a button to insert an operator in the calculation text box.
  See " Operators" for detailed information.

- Fields list
  This list contains all the available fields in your form. Double-click a field name in this list to place it in the calculation text box, or select it and click Paste.
  Or, click any field in your form to insert its name in the calculation text box. This is useful if you have many fields listed or if they do not have unique names. You can also drag the cursor around multiple objects to insert each one.

- Functions list
  This list contains all available functions that can be used in a calculation. (Functions are sorted by category. Click the plus sign in front of a category to open it.) Double-click a function to insert it in the calculation text box, or select it and click Paste.
  See " Functions" for detailed information.



2. Select the operators, fields, and functions that you need for your calculation.

3. Click the Accept Calculation button to define the calculation on the field and close the Calculation Builder dialog box.

- A calculation is defined on the selected field when you click the Accept Calculation button. flashFORM performs the calculation automatically in fill mode when the appropriate fields are filled.

- You can click the Cancel Calculation button to clear the calculation text box or to revert to the last accepted calculation.

- You can manually delete entries in the text box and click the Accept Calculation button if you want to clear the box entirely. This is useful if clicking the Cancel Calculation button causes it to revert to a previously accepted version.

4. Click the Calculation button in the design toolbar or choose Calculation in the Tools menu to close the calculation toolbar. Closing the toolbar also accepts the current calculation.

Suppose you wanted to create a calculation for a *Subtotal* field in an invoice. The *Subtotal* field is the sum of the *Price1* and *Price2* fields. There is often more than one way to create a calculation. Here are two calculations you could create:

- [Price1]+[Price2]
- Sum([Price1],[Price2])

Both calculations return the same result. The first calculation is simple addition. It is easy for new users to create.

The second calculation uses the *Sum* function and is more complex than the first calculation. This calculation is useful for adding multiple fields because you do not need to place the Addition operator between them.

flashFORM automatically inserts the necessary parentheses, brackets,

and commas when you create a calculation using the Calculation Builder. See " Calculation Guidelines" .

Auto Calculations

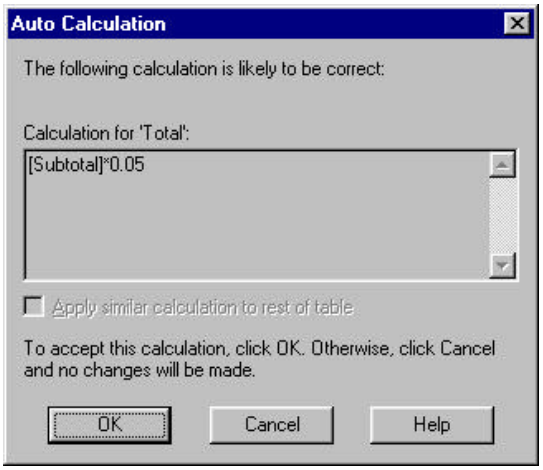
To create an auto calculation, flashFORM looks for such common field names as *Quantity, Price, Total,* and *Sum.* It also determines calculations based on field type, field names, and column header labels. If you selected a field named *Total,* for example, flashFORM would look for fields above the *Total* field to sum.

This is one reason it is important for fields to have unique names. See "Defining Objects on a Form" for detailed information.

To create an auto calculation:

1. Select a fill text, comb, check box, circle text, or table object in your form to activate the toolbar.
   A calculation appears in the calculation text box if one was defined for this object before. If so, proceed to step 4.
2. If no calculation appears, click the Auto button in the calculation toolbar.
   A message appears if an auto calculation could not be created. See "The Calculation Builder" if flashFORM could not create a calculation and you want to create your own.

The Auto Calculation dialog box appears if flashFORM proposes an auto calculation.



3. Accept or cancel flashFORM's proposed calculation.

- Click OK to accept the calculation.
  The calculation appears in the toolbar's text box.
- Click Cancel to close the dialog box without creating a calculation.

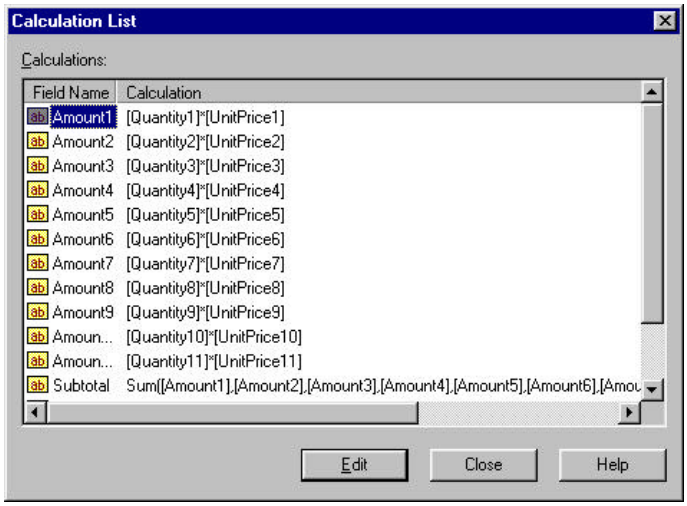
4. Edit the calculation in the toolbar if necessary:

- Click in the calculation text box and make manual changes, or click the Calculation Builder button to open the Calculation Builder dialog box. See " The Calculation Builder".
- Click the Accept Calculation button to accept changes.
- Click the Cancel Calculation button to close the Calculation Builder and revert to the version created by flashFORM.
  You can manually delete entries in the text box and click the Accept Calculation button to clear the box entirely. This is useful if clicking the Cancel Calculation button causes the calculation to revert to a previously accepted version.

5. Choose Calculation in the Tools menu to close the toolbar.

The Calculation List

The Calculation List dialog box lists all of your form's calculations and allows you to make changes to the calculations.



To change your calculations:

1. Click the Calculation List button in the calculation toolbar.
   The Calculation List dialog box appears.
2. Double-click the Field Name that you want to change. Or, select the Field Name that you want to change and click Edit.
3. The calculation that you want to change appears in the Calculation Edit text box.
4. Make any changes that you want.
5. Click the Accept Calculation arrow to apply the change.
   flashFORM automatically makes the change.

Using the *Recalculate...* Command

Recalculating records applies any new or changed calculations to *all* selected records in a database. Until you use the *Recalculate...* command, new or changed calculations apply only to new records or to current records whose relevant field entries change.

See " Recalculating Records" for detailed information.

Calculation Guidelines

Keep these guidelines in mind as you work with calculations:

- Brackets (**[]**) must enclose a field name that contains a space.
  [`Quantity Ordered`**]** `*` **[**`Unit Price`**]**
  flashFORM will not accept the calculation otherwise.

- Parentheses (**( )**) must enclose an entire function.
  `Sum(`[Price1],[Price2]`)`
  This tells flashFORM where the function begins and ends. You may have more than one function in a calculation.

- You must insert a list separator between fields in a manually created function.
  `Sum(`[Price1]`,`[Price2]`)`
  Use the list separator from the Windows Control Panel.
  Use the *List Separator* selection in the *Number* tab of the *Regional Settings* control panel.

- flashFORM automatically inserts list separators, parentheses, and brackets when you use the Calculation Builder or the Auto button to create a calculation, and when you click the Accept Calculation button to accept a calculation.
  See the previous bulleted item for an explanation of the list separator flashFORM uses.

- flashFORM does not automatically insert brackets around a manually created field name that contains a space. You must insert brackets manually.

- If you manually enter a decimal number in a calculation, use the decimal selection from the Windows Control Panel.
  Use the *Decimal symbol* selection from the *Number* tab of the *Regional Settings* control panel.

- Quotes (**" "**) must enclose a text string.
  If([Name1]="Ann","Dear Ann:","Dear Customer:")

- flashFORM automatically removes extra spaces (except a space in a field name) when it accepts a calculation.
  You can insert spaces between operators and after commas when creating a calculation if this helps you to see it more clearly.

- Calculations are performed in tabbing order.

- If a calculation contains another field that has a calculation, the other field's calculation is performed first.

Usage Conventions

Substitute the appropriate field name where you see *num* and *str* in the function examples. Parentheses are required where indicated. Below is a list of conventions showing operator and function usage.

Operator	***Function***
date	date value: the expression must evaluate to a valid date
time	time value: the expression must evaluate to a valid time
num	number or numeric expression; num1, num2, and so forth indicate additional number values
str	text string: str1, str2, and so forth indicate additional string values
...	additional repeating values of the given type may be entered
[ ]	brackets inserted around field names
log exp	logical expression
true exp	true expression
false exp	false expression

Operators

Operators represent mathematical, comparison, logical, and text operations to be performed within a calculation. You must have an operator between fields in a calculation.

For example, a calculation for a *Total* field might look like this:

```
[Price1] + [Price2] + [Price3]
```

The plus signs between the field names are the *Addition* operators in the calculation.

The calculation could also look like this:

```
Sum([Price1],[Price2],[Price3])
```

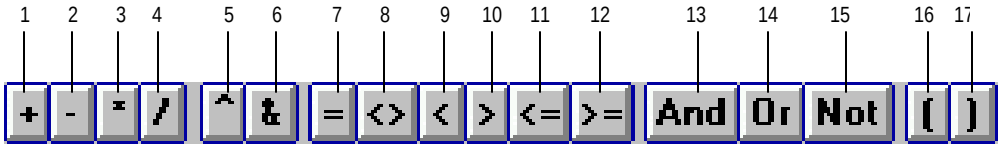
The parentheses are the operators in the calculation. Commas, although not operators, also separate the fields.

You must insert the proper parentheses, brackets, and commas when you create a function manually or flashFORM will not accept the calculation. See " Calculation Guidelines" for detailed information.

flashFORM automatically inserts commas, parentheses, and brackets when you create a calculation with the Calculation Builder or the Auto button, and when you click the Accept Calculation button.

Operator Buttons

See " Calculation Overview" for instructions on creating calculations.



1=Addition
2=Subtraction
3=Multiplication
4=Division
5=Power of
6=Concatenate
7=Equal
8=Not equal
9=Less than
10=Greater than
11=Less than or equal to
12=Greater than or equal to
13=Logical and
14=Logical or
15=Logical not
16=Left parentheses
17=Right parentheses

Operators — Quick Reference

See " Usage Conventions" for information on how to interpret the examples in the following table.

Operator	Type	Description	Usage Example
+	Mathematical	Addition: add numbers or fields	[num1] + [num2]
-	Mathematical	Subtraction: subtract numbers or fields	[num1] - [num2]
*	mathematical	Multiplication: multiply numbers or fields	[num1] * [num2]
/	mathematical	Division: divide numbers or fields	[num1] / [num2]
^	mathematical	Power of: raise a number or field by a power	[num1]^2
&	text	Concatenate: put together strings	"str1"&"str2"
=	comparison	Equal: compare values or results	If ([num1]=[num2], true exp, false exp)
<>	comparison	Not Equal: compare values or results	If ([num1]<>[num2], true exp, false exp)
<	comparison	Less Than: compare values or results	If ([num1]<[num2], true exp, false exp)
>	comparison	Greater Than: compare values or results	If ([num1]>[num2], true exp, false exp)
<=	comparison	Less Than or Equal to: compare values or results	If ([num1]<=[num2], true exp, false exp)
>=	comparison	Greater Than or Equal to: compare values or results	If ([num1]>=[num2], true exp, false exp)
And	logical	Logical And: use with Logical If to put together more than one condition. All conditions must be true for the Logical If function to be true.	If ([num1]=[num2] And [num3]=[num4], true exp, false exp)
Or	logical	Logical Or: use with Logical If to include more than one condition. Only one condition must be true for the Logical If function to be true.	If ([num1]=[num2] Or [num3]=[num4], true exp, false exp)
Not	logical	Logical Not: used with the Logical If function to negate a condition.	If ([num1]=[num] And NOT [num3]=[num4], true exp, false exp
()	mathematical	Left and Right Parentheses: show precedence. A matching set of	([num1]+[num2]) * 3

		parentheses must exist.	
" "	text	Constant Quotes: mark the beginning and end of a character used as a constant or characters used as a text string. A matching set of quotes must exist.	"John Doe"

Functions

Functions are single words used by flashFORM to represent operations within a calculation. Functions can use field values, information you enter, and information from outside sources such as the computer date.

Please refer to the online help for a definition of each function and instructions on how to use a function in a calculation.

See "Creating a Calculation" for instructions on creating calculations. See "Usage Conventions" for a list of the conventions used in this chapter.

The format of the values returned in the examples is dependent on:

- The *Language* selection in the *International* tab of the Options dialog box
- The *Format* selection in the *Properties* tab of the Object Definition dialog box for the selected object

Functions — Quick Reference

See "Usage Conventions" for information on how to interpret the examples in the following table. Or, refer to online help for an example of each function. The following table lists a brief description and usage of each function.

Function	Type	Description	Usage Example
Abs	mathematical	Absolute Value: returns the value of num	Abs(num)
Avg	statistical	Average: returns the average for num1, num2, and so forth	Avg(num1, num2, ...)
Date	date	Date: returns the current date as MM/DD/YY based on the current system date	Date()
DayName	date	DayName: returns the name of the day of the week for a given date	DayName(date)
DayOfMonth	date	DayOfMonth: returns the number for the day of the month for a given date	DayOfMonth(date)
DayOfWeek	date	DayOfWeek: returns the number for the day of the week for a given date. Sunday returns 1, Monday returns 2, and so forth	DayOfWeek(date)
DayOfYear	date	DayOfYear: returns the number for the day of the year for a given date	DayOfYear(date)
Exp	mathematical	Exponentiation: returns the value of the constant e, the base of natural logarithms (approximately 2.71828) to the power of num; inverse of ln function.	Exp(num)
FV	financial	Future Value: returns the future value of an investment given a payment num, interest rate num, and num of periods	FV(payment num, rate num, num of periods)
Hour	time	Hour: returns the hour for a given time	Hour(time)

If	logical	If: if the log exp is true, the true exp is executed; otherwise, the false exp is executed	If(log exp, true exp, false exp)

Function	Type	Description	Usage Example
Int	mathematical	Integer: returns the integer portion or whole number of num	Int(num)
Left	text	Left: returns the characters for str beginning from the left and proceeding to the right for num characters	Left(str, num)
Length	text	Length: returns the number of characters in str	Length(str)
In	mathematical	Natural Logarithm: returns the natural logarithm (base e - approximately 2.71828) of num; inverse of Exp function of num	In(num)
Log	mathematical	Base 10 Logarithm: returns the base 10 logarithm of num	Log(num)
Lower	text	Lower: converts the str to lowercase	Lower(str)
Max	statistical	Maximum: returns the maximum (highest) value for num1, num2, and so forth	Max(num1, num2, ...)
Middle	text	Middle: returns the characters for str beginning at start position num for num of characters	Middle(str, start position num, num of characters)
Min	statistical	Minimum: returns the minimum (lowest) value for num1, num2, and so forth	Min(num1, num2, ...)
Minute	time	Minute: returns the minute for a given time	Minute(time)
Mod	mathematical	Modulus: returns the remainder of the dividend num divided by the divisor num	Mod(dividend num, divisor num)
Month	date	Month: returns the number of the month for a given date	Month(date)
MonthName	date	MonthName: returns the number of the month for a given date	MonthName(date)
Pi	mathematical	Pi: returns the value of Pi (approximately 3.14159265)	Pi()
PMT	financial	Payment: returns the payment required given a principal num, interest rate num, and num of periods	PMT(principal num, interest rate num, num of periods)
Position	text	Position: returns the position in the source str of the find str beginning at start position num	Position(source str, find str, start position num)
Proper	text	Proper Case: converts the first letter of each word in str to uppercase and the rest of the word to lowercase.	Proper(str)
PV	financial	Present Value: returns the present value of an investment given a payment num, interest rate num, and num of periods	PV(payment num, interest rate num, num of periods)
Record Count	database	Record Count: returns the number of records in the current database.	RecordCount()
Replace	text	Replace: replaces the source str beginning at start position num for num of characters with the replacement str	Replace(source str, start position num, num of characters, replacement str)
Replicate	text	Replicate: repeats a str for num times	Replicate(str, num)
Right	text	Right: returns characters for str beginning from the right and proceeding to the left for num characters	Right(str, num characters)
Round	mathematical	Round: returns the value of num rounded to the specified num of decimal places	Round(num, num of decimal places)
Second	time	Second: returns the second for a given time	Second(time)
Sign	mathematical	Sign: returns the sign of num. A positive num returns 1, zero returns 0, and a negative num returns -1.	Sign(num)
Sqrt	mathematical	Square Root: returns the square root of a positive	Sqrt(num)

		number	
Sum	statistical	Sum: returns the total of num1, num2, and so forth	Sum(num1, num2, ...)

Function	Type	Description	Usage Example
Time	time	Time: returns the current time as HH:MM:SS based on the current system clock	Time()
Trim	text	Trim: removes leading, trailing spaces, and all other extra spaces from str.	Trim(str)
Trunc	mathematical	Truncate: returns the value of num truncated down to the specified num of decimal place	Trunc(num, num of decimal places)
Upper	text	Upper: converts str to uppercase	Upper(str)
Year	date	Year: returns the year number for a given date	Year(date)

Functions Sorted by Type

The following table lists each function by type. (The Calculation Builder dialog box contains folders for each type of function listed.)

Database	*Date/Time*	*Financial*	*Logical*	*Math*	*Text*
Record Count	Date	FV	If	Abs	Left
	DayName	PMT		Avg	Length
	DayOfMonth	PV		Exp	Lower
	DayOfWeek			Int	Middle
	DayOfYear			ln	Position
	Hour			Log	Proper
	Minute			Max	Replace
	Month			Min	Replicate
	MonthName			Mod	Right
	Second			Pi	Trim
	Time			Round	Upper
	Year			Sign	
				Sqrt	
				Sum	
				Trunc	

Technical Information

This chapter explains how to troubleshoot common problems you may encounter. It also provides technical information on such topics as how to improve Optical Character Recognition (OCR) and scanning performance.

This chapter contains the following sections:

- General Troubleshooting Solutions
- flashFORM Setup Issues
- Uninstalling flashFORM
- Scanning and Recognition
- Operation
- Improving Performance
- flashFORM Compatibility

General Troubleshooting Solutions

If you have a problem with flashFORM, first check that your computer, scanner, and other applications are functioning properly.

Make backups of flashFORM files regularly, preferably in a location other than your hard drive. This could save you hours or days of work if the unexpected happens: file deletion or corruption caused by disk crashes, viruses, or user error.

Solutions to Try First

Try these possible solutions if you experience problems using flashFORM.

- Make sure that your system meets all requirements as listed in " System Requirements".
- Restart your computer and make sure other applications are functioning properly.
- Make sure that your scanner is plugged in and turned on, and that all cable connections are secure.
- Turn off your computer, restart your scanner, and then restart your computer.
- Use the software that came with your scanner to verify that it works properly in Windows before using it with flashFORM.
- Fix Windows problems before using flashFORM again.
- Run virus-checking software regularly.
- Defragment your hard disk occasionally. See your Windows online help for more information.
- Run ScanDisk for Windows 95 or 98 or Check Disk for Windows NT to check your hard disk for errors. See Windows online help for more information.
- Uninstall and reinstall flashFORM.

flashFORM Setup Issues

This section contains information on some common installation problems and information on how to optimize the installation process.

Memory and Installation

Close all applications — including screen savers, virus checkers, and mail applications — to free up memory before starting the flashFORM setup program.

Installing flashFORM 4.0 over Older Versions

Select your current flashFORM folder during installation to install flashFORM 4.0 over a 3.0, 2.0 or 1.x version. flashFORM prompts you to confirm that you want to overwrite the previous version.

You will no longer be able to run an older version of flashFORM in this case.

Uninstalling flashFORM

Follow these steps to remove flashFORM from your system.

The steps listed here remove all flashFORM files from your computer. Back up files and records outside your `flashFORM` folder if you want to save them.

To uninstall flashFORM:

1. Exit from flashFORM.
2. Click Start in the Taskbar and choose Settings Control Panel.
   The Add/Remove Programs Properties dialog box appears.
3. Select flashFORM 4.0. in the Install/Uninstall tab.
4. Double-click Add/Remove....
5. Click Yes in the confirmation dialog box.

Windows removes flashFORM from your system.

Scanning and Recognition

This section describes common scanning and recognition problems and possible solutions:

- System Hang During Scan
- System Hang During Auto Form Design
- Scanner Compatibility

System Hang During Scan

A system hang during a scan could have several possible causes:

- An interrupt conflict between your scanner and another device such as a bus mouse or network card.
  Check interrupt addresses for a possible conflict. See your device documentation.
- A SCSI termination problem.
  Make sure the scanner is terminated properly. See your scanner documentation.
- A memory-related problem.
  Try closing open windows and applications to free up memory.

System Hang During Auto Form Design

Many computer systems provide a feature called shadow RAM to enhance system performance. If flashFORM causes the system to hang, turn off the shadow RAM function of your computer and try again. See your computer's operations manual for information on disabling shadow RAM. Some computer systems do not allow you to turn off shadow RAM. Incompatibilities with these systems are usually not related to shadow RAM.

System hangs may be related to incompatibilities with memory-resident applications or device drivers. Use a text editor to comment out any memory-resident device drivers and applications from your `autoexec.bat` and `config.sys` file not used by Windows, DOS, flashFORM, your scanner, or your hard drive, and then restart your system.

Do not remove a device driver unless you are aware of its function and know that it may be removed safely.

Hard disks often require special device drivers that should not be removed. Video displays that require special device drivers may need to be reconfigured instead of removed.

Make a backup disk with your current operating system version, `autoexec.bat`, and `config.sys` to guard against potential mistakes. Consult your device documentation for more information.

Scanner Compatibility

If you experience a problem between flashFORM and your scanner, make sure your scanner is one that flashFORM supports.

Please refer to *Scanner Setup Notes* for a list of compatible scanners and more detailed information about how to solve scanning problems.To open this PDF file, click Start in the Windows taskbar and choose *Programs* ▸ *FORMation* ▸ *FORMation Documents* ▸ *Scanner Setup Notes* after flashFORM has been installed

Select setup options for TWAIN-compliant scanners in the TWAIN dialog box that appears before scanning. Select 200, 300, or 400 dots per inch (dpi) for the resolution. Select line art, bi-tone, or black-and-white line drawing for the image type. flashFORM cannot process grayscale scans.

Operation

This section provides troubleshooting techniques for potential operational problems as well as additional technical information:

- flashFORM Limits
- Low Memory
- Low Disk Space
- Right Mouse Button Functions
- Object Linking and Embedding (OLE) Automation Support

flashFORM Limits

The following limits apply in flashFORM:

- Pages in a form: 100
- Open forms: 20 (depends on your system)
- Records in a database: 10,000 or approximately 5.4 MB of data across all records
- Length of *Help* message in an Object Definition dialog box: 100 characters
- Number of choices in the *List of Choices* list box in an Object Definition dialog box: 500 choices, each up to 100 characters long

Low Memory

Low memory can cause a number of problems, from persistent low-memory error messages to system hangs. You need a minimum of 16MB RAM for Windows 95 or 98 and Windows NT.

More memory is recommended if you run multiple applications.

Close Open Applications and Windows

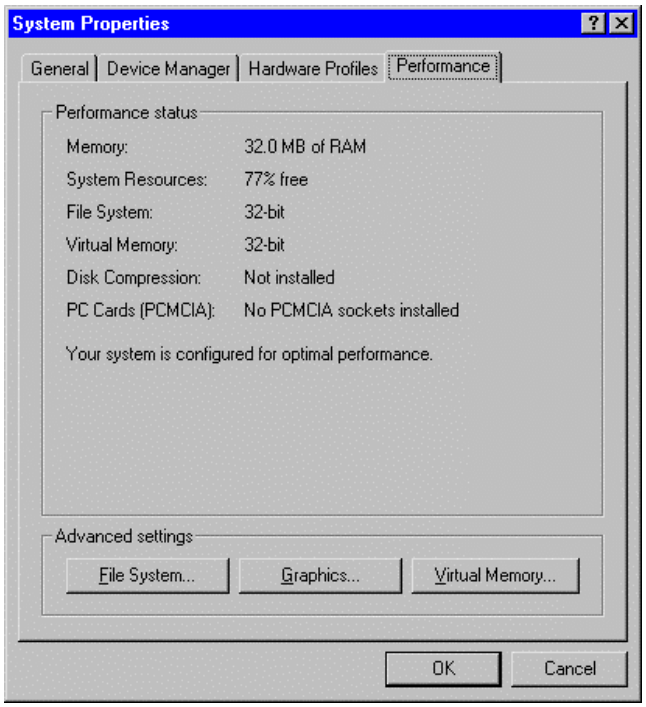
You may receive out-of-memory error messages or find that flashFORM works slowly and accesses the hard drive frequently. Try closing open flashFORM windows and other applications to free up memory.

Amount of Memory Available

You can find out how much memory you have and how much is currently available.

To check available memory in Windows 95 or 98:

1. Click the Start button in the Taskbar and choose Settings, Control Panel.
2. Double-click System in the Control Panel.
   The System Properties dialog box appears.
3. Click the Performance tab.



4. All memory information appears in this tab. See your Windows documentation or the Windows online help for more information.

You can click Virtual Memory... if you want to change virtual memory settings but it is recommended that users let Windows manage the virtual memory settings.

5. Click OK to close the System Properties dialog box and return to the Control Panel.

Virtual Memory

flashFORM uses virtual memory when memory runs low. Windows uses disk space to simulate the RAM it does not have available. Your system runs more slowly when it has to use virtual memory.

Try closing any other open applications and restarting your computer or Windows to free up memory so flashFORM does not use virtual memory. If you often work with long, complex forms or need to have many forms open at a time, add more RAM to your system.

Low Disk Space

Check your `Temp` folder for unnecessary files if you seem to be running out of disk space too quickly. Files are stored here especially after a system hang or crash. Usually the path to this folder is:

`c:\Win95\Temp` (Windows 95)

Right Mouse Button Functions

Some programs allow you to reconfigure your right mouse button for various functions. This may prevent you from using certain flashFORM functions, such as the right-mouse-button click to open a shortcut menu. Use your other software to return the right mouse button to its default state if you wish to use these right-mouse-button flashFORM functions.

Object Linking and Embedding (OLE) Automation Support

OLE Automation support is built into flashFORM. This allows you to write programs to control flashFORM from another application such as Microsoft Visual Basic, or from an application that supports Visual Basic for Applications (VBA) and other forms of OLE Automation control. You might, for example, write a program that allows you to send information from your open application directly into a flashFORM form and then print that form.

A flashFORM OLE Automation Programmer's manual and sample scripts are available. Please call 1-800-223-7346 for order information.

Improving Performance

If you scan typeset, high-quality printed pages, text recognition accuracy should be very high.

With lesser-quality pages, however, text recognition may not be as accurate. This section discusses a number of factors that affect scanning and recognition performance:

- Document Quality
- Scanning Angle
- Scanner Glass Clarity
- Paper Transparency

Document Quality

flashFORM recognizes characters in almost any font from 6 to 72 points in size. However, keep the following in mind when using flashFORM:

- The print should be reasonably clean and crisp. Characters must be distinct: separated from each other and not blurry or overlapping.
- The document should be free of notes, lines, or doodles. Anything that is not a printed character slows recognition, and any character distorted by a mark will be unrecognizable.
- The document font should be nonstylized; for example, flashFORM may not recognize the *Zapf Chancery* font accurately.
- Forms with underlined text should have the lines placed below the text and not touching it for best results. It is difficult to recognize underlined text because the underline overprints the descenders on the letters g, j, p, q, and y, changing their shape.

Scanning Angle

Make sure that each document is positioned correctly in your scanner and is not crooked. Even if you use the *Auto Form Straightening* option, it is possible for the page to be too skewed for flashFORM to design it properly. Adjust the page and rescan it if you see numerous recognition errors due to skewing.

Scanner Glass Clarity

The sheet of glass on the flatbed of the scanner must be clear. If it gets dirty, wipe it gently with a soft, damp, lint-free cloth or tissue. Be sure that it is completely dry before you put pages on it.

See your scanner documentation for more information on proper scanner maintenance.

Paper Transparency

Some paper is thin enough that the scanner sees text printed on the opposite side of a two-sided page. To correct this problem, put a black piece of paper behind the page between the page and the lid of the scanner.

flashFORM Compatibility

This section provides flashFORM compatibility lists.

Database Information Exchange

flashFORM uses industry-standard ODBC to exchange information with the following databases:

- Microsoft Access (2.x or higher)
- dBASE (III or higher)
- Excel (3.0 or higher)
- FoxPro (2.0 or higher)
- Paradox (3.x or higher)
- text-based and CSV files

E-mail Programs

- Microsoft Exchange/Outlook
- Lotus cc:Mail/Notes (32-bit versions only)

Graphic Formats

flashFORM can import the following file types into a graphic object or a fill graphic field:

- BMP
- GIF
- JPEG
- PCX
- TIFF
- Macintosh PICT

Image File Formats

flashFORM can import and recognize black-and-white forms in either PCX or TIFF format. Image resolution must be 200, 300, or 400 dots per inch (dpi) for black-and-white forms, and 300 dpi for color forms.

Scanners

The *Scanner Setup Notes* contains information about supported scanners and related issues. To open this PDF file, click *Start* in the Windows taskbar and choose *Programs* ▸ *FORMation* ▸ *FORMation Documents* ▸ *Scanner Setup Notes* after flashFORM has been installed.

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