Contents

This on screen manual covers the following subjects:

Using OfficeForms features

The following features are described:

- The Designer environment
- The Filler environment
- Closing OfficeForms

The Designer environment

The Designer environment is used to construct your forms. When you start the Designer, you will see the Designer screen.

This is the screen you use to design your forms. You can open any number of forms within the Designer at any time. Each will be shown in its own window, and you can select the form you want from the list at the bottom of the Window menu.

Three toolbars hold the tools that you use to design your forms.

The right-hand area of the screen shows tutorial tips. This shows general information until you select a tool, when context-sensitive information relating to the use of that tool is displayed. You can use the buttons at the bottom to navigate through the tutorial tips.

The Designer screen

Designer toolbars

Changing the view of your form

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Designer screen

The following illustration shows the Designer screen. As you can move the toolbars around within the screen, your screen may look slightly different but all of the major features should be present.

Click areas of the screen to see a description of what they do.
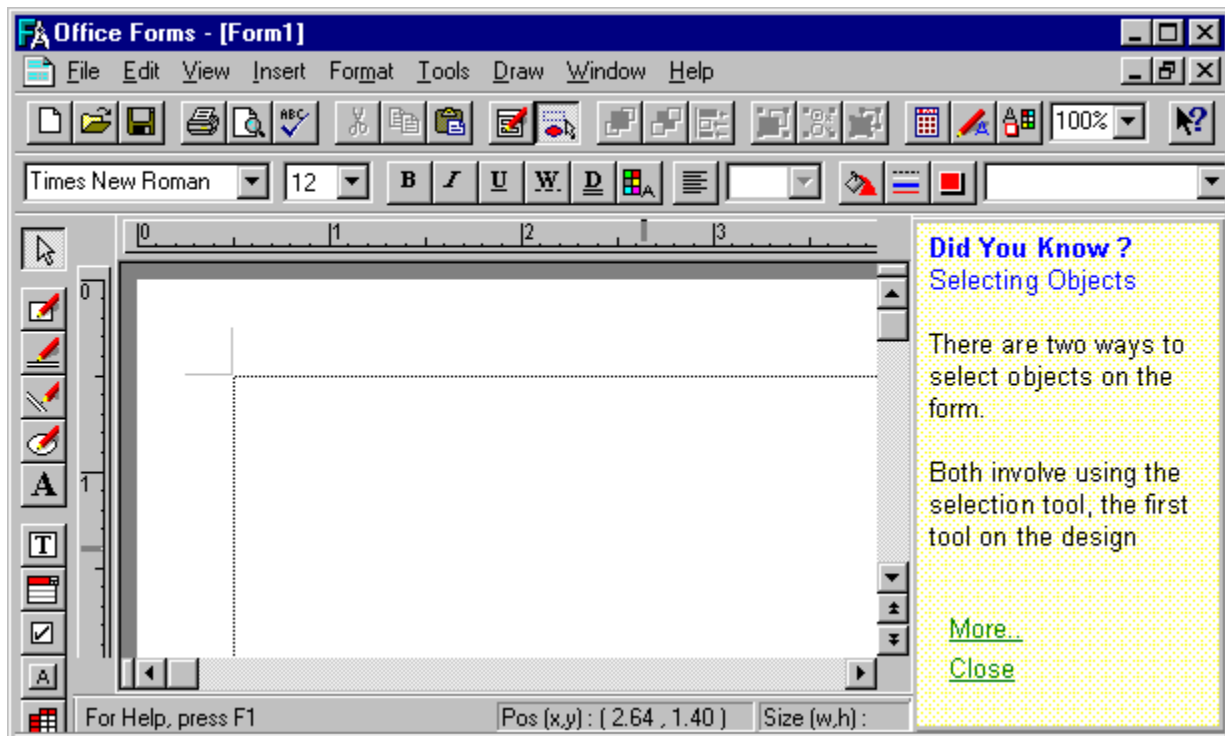
Main toolbar

This toolbar contains tools that affect form management.

Factory toolbar

This toolbar contains tools to create the elements that make up a form, and also to select the elements once they have been added to a form.

Format toolbar

This toolbar contains tools that control the appearance of text within the form.

Form design area

This area contains your actual form design. You can place, edit and move objects in this area to create the layout of your form.

Tutorial tips area

This area contains tutorial tips related to the Designer screen. Clicking tools displays help relevant to that tool.

Status area

This area shows information about your form design. It contains:

- The current cursor position.
- The size of the current object.
- The status of the Num Lock and Caps Lock keys on your computer keyboard.

Title bar

This shows the name of your current form.

Window control buttons

These buttons control the size and status of the displayed window.

Screen control buttons

These buttons control the size and status of the screen.

Menu bar

This contains all of the menus that are available in this screen.

Designer toolbars

Three toolbars hold the tools you need to manipulate forms:

- The Main toolbar contains tools that affect form management.
- The Factory toolbar contains tools to create the elements that make up a form, and also to select the elements once they have been added to a form.
- The Format toolbar contains tools that control the appearance of text within the form.

You can show or hide the toolbars individually, using options in the View menu. In the Windows 95/NT version of OfficeForms you can also position them as floating bars, or at the top or side of the dialog, by clicking within the toolbar and dragging it to the required position.

- The Main toolbar
- The Factory toolbar
- The Format toolbar

Main toolbar

The following illustration shows the Main toolbar. Click the tools to see a description of what they do.

New tool

This opens a new blank form within the Designer. You can then begin a form design. This tool is also available in the File menu.

Open tool

This allows you to load an existing form into the Designer. You then change the design, use the Test Fill facility or print your form. This tool is also available in the File menu.

Save tool

This allows you to save your work to disk. This tool is also available in the File menu.

Print tool

This allows you to print your form. This tool is also available in the File menu.

Print Preview tool

This displays a full page view of your form showing how it will appear when printed. This tool is also available in the File menu.

Spelling tool

This allows you to perform a spellcheck on all of the text contained in your form. This tool is also available as the option Spellcheck on the Tools menu.

Cut tool

This allows you to remove the selected object(s) or text from the form and place them on the Clipboard. This tool is also available in the Edit menu.

Copy tool

This allows you to place the selected object(s) or text on the Clipboard without removing them from your form. This tool is also available in the Edit menu.

Paste tool

This copies the contents of the Clipboard into your form. This tool is also available in the Edit menu.

Test Fill tool

This makes the Test Filler environment active, allowing you to test the filling properties of your form. This tool is available only when the Designer environment is currently operating.

Form Designer tool

This makes the Designer environment active. This tool is available only when the Test Filler environment is currently operating.

Bring to Front tool

This allows you to place the selected object (or objects) in front of any others in the form. This tool is also available in the Draw menu.

Send to Back tool

This allows you to place the selected object (or objects) behind any others in the form. This tool is also available in the Draw menu.

Align Objects tool

This allows you to line up the left-hand side of objects on your form. This tool is also available in the Draw menu.

Group tool

This allows you to form the selected objects into a single grouped object. This tool is available only when you have more than one object selected, and is also available in the Draw menu.

Group Radio Buttons tool

This allows you to form selected Checkbox objects into a group of Radio Button objects. This tool is available only when you have a number of Checkbox objects selected, and is also available in the Draw menu.

Ungroup tool

This allows you to disperse the selected group into its constituent objects. This tool is available only when you have a grouped object selected, and is also available in the Draw menu.

Show/Hide Math tool

This either displays or hides the Math tool to allow you to incorporate calculations into your form fields. This tool is also available in the View menu.

Show/Hide Factory tool

This allows you to decide whether you want to display the Factory toolbar. This tool is also available in the View menu.

Show/Hide Format tool

This allows you to decide whether you want to display the Format toolbar. This tool is also available in the View menu.

Zoom tool

This allows you to change the magnification used to view your form on the screen. This tool is also available in the View menu.

About tool

This allows you to view help information about the Designer environment. This tool is also available in the Help menu.

Factory toolbar

The following illustration shows the Factory toolbar. Only one tool can be selected at any time, and the selected tool is shown as pressed. Click the tools to see a description of what they do.

Selection tool

This allows you to select objects and groups within your form. Selected objects are shown with resizing handles.

Box tool

This allows you to create box objects within your form. You can click and drag to set the size and position of the box.

Line tool

This allows you to draw horizontal and vertical lines within your form. You can click and drag to set the size and position of the line.

Diagonal Line tool

This allows you to draw diagonal lines within your form. You can click and drag to set the size and position of the line.

Ellipse tool

This allows you to draw diagonal ellipses and circles within your form. You can click and drag to set the size and position of the ellipse.

Text tool

This allows you to draw text objects within your form. You can click and drag to set the size and position of the object, then type in the text.

Field tool

This allows you to draw field objects within your form. You can click and drag to set the size and position of the field.

Listbox tool

This allows you to draw listbox objects within your form. You can click and drag to set the size and position of the listbox.

Checkbox tool

This allows you to draw checkbox objects within your form. You can click and drag to set the size and position of the checkbox.

Action Button tool

This allows you to add a button to the form that will perform a number of actions when clicked.

Table tool

This allows you to place table objects within your form. A dialog will be displayed allowing you to enter details of the table.

Picture tool

This allows you to place graphics within your form. You can click and drag to set the size and position of the object, then a dialog will be displayed allowing you to select the graphic to be placed.

Barcode tool

This allows you to place barcodes within your form. You can click and drag to set the size and position of the barcode, then a dialog will be displayed allowing you to specify the barcode details.

OLE tool

This allows you to place embedded objects within your form. You can click and drag to set the size and position of the object, then a dialog will be displayed allowing you to specify the object to be inserted. This tool is also available as Object (Insert menu).

Format toolbar

The following illustration shows the Format toolbar. Click the tools to see a description of what they do.
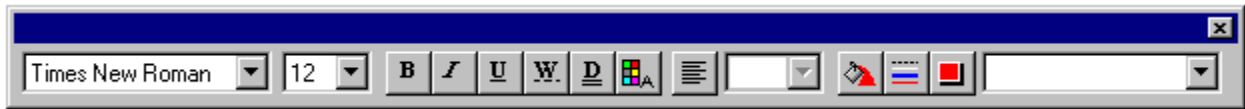
Typeface tool

This allows you to select the typeface you want for any selected text within your form. Typeface are shown in a drop-down list. In the Filler, you can change the typeface of text in memo fields.

Point Size tool

This allows you to choose the size of selected text within your form. Point sizes are shown in a drop-down list.

Bold tool

This allows you to make bold selected text within your form. This is a toggle tool.

Italic tool

This allows you to use the italic form for selected text. This is a toggle tool.

Underline tool

This allows you to underscore selected text within your form. This is a toggle tool.

Underline Word tool

This allows you to underscore selected words within your form (but not the spaces between them). This is a toggle tool.

Double Underline tool

This allows you to double underscore selected text within your form. This is a toggle tool.

Text Colour tool

This allows you to set the colour of selected text within your form. A colour palette will be displayed, from which you can select the required colour.

Text Alignment tool

This allows you to line up text within selected text objects. A dialog will be displayed allowing you to choose the alignment you want.

Text Rotation tool

This allows you to rotate selected text within your form. Common rotation angles are shown in a drop-down list, and you can either select one of these or type in any angle (to the nearest degree).

Shade tool

This allows you to set the background colour and pattern of selected objects within your form. A dialog will be displayed, from which you can select the required colour and pattern.

Line Style tool

This allows you to set the colour and pattern of the boundaries of selected objects within your form. A dialog will be displayed, from which you can select the required colour and pattern.

Shadows tool

This allows you to set the colour and style of shadow for selected objects within your form. A dialog will be displayed, from which you can select the required colour and style.

Style tool

This allows you to choose a style for selected objects within your form. Styles for the object type are shown in a drop-down list.

Changing the view of your form

Within the Designer environment, you can change the way that your form is displayed. The View menu contains options that allow you to:

- Display or hide each individual toolbar.
- Display tutorial tips (shown on cue cards). You can move cue cards, but you cannot resize them.
- Display rulers at the edges of the form and the status bar at the bottom.
- Display the Math tool.

- Zoom in or out on one portion of the form.

You can change the following by selecting Options (Tools menu):

- Display or hide the outlines of checkboxes.
- Show the baselines of objects containing text.
- Show the margins at the edges of the form.

You can also use the normal Windows facilities to expand or contract the whole program frame.

If you have more than one form open within OfficeForms, each form is assigned to one or more window(s) which act as views onto the form. You can select the way that they are displayed using options in the Windows menu.

Using tutorial tips

You can display tutorial tips, giving context-sensitive information about OfficeForms screens and tools, within the Designer. These tips are shown in the right-hand area of the Designer screen, and change to reflect tools and selections.

To start or finish the display of tutorial tips, select Tutorial Tips (View menu).

The Filler environment

The Filler environment is used to enter data into your forms. When you start the Filler, you will see the Filler screen.

This is the screen you use to design your forms. You can open any number of forms within the Designer at any time. Each will be shown in its own window, and you can select the form you want from the list at the bottom of the Window menu.

Note   If you have designed a form and you want to test its filling procedure, you do not need to use the Filler environment. You can use Test Fill (View menu), but you cannot save any entries you make during a Test Fill operation.

Three toolbars hold the tools that you use to design your forms.

- The Filler screen
- Filler toolbars

Filler screen

The following illustration shows the Filler screen. As you can move the toolbars around within the screen, your screen may look slightly different but all of the major features should be present.

Click areas of the screen to see a description of what they do.
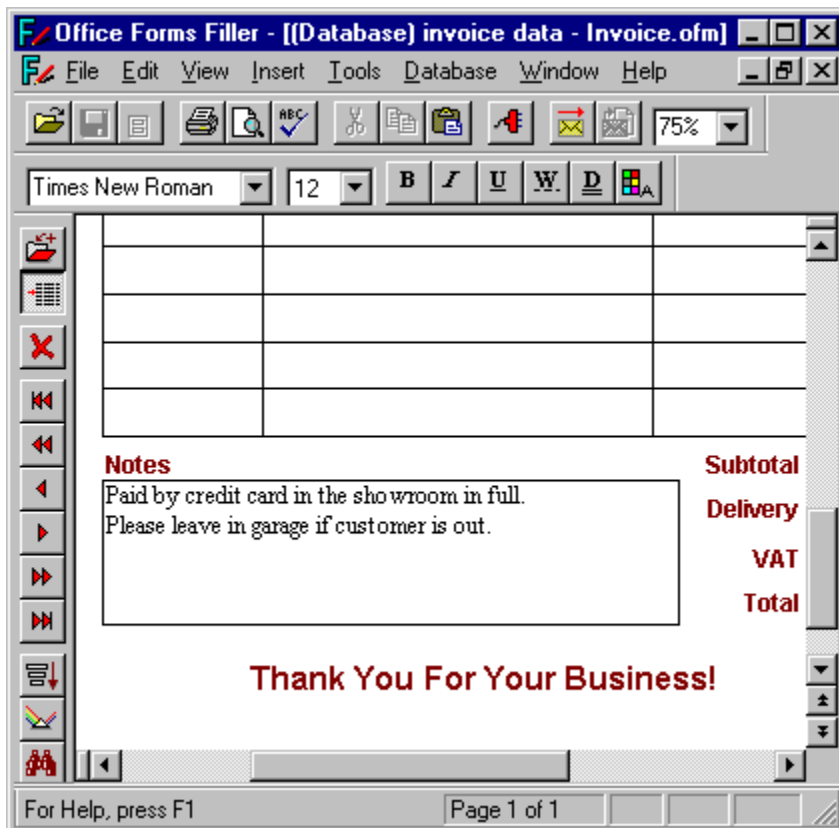
Control toolbar

This toolbar contains the tools you need to navigate through and manipulate your form.

Text Format toolbar

This toolbar contains tools that control the appearance of text within the form when a memo field is filled in.

Form area

This area contains the form to be filled. You can make your entries into form fields in this area.

Status area

This area shows information about the current form. It contains:

- The current page in the form.
- The status of the Num Lock and Caps Lock keys on your computer keyboard.

Filler toolbars

Three toolbars hold the tools you need to manipulate forms:

- The Main toolbar contains tools that affect form management.
- The Control toolbar contains the tools you need to navigate through and manipulate your form.
- The Text Format toolbar contains tools that control the appearance of text within the form.

You can show or hide the toolbars individually, using options in the View menu. In the Windows 95/NT version of OfficeForms you can also position them as floating bars, or at the top or side of the dialog, by clicking within the toolbar and dragging it to the required position.

- The Main toolbar
- The Control toolbar
- The Text Format toolbar

Main toolbar

The following illustration shows the Main toolbar. Click the tools to see a description of what they do.

Open tool

This allows you to load an existing form into the Filler. You then begin filling or print your form. This tool is also available in the File menu.

Send E-mail tool

This allows you to send the filled form directly to a remote e-mail address. This tool is also available in the File menu.

Import E-mail tool

This allows you to import form contents received by e-mail into the current form. This tool is also available in the File menu.

Save tool

Saves the typed-in information to a form data file.

If information has been typed in to a form and not yet saved, a dialog will appear for the data file name to be defined.

If, however, the data has already been saved or if the form was invoked by opening a form data file, the updated contents are simply saved to the existing file.

See also : File Operations with Forms and Data.

Reload Contents tool

This reinitialises the fields on the form with the data that was last saved using the Save Contents tool.

Clear Contents tool

This resets all the fields on the form to their initial values.   This will be blank for text and date fields and zero for number fields unless particular initial values have been set up in the designer.

Control toolbar

The following illustration shows the Control toolbar. Click the tools to see a description of what they do.

Connections tool

This allows you to set up links from the Filler to external database applications. This tool is also available in the Database menu.

Add Mode tool

This sets the Filler so that you can make entries into the fields of the form. If the form is connected to a database, selecting this tool allows you to add records.

Browse Mode tool

This sets the filler so that you can view the objects but cannot make entries in fields.

Delete Record Tool

Deletes the currently displayed record from the database.

First Record tool

This allows you to move back to the first record in the set of records.

Skip Backwards tool

This allows you to move back several records in the set of records.

Prior Record tool

This allows you to move back to the previous record in the set of records.

Next Record tool

This allows you to move forward to the next record in the set of records.

Skip Forwards tool

This allows you to move forward several records in the set of records.

Last Record tool

This allows you to move forward to the last record in the set of records.

Sort Records Tool

Allows you to select a field to sort on.   The records are then presented in the requested order.

Filter tool

This allows you to specify criteria so that you can select a narrow range of records. This can be useful if you are trying to find a particular record within a sequence.

Setup Search tool

This allows you to enter search criteria to find a particular record within the current sequence.

Text Format toolbar

The following illustration shows the Text Format toolbar. Click the tools to see a description of what they do.

Closing OfficeForms

You can close the OfficeForms programs at any time. To do this, select Exit (File menu). If you have any unsaved work, you will be asked if you want to save it before OfficeForms closes.

Note   If you are running Windows 95, you can close OfficeForms by clicking the Close button in the upper-right corner of the dialog.

The basics of form design and filling

The following are basic form design and filling operations:

- Starting a new form
- Designing a simple form
- Closing a form
- Printing and previewing a form
- Opening an existing form
- Saving a form
- Filling in a form
- Faxing a form

Starting a new form

Whenever you open OfficeForms, a new form is displayed for you to work on. You can also load a new, empty form at any time during an OfficeForms session.

To open a new form

Select the New tool from the Main toolbar. A new form will be opened automatically within OfficeForms.

Note   This form will be given a number. You must save it to give it a name.

You can now add objects as described in the topic Designing a simple form.

Opening an existing form

You can open any form at any time during an OfficeForms session.

To open an existing form

1 Select the Open tool from the Main toolbar. The standard Windows Open dialog will be displayed.

2 Select the form you want open, then click Open.

The selected form will open automatically. You can now modify the form using the techniques described in this manual.

Note   You can open as many forms as you want. Each will be shown in its own window.

Designing a simple form

Designing a form consists of placing objects on a page. These objects include lines, boxes, entry fields, checkboxes, listboxes, tables, pictures and text. You can also define how these objects will appear by setting shading and line parameters, and font details for text.

Simple form design consists of:

- Placing objects onto the form page
- Modifying objects
- Entering text into fields
- Moving objects
- Deleting objects

Placing objects onto the form page

You can place any type of object in any position on your form using the Designer environment. You can then modify and/or move the objects to make the form look the way you want.

You can place objects of the following types:

- Boxes
- Angled lines
- Text Objects
- Listboxes
- Tables
- Barcodes
- Horizontal and vertical lines
- Ellipses
- Fields
- Checkboxes
- Pictures
- Embedded Objects

To place a box object on the form

1 Select the Box tool from the Factory toolbar.
2 Click and drag the outline for the object, in the position you want the box to appear on the form.

To draw a horizontal or vertical line on the form

1 Select the Line tool from the Factory toolbar.

2 Click and drag to draw the line where you want it to appear on the form.

To draw an angled line on the form

1 Select the Diagonal Line tool from the Factory toolbar.
2 Click and drag to draw the line where you want it to appear on the form.

To place an ellipse on the form

1 Select the Ellipse tool from the Factory toolbar.

2 Click and drag the outline for the object, in the position you want the ellipse to appear on the form.

If you want to place a circle on your form, you can do it using the Ellipse tool, making the length and width identical.

To place a Text Object on the form

1 Select the Text tool from the <u>Factory toolbar</u>.

2 Click and drag the outline for the object, in the position you want the text to appear on the form. The text outline will appear on the form, and the cursor will be shown at the beginning of the text area.

3 Type in the text that you want to appear within the Text Object.

Note   You must enter the text before you perform any other action in the Designer environment. If you click outside the Text Object, without entering text, the object will be removed from the form.

If the text you enter is larger than the size of the text object, the object will expand downwards to accept all of your text.

To place a Field on the form

1 Select the Field tool from the [Factory toolbar](#).

2 Click and drag the outline for the field, in the position you want it to appear on the form.

To place a Listbox on the form

1 Select the Listbox tool from the <u>Factory toolbar</u>.

2 Click and drag the outline for the Listbox, in the position you want it to appear on the form.

The instructions for entering the options for a listbox are given in <u>Setting up listboxes</u>.

To place a Checkbox on the form

1 Select the Checkbox tool from the Factory toolbar.

2 Click and drag the outline for the Checkbox, in the position you want it to appear on the form.

Creating a set of radio buttons is described in To make radio buttons.

To place a Table on the form

1 Select the Table tool from the <u>Factory toolbar</u>. The <u>Table Properties dialog</u> will be displayed:

2 Enter the details of the table you want to insert, then click OK. The table will be displayed in the top left-hand corner of your form. You can then move it and resize it to meet your exact requirements.

Table Properties dialog

The following illustration shows the Table Properties dialog. Click areas of the dialog to see a description of what they do.
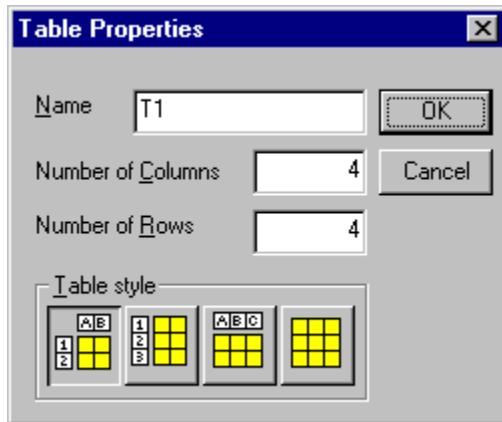
Name area

You can enter the name for your table object in this area.

Number of Columns area

You can enter the number of columns for your table in this area.

Number of Rows area

You can enter the number of rows for your table in this area.

Table style area

This area allows you to select one of the following table styles:

- Table with headings for rows and columns.
- Table with headings for rows but not for columns.
- Table with headings for columns but not for rows.
- Table with no headings for columns or rows.

OK button

Clicking this accepts all of your entries and selections, and closes the dialog.

Cancel button

Clicking this ignores all of your entries and selections, and closes the dialog.

Close dialog button

Clicking this closes the dialog.

To place a Picture on the form

1 Select the Picture tool from the Factory toolbar.

2 Click and drag the outline for the Picture, in the position you want it to appear on the form. The standard Windows Open dialog will be displayed.

3 Select the picture you want to place on the form then press RETURN.

To place a Barcode on the form

1 Select the Barcode tool from the Factory toolbar.

2 Click and drag the outline for the Barcode, in the position you want it to appear on the form. The Barcode Appearance dialog will be displayed:

3 Enter the details of the Barcode you want to insert, then click OK.

Barcode Appearance dialog

The following illustration shows the Barcode Appearance dialog with the Format tab selected. Click areas of the dialog to see a description of what they do.
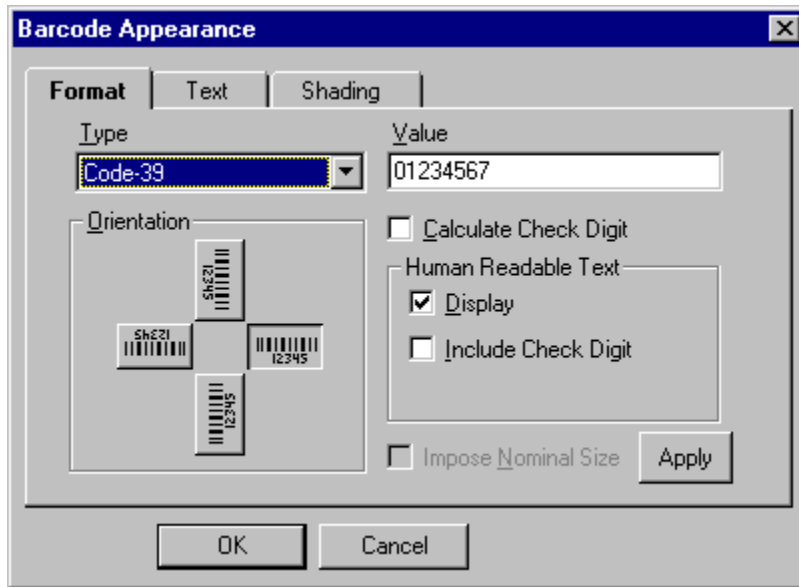
Type list

This drop-down list shows all permissible types of barcode. You can select the type you want to use.

Orientation area

This area allows you to select one of the following barcode orientations:

- Vertical running from top to bottom.
- Horizontal running from left to right.
- Table with headings for columns but not for rows.
- Vertical running from bottom to top.
- Horizontal running from right to left.

Value area

You can enter the numerical value for your barcode in this area.

Calculate Check Digit checkbox

Select this checkbox to include a check digit in your barcode.

Human Readable Text area

You can set the following readable text attributes in this area:

- Whether any readable text will be shown with the barcode.
- If readable text is shown, whether any check digit will be included.

Impose Nominal Size checkbox

Select this checkbox to make the barcode a fixed size, regardless of its normal size and properties.

Apply button

Click this to apply the attributes that have been set in this dialog. The barcode will show the attributes with the Barcode Appearance dialog still open, allowing you to modify your barcode interactively.

Text tab

Click this to show [text attributes within the dialog](#).

Shading tab

Click this to show shading attributes within the dialog.

Barcode Appearance dialog

The following illustration shows the Barcode Appearance dialog with the Text tab selected. Click areas of the dialog to see a description of what they do.
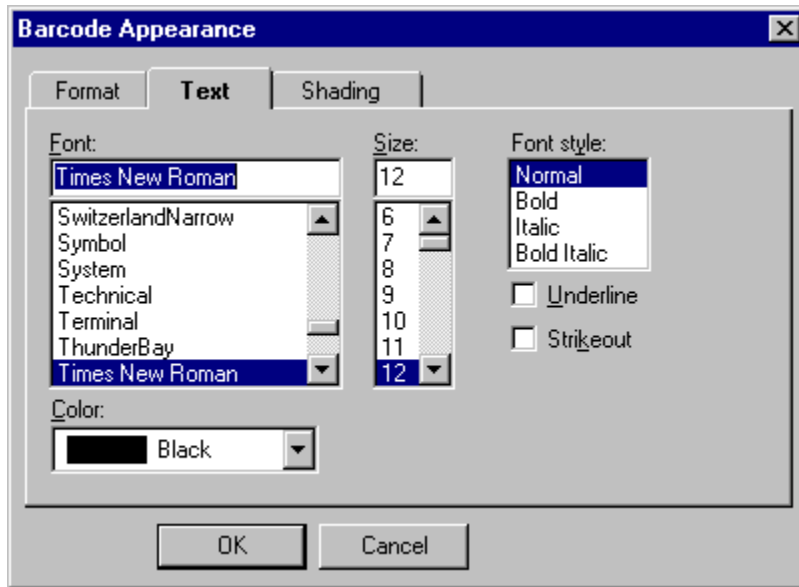
Font list

You can select the text font from this list, which shows all of the fonts on your computer.

Colour list

You can select the text colour from this drop-down list.

Size list

You can select the text size from this list.

Font style area

You can select the style for the font. The following styles are available for most fonts:

- Normal.
- Bold.
- Italic.
- Bold and italic.

Underline checkbox

Select this to underscore the text.

Strikeout checkbox

Select this to strike out the text.

Format tab

Click this to show [format attributes within the dialog](#).

Barcode Appearance dialog

The following illustration shows the Barcode Appearance dialog with the Shading tab selected. Click areas of the dialog to see a description of what they do.
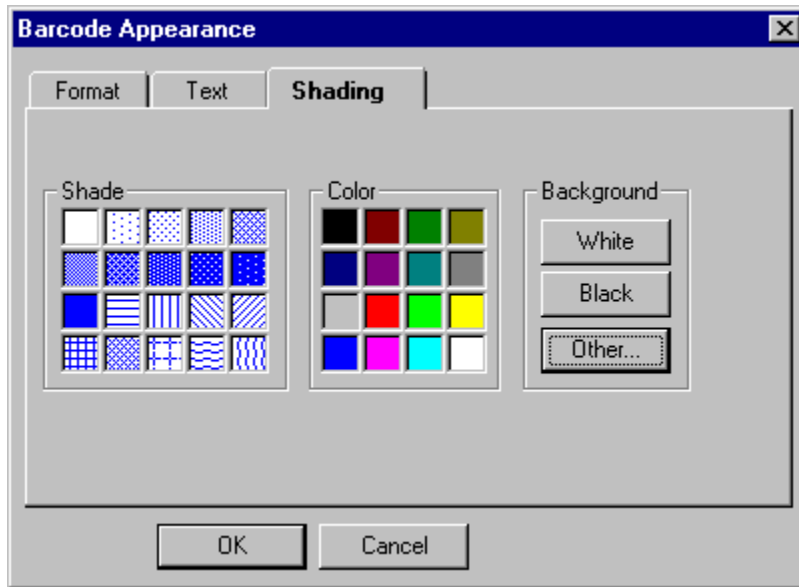
Shade area

You can select the shading pattern for your object by clicking the square containing the pattern that you want.

Colour area

You can select the colour for your object by clicking the square containing the colour that you want.

Background area

The three buttons in this area allow you to choose the background colour that will show through the shading pattern. If you click the button labelled Other, a drop-down list will appear allowing you to choose the colour that you want.

To place an embedded object on the form

1 Select the OLE tool from the Factory toolbar.
2 Click and drag the outline for the Object, in the position you want it to appear on the form. The Insert Object dialog will be displayed.
3 Choose the type of object you want to place on the form, then click OK.

Insert Object dialog

The following illustration shows the Insert Object dialog for creating new objects. Click areas of the dialog to see a description of what they do.

Insert Object

Object Type:
- \NotInsertable
- AmiPro Document
- Approach Application
- Approach Chart
- Approach Crosstab
- Approach Form Letter
- Approach Form
- Approach Mailing Labels

○ Create New
○ Create from File

OK
Cancel

☐ Display As Icon

Result

Inserts a new \NotInsertable object into your document.
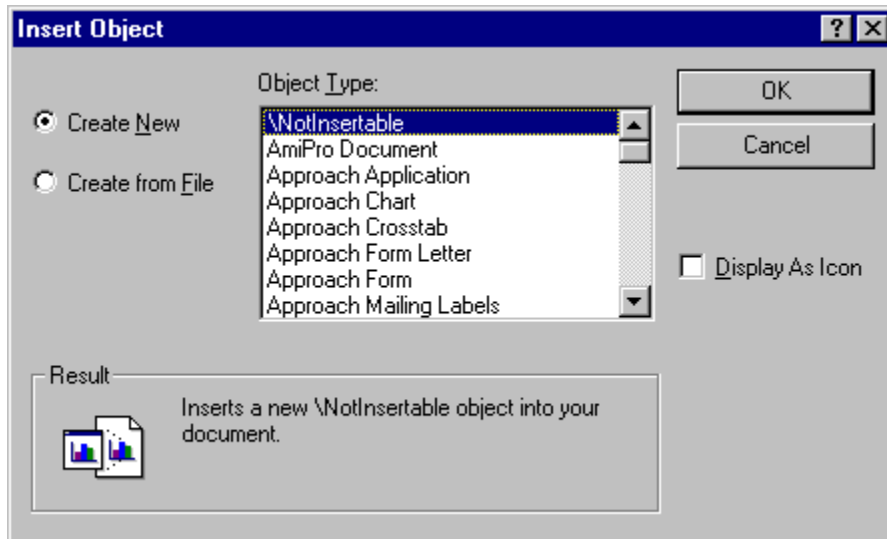
Create New button

Select this if you want to insert an empty object. This will already be selected in this dialog.

Create from File button

Select this if you want to insert an object that already exists. The dialog will change to show file selection facilities.

Object Type area

This lists all of the file types that can be inserted. You can select a file type by clicking it in this list.

Display As Icon checkbox

Select this if you want the object to be represented by an icon in the form.

Result area

This area shows the type of object that will be inserted.

What's this? button

This allows you to view help on any part of the dialog. Click the button, then click the area for which you want to see help. A pop-up will appear showing details.

Insert Object dialog

The following illustration shows the Insert Object dialog for importing existing objects. Click areas of the dialog to see a description of what they do.

Insert Object   ? X

○ Create New

● Create from File

File:

`C:\WINDOWS\Desktop\`

[Browse...]   ☐ Link

OK

Cancel

☐ Display As Icon

Result

Inserts the contents of the file as an object into your document so that you may activate it using the program which created it.
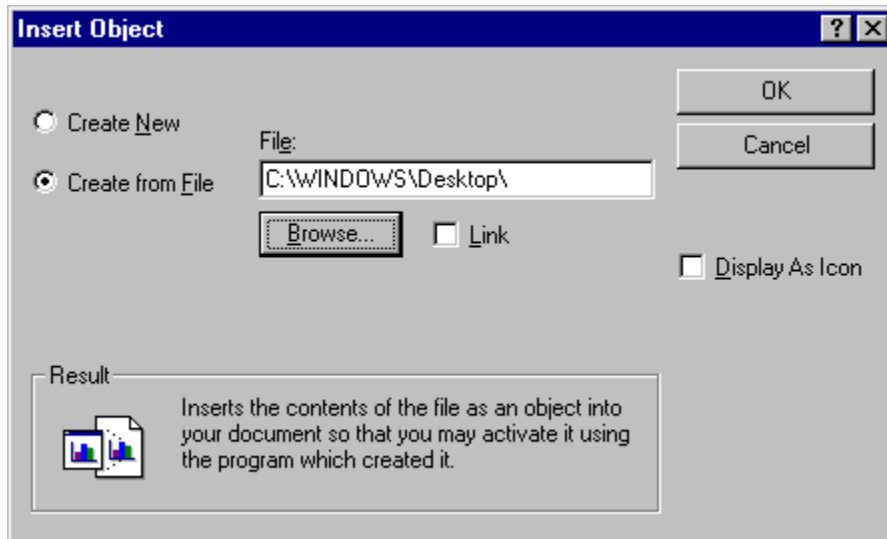
Create New button

Select this if you want to insert an empty object. The dialog will change to <u>show a list of object types</u>.

File area

This shows the name of the selected object. You can enter the name of any file, or select a file using the Browse button.

Browse button

Click this button to display a dialog allowing you to search for the object that you want to insert.

Link checkbox

Select this if you want to link the object to your form. If this checkbox is not selected, the object will be embedded in your form.

Create from File button

Select this if you want to insert an object that already exists. This will already be selected in this dialog.

Moving objects

When you have placed an object on a page of your form, you may need to move it to another position. You can do this at any time.

- Moving objects using the mouse
- Moving objects using the keyboard

To move an object using the mouse

1 Choose the Selection tool from the <u>Factory toolbar</u>.

2 Click within the outline of the object you want to move. The object will be selected.

3 Click again within the outline of the object and drag the object to its new position.

You can select and move a number of objects in one operation as described in <u>Using multiple objects</u>.

To move an object using the keyboard

1 Choose the Selection tool from the <u>Factory toolbar</u>.

2 Click within the outline of the object(s) you want to move. The object(s) will be selected.

3 Use the ARROW keys to move the selected object(s), which will move in steps of one grid space.

Note   If you have only one object selected, you can resize it by holding SHIFT and using the ARROW keys.

Modifying objects

You can change the size, shape, properties or appearance of an object at any time.

Note   You can apply an appearance style to an object. This is described in <u>Using Styles</u>.

The actual properties and appearance details that you can change depend on the type of object. You can:

- Modify object size and shape
- Change object line properties
- Change text characteristics
- Change object shading
- Change object shadow properties

To modify an object size or shape

1 Choose the Selection tool from the Factory toolbar.
2 Select the object by clicking anywhere within its outline.
3 Click and drag the resizing handles to form the shape and size you want for the object.

To change object shading

1 Choose the Selection tool from the <u>Factory toolbar</u>.

2 Select the object by clicking anywhere within its outline.

3 Click the Shading tool from the <u>Format toolbar</u>. This will display a <u>shading dialog</u>.

4 Select the colours for the shading and the background. The object will change to reflect the changes.

5 When you are happy with the shading colours, click the OK button.

Shading dialog

The following illustration shows the shading dialog. Click areas of the dialog to see a description of what they do.
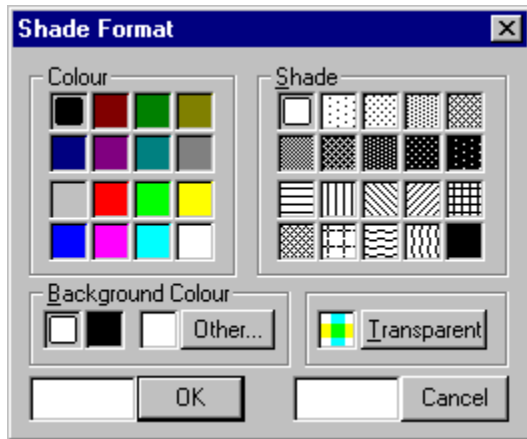
Background colour area

You can select the background colour from the drop-down list.

Demo area

This area shows the effect of clicking the OK button.

Demo area

This area shows the effect of clicking the Cancel button.

To change object line properties

1 Choose the Selection tool from the <u>Factory toolbar</u>.

2 Select the object by clicking anywhere within its outline.

3 Click the Line Style tool from the <u>Format toolbar</u>. This will display the <u>Line Format dialog</u>.

4 Select the colour and style for the lines that border the object. The object will change to reflect the changes.

5 When you are happy with the properties, click the OK button.

Line Format dialog

The following illustration shows the Line Format dialog. Click areas of the dialog to see a description of what they do.
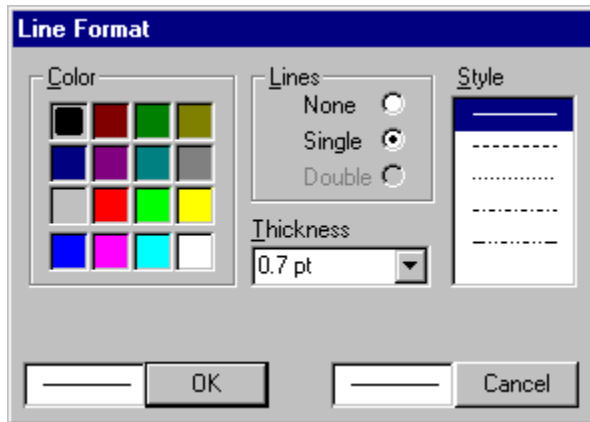
Style area

You can choose the style of your lines from those displayed in this area.

Arrowheads area

You can select the style of arrowheads (if you want to use them) from those shown in this area.

Lines buttons

These buttons allow you to select the type of line.

Thickness list

You can select the line thickness you want from this drop-down list.

Demo area

This area shows how the selections in this dialog will make the object appear.

To change object shadow properties

1 Choose the Selection tool from the <u>Factory toolbar</u>.

2 Select the object by clicking anywhere within its outline.

3 Click the Shadow button from the <u>Format toolbar</u>. This will display the <u>shadow dialog</u>.

4 Select the colour and style for the shadow. The object will change to reflect the changes.

5 When you are happy with the shadow properties, click the OK button.

Note If you want to change more than one property, e.g. shading and line, for an object, you can make the changes in the same visit to the Appearance dialog.

Shadow dialog

The following illustration shows the shadow dialog. Click areas of the dialog to see a description of what they do.
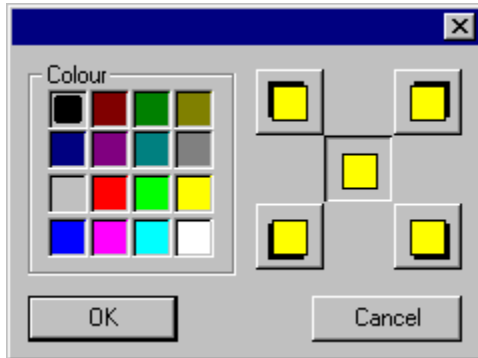
Shadow style area

You can select from five styles of shadow by clicking the buttons in this area.

Shadow colour area

You can select the colour for the shadow of your object by clicking the square containing the colour that you want.

To change text characteristics

1 Choose the Selection tool from the <u>Factory toolbar</u>.

2 Select either the text itself or the object containing the text.

3 Use the facilities on the <u>Format toolbar</u> to set the characteristics of the text, which will change to show the effect of each alteration you make. You can:

- Make text **bold** and/or *italic*.
- Apply any of three types of underline.
- Change the colour of the text.
- Change the alignment of the text within the object.
- Rotate the text.

Note   When you change any of these characteristics, the changes will be applied to all of the text in the selected object. If you make alterations to the text within an object, for example changing or deleting characters, only selected text is affected.

Deleting objects

If you want to delete an object, you can either cut it from the form and place it on the clipboard or simply delete it.

Cutting an object	
Deleting an object	

To cut an object from your form

1 Choose the Selection tool from the <u>Factory toolbar</u>.

2 Select the object by clicking anywhere within its outline.

3 Select the Cut tool from the <u>Main toolbar</u>.

To delete an object from your form

1 Choose the Selection tool from the <u>Factory toolbar</u>.

2 Select the object by clicking anywhere within its outline.

3 Press the DELETE key on your keyboard.

Note   If you accidentally delete an object (or group of objects) that you wanted to keep, you can recover it by selecting Undelete (Edit menu).

Entering text into fields

You can enter text into:

- Text Objects
- Checkboxes
- Table headings

Entering text into Text Objects

When you have drawn the outline of a Text Object, the cursor will appear within the box. You can type in the text directly. If the text is either too small or too large to fill the object, the object size will adjust automatically to the area occupied by the text. You can then format the text as described in To change text characteristics.

If you deselect a Text Object without typing any text within it, the object will be deleted from your form. You cannot have a Text Object without text, even temporarily, as a this would be almost impossible to locate when not selected.

Entering text into Checkboxes

You can enter text into a Checkbox at any time after the Checkbox has been placed on your form. Double-click the Checkbox to place cursor within the box, then type in the text.

Entering text into table headings

To enter text into a table cell, select the table then double-click the cell. The cursor will appear in the cell. Type in the text that you want to enter.

Saving a form

You can save a form using either:

- The current name
- A new name

To save a form using its current name

To do this, simply select the Save tool while the form is open. Its current state will overwrite the last saved version of the form.

If you have not saved the form before, this will display the Save As dialog described in To save a form using a new name.

To save a form using a new name

1   Select Save As (File menu). The standard Windows Save As dialog will be displayed.

2   Select a folder (or directory path) for the form and enter its name, then click OK.

If you enter a name that already exists within the folder/directory, you will be asked to confirm that you want to overwrite the old form with that name.

Closing a form

You can close a form at any time during an OfficeForms session unless you are working with the Designer in Test Fill mode. If you are using Test Fill and you want to close the Designer, you must first click the Form Design tool from the Main toolbar.

To close a form

Select Close (File menu). If the form has changed since you last saved it, you will be asked if you want to save again before it is closed.

Filling in a form

There are two ways of filling a form:

- Using the Test Fill facility
- Using the Filler environment

Using the Test Fill facility

You can use the Test Fill facility to check that the fill characteristics are correct.

Note   You cannot save any entries you make using the Test Fill facility. It is simply intended as a quick check to try out the form without having to start the Filler.

To use the Test Fill facility

1   In the Designer environment, select Test Fill (View menu). The cursor will appear in the first field to be completed.

2   Type an entry for the first field, pressing RETURN if you want the entry to cover more than one line.

3   Press the TAB key to move to the next field (or use the mouse to select the next field to be filled).

4   Repeat steps 2 and 3 until you have entered data into all the forms fields.

5   To close the Test Fill facility, select Design View (View menu).

Note   You cannot connect to a database in Test Fill. You can only do this using the Filler.

Using the Filler Environment

There are two different possible situations in the Filler Environment. They are:

- Where a database is connected to the form.
- Where the form is not accessing a database.

This section only deals with the second of these two situations. For details about using the filler with a database, see Using OfficeForms with databases.

When a form is first opened in the Filler, it is presented using the default connection. If no default connection has been defined, the form displays a dialog to allow the required connection to be chosen from a list.

Assuming the No Database Access has been chosen - either because it is the default connection or because it has been chosen from the dialog, the form toolbars will be modified.

Because there is no access to databases, one of the tools - the Control Toolbar, which controls access to the database - is not visible.

Data that is typed in to a form may be saved in a form contents file.
For details, see File Operations with Forms and Data.

- Navigating around your form
- Cutting entries to the clipboard
- Pasting entries from the clipboard
- Changing the text colour
- Filling fields in your form
- Copying entries to the clipboard
- Changing the format of text

File Operations with Forms and Data.

Overview

The form filler deals primarily with two different types of files - form files, which have an OFM extension, and form data files which have an OFD extension.

Form files are the forms you see presented on screen or output to a printer and into which information may be typed.

Form data files represent the information that is typed in to a form and then saved to disk. These files contain the data that was filled in on a form as well as the full path name of the form file that was filled. By keeping the full name of the filled-in form, the filler is able to automatically open that form whenever the data file is opened.

File / Open Form command.

This command may invoked by selecting it from the File menu or by clicking the File Open button on the main toolbar.

It brings up a dialog which allows the required form to be selected or named directly. When the form has been identified it will be brought into view in the filler. There are three possible ways for the form to appear depending on the way the form was set up in the form designer:

1. The form may open linked to an untitled OFD file.
In other words, the form is not linked to a database. In this case the form is ready to be filled in. Once this has been done, its data can be saved using the Save Data command which will create a form data file.

2. The form may be open linked to a database.
In this case, the form will normally be in browse mode which means that the records of the database appear one-by-one inside the form.

3. The form may have no default connection.
In this case a list of possible connections - including the one for no database access - will appear for the user to choose from.

File / Open Data command.

This command may invoked by selecting it from the File menu.

It brings up a dialog which allows the data file to be selected or named directly. When the required file has been identified, the form that was originally used to save it is brought into view with the values from the data file already filled in.

File / Save Data command.
File / Save Data As command.

These commands are only available when the active form is not linked to a database. If the form is linked to a database, the Save Data command is replaced with the Export Data command (see below).

The Save Data command may invoked by selecting it from the File menu or by clicking the Save button on the main toolbar. The Save Data As command is always invoked by selecting it from the File menu.

The Save Data As command saves the data to an OFD file. It always prompts for the name of the file before saving. The Save Data command, on the other hand, only prompts for a name if there is not one already defined. So if the data has already been saved, or if the form was initially opened by opening a form data file, the data will simply be saved to disk without prompting.

Export Data.

This command may invoked by selecting it from the File menu.   It is only available when the active form is connected to a database, and its affect is to create a form data file based on the currently displayed record.

Insert / Form Data File command.

This allows data from a data file to be inserted into the current form.   The data file may or may not have been created with the form into which it is inserted.   If not, only the fields which have the same name as those in the original form will be affected.   A typical use for this command is to import common values from a file into a batch of new database records.

Clear values tool

The Clear Values tool, which initialises the fields on the form back to their default values. For most fields this is blank or zero. The exceptions are:

- Fields that have had an initial value specified in the designer.
- Fields that have had a calculation specified in the designer.

Save values tool

Save Values, which saves the contents of all fields on the form. Any values already saved are overwritten. The values are saved with the form itself. The exception is when the form is a program that has been created by the designer using the Save As Exe command. In this case the contents are saved to a file called <FormName>.ofx. When the form is closed, a message box will ask whether the field contents should be saved. If the answer is Yes - the contents will be saved as though this button had been pressed.

Reload values tool

Reload Values, which reloads the contents of the form as last saved using the Save Values button.

To navigate around your form

Within the Filler environment, each form may have many pages. You can also have more than one occurrence of the form. In this case, each occurrence is called a *record*.

Tools on the <u>Control toolbar</u> allow you to:

- Display the first or last record associated with the form.
- Scroll backwards and forwards through the records associated with the form.
- Move backwards and forwards through the pages of the current record.

You can use the scroll bars to move up and down through the current page.

To fill fields in your form

When you open a record, the focus will be placed in the first field to be filled. You can type the field entry directly using your computers keyboard. When you have entered data, press TAB to move to the next field. Fields will be filled in an order determined by the form designer.

To move the focus directly to a field, click within the field.

Some fields may have a restriction placed on the type of entry or the values that are allowed. If you enter a value that is not within the allowed type and range, an error message will be displayed.

To cut an entry from your form onto the clipboard

1 Select the field containing the entry by clicking anywhere within its outline.

2 Select the Cut tool from the Main toolbar.

Note that only the text is cut from the form. The field is not removed.

To copy an entry from your form onto the clipboard

1   Select the field containing the entry by clicking anywhere within its outline.

2   Select the Copy tool from the [Main toolbar](#).

To paste an entry from the clipboard onto your form

1 Select the field containing the entry by clicking anywhere within its outline.

2 Place the caret where you want the new information to appear.

3 Select the Paste tool from the Main toolbar.

To change the format of text

1 Select the text that you want to format.

2 Use the tools on the Text Format toolbar to set the typeface and point size. You can also make the text bold and/or italic, and you can underline with a single underline, double underline or underline words (but not the spaces between them).

Note   Text in fields that have not been set up as memo fields cannot be formatted using the Text Format toolbar.

To change text colour

1 Select the text to have its colour changed.

2 Click the Text Colour tool on the Text Format toolbar. A list will be displayed showing the colours that can be applied to text.

3 Select the colour you want.

Note The colour will be applied only to selected text or to text typed in after you have selected the colour.

Printing and previewing a form

You can print the form at any time. If you want to see how the whole form looks before you print, you can preview the form.

- Printing a form
- Previewing a form

To print the form

Click the Print Direct tool from the [Main toolbar](). The form will be printed using the default printer for your computer.

If you want to select a different printer or to change the print options, select Print (File menu). This will display the standard Windows Print dialog allowing you to set up the print parameters before you print the form.

To preview the form

1 Select the Print Preview tool from the <ins>Main toolbar</ins>. The first page of the form will be displayed.

2 Using the command buttons on the toolbar at the top of the dialog, you can view any other pages of the form, and zoom in or out to examine details of the form.

3 If you want to print the form from the preview, click the Print command button. The Print dialog will be displayed and you can continue from step 2 of the <ins>procedure to print the form</ins>.

Manual

Please refer to the OfficeForms User Manual for information on this subject.

Faxing a form

You can fax a form from either the Designer or the Filler, allowing rapid transmission of both blank and completed forms. OfficeForms will use the standard fax interface for your computer (either a MAPI-compliant system or WinFax).

To fax a form

1 With the form open in the Designer, select Fax (File menu). This will display the Enter fax number dialog.

2 Enter the name and fax number of the person to receive the form. If the person is in your Windows address book, you can press RETURN to display the address book then choose the recipient.

3 Click OK. If this is the first fax you have sent from OfficeForms, you will be asked to choose a profile for the transmission; if you have faxed forms before, the existing profile will be used.
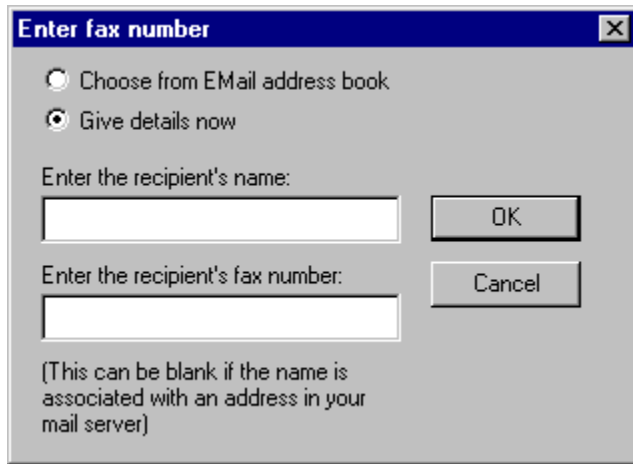
If your computer uses WinFax, it may take a few minutes to set up the transmission. A message box will be displayed to confirm this, and you can cancel the transmission if you do not want to wait.

Note   The form may be configured so that the e-mail recipient and address are derived automatically from fields within the form. If this is the case, the e-mail will be sent automatically when you select the Fax tool. For more information about automatic addressing of e-mails, refer to the examples given in Specifying calculations.

Enter fax number dialog

The following illustration shows the shading dialog. Click areas of the dialog to see a description of what they do.

Enter fax number ☒

○ Choose from EMail address book
◉ Give details now

Enter the recipient's name:

[   ]   [OK]

Enter the recipient's fax number:

[   ]   [Cancel]

(This can be blank if the name is
associated with an address in your
mail server)

Recipient's name area

Enter the name of the person who will receive the fax.

Recipient's fax number area

Enter the fax number of the person who will receive the fax.

If the person is in your Windows address book, you do not need to enter the number as OfficeForms will retrieve it automatically.

Streamlining form design

There are a number of ways that you can speed up the design of your forms, at the same time enhancing their appearance.

- Using multiple objects
- Aligning objects
- Sending objects to the back or front
- Using styles
- Using the object library
- Setting up different page layouts
- Setting up fields
- Using the alignment grid
- Copying objects
- Grouping and ungrouping objects
- Using templates
- Formatting text
- Using action buttons

Using multiple objects

You can select any number of objects at one time. You can then manipulate the selected items as if they were a single object.

Selecting multiple objects

Setting properties for multiple objects

To select multiple objects

1 Choose the Selection tool from the Factory toolbar.

2 Select the first object by clicking anywhere within its outline.

3 Press and hold the SHIFT key on your keyboard.

4 Select the first object by clicking anywhere within its outline.

5 Repeat steps 3 and 4 until you have selected all of the objects you want.

If the objects are close together, with no other objects close to them, you can:

1 Choose the Selection tool from the Factory toolbar.

2 Click and drag an outline that includes all the required objects. All the objects that are totally enclosed by the outline will be selected.

You can now set the properties for these objects. If you move the selected objects, their relative positions will be maintained and they will be moved as a single object. You can also cut or copy the selected objects to the clipboard.

If you click anywhere outside the selected objects, all the objects will be deselected.

To set properties for multiple objects

If you have multiple objects selected, you can set properties for all of them in one action. The objects do not even have to be the same type. If any selected object does not possess the property you change, that object will remain unchanged.

Using the alignment grid

To simplify the alignment of objects as you move them around the form, you can set up a grid in the Designer environment. You can then choose whether you use the grid when positioning an object.

- Setting up the grid
- Making the grid active
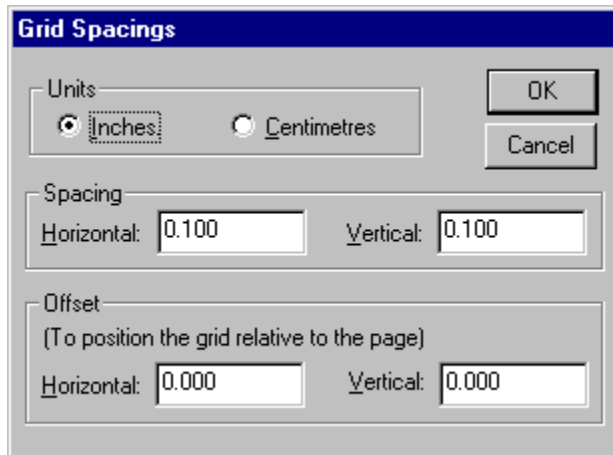
To set up the grid

1   Select Grid Settings (Tools menu). This will display the <u>Set Grid Spacings dialog</u>.

2   Enter the spacings for your grid.

3   Click OK.

Set Grid Spacings dialog

The following illustration shows the Set Grid Spacings dialog. Click areas of the dialog to see a description of what they do.

Grid Spacings

Units
- ⦿ Inches
- ○ Centimetres

OK

Cancel

Spacing
Horizontal: 0.100   Vertical: 0.100

Offset
(To position the grid relative to the page)
Horizontal: 0.000   Vertical: 0.000

Horizontal offset area

You can enter a starting point for the grid, measured from the left-hand edge of your form, in this area.

Vertical offset area

You can enter a starting point for the grid, measured from the top edge of your form, in this area.

Horizontal spacing area

You can enter the horizontal spacing for your grid in this area (in inches).

Vertical spacing area

You can enter the vertical spacing for your grid in this area (in inches).

To make the grid active

To work with the grid on, simply select Snap To Grid (Draw menu). Any objects that you move will jump in steps of the size you set up for the grid, and new objects will lock onto the grid as you create them.

We strongly recommend that you should set up and use a grid whenever possible, as it simplifies enormously the process of designing a form. The coarser the grid you use, the easier it is to position objects relative to each other.

Aligning objects

To make your form look fully professional, you will need to line up the objects that you have placed. OfficeForms makes this easy.

To align objects on your form

1   Using the Selection tool from the <u>Factory toolbar</u>, select the objects that you want to align.

2   Click the Align Objects tool from the <u>Main toolbar</u>. This will display the <u>Align dialog</u>.

3   Select the alignment parameters you want. Horizontal and vertical alignment are independent, and you can align objects with each other, the page margins or a fixed position on the form.

4   Click the OK command button.

Align dialog

The following illustration shows the Align dialog. Click areas of the dialog to see a description of what they do.
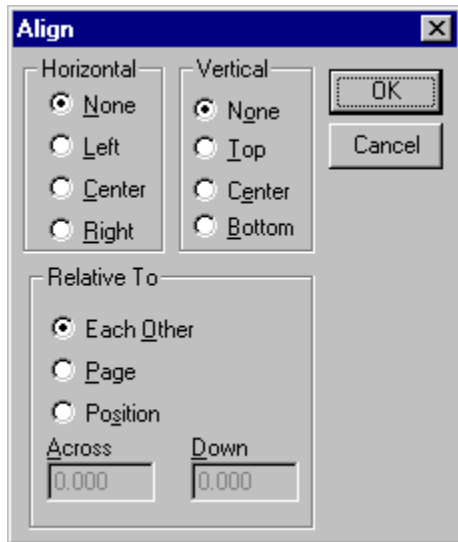
Horizontal alignment buttons

You can choose the type of horizontal alignment for the selected object.

Vertical alignment buttons

You can choose the type of vertical alignment for the selected object.

Relative anchor buttons

You can select the item to which the object will be aligned, and its distance from the anchor item.

Copying objects

When you have placed an object on your form, you may want to add another that is either identical or very similar. Within OfficeForms you can copy an object as many times as you want, either by copying directly onto the form or using the clipboard.

- Copying an object directly
- Copying an object using the clipboard

Tip   If you want to copy an object or group of objects to a different form, copy using the clipboard.

To copy an object directly

1 Choose the Selection tool from the [Factory toolbar](#).

2 Select the object by clicking anywhere within its outline.

3 Press and hold the CTRL key on your keyboard.

4 Keeping the CTRL key held down, click and drag the object to where you want the copy to appear.

To copy an object using the clipboard

1 Choose the Selection tool from the <u>Factory toolbar</u>.

2 Select the object by clicking anywhere within its outline.

3 Choose the Copy tool from the <u>Main toolbar</u>. This will place the object on the clipboard.

4 Choose the Paste tool from the Main toolbar. This will place a copy of the object in the top left-hand corner of the form window.

5 Click and drag the object to the position you want on the form.

Note   When you have pasted an object into your form from the clipboard, it will stay on the clipboard until you replace it with something else. You can paste as many copies as you want into your form (or even into a different form).

Sending objects to the back or front

If two or more objects overlap, you can decide which appear at the front and back on the form.

- Sending objects to the back
- Bringing objects to the front

To send an object to the back

1 Using the Selection tool from the <u>Factory toolbar</u>, select the object that you want to send to the back.

2 Click the Send to Back tool from the <u>Main toolbar</u>.

To bring an object to the front

1 Using the Selection tool from the [Factory toolbar](#), select the object that you want to send to the back.

2 Click the Bring to Front tool from the [Main toolbar](#).

Grouping and ungrouping objects

You can form objects into groups that will behave as single items within OfficeForms. You can even form groups that contain other, smaller subgroups.

- Grouping
- Ungrouping

Grouping

You can group any combination of objects to form a single object. You can then manipulate the group as a single object, setting the properties for the whole group at the same time.

The ability to group objects also allows you to convert a set of checkboxes into radio buttons to represent a group of mutually exclusive options. The user will then be allowed to select only one option at a time. If an option is already selected, selecting a different option will replace the current selection. Options are shown as circles, with a black dot in the selected option.

Grouping objects

Selecting an item within a group

Making radio buttons

To group objects

1 Select all the objects to be grouped (as described in the topic Selecting Multiple Objects).

2 Click the Group tool on the Main toolbar. The group will now show the outline of a single object

When you select a group, making a change to the appearance, for example changing the shading, will change the appearance of all of the objects in the group.

You can still select individual objects within a group, so that you can modify, move or delete any group component without affecting other group members.

To select an object within a group

1 Select the group containing the object.

2 Click within the object you want to select.

If the object you want to select is within a subgroup, you will need to select the subgroup before you select the individual object.

To make radio buttons

1 Place the required number of checkboxes on your form as described in <u>To place a Checkbox on your form</u>.

2 Align the checkboxes as described in the topic <u>Aligning Objects</u>.

3 Select the Group Radio Buttons tool from the <u>Main toolbar</u>.

Ungrouping

Ungrouping converts the group into its constituent objects.

To ungroup objects

1   Select the group that you want to ungroup.

2   Select the Ungroup tool from the Main toolbar.

The process is hierarchical; if you had subgroups within the group, then ungrouping will still keep the subgroups. If you want to restore all subgroups to their individual objects, you will need to ungroup each of the subgroups.

Using styles

To make sure that the appearance of objects on your form is consistent, you can set up styles containing details of how an object will look. OfficeForms lets you build up a library of styles for each form that you can apply to any combination of objects. This gives you a quick and easy way of producing professional forms.

You can set up styles for a range of object types.

■   Object types

You can set up standard styles all text and fields within your form. To keep the appearance consistent, relatively few styles are needed for even the most complex forms. You can then change the appearance of your form quickly and easily by simply changing the styles.

For example, you may have 25 drop-down lists with the same style. If you want to apply a green shadow to these, you only need to make one change - to the style. All of the list boxes will then change in one action. If you did not use a style, you would need to change each list box individually.

■   Setting up a style library

■   Applying a style to an object

Object types

You can set up styles for the following objects:

- Action buttons.
- Barcodes.
- Checkboxes.
- Ellipses.
- Fields.
- Lines.
- Lines.
- Tables.
- Text Objects.

Setting up a style library

Using the OfficeForms style manager, you can enter as many styles as you want for each type of object. As you enter details of the style, you give it a name. This name will then be used to apply the style to objects on your form.

To enter a new style

1   Select Style Manager (Tools menu). This will display the <u>Style Manager dialog</u>.

2   Click the New button. This will display the <u>Style Manager - New Style dialog</u>.

3   Enter the name for the new style and select the type of object to which the style will apply.

4   Click the Next button. This will display the <u>Style Properties dialog</u>.

5   Set the object properties as you want them.

6   Click the Finish button. The style will be added to your style library for this form.

Style Manager dialog

The following illustration shows the Style Manager dialog. Click areas of the dialog to see a description of what they do.
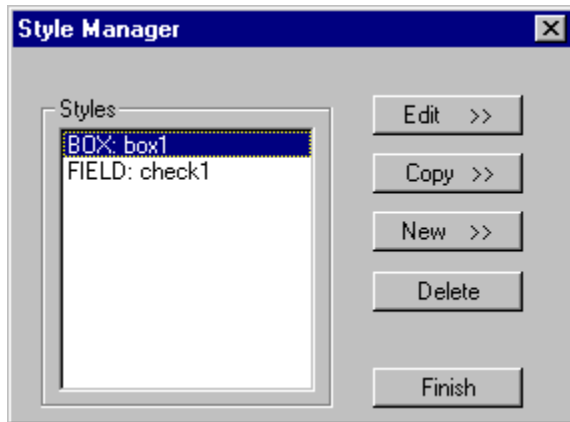
Styles area

This area shows all of the styles defined in your Style Manager.

Edit button

Click this to edit the style selected in the Styles area. This will display the [Style Properties dialog](#) containing the properties of the selected style.

New button

Click this to add a new style to the list in the Styles area. This will display the <u>Style Manager - New Style dialog</u>.

Delete button

Click this to delete the selected item.

Copy button

Click this button to make a copy of the style under a different name. This will display the [Style Manager - Copy Style dialog](#).

Style Manager - Copy Style dialog

The following illustration shows the Style Manager - Copy Style dialog. Click areas of the dialog to see a description of what they do.

Style Manager - Copy style

Style based on...
BOX: b

New style name.

Cancel   Next >>
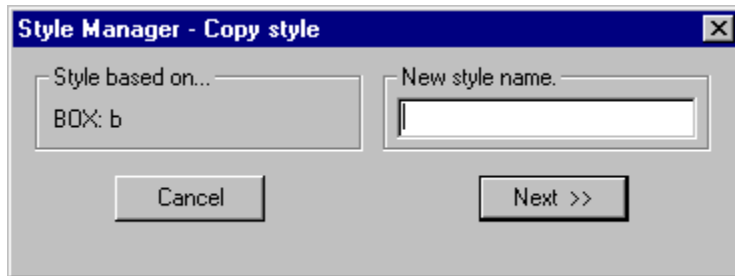
Style based on area

This display-only area shows the object type and style that is to be used as the basis of the copy.

New style name area

Enter the name for the new style. This must be a unique name for that type of object.

Next button

Click this button when you are happy with the other entries in the dialog. This will display the Style Properties dialog.

Style Manager - New Style dialog

The following illustration shows the Style Manager - New Style screen. Click areas of the screen to see a description of what they do.

Style Manager - New Style   ☒

New Style Name

Object type

BARCODE:
BOX:
BUTTON:
CHECKBOX:
ELLIPSE:
FIELD:
LINE:
LISTBOX:

<< Back   Next >>   Cancel

Object Type area

Select the object type for the new style, from the list.

Not available

This facility is not available in this dialog.

Style Properties dialog

The following illustration shows the Style Properties screen with the Text tab selected. Click areas of the screen to see a description of what they do.
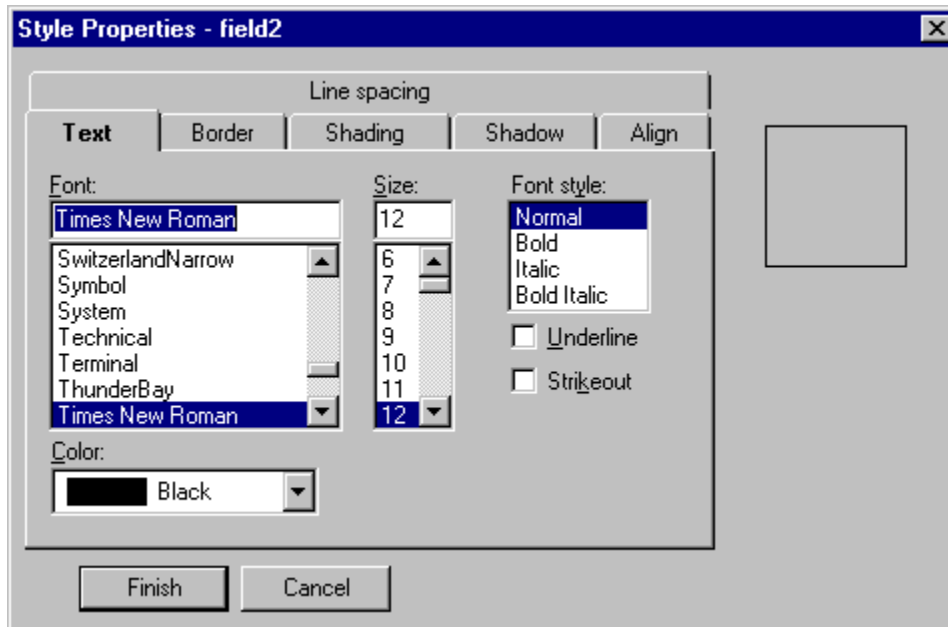
Style Properties - field2   ✕

Line spacing

| Text | Border | Shading | Shadow | Align |

Font: Size: Font style:

Times New Roman   12   Normal

SwitzerlandNarrow   6   Bold
Symbol   7   Italic
System   8   Bold Italic
Technical   9
Terminal   10   ☐ Underline
ThunderBay   11
Times New Roman   12   ☐ Strikeout

Color:

Black

Finish   Cancel

The actual properties that are shown in this dialog depend on the object type.

Object type details

Border tab

Click this to display the Border window within the Style Properties dialog.

Shading tab

Click this to display the <u>Shading window</u> within the Style Properties dialog.

Shadow tab

Click this to display the Shadow window within the Style Properties dialog.

Align tab

Click this to display the Align window within the Style Properties dialog.

Line spacing tab

Click this to display the Line spacing window within the Style Properties dialog.

Text tab

Click this to display the Text window within the Style Properties dialog.

Style Properties dialog

The following illustration shows the Style Properties screen with the Border tab selected. Click areas of the screen to see a description of what they do.
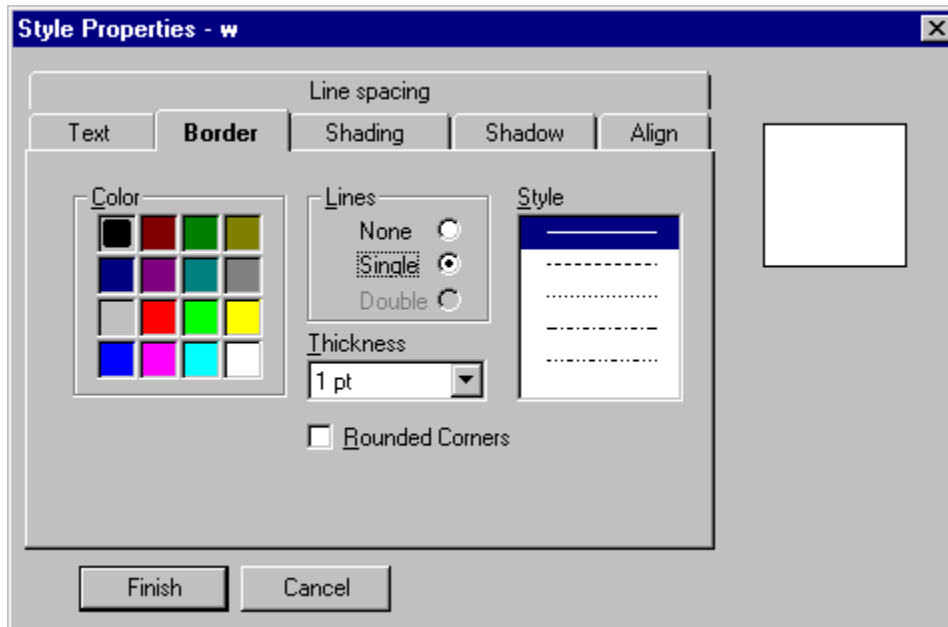
Style Properties - w ☒

Line spacing

| Text | **Border** | Shading | Shadow | Align |

Color

Lines
- None ○
- Single ●
- Double ○

Thickness
1 pt ▼

Style

☐ Rounded Corners

Finish   Cancel

The actual properties that are shown in this dialog depend on the object type.

■   Object type details

Colour area

You can click the colour that you want to use for your border from the palette.

Lines area

Select the type of line to be used for the borders. Options are:

- None.
- Single lines.
- Double lines.

Rounded Corners checkbox

Select this if you want your border to have rounded corners. If this is unchecked, the borders will have squared corners.

Style Properties dialog

The following illustration shows the Style Properties screen with the Shading tab selected. Click areas of the screen to see a description of what they do.
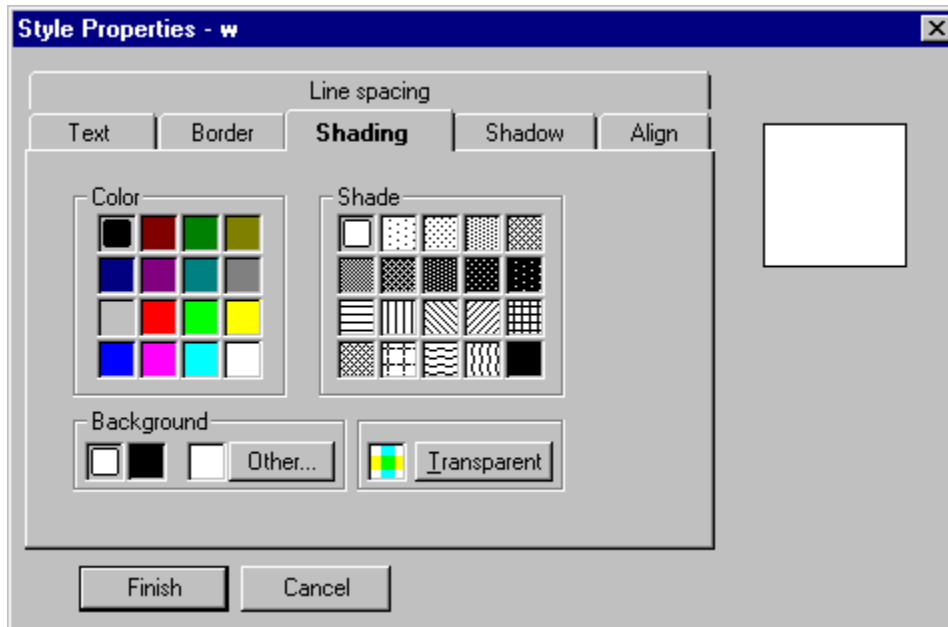
The actual properties that are shown in this dialog depend on the object type.

Object type details

Transparent button

Click this if you want the form background to show through your objects.

Style Properties dialog

The following illustration shows the Style Properties screen with the Shadow tab selected. Click areas of the screen to see a description of what they do.
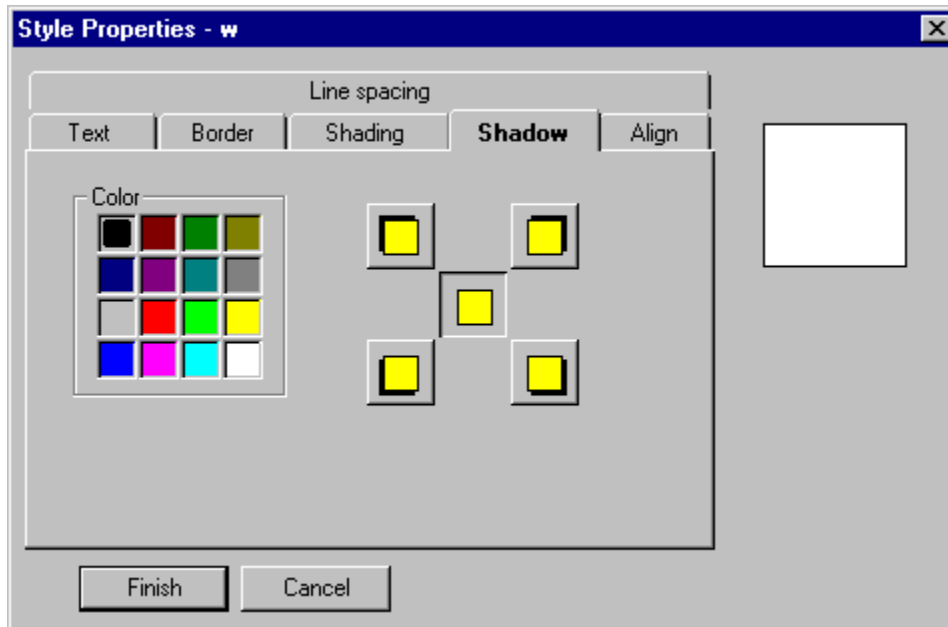
The actual properties that are shown in this dialog depend on the object type.

Object type details

Style Properties dialog

The following illustration shows the Style Properties screen with the Align tab selected. Click areas of the screen to see a description of what they do.
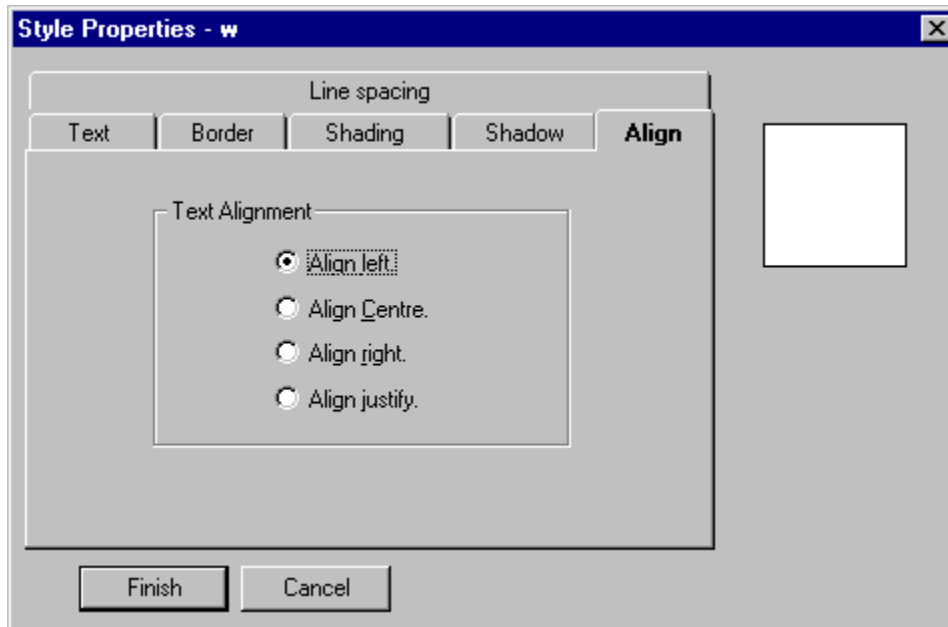
The actual properties that are shown in this dialog depend on the object type.

■　　Object type details

Text Alignment area

You can choose the alignment and justification for your text by selecting one of these radio buttons

Style Properties dialog

The following illustration shows the Style Properties screen with the Line spacing tab selected. Click areas of the screen to see a description of what they do.

```
Style Properties - w                                    [X]

 ┌────────┬─────────┬─────────┬─────────┬─────────┐
 │  Text  │ Border  │ Shading │ Shadow  │  Align  │
 └────────┴─────────┴─────────┴─────────┴─────────┘
                    Line spacing

   (•) Height of tallest font

   ( ) Fixed height        Value [          ]

   ┌─Presets──────────────────────────────────┐
   │  ┌──────────────────┐  ┌────────────────┐ │
   │  │ 6 lines per inch │  │8 lines per inch│ │
   │  └──────────────────┘  └────────────────┘ │
   └───────────────────────────────────────────┘

   ┌─Units──────────────────────────────────┐
   │  (•) Inches.    ( ) Centimetres         │
   └────────────────────────────────────────┘


      ┌──────────┐    ┌──────────┐
      │  Finish  │    │  Cancel  │
      └──────────┘    └──────────┘
```
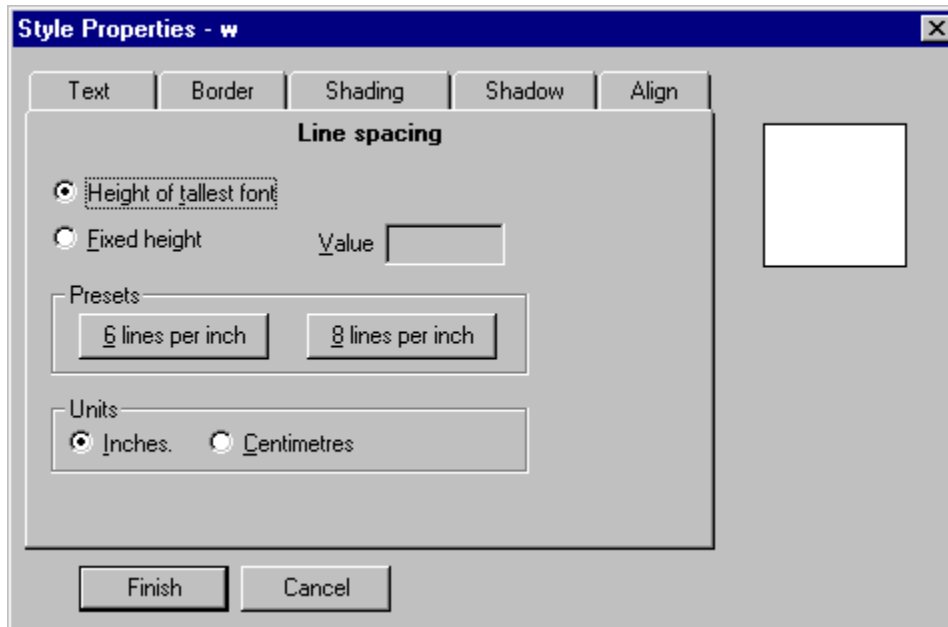
The actual properties that are shown in this dialog depend on the object type.

▣   Object type details

Height of tallest font button

Select this radio button to allow OfficeForms to set the line spacing to match the size of the largest font.

Fixed height button

Select this button to specify an exact height for lines of text. You must then enter the height in the Value area.

Value area

If you have selected the Fixed height radio button, enter the value of the line height in this area.

Presets area

You can select one of the preset line spacings by clicking one of these radio buttons.

Units area

You can set the units of the spacing value, either inches or centimetres, by selecting one of these radio buttons.

Finish button

Clicking this accepts all of your entries and selections, and closes the dialog.

Properties shown

The properties shown for each object type are:

- For Boxes you can set details of border appearance, shading and shadow.

- For Lines you can set details of border appearance, showing the colour and style of the line.

- For Ellipses you can set details of border appearance, shading and shadow.

- For Text objects you can set details of text format, alignment and line spacing.

- For Fields you can set details of text format and alignment, line spacing, border appearance, shading and shadow.

- For Tables you can set details of text format and alignment, border appearance, shading and shadow.

- For Pictures and Embedded objects you can set details of border appearance, shading and shadow.

- For Barcodes you can set details of text format and shading.

Applying a style to an object

When you select an object, all of the styles you have designed for that object are available in the style library.

To apply a style

1 Select the object(s) to which you want to apply the style. Any style currently applied to the object will be shown in the Style tool at the right-hand end of the Format toolbar.
2 Click the arrow at the right of the Style tool to show a drop-down list containing all the styles from the library that you can use for that type of object.
3 Select the style that you want to apply to the object(s). The new style will be applied, and its name will be shown in the Style tool whenever the object is selected.

Using templates

OfficeForms allows you to save a form as a template so that you can use it as the basis for other forms in the future. This saves:

- The page size, rotation (landscape or portrait) and margins.
- All of the object styles in your current form.

When you apply the template to a different form, these are imported from the template. You can apply a template to a form at any time.

- Saving a form as a template
- Applying a template to a form

To save a form as a template

Note When you save a form as template, the form itself and its objects are not saved in the template. Take care to save your form before you close it.

1 Select Save As Template (File menu). The Save As Template dialog will be displayed. This is a Windows Save As dialog allowing you to specify a file and destination.

2 Select a folder or directory for the template, and enter a name for it. Templates normally have the extension **.OFL**.

3 Click the Save button.

To apply a template to a form

1   Select Apply Template (File menu). This will display the Apply Template dialog allowing you to specify a file and location.

2   Select the folder/directory and template to be applied.

3   Click the Open button.

The current form will now take its page setup from the template. Styles defined in the template will also be imported into the current form. If styles in the form and template have the same type and name, the imported styles will replace those in the form. Any objects based on these styles will, of course, instantly change to reflect the newly imported styles.

Using the object library

If you often use identical or similar objects, you can speed up your form design by setting up an object library containing your most common objects. You can then place these onto any form quickly and easily. You can also place object groups in your object library.

- Adding items to the library
- Deleting objects from the library
- Copying objects from the library onto forms

To add an item to the library

1 Select the object or group of objects on your form.

2 Select Object Library (Tools menu). This will display the OfficeForms Object Library dialog. The selected object is shown in the top left-hand box of the dialog.

3 Click the Add button. This will display the Object Name dialog.

4 Enter the name you want to use for the object, then click the OK button. The object will be placed in the library section in the right-hand portion of the dialog. Its name will be shown below its image, and will also be placed in the object list in the bottom left-hand box. The dialog will then close automatically.

OfficeForms Object Library dialog

The following illustration shows the OfficeForms Object Library dialog. Click areas of the dialog to see a description of what they do.
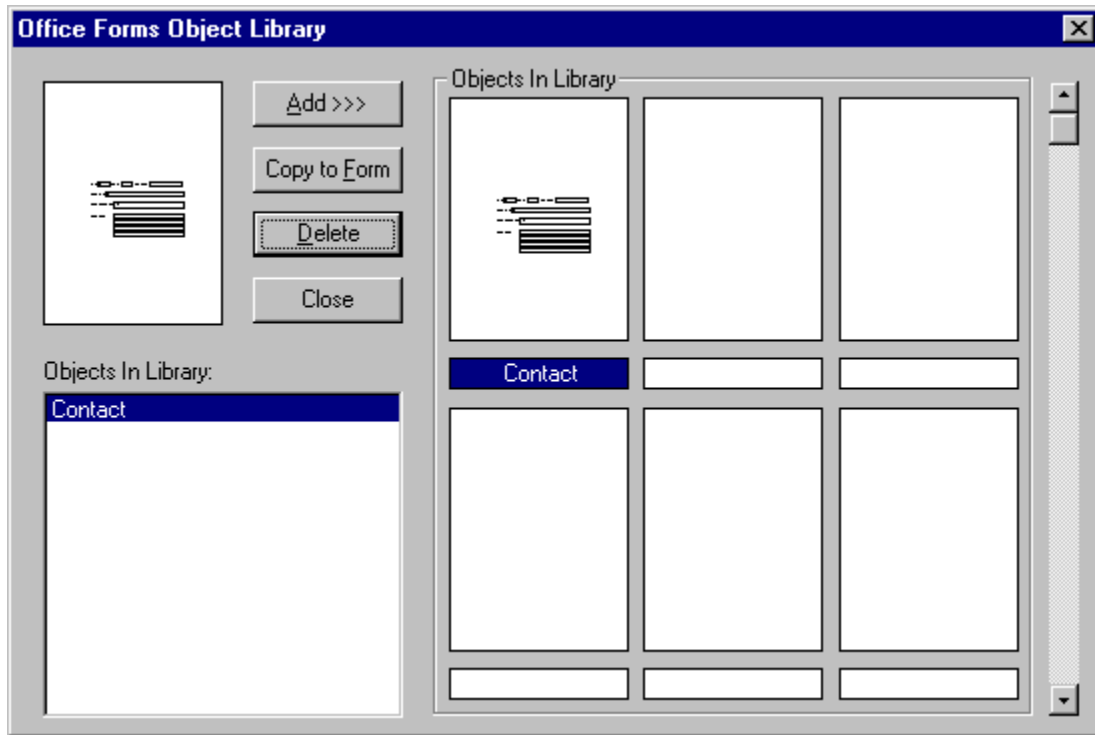
Add button

Click this to add an object to the library. This will display the [Object Name dialog](#).

Copy to Form button

Click this to place the selected library object on the current form.

Close button

Click this button to close the dialog.

Objects in Library list

This list shows the names of all of the objects in the library. Selecting an object in this list displays it in the Objects in Library view area,

Objects in Library view

This area shows the name and appearance of every object in the library.

Selected object area

This area shows the appearance of the selected object.

Object Name dialog

The following illustration shows the Object Name dialog. Click areas of the dialog to see a description of what they do.
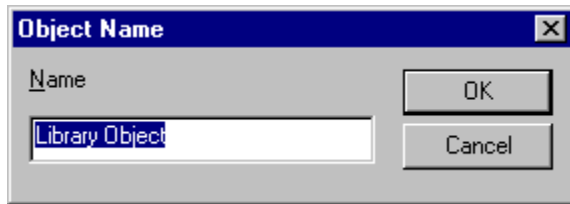
Name area

Enter the name of your library object here.

To delete an object from the library

1 Select Object Library (Tools menu). This will display the <u>OfficeForms Object Library dialog</u>.

2 Select the object you want to delete from the list in the bottom left-hand box.

3 Click the Delete button.

4 When you have deleted all the objects you no longer need, click the Close button to close the dialog.

To copy an object from the library onto a form

1 Select Object Library (Tools menu). This will display the OfficeForms Object Library dialog.

2 Either select the item you want to copy from the list in the bottom left-hand box or click the item in the preview box at the right-hand side of the dialog.

3 Click the Copy to Form button.

4 The dialog will close automatically and the selected item will be placed in the top left-hand corner of the current page of your form.

Formatting text

The Format toolbar contains a number of tools that you can use to determine the appearance of text in your forms.

Tip   If you want to apply the same formatting to text in a number of objects, you may prefer to either group the objects or set up a style for the text.

You can change:

- Text format
- Text justification
- Text colour
- Text angle

To change text format

1 Select the text using the Selection tool from the <u>Factory toolbar</u>.

2 Use the tools on the <u>Format toolbar</u> to set the typeface and point size. You can also make the text bold and/or italic, and you can underline with a single underline, double underline or underline words (but not the spaces between them).

To change the justification of text

1 Select the object containing the text.
2 Select the Text Alignment tool from the <u>Format toolbar</u>. This will display a list showing the alignments for text.
3 Select the alignment you want for the text.

Note   When you align text within an object, all of the text within the object is aligned to match your selection.

To change the colour of text

1 Select the object containing the text.

2 Select the text to have its colour changed.

3 Click the Text Colour tool on the Format toolbar. A list will be displayed showing the colours that can be applied to text.

4 Select the colour you want.

Note   The colour will be applied only to selected text. If you want to change the colour of all of the text in a text object, omit step 2.

To change the angle of text

1 Select the object containing the text.

2 Click the Text Rotation tool from the <u>Format toolbar</u>.

3 Enter the angle of rotation you want for the text, in whole degrees. The text will rotate counter-clockwise about its centre point.

Tip   A drop-down list attached to the Text Rotation tool shows recent entries together with increments of 45o from 0o. If you want to use one of these, it may be quicker to select the angle you want from the list.

Setting up different page layouts

You can set up the size and orientation of your form, together with the margins that will be left free at the edges of the page. You can also add and remove pages.

Setting up the page layout

To add a page at the end of the form

To add a page immediately after the current page

To remove a page

To set up the page layout

1 Select Page Layout (File menu). The <u>Page Setup dialog</u> will be displayed.

2 Enter the details of the page you want for your form.

3 Click OK.

Note   Changing the Units selection does not change the units that are shown on the rulers in the Designer environment.

If your form has more than one page, you can add or remove pages.

Page Setup dialog

The following illustration shows the Page Setup dialog. Click areas of the dialog to see a description of what they do.

Page Setup		✕
Paper Size	A4 210 x 297 mm ▼	OK
Width 8.27	Height 11.69	Cancel
⦿ Portrait	○ Landscape	

Margins
Top 0.00   Bottom 0.00
Left 0.00   Right 0.00

Units: ⦿ Inches   ○ Centimeters
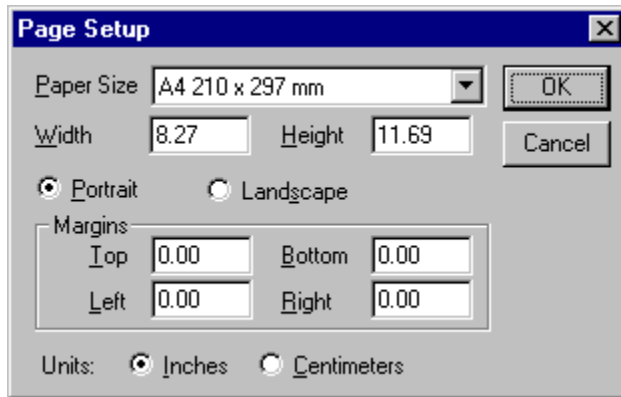
Paper Size list

Select the paper size for your form from this list. If you select Custom Size, you can enter your values in the Paper size areas.

Paper size areas

These show the width and height of the paper. If you have selected Custom Size from the list, you can enter the size values in these fields.

Paper orientation buttons

Select either Portrait or Landscape to determine the orientation of your form.

Margins area

You can enter values for the margin sizes of your form.

Units buttons

You can set the units of size values, either inches or centimetres, by selecting one of these radio buttons.

To add a page at the end of the form

Select Append Page (Edit menu).

To add a page immediately after the current page

Select Insert Page (Edit menu).

To remove a page

Select Delete Page (Edit menu). The current page will be deleted.

Using action buttons

An action button is a button that performs a predefined sequence of operations. You can place an action button anywhere on your form, and you can specify the operations that will be performed when the button is clicked.

Action buttons can greatly speed up and simplify form design if you have any operations that you need to perform regularly. By attaching these to an action button, one click can implement as many operations as you specify.

Placing an action button on your form

Specifying an action buttons operations

To place an action button on your form

1   Select the Action Button tool from the <u>Factory toolbar</u>.

2   Click and drag the outline of the button where you want it to appear on the form.

You can then select and move the button as required.

To specify an action buttons operations

1 With the cursor inside the area of the action button, click the right mouse button. This will display a menu.

2 From the menu, select Button Actions. This will display the Action Button dialog:

3 In the Button Text area, enter the caption that you want to appear on the button.

4 To specify an action, click either the Add button (to include an action at the end of the list) or the Insert button (to place an action immediately after the selected action). A list of all permissible actions will be displayed.

5 Select the action to be performed. You will be prompted to enter any further information needed to perform the action (for example e-mail address or fax number).

6 Repeat steps 4 and 5 until all of the operations to be performed have been specified.

7 If you want the button to be shown when the form is printed, select the Print Button checkbox.

8 Click the OK button.

List of actions

List of actions

The following actions can be allocated to action buttons:

Action	Result
Print Form	This will print the current form.
Close Form	This will close the form.
Initialise all fields	This will set all of the fields in the form to their specified initial values (or blank if no initial value has been specified).
Validate all fields	This will check that all field entries are within permitted limits.
Fax form to	This will allow you to enter recipient details and fax the form.
Export form contents to	This will allow you to export the form contents to a specified file.
Import form contents from	This will allow you to select a form whose contents will be imported into the current form.
Email form to	This will allow you to enter recipient details and e-mail the form.
Open form	This will display a dialog box allowing you to select a form to be opened.
Set field value	This will allow you to enter a value for the selected field.

Action Button dialog

The following illustration shows the Action Button dialog. Click areas of the dialog to see a description of what they do.

Action Button

Button Text
ACTION

Actions:

Print Button ☐

Add   Edit
Insert   Delete
Move Up
Move Down
OK   Cancel
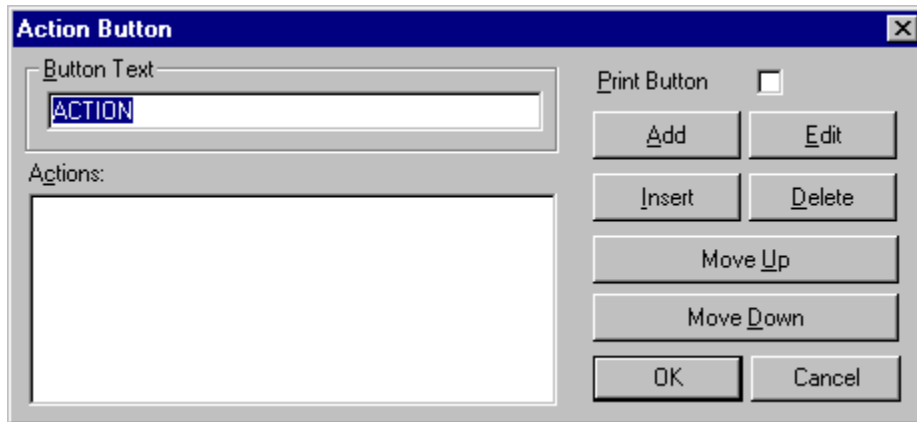
Button Text area

This area shows the text that will appear on the button. You can enter the label that you want.

Actions area

This area shows the actions that will be performed when the button is clicked. These actions are shown in the order in which they will be performed, with the first at the top of the list.

Print Button checkbox

Select this if you want the button to appear on hardcopy prints of the form.

Add button

Click this to insert an action at the bottom of the list in the Actions area. A list of all actions will be displayed, and you can select the one you want to insert.

Edit button

Click this to edit the parameters associated with the current selection in the list in the Actions area. If there are no parameters associated with the selection, this button is inactive.

Insert button

Click this to insert an action immediately above the current selection in the list in the Actions area. A list of all actions will be displayed, and you can select the one you want to insert.

Delete button

Click this to remove the selected action from the list in the Actions area.

Move Up button

Click this to move the selected action up the list in the Actions area.

Move Down button

Click this to move the selected action down the list in the Actions area.

Setting up fields

At a simple level, setting up a field is a matter of selecting the field tool and, as described in The basics of form design and filling, drawing as many fields as required. The same can be said of listboxes and checkboxes. This bald description is true, but it misses out some essential details and subtleties.

A field is a complex object. It can be used, in the Filler, to represent different types of data including:

- Text.
- Memo data.

Memo data is like text but is capable of receiving different formatting characteristics, so the user may type in a mixture of fonts and character formatting into a field set up to hold memo data.

- Numbers.
- Dates.
- Pictures.
- Barcodes.
- Logical values.

Logical values can be represented as a checkbox, a tickbox or a radio button.

- Fields, listboxes and checkboxes
- Selecting the field type
- Number formatting
- The Field data properties dialog
- Setting formatting characteristics
- Barcode formatting

Fields, listboxes and checkboxes

Fundamentally, a checkbox is just a field with a logical datatype. It is perfectly possible to convert any field into a checkbox by selecting this type in the Field data properties dialog. It is just as possible to go the other way and draw out a checkbox using the checkbox tool and then convert it, in the Field data properties dialog to have a completely different data type., a listbox is just a field which has the Act As Listbox property set. This causes the field to display as a listbox so that users can select the value from a list of possible values rather type in the value from scratch.

The reason for having separate checkbox and listbox tools on the toolbar is simply a matter of convenience. It is much easier to create a checkbox by selecting the tool and drawing it out than to draw out a field, invoke the Field data properties dialog, an set its datatype to checkbox (logical).

The Field data properties dialog

This dialog is the key to setting up the various different characteristics of a field (or checkbox, or listbox) which affect the way that the field behaves when it is filled in the Filler.

The part Preparing a Form for Filling deals with aspects of this such as setting validation, help and initial values for a field. This part of the manual outlines the way that the field can be made to represent different kinds of data, and how the presentation of the data can be controlled.

Selecting the field type

Selecting different types of data is controlled using the General window within the Field data properties dialog.

Each of the buttons with pictures in represent a different type of data. Reading from left to right we have:

- Text.
- Memo.
- Numeric.
- Date.
- Pictures.
- Barcodes.
- Logical - checkbox, tickbox or radio button.

Additional controls on this page supply additional control over the way that the field will act in the Filler.

- Protect From Data Entry.
  This means that the user will be prohibited from entering data directly in to the field. Select this, for example, if the fields value is to be set only from a calculation, or if it is used to display a value in database record without allowing that value to be altered.

- Mandatory Data Entry.
  This means that, in the filler, the value *must* be supplied by the user before the form that contains it can be printed or saved to a database.

Note   Protect From Data Entry and Mandatory Data Entry are, of course mutually exclusive - you cannot set them both for the same field.

- Save Field In Automatic Database.
  When OfficeForms creates a database to hold information for a form, the usual thing is for it to create a column in the database for every field on the form. This will mean that the value of every field will be stored when a record is saved.
  It is possible, however, that some fields are not required to be stored. In this case this control should be unchecked.

- Act As Listbox.
  This control is enabled when the data type has been set to Text, Memo, Number or Date. It is disabled (and set to false) for all other types. Setting it means that a list of values can be specified for the field. The field itself will be displayed with a button next to it which, in the filler, can be clicked to reveal these predefined values to choose from.

Setting formatting characteristics

Each field type has different formatting options. Therefore, different formatting pages will be displayed in the Field data properties dialog for different data types.

- Text Formatting.
  There is no special formatting characteristics that may be specified for text.
- Memo Formatting.
  For memo fields, the option to allow different character formats and fonts to be mixed within the text may be enabled or disabled.
- Number Formatting.
  The number formatting page is quite complex. Its appearance varies substantially according to the selection set up in the listbox between Accounting, Currency, Custom and Number.
- Date formatting.
  Allows a choice of common date formats.
- Picture Formatting.
  There are no special formatting characteristics that may be specified for picture data.
- Barcode Formatting.
  Allows the type, orientation and other characteristics of the barcode to be set. See below for full explanation.
- Checkbox formatting.
  Allows a choice of checkbox, tickbox or radio button presentations.
  Also allows the text to be placed either to the left or right of the checkbox.

Number formatting

You can format a number field by selecting the field then displaying the <u>Format window</u> in the Field data properties dialog.

The accounting, currency and number format choices are broadly similar.

Accounting and currency allow specification of:

- Whether to include the currency symbol to be included.
  Number of decimal places.
- Accounting leaves a gap between the currency symbol and the number itself. Currency additionally allows a format for negative numbers to be specified.

Number allows specification of:

- Number of decimal places.
- Negative number format.
- Whether to use the thousands separator.

The <u>Custom number format option</u> is much more sophisticated:

A separate specification is allowed for each of positive numbers, negative numbers and zero. The specification consists of:

- Option to use the thousands separator.
- Option to pre-scale the number by 100.
  This is used in percentages where, for example,
  a value of .1 is displayed as 10 (as in 10
  percent).
- A text colour.
- A mask.

- Understanding the mask

Field data properties dialog

The following illustration shows the Custom number format option in the Field data properties dialog. Click areas of the dialog to see a description of what they do.
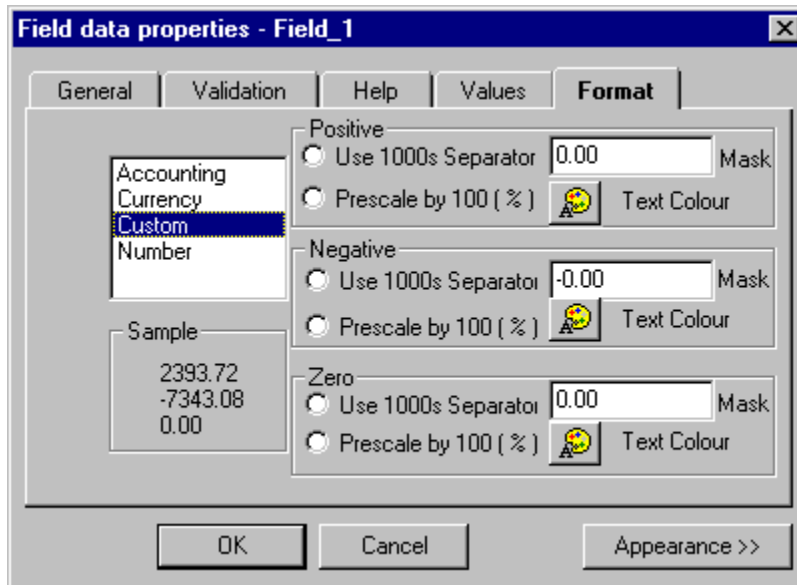
Sample area

This area shows how the selections will affect the appearance of numbers.

Positive number format area

In this area you can specify the format of positive numbers. You can set up:

- Whether to use the thousands separator.
- Whether numbers will be shown as percentages.
- The text colour for the numbers.

Negative number format area

- Whether to use the thousands separator.
- Whether numbers will be shown as percentages.
- The text colour for the numbers.

Zero number format area

- Whether to use the thousands separator.
- Whether numbers will be shown as percentages.
- The text colour for the numbers.

Number type selection area

You can select the type of number to be formatted from the list in this area.

Understanding the mask

A mask consists of text that may include:

- The # symbol.
- The 0 symbol.
- The decimal point symbol (.).
- Quoted text - e.g. - Pounds
  This causes the text to appear in the number.
- An underscore (_) followed by another character.
- An asterisk (*) followed by another character.
  There may only be one of these in the mask.

To understand how to use the mask you need to understand how it is processed, together with the number, to arrive at the number to display.

To the left of the decimal point, counting only the 0 and # characters in the mask (everything else is considered to have zero length) :

If the mask is shorter than the number, it is padded to the left with # characters to be equal to the number of digits preceding the decimal point. Any mask characters preceding the unexpanded mask are left preceding the mask when it has been expanded.

If the number is shorter than the mask, it is padded to the left with leading zeros to be equal to the number of # and 0 characters preceding the decimal point.

To the right of the decimal point a similar padding action occurs.

- Processing numbers before the decimal point
- Processing numbers after the decimal point

Processing numbers before the decimal point

- Each *leading zero* digit is either displayed or discarded depending on whether the corresponding mask character is a 0 or a # respectively.

- If Use Thousands Separator is specified, the thousands separator (normally a comma) is inserted at the appropriate points.

- Any quoted text is inserted in the display as it is encountered in the mask. Similarly, an underscore followed by a character is replaced by a space of the same width as the character.

- The decimal point is displayed if it is specified in the mask.

Processing numbers after the decimal point

- For each in 0 character in the mask following the decimal point, a number is displayed - including a trailing zero.

- For each # in the mask, a number is displayed if, and only if, it is not a trailing zero.

- After all other processing of the mask has been completed, if there is an asterisk followed by a character, the display is padded with that character to fit the available space.

Barcode formatting

You can format a barcode field by selecting the field then displaying the Format window in the Field data properties dialog.

Options may be set for:

- Barcode type.
  This is the fundamental encoding format to be used for the barcode and will depend on its intended application.

- Orientation.
  Choose one of 4 possibilities.

- Calculate check digit.
  If the barcode type requires a check digit, this will cause it to be calculated automatically by the system. Otherwise the users input must include the check digit.

- Human Readable Text.
  Often, a barcode is printed including the text upon which it is based. Select the Display checkbox to enable this.

- Check Include Check Digit to include this in the displayed text.

- Impose nominal size.

Some barcode types have a nominal or recommended size for which the barcode is designed. If this is checked, the barcode field may not be resized to any other dimension.

Field data properties dialog

The following illustration shows the Barcode format option in the Field data properties dialog. Click areas of the dialog to see a description of what they do.
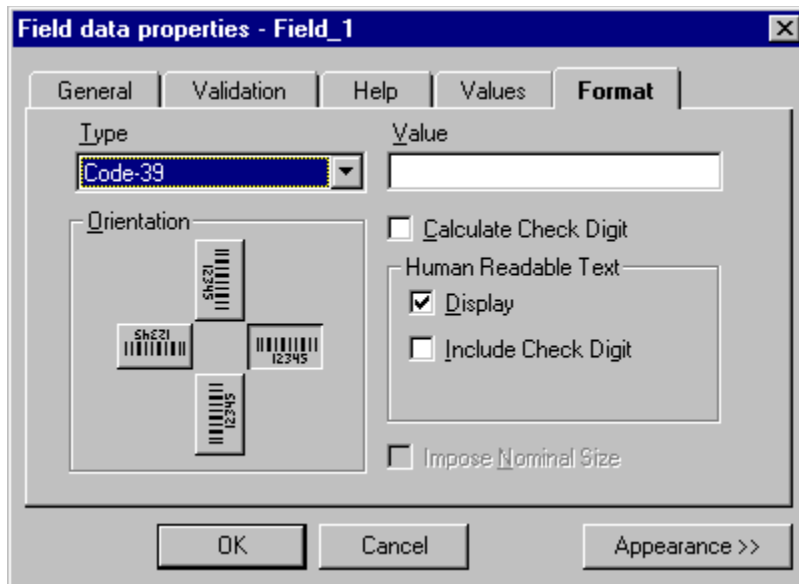
Preparing a form for filling

The following can be done to prepare your form for filling:

- Customising the filling order
- Setting up listboxes
- Setting up standard phrases
- Specifying calculations
- Fixing the input format
- Setting filling properties
- Specifying initial values
- Setting up validation
- Setting up context sensitive help

Customising the filling order

By default, the OfficeForms will fill the fields working from left to right then stepping down to the next row and repeating. Sometimes, for example if name and address fields are placed one below the other, it would be better to fill the fields in a different order.

OfficeForms allows you to decide the order in which fields will be presented for filling.

- Changing the filling order
- Restoring the default filling order

To change the filling order

1 Select Change Filling Order (Tools menu). This will display the <u>Filling Order dialog</u>.

2 Select the fields on your form in the Designer in the order that you want them to be filled. The order will be shown in the Order area of the Filling Order dialog.

3 If you want to replace the first field to be filled, select the field you want to be first then click the Move to top button. You will be asked to confirm the change.

4 If you want to ignore all changes made in this occurrence of the dialog, click the Undo Changes button. The original filling order will be shown in the Order area.

5 If you use the UP and DOWN arrow keys to move through the list, the fields on your form will be highlighted. You can use this to check that the filling order is as you want it.

Filling Order dialog

The following illustration shows the Filling Order dialog. Click areas of the dialog to see a description of what they do.

Filling Order ☒

Order

Category
Sendmsg
Product
Jane
Janine
Pat
Hidden
Fortunecookie
Lorraine
Elaine
Sean

Set Natural Order

Undo Changes

OK

Cancel

To try the filling order, move up and down in the list.

To set the next field to the one selected in the list, click on the field in the form itself.
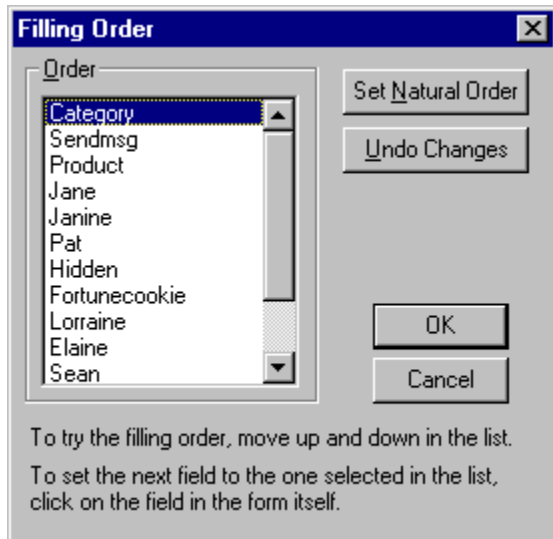
Order area

This area shows the fields in the order in which they will be filled. You can select fields by clicking them or by using the UP and DOWN arrow buttons.

Move to top button

Click this to move the selected field in the Order area to the top of the filling list. This field will then be filled first.

Set Natural Order button

Click this to set the filling order to its default sequence. This presents fields for filling in the same order as they were placed on the form.

Undo Changes button

Click this to ignore all changes made in this occurrence of the dialog. The original filling order will be shown in the Order area.

To restore the default filling order

If you have changed the filling order, but you now want to return to the default filling order, click the Set Natural Order button.

Setting filling properties

You can set up the properties of fields within your form that affect their behaviour in the Filler.

To set general features

1 Select the field that you want to set up

2 Select Data Properties (Edit menu). Note that this option is also present on the menu displayed when you click the right mouse button. This will display the <u>Field data properties dialog</u>.

3 Enter the field name (if required).

4 Select the type of entry that the user will be able to make in the field using the seven buttons. Field types are text, memo, numeric, date, picture, barcode and checkbox.

5 Select the checkboxes that set the behaviour of the field.

Setting up listboxes

When you use the Listbox tool to place a Listbox object on your form, the listbox does not contain the options that will be shown for selection. You can enter the options you want to be presented.

Setting up listbox options

Inserting options

Changing list values

Specifying initial values

Moving options in the list

Removing options from the list

To set up listbox options

1 Select the Listbox that you want to set up

2 Select Data Properties (Edit menu). Note that this option is also present on the menu displayed when you click the right mouse button. This will display the <u>Field data properties dialog</u>.

3 Click the Values tab to display the Values window in the dialog:

4 Click the Add button. The cursor will be placed in the text entry field.

5 Type in the list entries, pressing RETURN after each. The entries will be presented in the list in the order in which you enter them.

6 If you want to allow clients to enter values that are not present in the list, select the Permit Values Not In List checkbox. If you do not want to allow this facility, deselect the checkbox.

7 Click OK to close the dialog

Field data properties dialog

The following illustration shows the Field data properties dialog with the General tab selected. Click areas of the dialog to see a description of what they do.
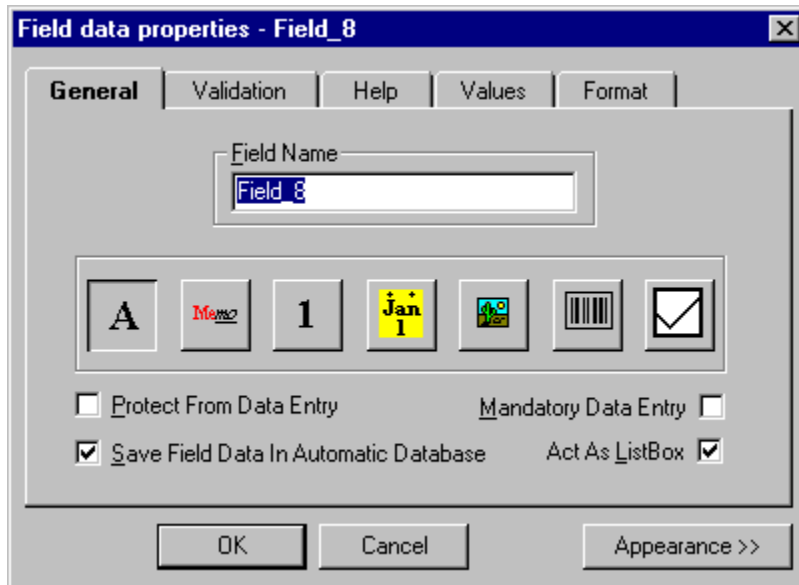
Field Name area

This area shows the name of the current field. You cannot change the entry in this field.

Text button

Click this to make the field a text field. When the form is filled, the user will be able to enter text into the field.

Memo button

Click this to make the field a text field. When the form is filled, the user will be able to enter memo data into the field.

Number button

Click this to make the field a text field. When the form is filled, the user will be able to enter numerical values into the field.

Date button

Click this to make the field a text field. When the form is filled, the user will be able to enter a date in the field.

Picture button

Click this to make the field a text field. When the form is filled, the user will be able to place a picture in the field.

Barcode button

Click this to make the field a barcode field. When the form is filled, the user will be able to set the barcode that will appear in the field.

Checkbox button

Click this to make the field a checkbox field. When the form is filled, the user will be able to select or deselect the checkbox.

Protect From Data Entry checkbox

Select this to prevent users from making entries into this field when the form is filled.

Mandatory Data Entry checkbox

Select this to ensure that the user must make an entry in this field when the form is filled.

Save Field Data in Automatic Database checkbox

Select this to allow entries made in the field to be passed to a database. Note that you must also link the form to the database.

Act As Listbox checkbox

Select this to make the field a listbox.

Validation tab

Click this to display the Validation window within the Field data properties dialog.

Help tab

Click this to display the [Help window](#) within the Field data properties dialog.

Values tab

Click this to display the [Values window](#) within the Field data properties dialog.

Format tab

The window that will be shown when you select this tab depends on the type of field you have selected in your form.

- Fields that can contain text
- Fields that can contain numbers
- Fields that can contain barcodes

General tab

Click this to display the General window within the Field data properties dialog.

Appearance button

Click this to set up the appearance of the object. The Object Appearance dialog will be displayed.

Object Appearance dialog

The following illustration shows the Object Appearance dialog with the Text tab selected.
Click areas of the dialog to see a description of what they do.

Appearance   ☒

| Text | Border | Shade | Shadow | Align | Spacing |

Font:

Times New Roman

| Monotype Sorts |
| MS Outlook |
| PenTip |
| Symbol |
| Tahoma |
| Technical |
| Times New Roman |

Size:

12

| 6 |
| 7 |
| 8 |
| 9 |
| 10 |
| 11 |
| 12 |

B *I* U̲ W̲ D̲

Sample

AaBbYyZz

Colour: ☐ Strikeout

Black

[OK]   [Cancel]   [Data >>]
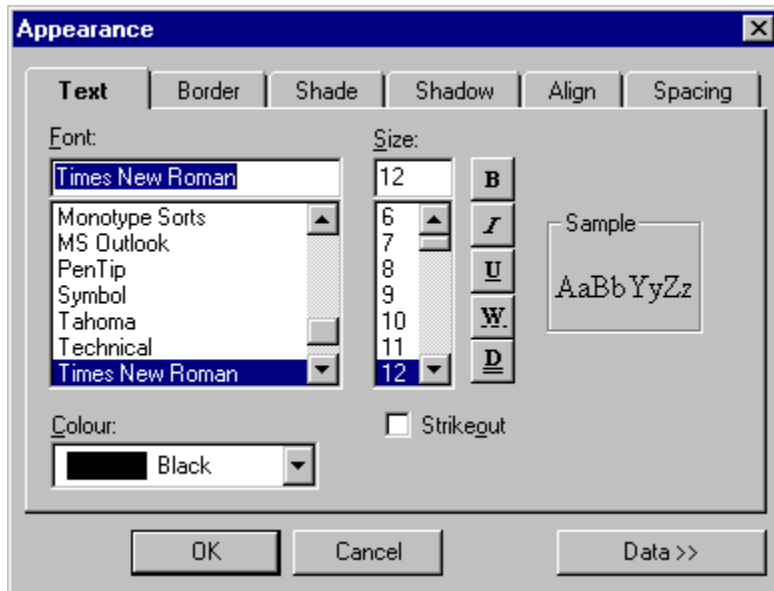
Text tab

Click this to display the Text window within the Object Appearance dialog.

Border tab

Click this to display the Border window within the Object Appearance dialog.

Shading tab

Click this to display the Shading window within the Object Appearance dialog.

Shadow tab

Click this to display the <u>Shadow window</u> within the Object Appearance dialog.

Align tab

Click this to display the Align window within the Object Appearance dialog.

Data button

Click this to display the [Field data properties dialog](#).

Line spacing tab

Click this to display the Line spacing window within the Object Appearance dialog.

Object Appearance dialog

The following illustration shows the Object Appearance dialog with the Border tab selected. Click areas of the dialog to see a description of what they do.
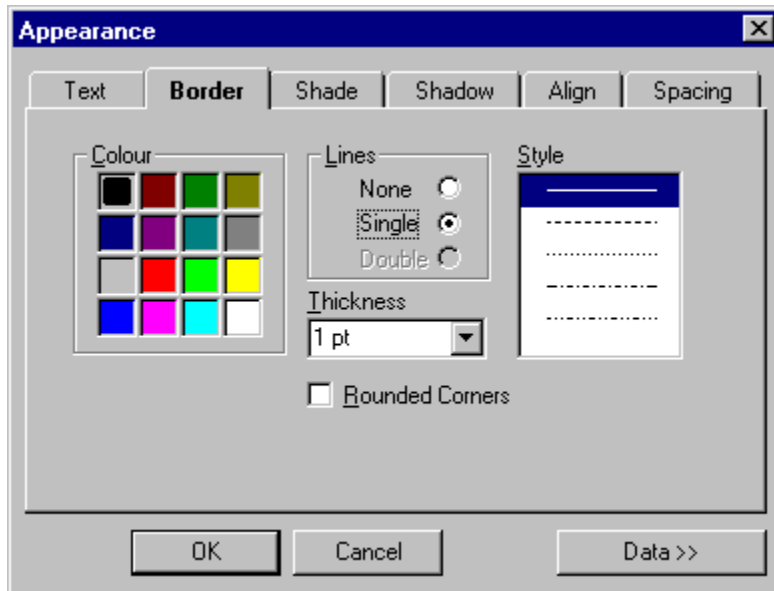
Appearance

| Text | **Border** | Shade | Shadow | Align | Spacing |

Colour

Lines
- None
- Single
- Double

Style

Thickness
1 pt

☐ Rounded Corners

OK   Cancel   Data >>

Object Appearance dialog

The following illustration shows the Object Appearance dialog with the Shading tab selected.
Click areas of the dialog to see a description of what they do.

Appearance

Text	Border	**Shade**	Shadow	Align	Spacing

Colour

Shade

Background

Other...

Transparent

OK   Cancel   Data >>

Object Appearance dialog

The following illustration shows the Object Appearance dialog with the Shadow tab selected. Click areas of the dialog to see a description of what they do.

Object Appearance dialog
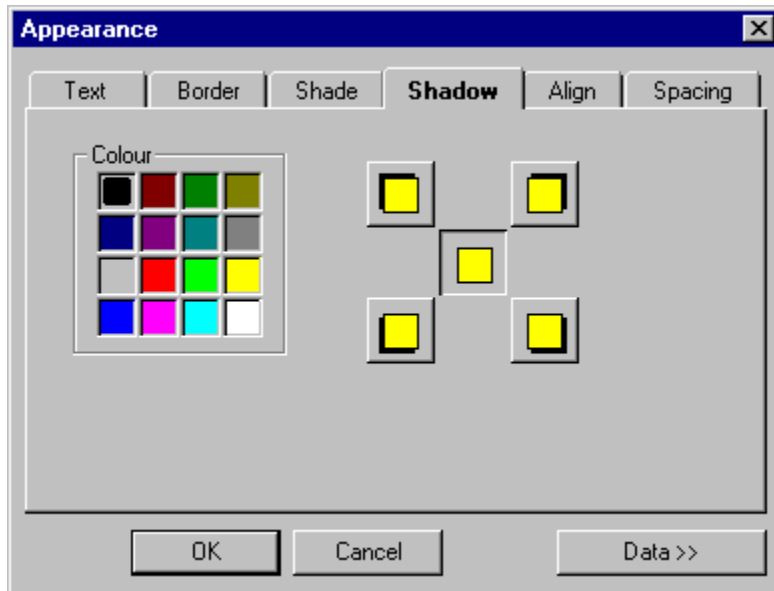
The following illustration shows the Object Appearance dialog with the Align tab selected. Click areas of the dialog to see a description of what they do.
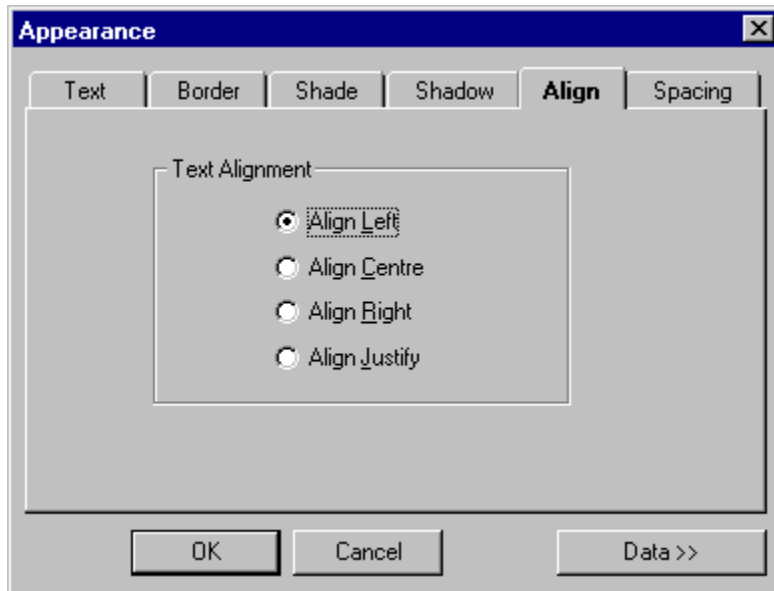
Appearance ☒

| Text | Border | Shade | Shadow | **Align** | Spacing |

Text Alignment

- ⦿ Align Left
- ○ Align Centre
- ○ Align Right
- ○ Align Justify

[OK] [Cancel] [Data >>]

Object Appearance dialog

The following illustration shows the Object Appearance dialog with the Line spacing tab selected. Click areas of the dialog to see a description of what they do.
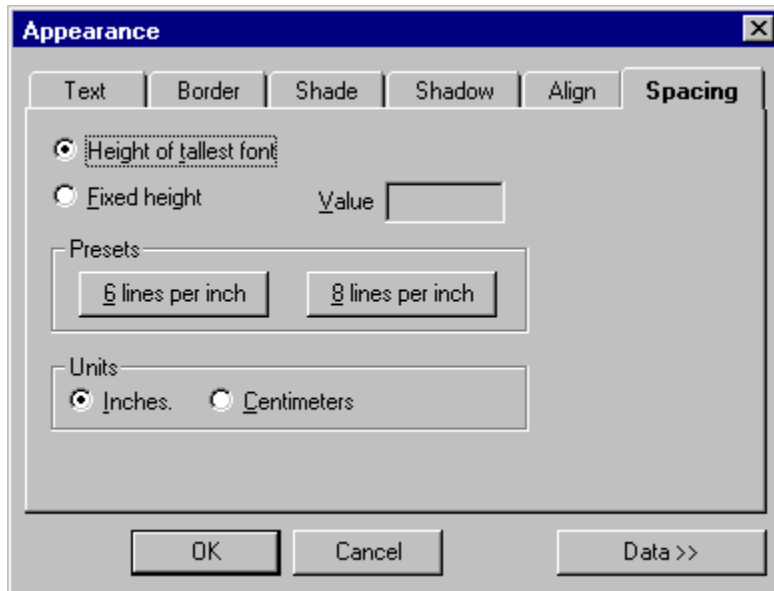
Field data properties dialog

The following illustration shows the Field data properties dialog with the Validation tab selected. Click areas of the dialog to see a description of what they do.
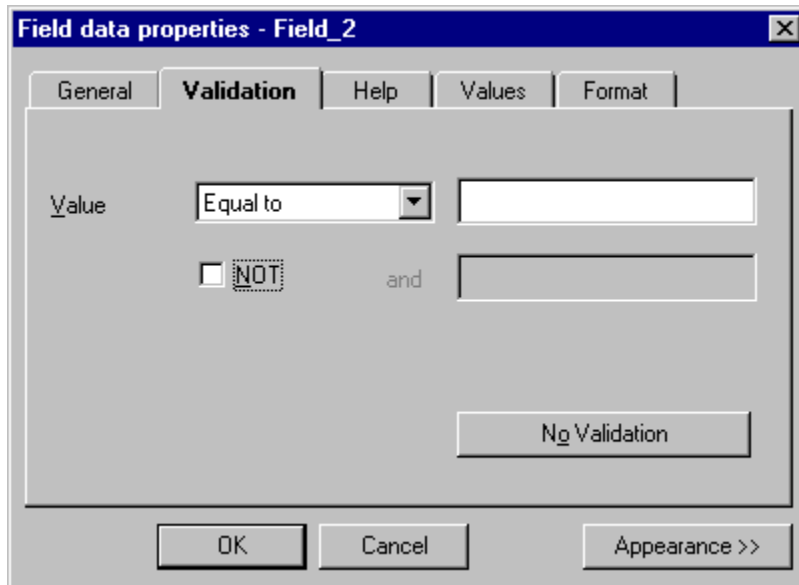
Expression list

Select the expression that you want to apply, from the drop-down list.

NOT checkbox

Select this to invert the expression (e.g. to convert *greater than* into *not greater than*).

Limits area

Enter the expression limit values into these areas. If only one limit is required for the expression, then only the top area will be available for entry of a value.

No Validation button

Click this if you want to remove all input validation from the field.

Field data properties dialog

The following illustration shows the Field data properties dialog with the Help tab selected. Click areas of the dialog to see a description of what they do.
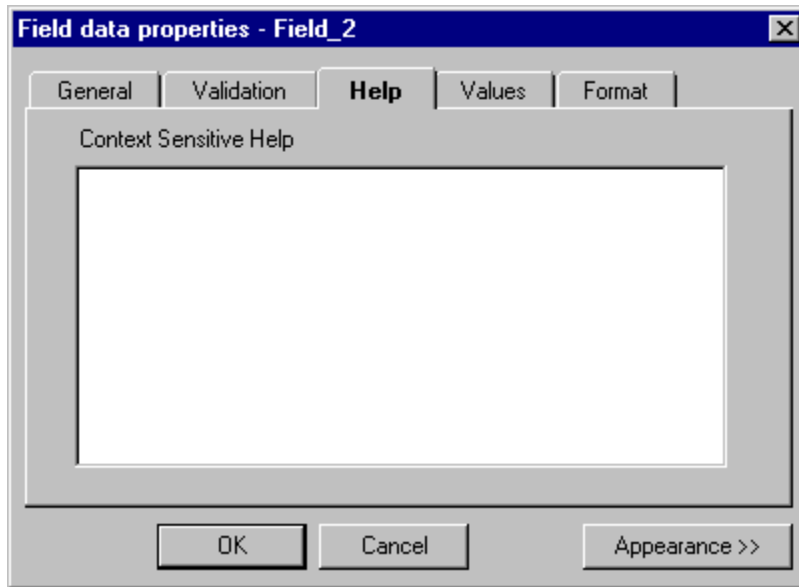
Context Sensitive Help area

You can enter any text that you want to append as context sensitive help for the field.

Field data properties dialog

The following illustration shows the Field data properties dialog with the Values tab selected.
Click areas of the dialog to see a description of what they do.
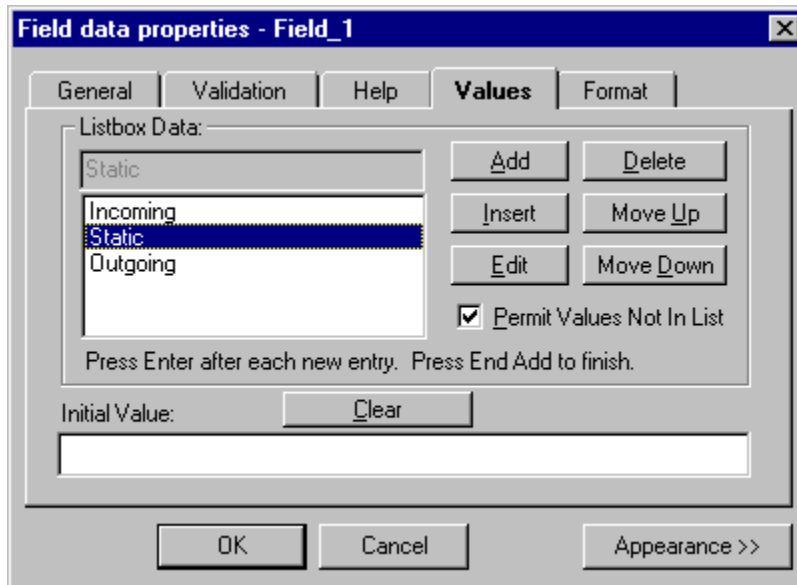
Listbox Data list

This shows the list of options that will be present in the drop-down list. You can enter new options in the top area by selecting either the Insert or Add button.

Add button

Click this to add a new option at the bottom of the list in the Listbox Data area.

Insert button

Click this to add a new option immediately above the selected option in the Listbox Data area.

Move Up button

Click this to move the selected option up one place in the list.

Move Down button

Click this to move the selected option down one place in the list.

Edit button

Click this button to edit the parameters associated with the selected option.

Permit Values Not In List checkbox

Select this if you want to allow users to enter values that are not present in the predefined list.

Clear button

Click this to delete the entry in the Initial Value area.

Initial Value area

You can enter an initial value here to appear as the default in the listbox.

Field data properties dialog

The following illustration shows the Field data properties dialog with the Format tab selected. Click areas of the dialog to see a description of what they do.

Field data properties - Field_2 ☒

| General | Validation | Help | Values | **Format** |

Text field formatting.

☑ Allow changes of formatting during entry.

OK   Cancel   Appearance >>
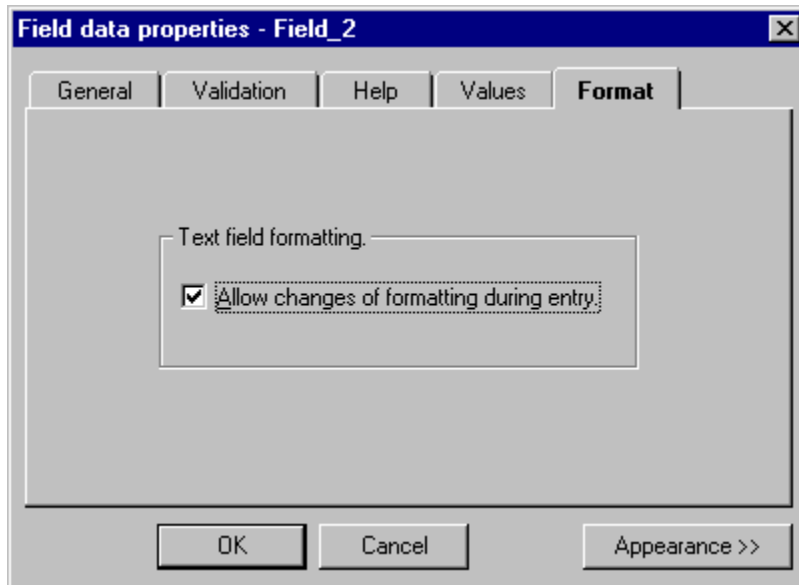
Allow format changes checkbox

Select this to allow the user to reformat entries as the form is filled.

To specify an initial value

To set the value that will appear by default in the list, enter the required value in the Initial Value area of the Values window. You can remove the contents of this area by clicking the Clear button.

To insert an option

1 In the Listbox Data area of the <u>Values window</u>, select the option above which you want to add the new option.

2 Click the Insert button. The cursor will be placed in the text entry field.

3 Type in the new entry, and press RETURN.

To move an option in the list

1 In the Listbox Data area of the <u>Values window</u>, select the option that you want to move.

2 Click the Move Up and Move Down buttons to move the option to the correct position in the list.

To change a list value

1 In the <u>Values window</u>, select the option.

2 Click the Edit button. The value will be placed in the text entry field.

3 Make the required changes then press RETURN.

To remove an option from the list

1 In the [Values window](), select the option.

2 Click the Delete button.

Setting up standard phrases

If you have phrases that you use regularly to allow clients to fill in your forms, you can enter them into a phrase library. This will speed up form filling. You can also give each phrase its own shortcut key combination. The phrase will then be printed on your form whenever you enter that key combination in the Filler environment.

Note   You can also use phrases from the library when typing text in the Designer.

Using the phrase library consists of:

- Entering phrases into the phrase library
- Editing phrases
- Making copies of phrases
- Placing phrases on forms

To enter a phrase into the phrase library

1 Select Phrase Library (Tools menu). This will display the [Phrases dialog](#).

2 Click the New button. This will display the [Modify Phrase dialog](#).

3 Enter a name, the phrase and any shortcut key combination.

4 Click OK. This will again display the Phrases dialog, with the name of your new phrase shown in the list area.

Phrases dialog

The following illustration shows the Phrases dialog. Click areas of the dialog to see a description of what they do.

Phrases	☒

Edit

Copy

New

Delete

Close
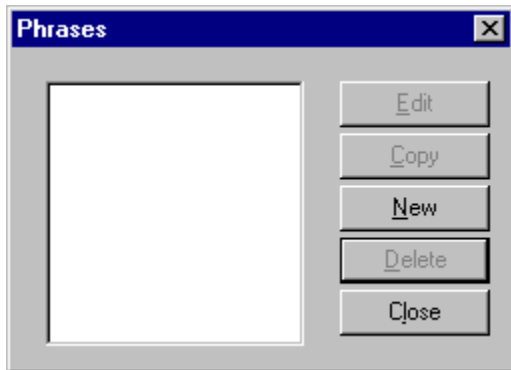
Phrase area

This area contains a list of all of the phrases in the phrase library.

Edit button

Click this to edit the selected phrase. This will display the [Modify Phrase dialog](#) containing the selected phrase.

Copy button

Click this to make a copy of the selected phrase. This will display the <u>Modify Phrase dialog</u> containing the selected phrase, and you can enter a name and shortcut key combination for the copy.

New button

Click this to enter a new phrase into the phrase library. This will display a blank [Modify Phrase dialog](#) so that you can enter details of the new phrase.
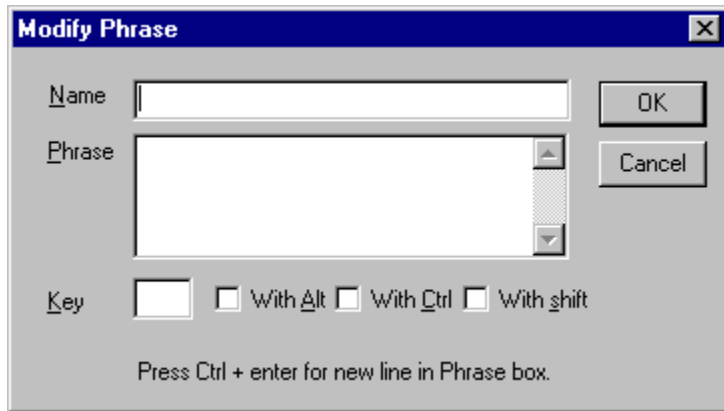
Delete button

Click this to remove the selected phrase from the phrase library. You will be asked to confirm the deletion.

Modify Phrase dialog

The following illustration shows the Modify Phrase dialog. Click areas of the dialog to see a description of what they do.

Modify Phrase	☒

Name

OK

Phrase

Cancel

Key   ☐ With Alt ☐ With Ctrl ☐ With shift

Press Ctrl + enter for new line in Phrase box.

Name area

This area shows the name of the phrase within the phrase library.

Phrase area

This area shows the full phrase. If you want the phrase to occupy more than one line, press CTRL + RETURN at the end of each line.

Key area

You can specify a shortcut key combination by entering an alphanumeric key in the Key area then selecting checkboxes to give a combination of CTRL, ALT and SHIFT keys.

To edit a phrase

1 Display the <u>Phrases dialog</u> and select the phrase.
2 Click the Edit button. This will display the <u>Modify Phrase dialog</u> with the selected phrase.
3 Make any changes you want then click OK.

To make a copy of a phrase

1 Display the <u>Phrases dialog</u> and select the phrase.

2 Click the Copy button. This will display the <u>Modify Phrase dialog</u> with the selected phrase but no phrase name.

3 Enter the new name and make the changes you want, then click the OK button.

Note Any shortcut key combination associated with the original phrase cannot be used with the copy; if you want to use shortcut keys, each phrase must have a unique combination.

To place a standard phrase on a form

1 Open the form in the Filler environment.

2 Select the field in which you want to place the phrase.

3 Select Insert Phrase (Text menu). This will display the Insert Phrase dialog containing all of the phrases in the library for the form.

4 Select the phrase you want then click OK.

If the phrase has a shortcut key combination, you can enter that combination after step 2 and the phrase will be entered in the field directly.

Insert Phrase dialog

The following illustration shows the Insert Phrase dialog. Click areas of the dialog to see a description of what they do.

Insert Phrase	☒
a2	OK
Ad Alt+Shift+A	Cancel
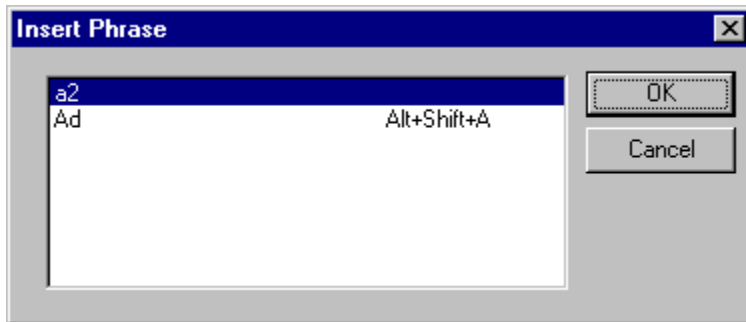
Phrase list

This area list the phrases in the library and shows their shortcut key combinations.

Specifying initial values

You can set up an initial value that will appear in a field of your form when it is opened in the Filler. The user can then change this, or just accept the default value.

To set up an initial value

1   Select the Field that you want to set up

2   Select Data Properties (Edit menu). Note that this option is also present on the menu displayed when you click the right mouse button. This will display the Field data properties dialog.

3   Click the Values tab to display the Values window in the dialog.

4   Click in the Initial Value area. The cursor will appear in the area.

5   Type in the initial value for the field. Note that clicking the Clear button will empty the Initial Value area.

6   Click OK to close the dialog.

Specifying calculations

You can set up calculations that will be used to fill fields within your form. These entries will then be made automatically as the client fills in the form.

If you are specifying calculations for a table, you can apply the same calculation to all rows. This allows you to have a results column, showing the calculation result for each individual row.

A general procedure for calculation specification is given here, together with two examples to show how the facility can be used in your forms.

- Specifying a calculation
- Example 1 - to sum a group of fields
- Example 2 - to introduce a total column into a table
- Example 3 - to include an e-mail or fax address

To specify a calculation

1 Select the Math tool from the Main toolbar. This will display the <u>Mathtool dialog</u>.

2 Select the field to which the calculation will apply.

3 Click in the Mathtool dialog text entry field. This will display the <u>expanded Mathtool dialog</u>.

4 Specify the calculation that you want to apply. To include the contents of another field in the calculation, click within that field. You can enter any combination of field contents, functions and mathematical operators, but you cannot end the expression with an operator. You can also use the Copy and Paste buttons to duplicate strings and operations within the Mathtool dialog.

5 If you want to apply the calculation to a table column, click the Fill Down button. This will apply a similar calculation to all rows below the current row. If you have included fields within the current row, the corresponding field will be used in each row.

6 Click the OK button.

If you want to delete a whole calculation, click the Eraser button.

Mathtool dialog

The following illustration shows the Mathtool dialog. Click areas of the dialog to see a description of what they do.

Fill Down button

Click this to apply a similar calculation to the following cells within the column of a table.

Address button

Click this to use the field as the source for an e-mail or fax address. This will display the [Select Special Field to Calculate dialog](#).

Calculation area

This area shows the calculation that will be applied to derive the content of the field.

Expand button

Click this to display the expanded Mathtool dialog.

Expanded Mathtool dialog

The following illustration shows the Mathtool dialog. Click areas of the dialog to see a description of what they do.
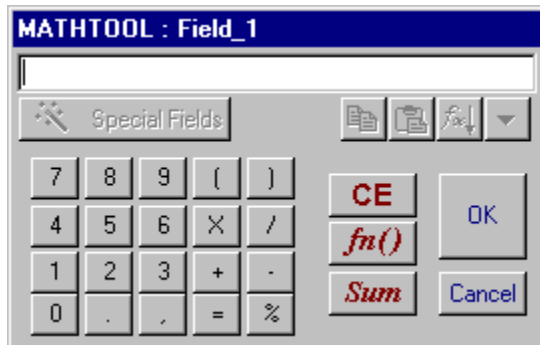
Keypad

You can click the buttons on the keypad to make entries in the calculation area.

Eraser button

Click this to delete the contents of the calculation area.

Functions button

Click this to display a list of functions that you can use in your calculations. You can then select a function to place the calculation area.

Sum button

Click this to place a SUM( ) function in the calculation area. You can then enter the items to be summed.

Example 1 - to sum a group of fields

To make the right-hand field (field 4) show the sum of three other fields (fields 1 to 3) in the form, simply open the Math tool then select the right-hand field. Hold down the SHIFT key on your keyboard and click in each of the other three fields. The calculator will show the names of the fields:
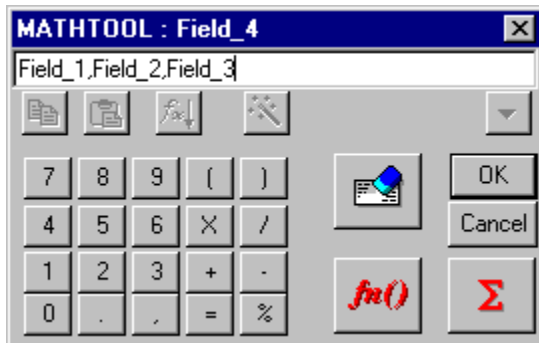
Click the OK button.

When a user enters numbers into the three fields, the sum of these numbers will be shown automatically in the fourth field.

Example 2 - to introduce a total column into a table

	Quantity	Price per item	Total cost
1			
2			
3			
4			

To make the right-hand column automatically reflect the contents of the other two columns, open the Math tool then select the right-hand cell in row 1 of the table. Click in the left-hand cell in row 1, then click the + button the Math tool. Click in the middle cell in row 1. The Math tool now shows:


```
MATHTOOL : T1.ColC[1]          ☒

T1.ColA[1]+T1.ColB[1]

▤  ▤  ⨍  ⚒           ▼

7  8  9  (  )    ⬛    OK
4  5  6  ×  /         Cancel
1  2  3  +  -
0  .  ,  =  %    fn()  Σ
```
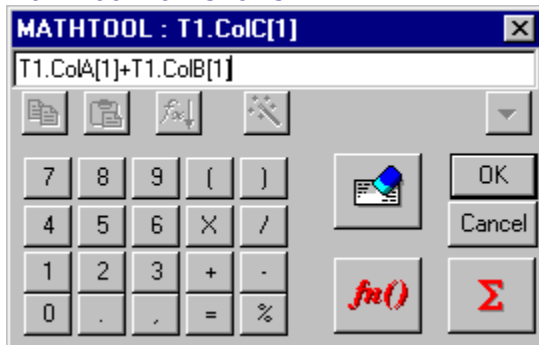
Click the Fill Down button, then the OK button.

When a user enters numbers into the Quantity and Price per item cells in any row, the product of these numbers will be shown automatically in the Total cost cell of the row.

Example 3 - to include an e-mail or fax address

You can use the Math tool to set up automatic generation of recipients and addresses for e-mail and form faxing. Whenever the form is e-mailed or faxed from the Filler, it will then be sent to this recipient and address.

To specify any of these, select the field that will be used as the data source in the completed form then open the Mathtool dialog. Click the Address button to display the Select Special Field to Calculate dialog.

Select the item that the field will represent, then click the Continue button. The expanded Math tool dialog will be displayed showing that the field has been assigned.

Select Special Field to Calculate dialog

The following illustration shows the Select Special Field to Calculate dialog. Click areas of the dialog to see a description of what they do.
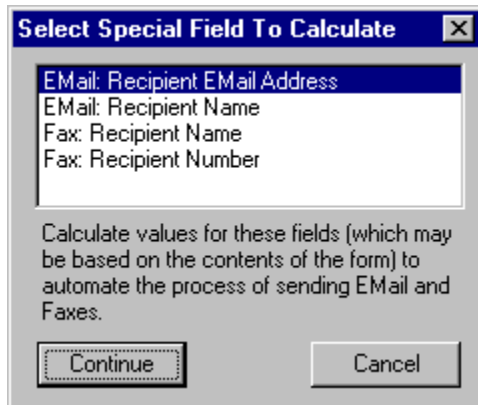
Field type area

This area shows the special field types that area available.

Continue button

Click this to set the field to the selected special field type.

Setting up validation

You can set up validation for fields within your form, so that entries are checked as they are made. If an invalid entry is made as the form is filled, an error message will be displayed.

To set up validation for a field

1 Select the field to which you want to apply validation.

2 Select Data Properties (Edit menu). This option is also available on the menu displayed when you click the right mouse button. This will display the Field data properties dialog.

3 Click the Validation tab to display the Validation window in the dialog.

4 Select the type of validation and its value, setting the NOT checkbox if required (for example to convert *greater than* to *NOT greater than*).

5 Click the OK button.

If you want to remove all validation from a field, click the No Validation button in the Validation window.

Setting up context sensitive help

You can enter help information for the field. When the form is being filled, a user can press F1 to view this information. This facility could be useful when field contents are complex, for example in the case of tax forms; you could use this facility to explain the meaning of a field and the possible consequences of certain responses.

To enter help information

1 Select the field that you want to set up

2 Select Data Properties (Edit menu). Note that this option is also present on the menu displayed when you click the right mouse button. This will display the <u>Field data properties dialog</u>.

3 Click the Help tab to display the <u>Help window</u> in the dialog.

4 Enter the help text then click the OK button.

Fixing the input format

You can fix the format of text entered into a field, so that the user cannot change the appearance of entries in the Filler.

To fix the format

1 Select the field that you want to set up

2 Select Data Properties (Edit menu). Note that this option is also present on the menu displayed when you click the right mouse button. This will display the <u>Field data properties dialog</u>.

3 Click the Format tab to display the <u>Format window</u> in the dialog.

4 Ensure that the checkbox is deselected.

Final checks on your form

You can perform final checks on your form by:

- Checking spelling
- Using the thesaurus

Checking spelling

You can check the spelling of either the whole form or selected text, in both the Designer and the Filler. OfficeForms maintains a dictionary that is used whenever you perform a spelling check.

- Using the spellchecker
- Adding a word to your dictionary

To use the spellchecker

1 If you want to check the spelling of only a selected part of your form, select the required text. If you do not select any text, you will only be able to perform a check on the whole form.

2 Select Spellcheck (Tools menu).

3 From the displayed sub-menu, select either All Text or Selected Text. If you did not select any text in step 1, the Selected Text option will be greyed. The spelling check will begin as soon as you make a selection.

4 If any unrecognised words are detected, a Spelling Check dialog will be displayed showing the detected word and any suggested corrections. Take the appropriate action in response to any messages in this dialog.

5 When the spelling check is complete, a message box will be displayed showing how many words have been checked. Click the OK button.

To add a word to your dictionary

1 Type the word in a text field on your form.

2 Select the text field.

3 Select Spellcheck (Tools menu).

4 From the displayed sub-menu, choose Selected Text. If the word is not already in your dictionary, a <u>Spelling Check dialog</u> will be displayed showing the word and any suggested corrections.

5 Click the Add to Dict. button.

When you add words to the dictionary they are stored in a dedicated file , named **userdict.lex**, in the same folder or directory as your OfficeForms program. You cannot edit this file, but you can delete or rename it. If you do this, the next addition will start a new file with the name userdict.lex.

Spelling Check dialog

The following illustration shows the Spelling Check dialog. Click areas of the dialog to see a description of what they do.
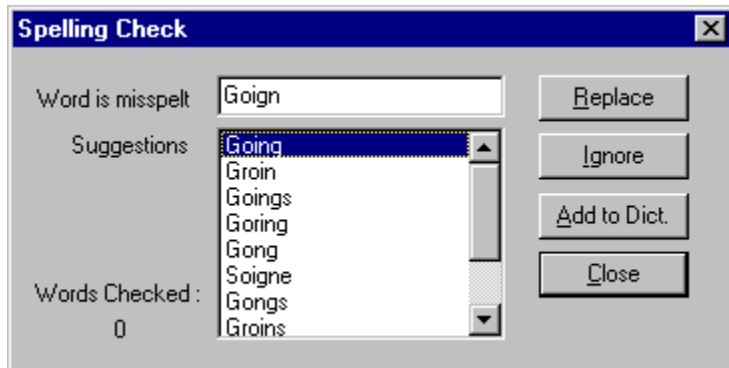
Word is misspelt area

This area shows any unrecognised word.

Suggestions area

This area lists similar words to the unrecognised word. The suggestions are taken from your dictionary.

Replace button

Click this to replace the unrecognised word with the highlighted suggestion.

Ignore button

Click this to ignore this occurrence of the unrecognised word.

Add to Dict. button

Click this to add the unrecognised word to your dictionary.

Using the thesaurus

OfficeForms has its own thesaurus that you can use to avoid repetition and ensure the most accurate phrasing of text on your form.

To use the thesaurus

1 Select the word that you want to look up in the thesaurus.

2 Select Thesaurus (Tools menu). The <u>Look Up dialog</u> will be displayed, containing the word you selected.

3 If you want to use one of the suggested synonyms, select it from the list and click the Insert In Doc button. The suggestion will replace the selected word.

4 If you want to look up further synonyms related to one of the suggestions, select the suggestion and click the Look Up button.

5 When you have finished using the thesaurus, click the Exit button.

Look Up dialog

The following illustration shows the Look Up dialog. Click areas of the dialog to see a description of what they do.
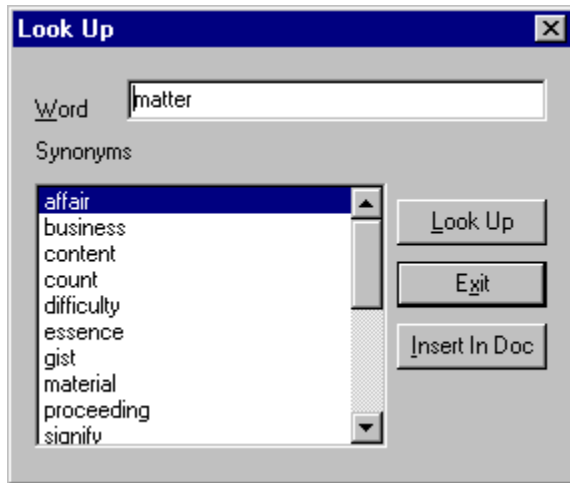
Exit button

Click this to close the dialog.

Word area

This area shows the word currently selected.

Synonyms area

This area shows a selection of words with similar meanings to the one in the Word area. Double-clicking an entry will place it in the Word area.

Look Up button

Click this to see a selection of synonyms for the word in the Word area.

Insert In Doc button

Click this to replace the selected word in the form with that in the Word area.

Using OfficeForms with databases

Database operations within OfficeForms are:

- Setting up a database
- Maintaining database links
- Using calculations with a database
- Storing pictures in a database
- Links to non-OfficeForms databases
- Using the Filler with a database
- Validation, calculations and databases
- Copying forms and databases

Setting up a database

OfficeForms contains a wizard that you can use to set up a Microsoft Access compatible database for your form. This will allow you to maintain a two-way link between the database and your form to store, edit and retrieve information whenever you need..

Setting up an Access database

To set up an Access database

1   Open the form in the Designer.

2   Select Database Wizards (Tools menu). This will display the <u>Link Manager dialog</u>.

3   Click the Create Connection button. This will display the <u>Create Connection dialog</u>.

4   Select the radio button labelled Create an Access database to hold your form data.

5   Click the OK button. This will display the <u>Enter a filename for the database dialog</u> prompting you to enter file and connection names for the link.

6   Enter the folder or directory and filename for the database. The default extension is **.MDB**, and we recommend that you should always use this.

7   Enter a unique name for the database connection.

8   Click the Finish button to create the database. The Link Manager dialog will be displayed showing the new connection.

Link Manager dialog

The following illustration shows the Link Manager dialog. Click areas of the dialog to see a description of what they do.
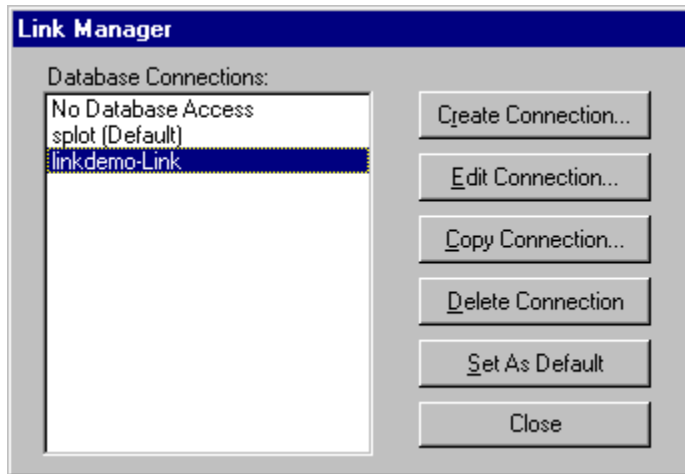
Database Connections area

This shows the names of all connections from the current form to databases. Connections to non-Office databases are shown by the suffix **-Link**.

Create Connection button

Click this to create a new connection.

Copy Connection button

Click this to make o copy of the selected connection. A chain of dialogs will be presented, allowing you to specify the characteristics of the copy.

Note   You can only copy connections with the suffix **-Link**.

Delete Connection button

Click this to delete the selected connection. You will be asked to confirm the deletion.

Set As Default button

Click this button to set the selected connection as the default for the form. This connection will be started whenever the form is opened.

Create Connection dialog

The following illustration shows the Create Connection dialog. Click areas of the dialog to see a description of what they do.

Create Connection   [×]

We strongly recommend that you give meaningful names to all the fields and tables on the form before going any further. Do this using the "Rename Fields" command on the Tools menu

◉ Create a Microsoft Access Database to hold your form data

    The database that is created will automatically track any changes made to the form

    The database stores the name of the form, so if you rename the form, you will be prompted to update the owner form name stored in the database

○ Link the form to an existing ODBC database

    You can link to any database type for which you have an installed ODBC driver.
    This includes the databases created by Office Forms.
    (Choose the "32 bit ODBC" option in your Control Panel to register a new data source)

    The drivers installed automatically with Office Forms are:
            Access
            dBase
            Paradox
            SQL Server   [OK]   [Cancel]

Create a Microsoft Access Database button

Click this to create a new Access database and link it to your form.

Link the form to an existing ODBC database button
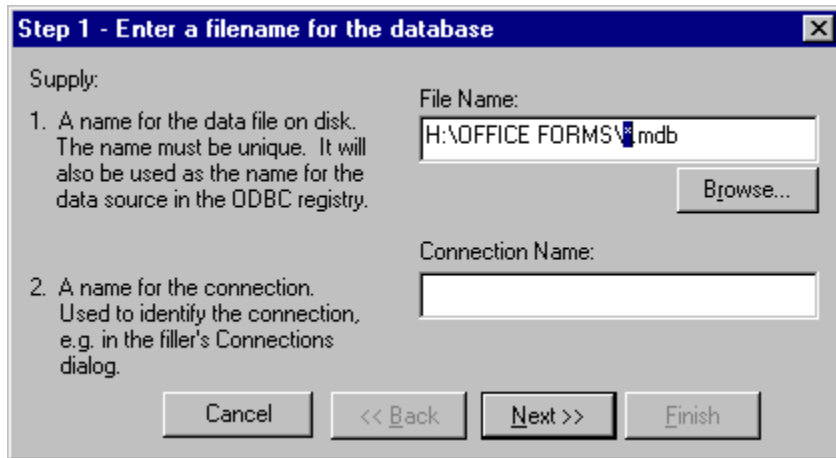
Click this to link the form to a non-Office database.

OK button

Click this to accept the data and selections then display the next dialog in the wizard sequence.

Enter a filename dialog

The following illustration shows the Enter a filename for the database dialog. Click areas of the dialog to see a description of what they do.

Step 1 - Enter a filename for the database

Supply:

1. A name for the data file on disk. The name must be unique. It will also be used as the name for the data source in the ODBC registry.

2. A name for the connection. Used to identify the connection, e.g. in the filler's Connections dialog.

File Name:

H:\OFFICE FORMS\.mdb

Browse...

Connection Name:

Cancel   << Back   Next >>   Finish

File Name area

You can enter a name for the database file in this area.

Connection Name area

You can enter a unique name for the connection between the form and the database.

Browse button

Click this to display a standard Windows dialog allowing you to enter a folder or directory and a filename.

Next button

Click this to accept the data and selections then display the next dialog in the wizard sequence.

Indexes area

Four drop-down lists allow you to select fields that will be used as the primary sort fields for records in the database.

Back button

Click this to close the dialog and go back to the previous dialog in the sequence. Any entries made in this dialog will be lost.

Finish button

Click this to complete the sequence of operations.

Database name

This shows the name of the database that you are creating.

Links to non-OfficeForms databases

You can also link your form to existing ODBC-compliant databases. Drivers for the following databases are provided within OfficeForms:

- Access.
- dBase.
- Paradox.
- Microsoft SQL Server.

If you want to link to any other database, you must first obtain a suitable driver. All drivers must conform to ODBC level 1 and must support keyboard-driven cursors.

- Linking a form to a database

To link a form to a database

1   Open the form in the Designer.

2   Select Database Wizards (Tools menu). This will display the <u>Link Manager dialog</u>.

3   Click the Create Connection button. This will display the <u>Create Connection dialog</u>.

4   Select the radio button labelled Link the form to an existing ODBC database.

5   Click the OK button. This will display the <u>Select source database dialog</u>.

Note   The database you want to use must be an available data source within the Windows Control Panel 32 bit ODBC dialog (for Windows 95 or NT) or the ODBC dialog for Windows 3.1x.

6   Select the data source you want to use, then click the Next button. This will display the <u>Connect to the database dialog</u>.

7   Click the Connect button. When the connection is made OfficeForms will check the Connected checkbox.

8   Click the Next button. This will display the <u>Select a table from the source dialog</u> showing the tables present in the selected data source.

9   Select the database table that is to link with the form, then click Next. This will display the <u>Link from fields to database columns dialog</u> in which you can set up the database table columns that will receive data from the form.

10   Select a table column in the list, then click the corresponding field in your form (in the Designer) to allocate the field to the table column. The name of the field will be shown. Repeat this until all of the required fields have been linked to database columns.

Note   You can break a link by selecting the field and clicking the Remove Link button.

11   Click the Next button. This displays the <u>Give this connection a name dialog</u> prompting you to enter a name for the link.

12   Enter a name for the connection then click the Finish button. The Link Manager will be displayed showing the new connection.

Select source database dialog

The following illustration shows the Select source database dialog. Click areas of the dialog to see a description of what they do.

Step 1 - Select source database   ☒

Select a data source to access using this form.

If you have a database that does not appear in this list, select "32 bit ODBC" from the Windows Control Panel, then add it to the available data sources.

Available Data Sources

gd
tryit
names
init

[Cancel]   [<< Back]   [Next >>]   [Finish]
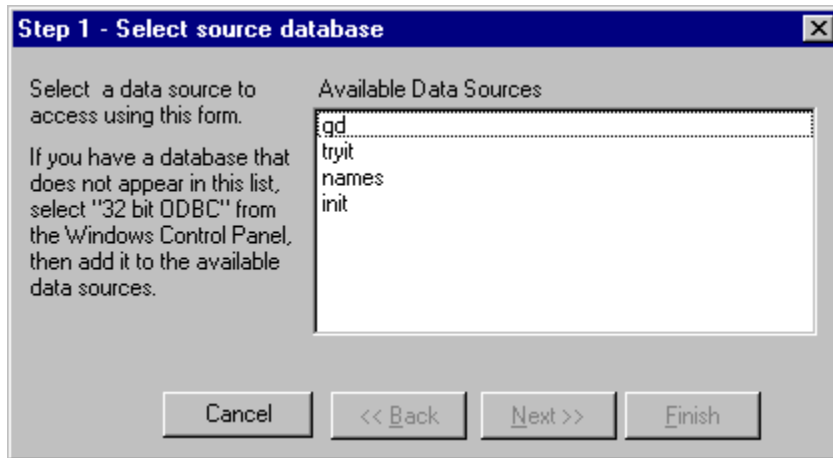
Available Data Sources area

This area shows all of the data sources available for this form. You can select any of these as the database to store records generated by the form.

Connect to the database dialog

The following illustration shows the Connect to the database dialog. Click areas of the dialog to see a description of what they do.

Step 2 - Connect to the database ☒

You must now connect to the database.

[Connect]

The system may prompt you for an ID, a password and more.

☐ Connected

[Cancel] [<< Back] [Next >>] [Finish]

Connect button

Click this to connect the form to the selected database.

Connected checkbox

When OfficeForms has made the connection to the database, it will check this box.

Select a table from the source dialog

The following illustration shows the Select a table form the source dialog. Click areas of the dialog to see a description of what they do.

Step 3 - Select a table from the source

Select the table to access using this form.

Each data source can hold one or more tables of data.

If you are connecting to a database created by Office Forms, the data will be in "OFDATATABLE".

Available Tables

OFDATATABLE

| Cancel | << Back | Next >> | Finish |
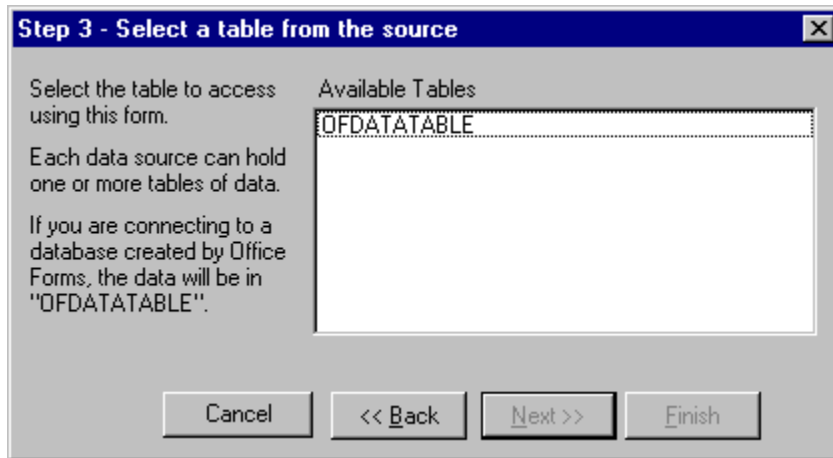
Available Tables area

This area shows all of the tables in the database that can be linked to your form. You can select any of these for the link.

Link form fields to database columns dialog

The following illustration shows the Link from fields to database columns dialog. Click areas of the dialog to see a description of what they do.

Step 4 - Link form fields to database columns

Link columns from the data table to fields in the form.

To link a column to a field, select the column in the list then click in the form on the field you wish to link it to.

Remove Link

Table Columns	
Field_6ST	No field to match
Field_5ST	No field to match
Field_4ST	No field to match
Field_3ST	No field to match
Field_2ST	No field to match
Field_1ST	No field to match

Cancel   << Back   Next >>   Finish
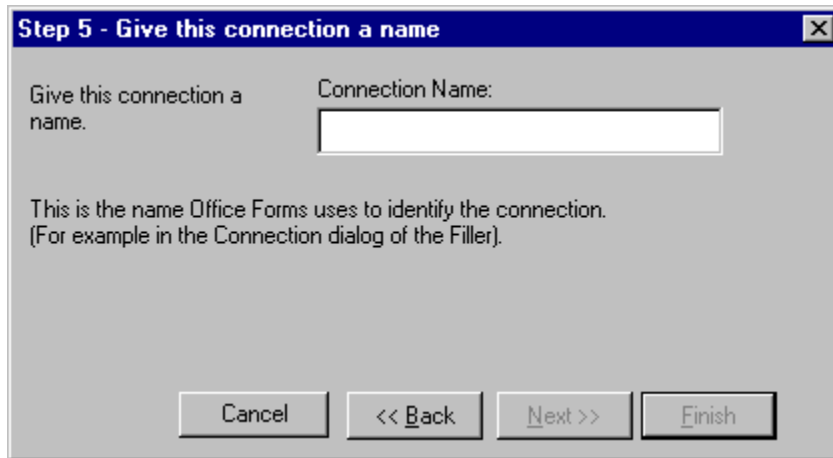
Table columns area

This contains a list of all of the columns in the selected database table. You can assign a form field to each by selecting the table column the clicking the field in the Designer. The field name will then be shown next to the table column name.

Remove Link button

Click this to remove the link selected in the Table Columns area.

Give this connection a name dialog

The following illustration shows the Give this connection a name dialog. Click areas of the dialog to see a description of what they do.

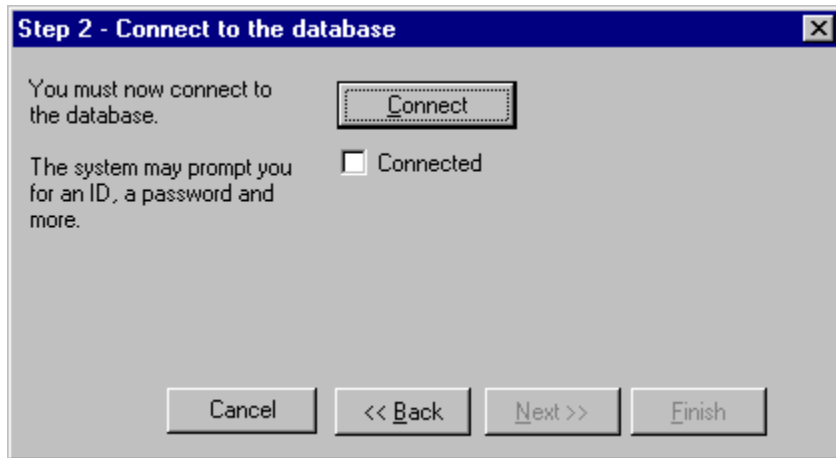**Step 5 - Give this connection a name** ☒

Give this connection a name.

Connection Name:

This is the name Office Forms uses to identify the connection. (For example in the Connection dialog of the Filler).

| Cancel | << Back | Next >> | Finish |

Maintaining database links

You can perform a number of tasks to maintain your database links. These are achieved through the Link Manager dialog which you can open by selecting Database Wizards (Tools menu). Database link maintenance consists of:

- Copying connections
- Deleting connections
- Setting up a default connection to started automatically when the form is opened

To copy a connection

Note   You can only copy connections that link to databases. These are shown in Link Manager with the suffix **-Link**.

1   Select the connection in the <u>Link Manager dialog</u>.

2   Click the Copy Connection button. This will display the <u>Select source database dialog</u>.

Note   The database you want to use must be an available data source within the Windows Control Panel 32 bit ODBC dialog.

3   Select the data source you want to use, then click the Next button. This will display the <u>Connect to the database dialog</u>.

4   Click the Connect button. When the connection is made OfficeForms will select the Connected checkbox.

5   Click the Next button. This will display the <u>Select a table from the source dialog</u> showing the tables present in the selected data source.

6   Select the database table that is to link with the form, then click Next. This will display the <u>Link form fields to database columns dialog</u> in which you can set up the database table columns that will receive data from the form.

7   Select a table column in the list, then click the corresponding field in your form (in the Designer) to allocate the field to the table column. The name of the field will be shown. Repeat this until all of the required fields have been linked to database columns.

Note   You can break a link by selecting the field and clicking the Remove Link button.

8   Click the Next button. This displays the <u>Give this connection a name dialog</u>.

9   Enter a name for the copy of the connection then click the Finish button. The Link Manager will be displayed showing the copy as a new connection

To delete a connection

1 Select the connection in the [Link Manager dialog](#).
2 Click the Delete Connection button. You will be asked to confirm the deletion.
3 Click the Yes button to confirm the deletion.

To set a default connection

1 Select the connection in the Link Manager dialog.

2 Click the Set As Default button. A warning will be issued that this connection will be started automatically whenever the form is opened.

3 Click the OK button. The connection will be shown with Default in parentheses after it.

Using the Filler with a database

When a form has been linked to a database, users can connect the Filler to the database directly.

If you have not set up a link to a database, OfficeForms sets up a default called the No Database Access connection. This holds a single record containing the content of the form when it was last saved in the Filler.

If you use the No Database Access connection, clicking the Next Record tool from the Control toolbar stores the current form content and displays a blank record.

When a form is linked to a database, you can do the following:

- Adding records
- Sorting records
- Searching for records
- Navigating through the database
- Filtering records
- Changing the database connection

Adding records

If the form has a connection to a database, then the message No Records is shown when it is first opened in the Filler. You can add records with the Filler is in Add mode.

To add records

1 With the form in the Filler, click the Add Mode tool in the <u>Control toolbar</u>.

2 Make entries in the fields of the form.

3 If you want to add further records, click the Next Record tool in the Control toolbar. The existing record will be passed to the database and a blank record will be displayed. If you want to add a single record to the database, you must still click the Next Record tool to save the new record.

4 Repeat steps 2 and 3 until all records have been entered.

Navigating through the database

A set of navigation buttons allow you to move through the records held in the database. These are in the <u>Control toolbar</u>, and allow you to:

- Display the first record in the database.
- Skip ten records backwards.
- Display the previous record.
- Display the next record.
- Skip ten records forwards.
- Display the last record in the database.

Sorting records

You can sort the records in the database using any field or the order in which they were entered.

To sort records

1 Click the Sort tool in the <u>Control toolbar</u>. This will display the <u>Order dialog</u>.
2 Select the field to be used (or Entry Order).
3 Click the OK button. The records can now be viewed in order of the entries in the selected field.

Order dialog

The following illustration shows the Order dialog. Click areas of the dialog to see a description of what they do.
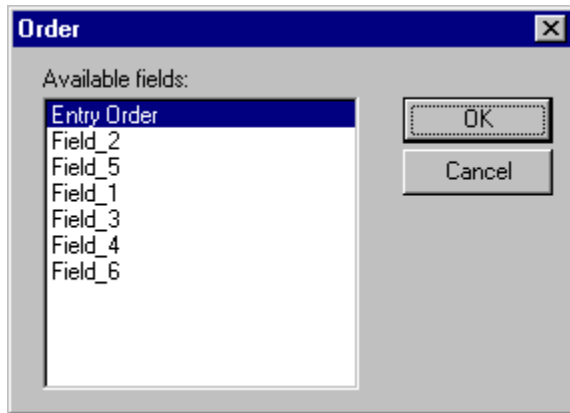
Available fields area

This area lists all of the fields within your form. You can select the field that will be used to sort records. Selecting Entry Order sorts records into the order in which they were entered.

Filtering records
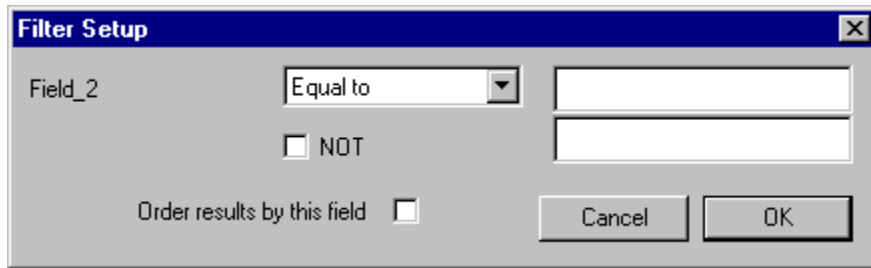
You can select a number of records from the database according to entries in a specified field. This can cut down the number of records viewed in large databases, making searches and sorts much quicker.

To filter records

1 Select the field that you want to use to filter records.

2 Click the Filter tool in the Control toolbar. This will display the Filter Setup dialog.

3 Select the expression that you want to use and enter values. Use the NOT checkbox to invert expressions (for example to change *greater than* to *NOT greater than*).

4 If you want the records to be sorted by this field as the records are filtered, select the Order results by this field checkbox

5 Click the OK button.

Filter Setup dialog

The following illustration shows the Filter Setup dialog. Click areas of the dialog to see a description of what they do.

Filter Setup	☒
Field_2	Equal to ▼ [ ]
	☐ NOT [ ]
	Order results by this field ☐ Cancel OK

Field name

This shows the name of the field selected for the filtering process.

Order results by this field checkbox

Select this if you want OfficeForms to sort records by this field as it filters them.

Searching for records

You can search for records according to the contents of a selected field.

To search for records

1 Select the field that you want to use to search for records.

2 Click the Setup search tool on the <u>Control toolbar</u>. This will display the <u>Search setup dialog</u>.

3 Enter the starting character string of all the records to be included in the search. This could be the first word, or even just the first few characters. If all of the records that you want have the same entry in this field, enter the whole entry.

4 Click the Start search button. When the first record meeting the search criteria has been found, the selected records will be presented and a small <u>Navigation toolbar</u> will be displayed.. You can use the Search Next and Search Previous tools to scroll through the records. Select the End Search tool to perform further operations on the database.

Navigation toolbar

The following illustration shows the Navigation toolbar. Click areas of the dialog to see a description of what they do.

Search Next tool

Click this to find the next occurrence of the search criteria.

Search Previous tool

Click this to return to the previous occurrence of the search criteria.

End Search tool

Click this to stop the search and close the Navigation toolbar.

Search setup dialog

The following illustration shows the Search setup dialog. Click areas of the dialog to see a description of what they do.
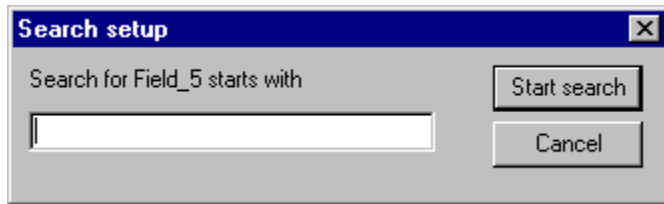
Search area

Enter the starting character string of all the records to be included in the search in this area.

Start search button

Click this to begin the search.

Changing the database connection

You can change the connection from the form to the database.

To change the connection

1 Select the Connections tool in the <u>Control toolbar</u>. This will display the <u>Choose a connection dialog</u> containing all of the connections defined for the form.

2 Select the connection then click the Connect button. If you want to choose the No Database Access option, click the No Access button.

Choose a connection dialog

The following illustration shows the Choose a connection dialog. Click areas of the dialog to see a description of what they do.

Choose a connection ☒

Connections

No Database Access
splot (Default)

Connect

No Access

Cancel
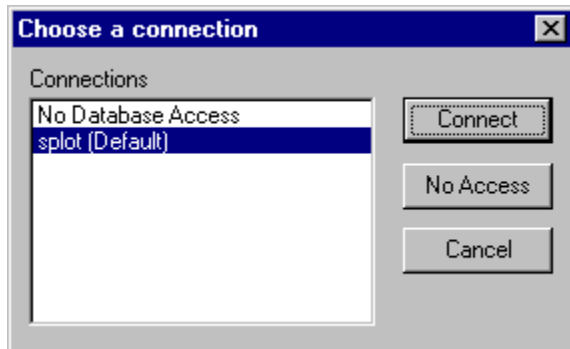
Connections area

This area shows all of the connections from this form to databases. You can select the new connection from this list.

Connect button

Click this to replace the current selection with the one selected in the Connections area.

No Access button

Click this to remove connections from the form to databases.

Using calculations with a database

Your forms may contain fields with associated calculations, and a set of fixed rules control how these calculations are handled when the form is linked to a database. This ensures that calculations cannot be performed twice for a given field using the same source data.

Writing Data to the Database

When data is passed from your form to a database, any calculations applied to a field are honoured. These calculations are performed before the information is added to the database.

If you do not want calculation results to be passed to the database, do not link the calculated field in the form to the database. To remove this link, open the <u>Field data properties dialog</u> and uncheck the Save Field Data In Automatic Database checkbox. For more information refer to <u>Fixing the input format</u>.

Reading Data from the Database

When data is passed from the database into a field that has an associated calculation, *no calculation will be performed.* The information from the database is written directly into the field and will not be changed.

Validation, calculations and databases

If validation has been specified for a field, the effects of the validation are somewhat modified when the form is connected to a database. The rules are:

1   Whenever a new value is typed in to a field, the field will be validated as specified. If it fails the validation a message box is shown and you are forced to enter a valid value into the field.

2   Calculated values, on the other hand, are not validated immediately after they are calculated. This is because a calculated field may go through several different values as more detail is entered on to other fields on the form, and only the final value is important (for example - if commission is calculated based on quantity of goods and the price per item). Only when the whole form is about to be saved - signalled by the user pressing the Next Record button - are calculated fields checked against the validation requirements. At this stage, a warning message box is displayed and you must correct the form before being allowed to save its contents.

3   When you are browsing through existing records in a database:

▪   No validation whatsoever is performed - whatever is already in the database is assumed to be valid.

▪   Calculated fields are only calculated if they are *not* linked to columns in the database. Again, this is because what is already in the database is assumed to take precedence. Some validation may be additionally imposed by the database itself. For example, if a database column is only allowed to hold integer values between 0 and 65386, that limitation will be imposed on a field which is linked to it *in addition* to any validation specified by the field itself.

Storing pictures in a database

When there is an open connection from the Filler to a database, any images placed in a picture field can be saved into the database. Picture fields are highlighted by a dashed line. If no image is present, the field contains the message No Image Available.

Note   You can store images in the single saved record if you are using the No Database Access connection option.

You can either insert a picture file directly, or use the clipboard to transfer a graphic image from another application.

- Inserting picture files
- Inserting images using the clipboard
- Removing pictures from picture fields

To insert a picture file

1 In the Filler, select the picture field in the form.

2 Select Picture (Insert menu). A standard windows file selection dialog will be displayed.

3 Select the folder or directory path and choose the picture file to be inserted.

4 Press RETURN. The picture will be imported into the filler and will be displayed in the field.

To insert an image using the clipboard

1   Display the image on your computer screen, opening its host application if necessary.

2   Select the image.

3   Use the appropriate menu selection or keyboard shortcut within the host application to copy the image to the clipboard.

4   Make the Filler active and select the field.

5   Select the Paste tool from the Main toolbar. The image will be inserted into the field.

To remove a picture from a picture field

1 In the Filler, select the picture.

2 Press the DEL key. A message box will be displayed asking you to confirm the deletion.

3 Click the OK button.

When pictures are saved within a form, the images will be saved in a separate file to optimise file sizes. This file will be placed in the same folder or directory as the database file (specified when the database was set up). It will be given the same name as the database, but with the suffix **.OFI**.

Copying forms and databases

You can copy, rename and move both forms and databases. You should remember that if a form has been linked to a database, then the form holds the link information between itself and the database. Each database can operate under the ownership of only one form, although you may be able to access it through links from other forms.

All links between forms and database files, including the graphics files, are maintained by an ODBC administrator program supplied as part of your computers operating system. This independent of both OfficeForms and the database, and checks the connection integrity whenever the form is opened. If you want more information about the ODBC manager, open it and refer to its on screen help system.

- Copying, moving and renaming forms
- Copying, moving and renaming database files

Copying, moving and renaming forms

You can do any of these using the standard operations available through your version of Windows. If you perform any of these operations on a form, its database links are maintained. As long as the form is kept on the same computer as its database file, the ODBC manager will ensure that the link integrity is maintained when the form is opened.

If you move the form to a different computer, you must also move all associated database and picture files. If the folder or directory structure on the new host computer is not identical, the ODBC manager will not be able connect the form to the database when the form is opened in the Filler. You will be prompted to select the files and their folder or directory so that the link can be made.

Copying, moving and renaming database files

You can do any of these using the standard operations available through your version of Windows. Any of these will, however, result in the loss of all connections to any related form.

The ODBC manager will not be able connect the form to the database when the form is opened in the Filler. You will be prompted to select the files and their folder or directory so that the link can be restored.

Saving forms as executables

You can save your form as an executable at any time, allowing users to fill it in without having to purchase a copy of OfficeForms. There are some limitations in the use of executable forms.

If you want to e-mail a form as an executable without saving it, you can select Send (File menu) then select the Send As Executable option from the sub-menu. You can then enter the name and address of the recipient to mail the form directly. For more information refer to OfficeForms and e-mail.

Saving the form as an executable

Using executable forms

Limitations of executable forms

To save a form as an executable

1 Select Save as Executable (File menu). This will display a standard Windows Save As window containing the default name for the executable (this is the name of the form with the extension **.EXE**).

2 If you want to change the filename for the executable, enter the name you want to use. We recommend that you should always use the extension .EXE.

3 Press RETURN. The form will then be saved as an executable.

Using Executable Forms

When a form has been saved as an executable, you can distribute it using diskettes or e-mail. Users can install it into any directory or folder, and can run it at any time either from diskette or the hard disk.

- Running an executable form
- Facilities available for executable forms

Running an executable form

You can run an executable form in the same way as any executable. Double-clicking the forms icon will run it, as will using the Run option (from the File menu in Windows 3.1x Program Manager, or the Start menu in Windows 95).

Running the executable will start the Filler containing the form.

Note   Running an executable form gives the Filler one view only. You will not be able to load any other form into the Filler, and closing the form will also close the Filler.

Facilities available for executable forms

When you run an executable form, you can fill it in the normal way. You can also fax and e-mail its content.

Limitations of Executable Forms

As an executable is saved as a stand alone item, there are limitations governing the objects and facilities that you can use in the form design. You cannot use any object or function that relies on links to external files.

The main limitations are:

- The form must not contain any Barcode Objects.
- There must be no pictures in the form.
- The form must have no links to external databases.
- The user cannot use the spellcheck or thesaurus facilities when filling the form.

OfficeForms and e-mail

You can mail your form directly from the Designer to any client with a MAPI-compliant e-mail system such as NetScape or Lotus Notes. If you are not sure whether the client system is MAPI-compliant, refer to the documentation supplied with the e-mail system.

The first time that you send an e-mail, you may need to select a profile to be used by your system. You will be asked to select a profile from a list.

- Mailing forms from the Designer
- Mailing forms from the Filler

To mail a form from the Designer

Note   In the following procedure, the actual steps you need to take after step 1 may depend on the e-mail system you use.

1   Select Send (File menu). From the displayed sub-menu, select either Send As Form or Send As Executable. This will display the EMail Address dialog.

2   Enter the recipients name and e-mail address. If you are mailing the form to another user on your own network, you do not need to enter an address.

3   Click the OK button.
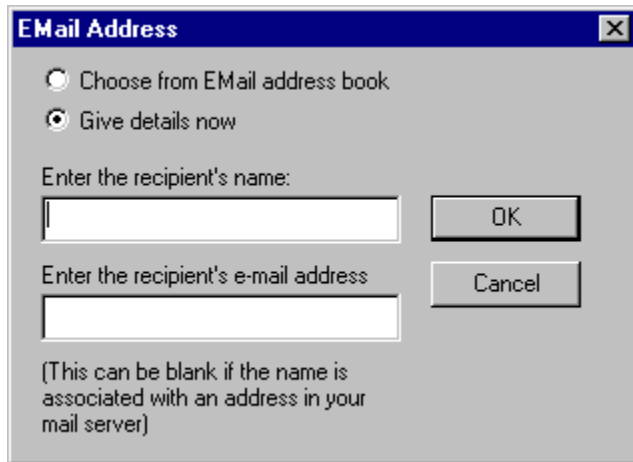
The form will be sent as a file attached to an e-mail message. The recipient can then open the file in OfficeForms in the usual way. If the form was sent as an executable, the recipient can run it directly without needing to open it in OfficeForms.

Note   The recipient must have OfficeForms to use a form sent from the Designer via e-mail. If the recipient does not run OfficeForms, you can save the form as an executable as described in Saving Forms as Executables then e-mail it using the facilities available in your e-mail system.

The EMail Address dialog

The following illustration shows the EMail Address dialog. Click areas of the dialog to see a description of what they do.

```
EMail Address                              [X]

  O  Choose from EMail address book
  ⊙  Give details now

  Enter the recipient's name:
  ┌──────────────────────────┐    ┌──────────┐
  │|                         │    │    OK    │
  └──────────────────────────┘    └──────────┘

  Enter the recipient's e-mail address         ┌──────────┐
  ┌──────────────────────────┐                 │  Cancel  │
  │                          │                 └──────────┘
  └──────────────────────────┘

  (This can be blank if the name is
  associated with an address in your
  mail server)
```

There are two ways to use the fields specifying recipient's name and Email address.

1. You can just enter a name, leaving the address blank.   This requires the name to have already been set up in your Email address book - for example the address book managed by Microsoft Exchange.   The mail will go to the specified name.

2. You can enter both name and address.   This requires the address to be specified a way that allows the EMail system to recognise the type of address and route it accordingly. This depends on prefixing the address itself with a type specifier such as **SMTP:** for internet addresses and **FAX**: for fax telephone numbers.   These prefixes are recognised by the EMail system as being associated with particular EMail gateways or transport services.

    Typically an address formatted like this:
        SMTP:bill@minisoft.com
    is recognised as an internet address, and providing the Email system has an Internet gateway associated with it, will be sent to the address **bill@minisoft.com.**

Recipient's name area

You can enter the recipients name in this area.

Recipient's address area

You can enter the recipients e-mail address in this area. Note that you do not need to enter an address in this field if the recipient is featured in your servers e-mail address book.

Choose From Address Book   or Give Details Now

If you check "Choose From Address Book" the Email system will be brought up to allow the recipient to be chosen using its standard facilities.   Otherwise you may specify the recipient by entering data into the name and address fields.

Mailing from the Filler

When a form is e-mailed from the Filler, only the form contents are sent. These are held in a format that can be read back into the Filler.

The first time that you send an e-mail, you may need to select a profile to be used by your system. You will be asked to select a profile from a list.

Mailing forms directly from the Filler

Importing mailed forms into the Filler

To mail a form directly from the Filler

Note   In the following procedure, the actual steps you need to take after step 1 may depend on the e-mail system you use.

1   Select the Send E-mail tool from the Main toolbar. This will display the EMail Address dialog.

2   Enter the recipients name and e-mail address. If you are mailing the form to another user on your own network, you do not need to enter an address.

3   Click the OK button.

The form will be mailed into the recipients e-mail in-box.

Note   The form may be configured so that the e-mail recipient and address are derived automatically from fields within the form. If this is the case, the e-mail will be sent automatically when you select the Send E-mail tool. For more information about automatic addressing of e-mails, refer to the examples given in Specifying calculations.

Importing a mailed form into the Filler

1 In the Filler, open the form to receive the mailed content.

2 Select the Import E-mail tool from the <u>Main toolbar</u>. This will display a dialog from which you can choose the file to be imported.

Note   This dialog shows, by default, all files in your in-tray containing form contents with fields that match the current form. You can select any mailed form, but you should take great care as there may be conflicts in field types between the form and the imported file.

The file will be imported, with the contents of fields matched by name to fields in the open form. OfficeForms will ignore any fields in the imported file with no corresponding fields in the open form and any fields with the same name but of different type.

OfficeForms and Microsoft Office

OfficeForms has been designed to integrate fully with the Microsoft Office suite. Three typical applications of this integration are:

- Using the Form Filler inside Word
- Using the Form Designer inside Word
- Using OfficeForms with Access

Using the Form Filler inside Word

One possible application for using the form filler in Word is to embed a form inside a word document which allows access to the contents of a database of names and addresses. For example, it is possible to place a small form inside a letter to act as a Fax Header. By activating the form, the user can locate the desired recipient from a database. Then, all the user has to do is to print the document which will be printed with the desired recipient details at the head of the letter.

How to do it

To use the Form Filler inside Word

1 Create the form.
Ideally this should be created with a page size corresponding to the actual space that it will occupy in the Word document. In particular, the height of the form would typically be no more than 3 or 4 inches.

Example

2 Create a database from the form.
This is simply a matter of choosing Database Wizards (Tools menu). This brings up the Link Manager dialog. Now choose Create Connection. The steps are straight forward - but see Using OfficeForms with databases for more information.

3 When the previous stage is finished control will return to the Link Manager. Now set the database as the Default Connection by selecting the newly created database in the list and pressing Set As Default. By doing this you will ensure that when the form is activated inside the Word document - as described below - it will already be connected to the database.

4 OK the Link Manager dialog.

5 Save the form.

6 Start Word and either open an existing document or start a new one. Establish where the form should go and click at that point to place the caret at the point of insertion.

7 Choose Insert Object from the menu. Then choose Create From File from the resulting dialog.

8 Select the file, either by typing in the full path name or by locating it using Browse. Press OK, leaving both Link To File and Display As Icon unchecked.

The form will now be inserted into the Word document. It is inserted as an inactive object - to use the filling and database access features of the filler it is necessary to activate the form.

Note Word, in common with most OLE client programs, allows OLE objects to be resized while they are inactive. The result is to distort any text in the object almost beyond recognition. We strongly recommend that you do not do this.

9 Activate the form by double clicking it. This will bring up the filler inside the Word document. You can then look through existing records in the database, add records to it and change existing records. In fact the in-place active form behaves just like it does when opened in the filler. When the form contains the information that you require to print with the Word document, click outside the form to deactivate it. You can then print the document from Word as usual.

A typical form to be used in Word

The form has been created 6 inches wide - a width that will easily fit within the margins of most Word documents, and 2 inches high - the correct height to accommodate the information that it is required to present:

Address:

From:

To:

Using the Form Designer inside Word

The form designer is not simply a tool for designing forms, it is also a powerful drawing package in its own right. Heres how to create a mini-form inside a Word document.

1   Start Word and either begin a new document or open an existing one.
Decide where the form should go and click at that point to place the caret at the point of insertion.

2   Choose Insert Object. Leave the dialog on the Create New page and pick OfficeForms Document from the Object Type list.

3   The object will appear in the Word document. You can now use the tools and facilities of OfficeForms to design your form inside the Word document. To deactivate the form, and resume working in Word itself, simply click outside the area occupied by the OfficeForms document. To reactivate the form, and alter details of the form you have created, double click the form.

The same principle outlined above can be used to insert an OfficeForms form inside any OLE client application.

Using OfficeForms with Access

You can use OfficeForms form to view, print and fax information from an Access database.

When OfficeForms is installed, a collection of utilities and drivers is installed alongside it. This is the ODBC system which allows software such as OfficeForms to access data from many different database systems.

Since the ODBC system allows access to any data source for which the system has a driver. OfficeForms is supplied with drivers for Microsoft Access, Paradox, dBase, FoxPro and SQL Server. It is, however, possible to obtain drivers for most common database formats. These will often come as part of the package, though sometimes it is necessary to approach the database supplier in order to obtain an ODBC driver.

Since a Microsoft Access driver is supplied as part of OfficeForms, it is easy to link a form to an Access database. There are three steps in the procedure:

- Establishing the database as a registered ODBC data source
- Establishing a link between OfficeForms and the data source
- Trying the connection

Establishing the database as a registered ODBC data source

1 Bring up the Windows Control Panel and either:

- If you are working with Windows 95 or Windows NT, start up the 32bit ODBC program.

- If you are working with Windows 3.1 or 3.11 bring up the ODBC program.

2 Now click the Add button to add the database to the list of registered data sources.

3 Choose Microsoft Access from the list of drivers.

4 Give the data source a name, then click the Select button to bring up a File Open dialog so you can find and select the database you wish to access.
When this dialog is OKd the selected Access database should be registered as an ODBC source.

Establishing a link between OfficeForms and the data source

In the Form Designer, open the form you wish to use to act as a Window on to the database.

1   Select Database Wizards (Tools menu).

2   Select Create Connection from the resulting Link Manager dialog.

3   In the Create Connection dialog choose Link The Form To An Existing ODBC Database.

4   Follow though the resulting series of wizard dialogs as follows:

- Select the source database.
  The dialog will display a list of registered data sources. You should simply highlight the one that you have established as the desired data source and then press Next.

- Connect to the database.
  This invokes the ODBC drivers connection function, so the actual procedure depends on the driver itself, and the nature of the database. You may be asked to supply security information such as a password before going any further. Once a connection has been established (signified by a tick in the Connected checkbox) press Next.

- Select a table from the source.
  A database typically consist of many Tables of information. A table is a structured set of data organised into rows, also known as records. Each record consists of a number of data items, where each set of items - or columns - is the same for each row. For example each row in a personnel database may have columns for name, age and address. a form can only access one table at a time, this dialog you to identify the particular table you wish to access. Having done so press Next.

- Link form fields to database columns.
  Fields on the form are used to view particular columns when a row of data from the table is retrieved from the database by OfficeForms. This dialog establishes the links between fields on the form and columns in the database table. To establish a link - select the column from the dialog list and then click the corresponding field in the form. It is not necessary to establish links for all columns or all fields. Just create links for the columns that you wish to access using the form.
  Having done so press Next.

- Finally a unique name needs to be given to this connection between the form and this particular data source. Many such connections can be created for a form, and it is these names which are used to refer to particular connections.

Control now returns to the Link Manager dialog.

If you wish, you can establish the new link as the Default Connection. This is done by pressing the Set As Default button. Doing so means that, when the form is opened in the filler, the database table will automatically be opened at the same time.

Trying the connection

Open the form in the Form Filler. What happens now depends on how the connections have been set up:

- If the table has been established as the default source, the database will be opened and the first record in the date table is used to initialise fields in the form.

- If no default connection exists, the Connection dialog is displayed an the connection may be chosen from the list.

- If another connection is default, press the Connection button. The Connection dialog is displayed an the connection may be chosen from the list.

Calculation reference

This reference gives you the information you need to implement calculations in your form fields.

- Evaluation order of operators
- Using functions
- Alphabetical list of functions

Evaluation order of operators

When you type in a formula the operators are evaluated in order according to normal algebraic conventions. Firstly operators are evaluated left to right and according to precedence. For example the formula:

+ 8 * 10 - 3

evaluates to 77 (i.e. 80 - 3) not to 56 (i.e. not to 8 * 7). This is because the operator * for multiply takes precedence over the minus - operator. The operator with the highest precedence is always evaluated first.

You can overrule the normal precedence rules using brackets (). For example, bracketing the above expression:

+ 8 * (10 - 3)

causes it to evaluate to 56 (i.e. 8 * 7). What happens is that parts of the expression which are enclosed in brackets are evaluated first. You can also nest brackets inside each other, for example:

+ 8 * (10 - 3 * (7 - 5))

This is more complicated but you can understand what happens here if you work out the different parts of the expression one by one starting with the innermost bracket.

First it becomes:

+ 8 * (10 - 3 * 2)

then the next bracket is evaluated starting with *, which has highest precedence, leaving:

+ 8 * (10 - 6)

followed by the minus - in the bracket, leaving:

+ 8 * 4

so the result is 32.

Order of precedence for operators

Order of precedence for operators

The precedence order of operators is shown below:

Operator	Description
%	percent
^	exponential
-	unary minus
* and /	multiplication and division
+ and -	addition and subtraction
&	string concatenation
= and <>	equal and not equal
< , > , <= and >= equal	less than, greater than, less than or equal and greater than or equal
#NOT#	logical NOT
#OR# and #AND#	logical OR and logical AND

Using functions

To use functions effectively, you need to know about:

- General rules for functions
- Mathematical functions
- Statistical functions
- Logical functions
- Date functions
- Financial functions
- Miscellaneous functions
- String functions

General rules for functions

Functions can be included in calculations in fields.

Functions are like equations. Functions are evaluated to give a result, usually a number.

For example the formulae:

A1+A2+A3+A4+A5+A6+A7+A8+A9+A10

and

SUM(A1,A2,A3,A4,A5,A6,A7,A8,A9,A10)

are equivalent.

Within a calculation formula you can use more than one function or combine functions with other operands, for example:

=SUM(Field_1,Fields_2) + 25

=SUM(Field_1,Field_2) - SUM(Field_3,Field_4,Field_7)

= SUM(Field_1,Field_2) * Vat_rate

The functions available are summarised in the following subsections.

Date functions

These are:

- DATE(Year,Month,Day)
- DAY(DateTimeNumber)
- MONTH(DateTimeNumber)
- YEAR(DateTimeNumber)
- TIME(Hours,Minutes,Seconds)
- HOUR(DateTimeNumber)
- MINUTE(DateTimeNumber)
- SECOND(DateTimeNumber)
- NOW()

Mathematical functions

These are:

- ABS(x)
- INT(x)
- RAND()
- SQRT(x)
- LOG(x)
- SIN(x)
- TAN(x)
- ACOS(x)
- ATAN2(x-coord,y-coord)
- RADIANS(x)

- MOD(x,y)
- ROUND(x,Places)
- PI()
- EXP(x)
- LN(x)
- COS(x)
- ASIN(x)
- ATAN(x)
- DEGREES(x)

Financial functions

These are:

- CTERM(Rate,FutureValue,PresentValue)
- TERM(Payment,Rate,FutureValue)
- RATE(FutureValue,PresentValue,NumberOfPeriods)
- PMT((PresentValue,Rate,NumberOfPeriods)
- FV((Payment,Rate,NumberOfPeriods)
- PV((Payment,Rate,NumberOfPeriods)
- SLN(Cost,Salvage,Life)
- SYD(Cost,Salvage,Life,Period)
- DDB(Cost,Salvage,Life,Period)

Statistical functions

These are:

- SUM(Range_1,Range_2,...)
- AVG(Range_1,Range_2,...)
- STD(Range_1,Range_2,...)
- VAR(Range_1,Range_2,...)
- MAX(Range_1,Range_2,...)
- MIN(Range_1,Range_2,...)

Note   In the above functions Range represents either a field or a range of cells in a table - for example Cost[1..9].

Miscellaneous functions

These are:

- CHOOSE(Number,Option0,Option1,...)
- ERR()

Logical functions

These are:

- IF(Condition,TrueValue,FalseValue)
- TRUE()
- FALSE()
- ISERR(x)

String functions

There is one string function:

- CONCATENATE (Field_1,Field2,...)

Alphabetical list of functions

ABS(x)

ABS gives the absolute (i.e. positive) value of x.

- Examples

ACOS(x)

ACOS gives the arc cosine of x. The result is the angle whose cosine is x, in radians. X must be between -1 and +1. The result is between zero and pi.

- Examples

ASIN(x)

ASIN gives the arc sine of x. The result is the angle whose sine is x, in radians. X must be between -1 and 1.

- Examples
- More

Alphabetical list of functions (continued)

ATAN(x)

ATAN gives the arc tangent of x. The result is the angle whose tangent is x, in radians.

- Examples

ATAN2(x-coord,y-coord)

ATAN2 gives the arc tangent of an angle. The angle is defined by the point x-coord,y-coord.

The result is the angle in radians whose tangent is y-coord/x-coord. The result will be between -pi and pi, with the quadrant chosen appropriately.

◼ Examples

AVG(Field_1,Field_2,...)

AVG gives the average of all the values used as arguments. Each argument, may be a number, a field, or a range of cells. Individual fields containing text or being blank are treated as though they contained 0.

◼ More

Alphabetical list of functions (continued)

CHOOSE(Number,Option0,Option1,...)

Choose selects one of the options depending on the number. So if the number is 0 the first option is selected, if the number is 1 the second option is selected. Options can be numbers, text strings and fields. All options supplied must be the same type. If the number is negative or too big for the list it returns ERR.

◼ Examples

COS(x)

COS gives the cosine of x where x is the angle in radians.

◼ Examples

See also SIN and TAN.

◼ More

Alphabetical list of functions (continued)

CTERM(Rate,FutureValue,PresentValue)

CTERM calculates the number of time periods required for an investment of PresentValue to grow to FutureValue whilst earning interest at Rate per compounding period.

Rate   is a numeric value giving the interest rate per compounding period.

FutureValue   is a numeric value giving the value the investment will grow to at some period.

PresentValue is a numeric value giving the present value of the investment.

◼ Examples
◼ More

Alphabetical list of functions (continued)

DATE(Year,Month,Day)

DATE returns the DateTimeNumber for the date specified by Year, Month and Day. It works with dates from 1st January 1900 up to 31st December 2078 returning a DateTimeNumber between 2 and 65380. So 1st January 1900 is 2, 2nd January 1900 is 3, 3rd January 1900 is 4 and so on.

Year   is a number between 0 (1900) and 178 (2078).

Month is a number between 1 and 12

Day   is a number from 1 to 28,29,30 or 31 depending on the month.

The DateTimeNumber is used in calculations, for example, to find the difference in days between two dates.

However you have dates displayed you can still do arithmetic on them because they are held internally as DateTimeNumbers.

▪ Example

See also DAY, MONTH and YEAR.

▪ More

Alphabetical list of functions (continued)

DAY(DateTimeNumber)

DAY returns the number for the day of the specified date. It works with dates from 1st January 1900 up to 31st December 2078 using a DateTimeNumber between 2 and 65380. So 1st January 1900 is 2, 2nd January 1900 is 3, 3rd January 1900 is 4 and so on. Because dates are held internally as DateTimeNumbers you can also supply it with a date as the argument.

▪ Examples

See also DATE, MONTH and YEAR.

▪ More

Alphabetical list of functions (continued)

DDB(Cost,Salvage,Life,Period)

DDB determines the amount of depreciation of an asset in a specified period using the double declining balance method. Depreciation is highest in the first periods and reduces sharply in subsequent periods. (Indeed it may be nothing for some assets for the last period(s)).

Cost   is the amount you paid for the asset.

Salvage   is the amount you expect the asset to be worth at the end of its Life.

Life   is the expected useful life of an asset. This is a whole number usually in years.

Period is a whole number giving the time period for which you want to determine the amount of depreciation. For example, if Period is 5 and you expressed Life in years it is the depreciation during the fifth year.

The formula is(Cost - Total depreciation from prior periods) * 2 / Life

The Salvage value is used to limit the depreciation in the final years.

▪ Examples

See also SLN.

▪ More

Alphabetical list of functions (continued)

DEGREES(x)

DEGREES converts a value x, supplied in radians, into degrees.

■   Examples

ERR()

ERR() gives the error value ERR. You can use it to bring attention to error conditions in conjunction with the IF function.

■   Example

See also IF .

EXP(x)

EXP gives ex where e is the mathematical constant 2.718..., the base value of natural logarithms.

■   Examples

See also LN.

■   More

Alphabetical list of functions (continued)

FALSE()

FALSE returns the logical value 0 which is FALSE. This may sound like a tautology until you realise that its main use is to make IF more easy to understand.

■   Example

See also IF and TRUE().

FV((Payment,Rate,NumberOfPeriods)

FV returns the future value of an ordinary annuity when a regular Payment is invested at a fixed interest rate of Rate per period over several periods NumberOfPeriods. It assumes that the payments are invested at the end of each period.

It uses the formula:

Future Value = Payment x ((1 + Rate)NumberOfPeriods - 1) / Rate

■   Example

If you want to consider the effects of making the payments at the beginning of the periods then you need to multiply the result by (1 + Rate).

■   Example
■   More

Alphabetical list of functions (continued)

IF(Condition,TrueValue,FalseValue)

IF evaluates the Condition then gives either TrueValue, if the condition is true or False Value if the condition is false.

The Condition can be any expression which can evaluate to true or false e.g. Items > 10, Field_1 = 3.

In addition to the arithmetic operators you can use the following comparison and combination operators together with bracketing:

= and <>   equal and not equal

< and > and <= and >=   less than and greater than and
less than or equal and
greater than or equal

#NOT#   logical NOT

#OR# and #AND#   logical OR and logical AND.

■   Examples

■   More

Alphabetical list of functions (continued)

INT(x)

INT drops the fractional part of the number X and returns only the integer part. This is not the same as rounding a number.

■   Examples

ISERR(x)

ISERR can be used to check the contents of a field for the error ERR. X can be a field name. If x contains ERR a value of 1 (true) is returned otherwise it's 0 (false).

ISERR is particularly useful when you have complex interrelations between the fields specified in the calculations.

For example if Average_cost = Total-cost/No_of_Items then when No_of_items is 0 this will result in ERR.

Normally further calculations which use Average_cost would also display ERR.

By setting:

Average_cost = IF(ISERR(Total_cost/No_of_items),0,Total_Cost/No_of-Items)

then Average cost displays 0 when there is no No_of _items.

■   More

Alphabetical list of functions (continued)

LN(x)

LN returns the natural logarithm of x. Natural logarithms use the mathematical constant *e* as a base. X must be a number greater than 0.

- Examples

See also EXP.

LOG(x)

LOG returns the base 10 logarithm of X. X must be a number greater than 0.

- Examples

MAX(Field_1,Field_2,...)

MAX returns the largest of the fields and numbers supplied to it as arguments. Blanks are treated as 0.

See also MIN.

- More

Alphabetical list of functions (continued)

MIN(Field_1,Field_2,...)

MIN returns the smallest of the fields and numbers supplied to it as arguments. Blanks are treated as 0.

See also MAX.

MOD(x,y)

MOD divides x by y and returns the remainder. X can be any number and y can be any number other than 0 (you cannot divide by 0). The resulting remainder is positive if x is positive and negative if x is negative.

- Examples
- More

Alphabetical list of functions (continued)

MONTH(DateTimeNumber)

MONTH returns the number for the month of the specified date. It works with dates from 1st January 1900 up to 31st December 2078 using a DateTimeNumber between 1 and 65380. So 1st January 1900 is 2, 2nd January 1900 is 3, 3rd January 1900 is 4 and so on. Because dates are held internally as DateTimeNumbers you can also supply it with a date as the argument.

- Examples

See also DATE, DAY and YEAR.

NOW()

NOW() returns the number which corresponds to the current date and time as reported by the computers built in clock. This is a DateTimeNumber. You can display the date by ensuring that the type of the field is set to one of the date formats. If you don't choose a date type for the field you will just see a number in it.

Note Do not use this function to calculate the date if you want this date to be permanently save with the form data. This is because the function will potentially be recalculated every time the form is opened. Instead, use the Insert Date/Time function to insert the date into the current field.

◼   Examples

See also DATE, DAY, MONTH, YEAR.

◼   More

Alphabetical list of functions (continued)

PI()

PI() returns the mathematical constant 3.1415...., which is an approximation of the value of pi.

◼   Example

PMT((Principal,Rate,NumberOfPeriods)

PMT returns the periodic payments required to service a loan of Principal amount at Rate interest rate per period over NumberOfPeriods. The periodic payments are equal amounts paid at the end of each equal length period.

Since Rate is the interest rate for a single period, if you have a yearly interest rate and want to work with monthly repayments then you will need to divide the yearly interest rate by 12 and give Rate as the monthly interest rate.

The following formula is used to work out the payments:

Principal * Rate / (1 - (1 + Rate)-NumberOfPeriods)

◼   Example
◼   More

Alphabetical list of functions (continued)

PV((Payment,Rate,NumberOfPeriods)

PV returns the present value of an ordinary annuity of equal Payments at interest rate Rate per period over NumberOfPeriods. The payments occur at the end of each period.

It uses the following formula:

(Payment * (1 + (1 + Rate)-NumberOfPeriods)/Rate

◼   Example

RADIANS(x)

RADIANS converts and angle, x, supplied in degrees to radians.

◼   Examples

RAND()

RAND returns a fractional random number between 0 and 1 (it will never actually be 1). This is useful for sampling if you are using the form to carry out simulations. A new random number is generated regularly.

If you want random numbers in a different range then multiply up the value returned by RAND by the range and add on the lowest number in the required range.

| | Examples |
| | More |

Alphabetical list of functions (continued)

RATE(FutureValue,PresentValue,NumberOfPeriods)

RATE returns the fixed interest rate per period needed for an investment of PresentValue to grow to FutureValue over NumberOfPeriods.

The following formula is used:

Rate = (FutureValue/PresentValue)(1/NumberOf Periods) - 1

| | Example |

ROUND(x,Places)

ROUND rounds x to the specified number of Places either to the right or left of the decimal point.

If Places is 0, x is rounded to a whole number. If Places is positive x is rounded to the number of decimal places (i.e. to the right of the decimal point). If Places is negative x is rounded to the number of places to the left of the decimal point. For example, if Places is -2 x is rounded to the nearest hundred.

| | Examples |

SIN(x)

SIN returns the sine of x. X is an angle in radians.

| | Examples |
| | More |

Alphabetical list of functions (continued)

SLN(Cost,Salvage,Life)

SLN returns the amount of depreciation for one period, using the straight line depreciation method. Cost is the cost of the asset, Salvage is the value you expect it to have at the end of its Life. Life is the time you expect the asset to be in use, usually measured in years.

It uses the following formula:

(Cost - Salvage) / Life

| | Example |

SQRT(x)

SQRT returns the square root of x. X must be a positive number. If x is negative SQRT returns

ERR.

◾ Examples

STD(Field_1,Field_2,...)

STD returns the standard deviation of the population of values supplied to it as arguments. Standard deviation gives a measure of how much individual values in the population vary from the mean value of the population. When standard deviation is small most of the values are close to the mean.

See also VAR.

◾ More

Alphabetical list of functions (continued)

SUM(Field_1,Field_2,...)

SUM returns the total of all the numbers supplied to it as arguments. Blank fields are treated as 0 and fields containing text or pictures cannot be used. Dates, however, can be added into numeric totals since they are stored internally as DateTimeNumbers.

SYD(Cost,Salvage,Life,Period)

SYD returns the amount of depreciation for the specified Period, using an accelerated depreciation method, where depreciation is highest at the start of the assets life. Cost is the cost of the asset, Salvage is the value you expect it to have at the end of its Life. Life is the time you expect the asset to be in use, usually measured in years. Period is one of the periods in Life.

It uses the following formula:

$$\text{(Cost - Salvage)(Life-Period+1) / Life(Life+1)/2}$$

◾ Example

See also DDB.

TAN(x)

TAN returns the tangent of x, where x is an angle measured in radians.

◾ Example

◾ More

Alphabetical list of functions (continued)

TERM(Payment,Rate,FutureValue)

Term returns the number of payment periods that it will take for a series of equal Payments earning Rate interest per period to grow to an investment of FutureValue.

It uses the formula:

$$\text{Ln(1 + FutureValue*Rate/Payment) / Ln(1 + Rate)}$$

◾ Example

TRUE()

TRUE returns the logical value 1 which is TRUE. This may sound like a tautology until you realise that its main use is to make IF more easy to understand.

◾ Example

See also IF and FALSE.

◾ More

Alphabetical list of functions (continued)

VAR(Field_1,Field_2,...)

VAR is a statistical function which returns the variance of the population of values supplied to it.

See also STD.

YEAR(DateTimeNumber)

YEAR returns the number for the year of the specified date. It works with dates from 1st January 1900 up to 31st December 2078 using a DateTimeNumber between 2 and 65380. So 1st January 1900 is 2, 2nd January 1900 is 3, 3rd January 1900 is 4 and so on. Since dates are held internally as DateTimeNumbers you can also supply it with a date as the argument.

◾xxxYEAR_DateTimeNumber_examples Examples

See also DATE, DAY and MONTH.

ABS(x) examples

ABS(12) = 12

ABS(-12) = 12

ABS(0) = 0

ACOS(x) examples

ACOS(1) = 0

ACOS(0.5) = 1.047 (PI()/3 radians)

ACOS(0.5) * 180 / PI() = 60 degrees

ACOS(ABS(Field_3)) = arc cosine of absolute value of Field_3

ASIN(x) examples

ASIN(1) = 1.571 (PI()/2 radians)

ASIN(-0.5) = -0.524 (-PI()/6 radians)

ASIN(-0.5) * 180 / PI() = -30 degrees

ATAN(x) examples

ATAN(1) = 0.785 (PI()/4 radians)

ATAN(1) * 180 / PI() = 45 degrees

ATAN2(x-coord,y-coord) examples

ATAN2(1,1) = 0.785 (PI()/4 radians)
ATAN2(1,1) * 180 / PI() = 45 degrees

CHOOSE(Number,Option0,Option1,...) examples

CHOOSE(0,100,200) = 100

CHOOSE(1,"Sue","Pete","Harry") = Pete

If Field_1 contains 2 then:

      CHOOSE(Field_1,1,2,3) = 3

      CHOOSE(Field_1,B1,B2,B3,B4) = value in field B3

COS(x) examples

COS(2.31) = -.674

COS(PI()) = -1

CTERM(Rate,FutureValue,PresentValue) examples

CTERM(5%,5000,2000) = 18.78

CTERM(0.05,5000,2000) = 18.78

DATE(Year,Month,Day) example

DATE(10,12,30) = 4017

DAY(DateTimeNumber) examples

DAY(4017) = 30

If Field_1 holds the date 30/12/1910 then:
DAY(Field_1) = 30

If Field_2 is 27/2/1911 then:
=DAY(Field_2) = 27

DDB(Cost,Salvage,Life,Period) examples

DDB(10000,3000,5,1) = 4000

DDB(10000,3000,5,2) = 2400

DDB(10000,3000,5,3) = 600 (reaches Salvage value)

DDB(10000,3000,5,4) = 0

DDB(10000,3000,5,5) = 0

DEGREES(x) examples

DEGREES(PI()) = 180
DEGREES(ASIN(1)) = 90

ERR() example

IF(Field_1 > Field_2,ERR(),0)

will display !err! in the field if Field_1 > Field_2

EXP(x) examples

EXP(1) = 2.718 i.e. e itself

EXP(2) = 7.389

FALSE() example

IF(Field_1 > 100,TRUE(),FALSE())

This is equivalent to, but more readable than:

IF(Field_1 > 100,1,0)

both give 1 if Field_1 > 100 and 0 if Field_1 <= 100

FV((Payment,Rate,NumberOfPeriods) example 1

£10 per annum at 10% for 2 years is

FV(10,10%,2) = 21

FV((Payment,Rate,NumberOfPeriods) example 2

£10 invested at the start of each year at 10% for 2 years:

FV(10,10%,2) * (1 + 10%) = 23.10

IF(Condition,TrueValue,FalseValue) examples

IF(Field_1 = 5,10,20) returns 10 if Field_1 is 5, otherwise 20

IF(Amount < 100 #AND# Credcode = 5,"Good","Bad") returns "Good" only if Amount is less than 100 and Credcode is 5, otherwise it returns "Bad".

INT(x) examples

INT(2.34) = 2

INT(5.9) = 5

INT(-22.5) = -23

LN(x) examples

LN(16)/LN(2) = 4

LN(EXP(3)) = 3

If Field_11 contains *e*, i.e. 2.718... :
LN(Field_11) = 1

LOG(x) examples

LOG(100) = 2

LOG(10^57.1) = 57.1

If A1 contains 10:
LOG(A1) = 1

MOD(x,y) examples

MOD(25,5) = 0

MOD(4,3) = 1

MOD(-4,3) = -1

MOD(-15,-4) = -3

MONTH(DateTimeNumber) examples

MONTH(4017) = 12

If Field_1 holds the date 30/12/1910 then:
MONTH(Field_1) = 12

If Field_2 is 27/2/1911 then:
=MONTH(Field_2) = 2

NOW() examples

If the date is 16/3/92:

NOW() = 33679

INT(NOW()) = 33679

DAY(NOW()) = 16

PI() example

To find the circumference of a circle with diameter 15 inches:

PI() * 15 = 47.12 inches

PMT((Principal,Rate,NumberOfPeriods) example

Suppose you are going to borrow £5,000 to buy a boat at 14% interest per year, paying off the amount over 2 years with 24 monthly payments:

PMT(5000,14%/12,24) = £240.07 payment amount per month

PV((Payment,Rate,NumberOfPeriods) example

Suppose one of your pension plans has matured and you have the choice of taking a £50,000 lump sum now or receiving payments of £7,000 per annum for the next 15 years. You think that inflation will be 5% over the next 15 years. You can work out the present value of the £7,000 annuity with PV:

PV(7000,5%,15) = £72,657

RADIANS(x) examples

RADIANS(180) = 3.14159 i.e. pi.

SIN(RADIANS(90)) = 1

RAND() examples

To get random numbers between 1 and 10:
1 + RAND() * 9

To get whole random numbers between 100 and 1,000:

INT(100 + RAND() * 900)

RATE(FutureValue,PresentValue,NumberOfPeriods) example

You have bought a valuable antique for £10,000 and expect that it will be worth £15,000 in 5 years time. What is the rate of return on your investment:

RATE(15000,10000,5) = 8.45%

ROUND(x,Places) examples

ROUND(13.457,2) = 13.46

ROUND(22.35,1) = 22.4

ROUND(22.34,1) = 22.3

ROUND(146.78,0) = 147

ROUND(453,-1) = 450

SIN(x) examples

SIN(30 * PI()/180) = 0.5

SIN(1.57) = 1

SLN(Cost,Salvage,Life) example

You buy a car for £15,000 which you expect to last for 6 years and then sell for £4,500. SLN can be used to find the straight line depreciation:

SLN(15000,4500,6) = £1,750

SQRT(x) examples

SQRT(4) = 2

SQRT(9) = 3

SYD(Cost,Salvage,Life,Period) examples

You buy a car for £12,000 which you expect to last for 5 years and then sell for £1,000. SYD can be used to find the depreciation for the second year and third year:

SYD(12000,1000,5,2) = £2,933

SYD(12000,1000,5,3) = £2,200

TAN(x) example

TAN(PI()/4) = 1

TERM(Payment,Rate,FutureValue) example

Suppose that at the end of every year you put aside £1000 into a savings account which earns interest at a fixed 9.5% per annum. TERM can tell you how many years it will take to save £10,000:

TERM(1000,9.5%,10000) = 7.35 i.e. 8 years

TRUE() example

IF(Field_1 > 100,TRUE(),FALSE())

This is equivalent to, but more readable than:

IF(Field_1 > 100,1,0)

both return 1 if Field_1 > 100 and 0 if Field_1 <= 100

YEAR(DateTimeNumber) examples

YEAR(4017) = 10

If Field_1 holds the date 30/12/1910 then:
YEAR(Field_1) = 10

If Field_2 is 27/2/1911 then:
=YEAR(Field_2) = 11

ODBC Errors

This section describes things that can go wrong when using Forms with databases - both automatically   created ones, and when linking to foreign databases.

There are two types of error that you might see.

1. If the program detects that an ODBC error has occurred, it will display the ODBC Error Dialog.:
   This tells you the ODBC error code and the statement (if any) that prompted this error

2. Error messages are sometimes shown by the Administrator and Drivers you use.   They will typically be a message box containing a small message and an OK button.   Click for example.

When Forms creates an automatic table, or links to an existing database, then connection between the form and the data is through an ODBC **Data Source.** This is maintained by the ODBC **Administrator**, found in the Control Panel.
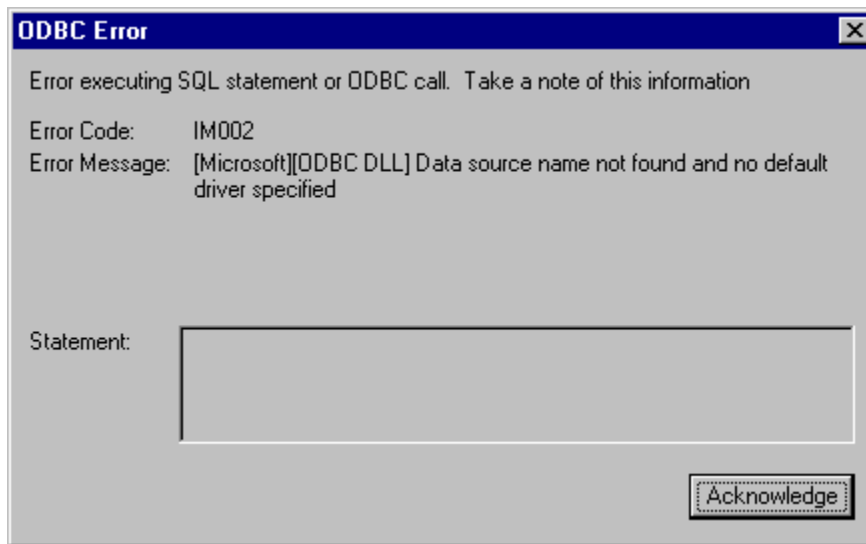
See:

Common Errors

Common Errors

1. If the data source is removed from the list that the Administrator maintains, then when Forms tries to connect to that source, you will get an ODBC error, code IM0002.
To correct the problem, the data source must be restored.
  See: <u>Setting Up A Database</u>.

2. The Automatic databases created by Forms use a particular file to store there data.   This file is an Access database file (xxxxxxxx.mdb) and is specified when you first create a connection.   If that file is deleted or moved, then you will get an Administrator error "Cannot find file '|'".   To correct the problem, the file must be either restored to its original location, or the data source reconfigured (with the Administrator) to specify where the file now is.

3. If a data source is not multi-user (as is the case for Forms' Automatic databases), and it is already in use,   then you will get errors when trying to connect to that source.
Typically, the ODBC Driver will prompt you for a login name and password.   Forms Automatic databases will provide "Admin" as a login name.   You will not be allowed to login to the source, and after the Driver has finished, Forms will tell you that it failed to connect to the data source.

4. Automatic databases also have a second file for storing images.   This will start in the same place as the Access file, with extension .ofi.   If this file should be moved or deleted, you will be prompted by Forms to find it.   If it is not found, then no picture services will be available when filling the form.

ODBC Error Dialog

ODBC Error

Error executing SQL statement or ODBC call. Take a note of this information

Error Code: IM002
Error Message: [Microsoft][ODBC DLL] Data source name not found and no default
                 driver specified

Statement:

Acknowledge

This tells you the ODBC error code and the statement (if any) that prompted this error

Example Of Driver Error Message