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Quick Reference: Using SmartForm Assistant

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TOPIC --

This quick reference describes how to use Claris' SmartForm Assistant
program. Use this application to print professional-looking forms with
high-quality graphics and legible, accurate data. SmartForm Assistant
forms are organized so you can enter data easily.

A form designer can program SmartForm Assistant forms to calculate
automatically, to check the data you enter, and to provide help when you're
filling in a form -- things you can't do with paper forms. You can also
export the data in your forms to a database or spreadsheet application.

This quick reference is based on SmartForm Assistant 1.1v2, and covers
these topics:

- Getting started

- Filling in a form

- Printing a form

- Using support features

- Managing a form set

- Where to find more information

DISCUSSION ---

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Getting Started with SmartForm Assistant 1.1v2
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There are four ways to begin filling in a form using SmartForm Assistant:

- Double-click a form.

- Highlight the SmartForm Assistant application icon, pull down the File
  Menu and select the Open option.

- Double-click the application icon.  SmartForm Assistant displays the
  Open file dialog box.  Select the form you want to fill in from this
  list.

- If you have a set of forms already open, you can pull down the Edit
  menu and select Add Blank Form to create a  blank form. Use this method
  if you need to fill in multiple copies of the same form in a single
  session. Also, use this method to create forms requiring unique form
  numbers.

Note: Throughout this quick reference document, Command-key equivalents are
shown in parentheses ( ). You can press these instead of going to menus
to select options.


Filling in a Form
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Here's how to fill in a form:

1) After you have gotten started with SmartForm Assistant, choose the
   appropriate form.

2) Once the form set is open, pull down the Edit menu and select Add Blank
   Form (Command-A).  This adds a blank form to your set of forms.

3) Type in the required information.  Use the Tab and Shift-Tab
   (backwards tab) to move from field to field. If you have any
   difficulties, see the section below, "Using Support Features"
   for on-line help.

4) When you complete the form, save the information to your hard disk or
   floppy for archiving purposes.  You are ready to print your form(s).


Printing a Form
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1) Pull down the File Menu and select Print (Command-P).  If a
   form requires you to print multiple copies, click the "Print with part
   labels" option in the print dialog box.

2) You can print The Current Form, All Forms, or Visible Forms.  Make
   your selection by using the pop-up menu on the print dialog box.
   The choice defaults to Print Current Form.
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Using Support Features

This section explains two categories of Support Features:

- Intelligent Assistance, which deals with things you need to know
  immediately.

- General forms Assistance, which contains information needed by more
  advanced users.

Intelligent Assistance

SmartForm Assistant provides three types of intelligent assistance. These
are menu items that help you fill in forms quickly and accurately. These
include Format Help, Support window, and Choices window.

- Format Help dialog box. This feature describes the different types of
  entry formats. SmartForm Assistant provides Format Help on all forms.
  The form designer must provide Support and Choices, which vary among
  forms.

  Format Help dialog box. The Format Help dialog box provides a concise
  explanation of the correct entry formats for each data type. The form
  designer can define a field as one of ten data types: text, decimal,
  integer, date, time, name, phone, international phone, logical, or
  picture. To display the Format Help dialog box, pull down the View menu
  and select Format Help... (Command-?) after you open a form.

- Support window. This feature describes the type of information to
  enter. The form designer can also provide custom help messages and
  custom error messages for each field in a form. These messages apply to
  the selected field and appear in the Support window. To display the
  Support window, pull down the Windows menu and select Show Support
  (Command-H).

- Choices window. This feature lists choices for the selected field.
  After selecting or tabbing to a field, you can enter data into it by
  typing, by pasting from the Clipboard, or by selecting an option from
  the Choices window. As with the Support window's help and error
  messages, choices are not built into all forms; the form designer must
  provide them. Some forms, or fields in a form, may not have choices
  associated with them.

  To display the Choices window, pull down the Windows menu and select
  Show Choices (Command-Y). You can select items from the
  Choices window by:

  - Selecting an item in the choice list and then clicking the Select
    button.

   - Double-clicking an item in the choice list.

   - Pressing the Command-key equivalent corresponding to the choice you
     want (Command-key equivalents for the first 10 choices are always
     Command-1 through Command-9, then Command-0).

General Forms Assistance

Beyond the intelligent assistance provided by Format Help, Support, and
Choices, the following features help ease data entry and provide
information about the form or its data. These include Name Options..., the
Form Info window, the Form Set Info window, and the Auxiliary window.

- The Name Options... dialog box shows prefixes and suffixes (like
  Mister and Senior) that help SmartForm Assistant interpret acceptable
  entries in a Name field. It also controls how SmartForm Assistant
  displays your accepted entry. Some prefixes and suffixes also have
  abbreviations (Mr. and Sr., for example) and alternate abbreviations (Mr
  and Sr), which you can view in the Name Options dialog box.

  To display the Name Options dialog box, pull down the View menu and
  select Name Options... The "Built-in" card displays name options for all
  forms; the "User-defined" card displays them for a specific form set;
  the "Library" card displays a list of name options that you define (for
  example, making Research Engineer, Researcher, or R.E. acceptable).

- The Form Info window displays data about the form with which you're
  working. The Form Info window displays the Form Name, number, and the
  creation and last modified dates for the current form. It also includes
  a field into which you can enter comments about the current form. To
  display the Form Info window, pull down the Windows menu and select Show
  Form Info (Command-T).

- The Form Set Info window, displays data about the current form set.
  The Form Set Info window displays the date the Form Set was created and
  last modified and information about the Source Form (the form created in
  SmartForm Designer). It also includes information about the total
  number of forms in the set, number of visible forms, and number of
  hidden forms. To display the Form Set Info window, pull down the Windows
  menu and select Show Form Set Info (Command-M).

- The Auxiliary window is an extra page, consisting of information
  that will not be printed with the rest of the form. The Auxiliary
  window contains extra information that SmartForm Assistant does not
  print. To display the Auxiliary window, pull down the Windows menu and
  select Show Auxiliary (Command-U).

Managing a Form Set

When you have a number of forms to keep straight -- as with numerous weekly

expense reports in the same file -- you can search through old forms and manage forms more easily with the controls First Form, Next Form, Previous Form, and Last Form. These items are in the View Menu. When you want to view a different form in the set, use these menu items to move through the form set.

Find Forms...

This is used to find a specific form. To find a form, pull down the View Menu and select Find Forms... (Command-F) and a blank form will appear. Determine which field you want to search on and enter the search criteria into that field. To find a form that was created on 7/25/88, you'd enter 7/25/88 as the search criteria in the date field and then click Find in the find dialog box. To find a Facilities Work Request form for reconfiguration of cubicles, you would open the Facilities set of forms, pull down the View menu and select Find Forms..., and enter "reconfigure cubes" in the comments field. The program would find the form in which you entered "reconfigure cubes" in the comments field.

Hide Current Form, Swap Hidden-Visible, or Show All Forms

These menu options are used to manipulate forms in a set after you have searched for a form(s). Suppose you fill in forms for John Doe and Sally Smith. There are 10 forms in the set with John's name, and 5 with Sally's name. Sally has just asked you to print all of her forms. You would pull down the View Menu, select Find Forms..., enter = Smith and click Find on the dialog box. You'd now have 5 forms visible and 10 forms hidden. Now you pull down the File Menu, select print and choose Print Visible Forms from the pop-up menu.

If you wanted to see all of John's forms, you'd pull down the View Menu and select Swap Hidden-Visible (Command-J). John's 10 forms would be visible and Sally's 5 forms would be hidden.

Collect...

The Collect feature lets you take a form that you've already filled out and collect all similar forms to create a form set. For example, if you created 15 Vacation Leave forms, you have 15 different files. If you wanted to examine the one you filled out last week, you'd have to search through your hard drive and open that file. But, using SmartForm Assistant 1.1v2, you open one of those Vacation Leave forms, pull down the File menu and select Collect. Select the folder that has the 15 vacation forms in it and Collect forms into "the current [front-most] set". Watch the dialog box compare each file and collect the ones that match the type of form that is open. This gives you a set of 15 vacation forms.

You can also collect forms by launching SmartForm Assistant, pulling down the File Menu, selecting Collect, choosing the file you want to collect, and clicking Collect forms into "a new set of forms". The application will

search for all the files that match the chosen form type.

Where to Find More Information

About SmartForm Assistant 1.1v2

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