

Lotus cc:Mail

Release 6

Forms Tutorial

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Chapter 1

Overview

Welcome to *Lotus cc:Mail Forms™ Tutorial*. This tutorial is designed to provide you with firsthand experience using cc:Mail Forms Designer to create forms. Its lessons are designed to help you with the following activities:

- Try out a range of cc:Mail Forms features
- Quickly test modifications that you have made to forms
- Understand a host of additional product capabilities

After completing several lessons, you'll discover how cc:Mail Forms helps to eliminate paperwork and streamline business tasks.

The tutorial lessons are designed to be used with the cc:Mail Forms Designer software. The guide directs you through setting up the software and completing the tutorial lessons.

Audience

Lotus cc:Mail Forms Tutorial is intended primarily for application developers, designers of electronic forms, and technical software evaluators. Additionally, if you are responsible for workflow automation or application integration, then this guide is for you.

Organization

Lotus cc:Mail Forms Tutorial includes the following chapters:

- The Overview chapter is the introduction you are currently reading.
- The Getting Started chapter covers system requirements and shows you how to open and close lesson files.
- The Tutorial Lessons in Chapters 3 through 9 provide complete directions for working with and testing a diverse set of sample forms.

The Tutorial Lessons

Seven lessons are included in the tutorial. Each is designed to showcase a specific group of cc:Mail Forms Designer features and capabilities. Because these lessons are independent of one another, you may elect to complete any of the lessons in any order. In addition to step-by-step instructions, each lesson discusses a host of related product functions that may be of interest to you.

The lessons cover the following topics:

- Designing GUI forms
- Making paper-based forms electronic
- Modifying field properties
- Setting mail stops and routing lists
- Linking databases
- Customizing forms
- Using the filler to test the forms

The forms used in these lessons are developed for a fictional company. Mercury Sports, Inc. is a \$24 million corporation. With just over 200 employees, Mercury Sports conducts business in dozens of locations around the world. Senior management has decided to use desktop systems to end the paper chase at Mercury Sports. By designing and implementing electronic forms, the company could automate paperwork across company LANs and WANs.

Other Documentation

In addition to *Lotus cc:Mail Forms Tutorial* and activity files, several other resources are of value as you use and evaluate the software.

cc:Mail Forms Application Developer's Guide

Lotus cc:Mail Forms Application Developer's Guide fully documents how to use the product. It covers basic concepts for most features as well as step-by-step procedures. Examples, shortcuts, and useful illustrations are also included.

Several valuable appendices discuss customizing SmartIcons®, LotusScript™ commands, and electronic signature security.

LotusScript Language Reference

LotusScript Language Reference provides information about LotusScript, a BASIC-compatible programming language that can be used within cc:Mail Forms applications.

Getting Started with Sample Forms

Lotus cc:Mail Forms Getting Started with Sample Forms introduces experienced forms application developers to the power and flexibility of cc:Mail Forms through a series of sample form applications. These samples offer developers the opportunity to explore form templates, view routing and tracking information, examine the use of LotusScript, enter actual data, and run the forms. The Sample Forms section of Help offers complete details for understanding and running each of the sample applications.

Help

Lotus cc:Mail Forms Designer Help complements both *Lotus cc:Mail Application Developer's Guide* and *Lotus cc:Mail Getting Started with Sample Forms*. Help documents product features and provides step-by-step descriptions, procedures, examples, and conceptual information.

A Quick Look at cc:Mail Forms Features and Benefits

The following brief summary introduces you to the most important cc:Mail Forms Designer features and benefits.

cc:Mail Forms is a powerful and flexible software development environment for creating electronic forms that automate workflow across LANs and WANs.

cc:Mail Forms includes the following features:

- Designer, a graphical environment for designing, developing, and implementing forms
- LotusScript, a robust programming language similar to BASIC, that lets you extend the power of cc:Mail Forms and build custom applications

Create intelligent, professional-looking forms in record time

- Quickly create, size, and position text fields, command and option buttons, list and combo boxes, check boxes, tables, static text, and graphic images simply by pointing and clicking your mouse.
- Use convenient, pop-up property boxes to design distinctive-looking forms. Select fonts, styles, point sizes, text and background colors, and text justification.
- Use the object library to copy sample objects, complete with attributes and script, into your forms. Add your own objects to the object library for use in other forms.
- Save time by customizing page layout, using rulers, zooming in and out, and duplicating objects. Increase accuracy by setting alignment guides, selecting measurement scales, and displaying precise object positions and dimensions.
- Speed form development by scanning existing paper forms and using these as background images.
- Use the spell checker to proof your form templates and documents.

Develop advanced forms applications

- Take full advantage of the ability to specify field types, set field properties, program field operations, include any number of fields within a form, and mail form templates and data or data only to recipients.
- Easily identify form routing, define routes based on roles databases, establish form tracking databases, specify serial or parallel, ad hoc, and conditional routing of forms, and route forms via Lotus Notes®, Lotus cc:Mail™, or any other VIM®- or MAPI-compatible messaging system.
- Use point-and-click simplicity to establish database links. Use ODBC drivers to retrieve data from popular database formats including dBASE®, Oracle®, Microsoft® SQL Server, DB2/2™, Lotus Notes, and Paradox®. Offer users the power to perform calculations and populate fields with information from corporate databases.
- Incorporate functionality based on DDE, OLE, MDI, ODBC, and RSA compliance. Exploit the benefits of remote access support and Lotus Notes/FX interoperability.
- Extend, customize, and optimize forms with the LotusScript 3.0 programming language.

Make it easy for users and administrators

- Take advantage of the easy-to-use Filler to ease and speed form completion by end users. Use the built-in red pen tool to highlight entries and attach annotations with the pop-up note editor.
- Create applications that reflect a standard look and feel by relying upon SmartIcons, SmartStatus bars, and other ease-of-use features common to all Lotus® products.
- Provide users with customized, form-specific help (down to the individual field level) to facilitate data entry and form completion.
- Use the File - Process Next Form command so that users can open and process forms attached to mail messages without having to exit and restart the Filler.
- Store your form template (.LTM) files in a Notes™ database or cc:Mail bulletin board.

Work together with cc:Mail and other applications

- Distribute your electronic forms to individuals, workgroups, the entire company, and beyond using Lotus cc:Mail.
- Distribute forms as standard file attachments using e-mail directories or address books to define routes.
- Integrate cc:Mail Forms with Lotus 1-2-3®, Lotus Ami Pro®, and other applications through DDE.
- Let users easily access and update form information from Lotus Notes databases.

Approve forms electronically

- Use password security to protect forms from unauthorized access.
- Allow managers to electronically validate and approve forms based on RSA signature authentication.

Automate workflow

- Create and implement fully-automatic, client-based form workflow models as enterprise-wide business solutions.
- Facilitate the setup and management of form routing through the use of roles databases.
- Establish conditions for form routing based on user entries, specify serial or parallel routing paths, and provide for user-specified routing modifications.
- Easily monitor the movement and progress of company forms. Provide automatic receipt confirmation to the originator of a form and utilize direct tracking through a database.

Chapter 2

Getting Started

This chapter provides information on the following tasks:

- Checking system requirements
- Installing the cc:Mail Forms tutorial files
- Opening and closing tutorial files
- Checking System Requirements

To take full advantage of cc:Mail Forms Designer, make sure your system meets the following requirements:

- IBM® PC or compatible, 386 or higher (486 recommended for Designer)
- Minimum 4MB RAM
- 20MB free disk space for Designer
- 10MB free space for Filler
- Microsoft Windows® 3.1 or later release
- VGA or higher graphics card and monitor
- Mouse or pointing device recommended
- VIM- or MAPI-compatible mail system required for form routing
- Lotus User ID (generated from Client edition of Lotus Notes Release 3 or later release) required for RSA signature support.

Note The sample Post Office that ships with cc:Mail Forms contains the necessary ID files for the activities in this guide.

Installing the Tutorial Files

The tutorial files are automatically installed when you install cc:Mail Forms Designer. Refer to Chapter 1 of *Lotus cc:Mail Forms Application Developer's Guide* for complete instructions on installing cc:Mail Forms Designer.

The Sample Post Office

During the cc:Mail Forms Designer installation process, a sample cc:Mail post office is installed. This post office is located in the directory, designer\work\samples, or in the directory you specified during installation.

The following table lists the names, passwords, and signature ID files you will use in these lessons.

<i>Name</i>	<i>Password</i>	<i>ID File</i>
Pam Ressler	pr	PRESSLER.ID
Shane DiCristina	sd	SDICRIST.ID
Matt Mai	mm	MMAL.ID
Liz Murray	lm	LMURRAY.ID
Jeff Falco	jf	JFALCO.ID
Zac Blanchette	zb	ZBLANCHE.ID

Using the Tutorial Files

To open a lesson file

1. Choose File - Open Form Template.
2. Specify the template you want to open by doing one of the following:
 - Enter the template name in the File Name box.
 - Use the File Name, Directories, and Drives lists to select the template you want.
3. Click OK.

cc:Mail Forms opens the template in a Designer window and makes it the active window. Other windows remain open.

To display an open template in a Filler window

As you use the tutorial files, you will need to switch to Filler mode to enter and edit data, perform queries, or complete other application-specific functions. To switch to the Filler, follow these steps:

1. Make certain that the template you want to display in the Filler is the active window.
2. Choose View - Filler Mode.

The form is displayed in the Filler.

Note You can also press F7 to switch between the Designer and the Filler.

To close a lesson file

When you finish working with a lesson file and want to close it, follow these steps:

1. Make certain the template you want to close is the active window.
2. Choose File - Close Form Template or double-click the Control menu box of the Designer window you selected.

If you modified the template, but didn't save the changes, cc:Mail Forms indicates that the template has changed and asks whether you want to save the changes before closing.

Completing the Lessons

The following chapters present seven different forms and lessons. Each form highlights a set of features that demonstrates how cc:Mail Forms streamlines the electronic forms process.

Each lesson gives an overview to help you determine which one to explore based on general interest or specific features covered. Information for each lesson is then organized under the following headings:

- A Completing This Lesson section providing step-by-step instructions for each lesson
- A Using Other Features of This Form section pointing out additional form features

You may complete the lessons in any order. While some forms specifically instruct you to switch to the Filler, you may do this with any of the lessons. In some cases the lessons include mailing instructions, but even if this is not the case, once you have completed a lesson, you may wish to experiment further using the sample post office.

Chapter 3

Designing GUI Forms

This lesson demonstrates the value of graphical form design. It highlights the ease with which a plain form is transformed into an impressive, professional-looking form for gathering and distributing information.

The lesson includes step-by-step instructions for the following tasks:

- Aligning a field
- Aligning multiple fields
- Changing the color of the page
- Selecting a range of fields and changing field properties
- Adding an image
- Applying styles to form elements
- Changing button labels from text to bitmaps

The lesson starts with a partially completed form, which you will modify.

Completing This Lesson

Before you begin this lesson, cc:Mail Forms Designer should be open and the Form Directory field (in the cc:Mail Forms Preferences dialog box) set to the path \DESIGNER\WORK\TUTORIAL on the drive where you installed cc:Mail Forms.

Set cc:Mail Forms preferences

1. Choose File - cc:Mail Forms Preferences.
2. Set the Form Directory field to *drive*\designer\work\tutorial, where *drive* is the letter of the disk drive where cc:Mail Forms is installed.
3. Click OK.

Open the form template

To open the form template ACT_1A.LTM, follow these steps:

1. Choose File - Open Form Template.

The Open Form Template dialog box appears.

Tip You can also click the Open File SmartIcon to open a template.

2. Select ACT_1A.LTM.
3. Click OK.

The lesson form appears.

The screenshot displays the 'cc:Mail Forms Designer - ACT_1A.LTM' window. The form is titled 'Third Annual Karyak Jamboree' and 'Entry Application'. It contains the following elements:

- Print** and **Send** buttons on the left.
- Form fields: **Last Name**, **First Name**, **Street**, **Phone**, **City**, **State**, and **Zip Code**.
- Payment method buttons: **Amex**, **Visa**, and **MC**, each followed by a four-digit input field.
- Status Bar** at the bottom: 'Field Values: Avoid', '10:\C:\DESIGNER\WORK\TUTORIAL\ACT_1A.LTM', and '100%' zoom.

Display rulers and guides

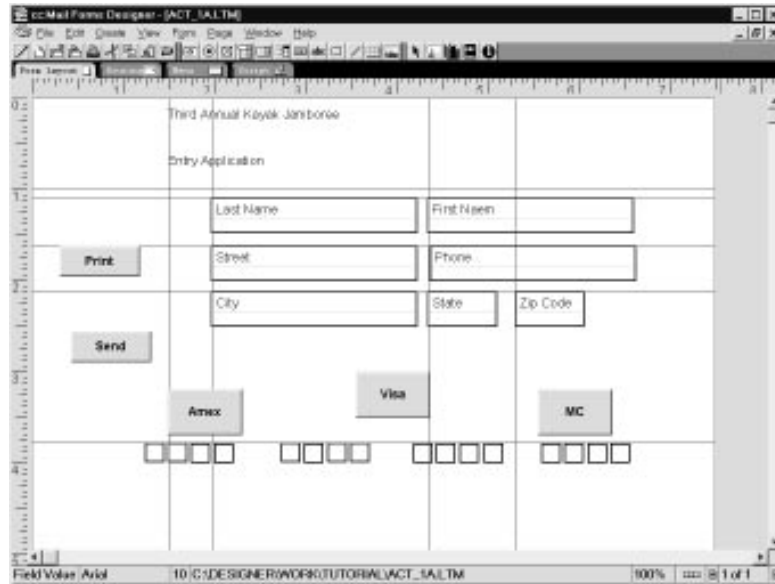
To display the vertical and horizontal rulers and the guides set for this form, follow these steps:

1. Choose View - Rulers and Guides.
2. Choose Show Rulers.

The vertical and horizontal rulers appear.

3. Choose View - Rulers and Guides.
4. Choose Show Ruler Guides.

The ruler guides specified for this form appear. You can move a ruler guide by selecting it and dragging it to a new position.



Add a ruler guide

To add a ruler guide for the Print and Send buttons, follow these steps:

1. Click the 1/4-inch mark on the horizontal ruler.
A new guide line appears.

2. Choose View - Rulers and Guides.
3. Choose Snap to Guides.

When you move a layout object near the ruler guide line, the object automatically snaps into position.

Align the Print and Send buttons

With the ruler guides visible and Snap to Guides on, align the Print and Send Buttons by selecting and moving each button.

1. Click and hold the pointer on the Print button and drag the button near the guide.
2. Repeat this process to move the Send button into position.

Hide guides

To turn the Guides and Snap to Guides off (unchecked), follow these steps:

1. Choose View - Rulers and Guides.
2. Choose Show Ruler Guides.
3. Choose View - Rulers and Guides.
4. Choose Snap to Guides.

Align the credit card buttons

To align the credit card buttons using the Align menu item, follow these steps:

1. Position the pointer just to the left of the Amex button (at about the 1-inch mark on the horizontal ruler and the 3-inch mark on the vertical ruler), and then press and hold the left mouse button.
2. Move the pointer so that the dotted line surrounds the three credit card buttons, and then release the mouse button.

The selection handles for all three buttons appear. Notice that any objects within the dotted line are selected.

Note If you select more than the button objects, click an empty area of the page to deselect all objects and repeat steps 1 and 2.

3. Choose Edit - Align.
4. Choose Top.

The three credit card buttons align to the top of the first selected button.

Modify field properties

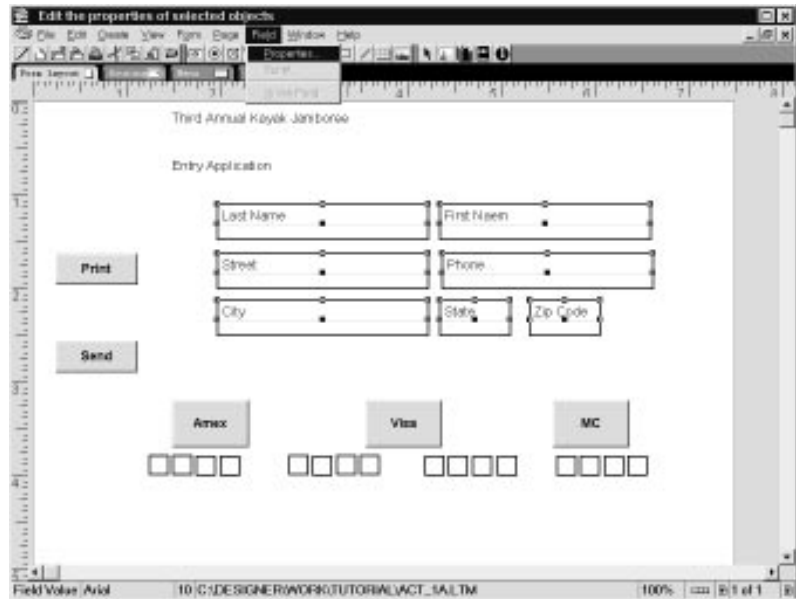
To modify field properties such as color and 3D properties, follow these steps:

1. Select the personal information fields. You should begin just to the left of the Last Name field and drag the dotted line to the Zip Code field.

Note If you select more than the personal information fields, click an empty area of the page to deselect all objects, and then repeat step 1.

Tip You can also select multiple fields by clicking the first field and holding the Shift key while you click additional fields.

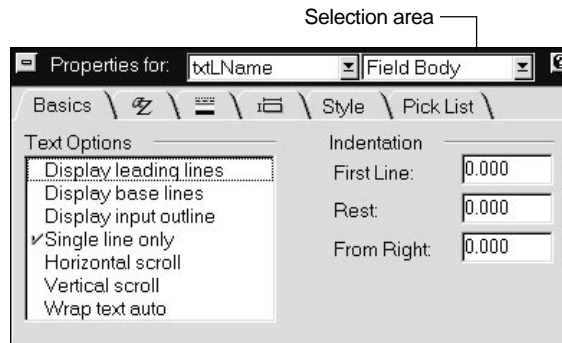
2. Choose Field - Properties.



The field properties box appears.

Tip You can also display a properties box by clicking the right mouse button on an object and selecting Properties from the Quick menu.

Note If the properties box covers an object you want to view, double-click the title bar to reduce the size. Double-clicking the title bar of a reduced properties box restores it to full size. You can move the properties box by positioning the pointer on its title bar and dragging it to a desired location.



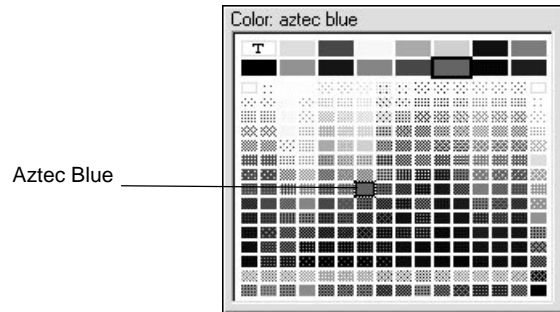
3. Click the pointer in the Selection area of the properties box and select Field Frame.
4. Click the Background and Line tab.



- Click the Background Color list and select Aztec Blue from the color palette.

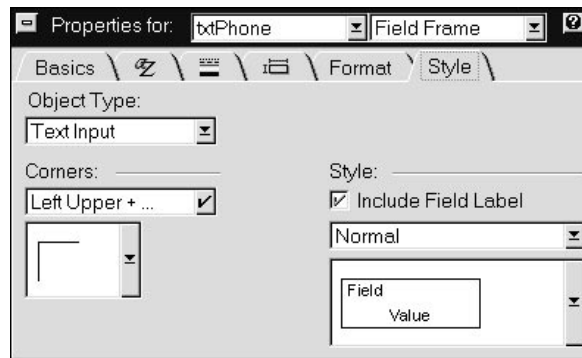
Aztec Blue is in the eighth row of the color palette, seven in from the left.

Tip To display the name of any color in the palette, hold down the left mouse button as you move within the palette. The name of each color appears in the top left of the palette.



- 6. Click the Style tab.**

The properties box Style panel appears.



- Click the arrow in the Style box where Normal appears and then select 3D In.

Modify the page color

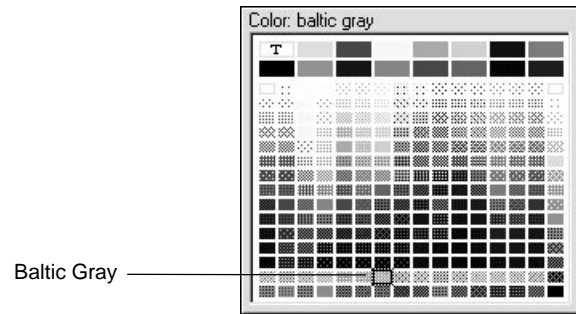
To change the background color of this form (set the page color), follow these steps:

1. With the properties box open, click an area of the form that contains no other object.

The properties box now displays Page 1 in the Object area.

2. Click the list under Page Color and select Baltic Gray.

The page color changes.



Modify field label style

To change the field labels style, follow these steps:

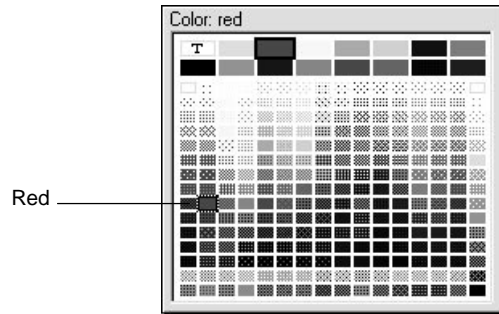
1. Choose Form - Define Text Styles.
2. Click the list for Style Name and select Field Label.
3. Under Style, select Bold.
4. Click OK.

The text for all field labels is now bold.

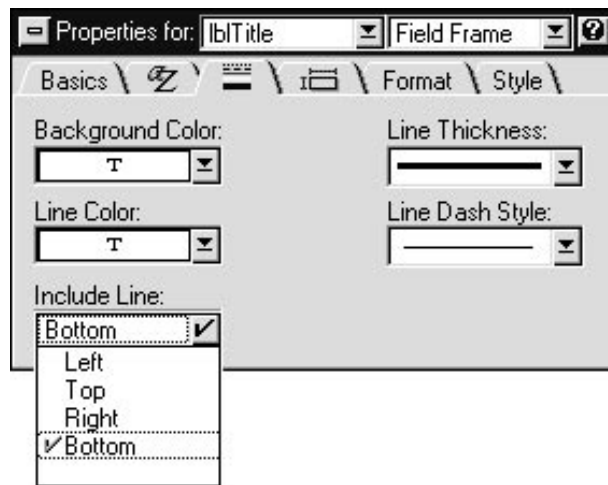
Modify the form title

To apply an existing style to the title field (Third Annual Kayak Jamboree) and add an accent line, follow these steps:

1. With the properties box open, click the title field.
The properties box object field displays lblTitle, the name of this field.
2. Click the Background and Line tab for the Field Frame.
3. Click the Line Color list and select Red.



4. Click the Include Line list and click on Bottom.
A check mark indicates that Bottom is selected.



- Click the Object style area in the lower left corner of the status bar.
A pop-up list appears.

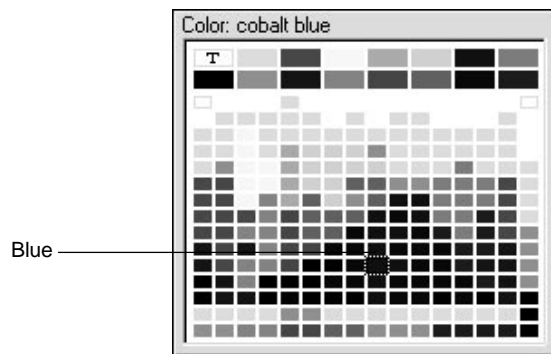


- Click Title.
The title appears in the typeface and size of the style.

Modify the form subtitle

To modify the subtitle of this form (Entry Application), follow these steps. The steps are similar to those you used to modify the form's title.

- With the properties box open, click the subtitle field of the form.
The properties box object field displays lblSubtitle, the name of this field.
- Click the Background and Line tab for the Field Frame.
- Click the Line Color list and select Blue.



- Click the Include Line list and click on Top.
A check mark indicates that Top is selected.
- Click the Object style area in the lower left corner of the status bar.
A pop-up list appears.
- Select Subtitle.
The subtitle appears in the typeface and size of the style.

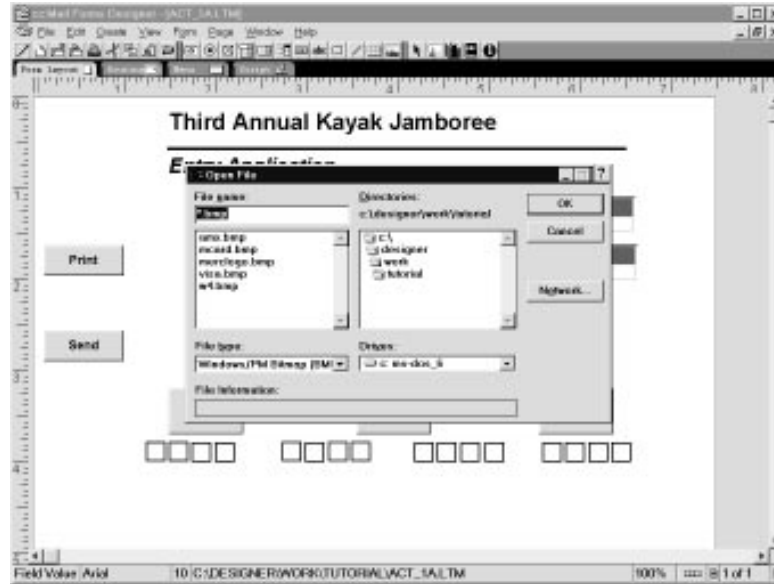


Add the Mercury Sports logo

To add the Mercury Sports logo to the form, follow these steps:

1. Click the Create Picture SmartIcon.
2. Position the pointer in the upper left corner of the form (close to 0 on both rulers) and click.

The Open File dialog box appears.



3. Select MERCLOGO.BMP from the File name list.
4. Click OK.

A message indicates that the image is being imported. The logo appears in the upper left corner.

Resize the Mercury Sports Logo

Once you add a bitmap to a form, you can easily resize it. To resize the Mercury Sports Logo, follow these steps:

1. Click the Mercury Sports Logo.
Selection handles appear on the bitmap.
2. Click and drag the bottom middle selection handle until the bottom of the bitmap reaches the vertical ruler guide set at 1 inch.

As you drag the mouse, the bitmap is resized.

3. Release the mouse button.

Tip You can precisely resize, position, and crop a bitmap using the Picture properties box. To display the properties box, select the picture object and then choose Picture - Properties.

Modify the credit card buttons

The final change to this form is to add images of credit cards to the respective buttons. The same procedure is used for each of the three buttons. To include images on the credit card buttons, follow these steps:

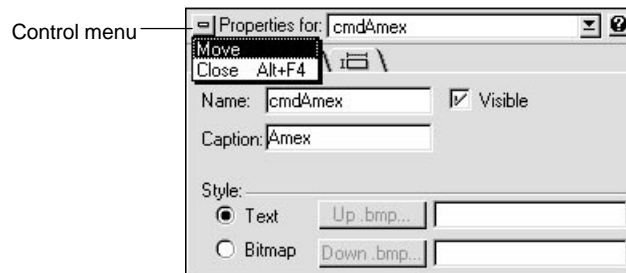
1. With the properties box open, click the credit card button.
The object area of the properties box displays the name of the button (cmdAmex for American Express®, cmdVisa for Visa®, and cmdMC for Master Card®).
2. Click the Bitmap option button under Style on the Basics tab of the properties box.
3. Click the Up.bmp button.
The Open File dialog box appears.
4. Select AMX.BMP.
5. Click OK.

This places the American Express bitmap on the credit card button. Repeat the steps for the other bitmaps.

Close the properties box

To close the properties box, follow these steps:

1. Click the properties box control menu.
2. Choose Close.



Turn off the rulers

To turn the rulers off, follow these steps:

1. Choose View - Rulers and Guides.
2. Click Show Rulers.

Proof the form

Once you've created a form, it's a good idea to check the spelling of text in the form. To spell check this form, follow these steps:

1. Choose Edit - Spell Check.
When a misspelled word is found, in this case Naem, the Check Spelling dialog box appears.
2. To replace the misspelled word, double-click the first word (Name) in the Guesses box.
cc:Mail Forms replaces the misspelled word and continues to spell check the form.
3. When the dialog box appears again, choose Done.
The Spelling Complete message appears.
4. Click OK.

See Chapter 4 in *Lotus cc:Mail Forms Application Developer's Guide* to find out more about spell checking.

View the form in the Filler

The form is now ready for use. To switch to Filler mode, follow these steps:



1. Choose View - Filler Mode.
You can also switch to the Filler mode by clicking the first SmartIcon in the SmartIcon palette.
2. Choose File - Close Form to return to Designer mode. If you are asked to save the form, choose No.

Close the form template

To close the form template, follow these steps:

1. Choose File - Close Form Template.
2. Choose No to end the work session without saving the template.

Note The template ACT_1B.LTM is a completed version of this form.

Using Other Features of This Form

- While this form appears in the Filler, the fields for the credit card numbers are not visible. These fields are made visible with LotusScript attached to the credit card buttons. To view the code that makes these fields visible, click the Script tab in Designer mode and select one of the credit card buttons (cmdVisa, cmdMC, or cmdAmex) from the object list.
- The Send button is used to send the form to Pam Ressler using the sample Post Office. To view the LotusScript for the Send button, click the Script tab and select the object cmdSend from the object list.
- The Print button is used to print the form. To view the LotusScript for the Print button, click the Script tab and select the object cmdPrint from the object list.

Chapter 4

Making Paper-based Forms Electronic

This lesson shows how quickly paper-based forms can be transformed into electronic versions. Using an image of a W-4 form as a background, you can add objects for the different input fields.

The lesson includes step-by-step instructions for the following tasks:

- Adding a background image
- Creating new fields
- Changing the object type of a field
- Using the Duplicate feature to create and place new objects
- Copying and Pasting fields
- Placing and sizing fields
- Specifying the tab order for the form
- Specifying field formats
- Adding Print and Send buttons

Completing This Lesson

Before you begin this lesson, cc:Mail Forms Designer should be open and the Form Directory field (in the cc:Mail Forms Preferences dialog box) set to the path \DESIGNER\WORK\TUTORIAL on the drive where you installed cc:Mail Forms.

Set cc:Mail Forms preferences

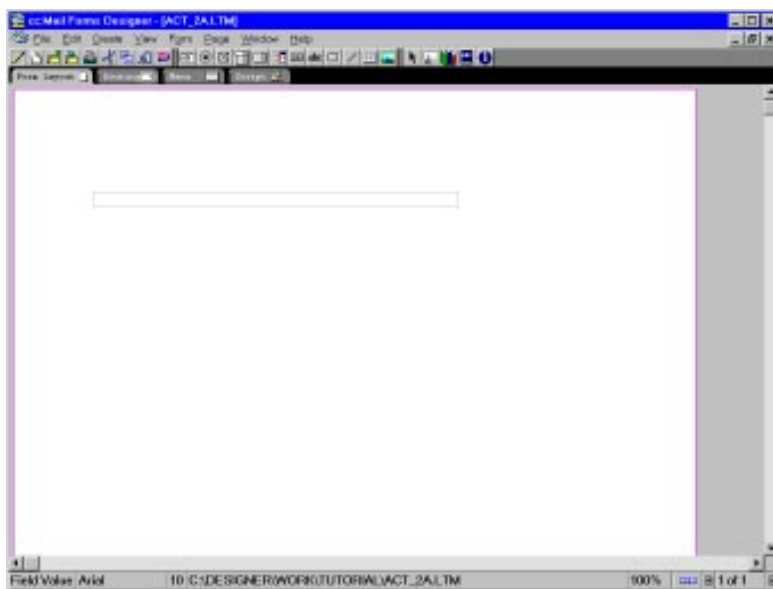
1. Choose File - cc:Mail Forms Preferences.
2. Set the Form Directory field to *drive\designer\work\tutorial* where *drive* is the letter of the disk drive where cc:Mail Forms is installed.
3. Click OK.

Open the form template

To open the form template ACT_2A.LTM, follow these steps:

1. Choose File - Open Form Template.
The Open Form Template dialog box appears.
2. Select ACT_2A.LTM.
3. Click OK.

The lesson form appears. Note that there is a single field already in the form. You will work with the field later in this lesson.



Turn off the Snap to Ruler

To allow for placement of objects in predetermined locations of the form, follow these steps:

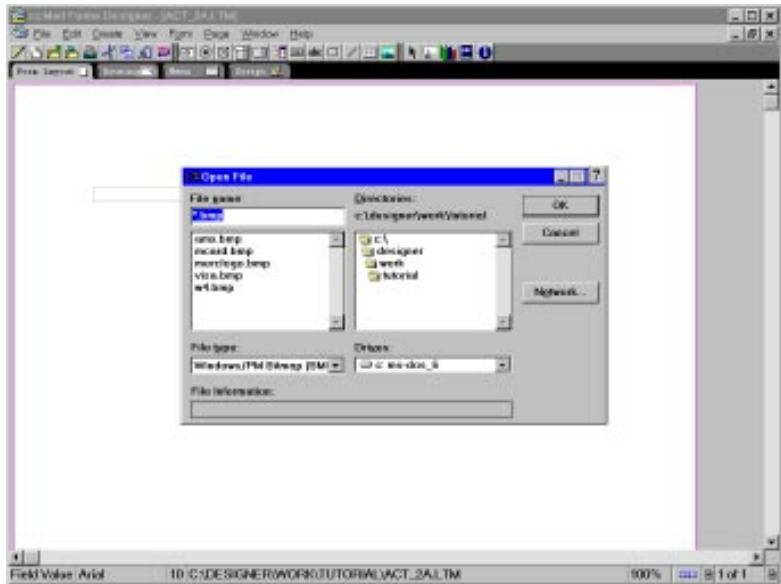
1. Choose View - Rulers and Guides.
2. Choose Snap to Rulers.

Add the image of the form

To add the image of the W-4 form, follow these steps:

1. Click the Create Picture SmartIcon.
2. Click the upper left corner of the form.

The Open File dialog box appears.



3. Select W4.BMP.
4. Click OK.

The image of the W-4 form appears.

Move the image to the background

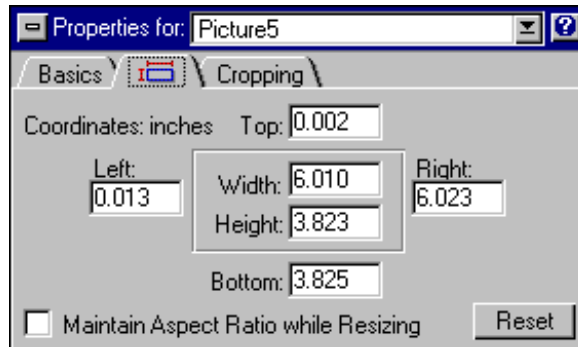
To ensure that the fields added to this form are placed precisely, follow these steps:

1. Choose Edit - Send to Back.

The image of the W-4 form moves to the background of the page and the field outline is visible.

2. Choose Picture - Properties.

The properties box appears.



3. On the Position panel, set the values for both the Top and Left to 0.000.

Note If the properties box covers an object you wish to view, double-click the title bar to reduce the size. Double-clicking the title bar of a reduced properties box restores it to full size. You can move the properties box by placing the pointer on its title bar and dragging it to the location you want.

Position the field on the form

To position the first field over the name area of the W-4 form, follow these steps:

1. Click the blank field in the foreground of the form.

The name Field1 appears in the Object area of the properties box and Field Frame appears in the Selection area.

2. Click and hold the mouse button over the field and drag the field into position over the name area of the form.

The left edge of the field frame should line up with the word "Type."

Split the field to create additional fields

To create additional fields with the same properties as the existing field, follow these steps:

1. Double-click the Split Tool SmartIcon.

The Split Tool cursor appears.

Tip Double-clicking an icon allows you to perform an action multiple times.

2. Position the cursor to the left of the midpoint of the field under the second "d" of middle and click the mouse button.



3. Move the split cursor to the right approximately 1/2 inch and click the mouse button.

The original field has now been divided into three fields. Each new field can be moved and sized as desired.



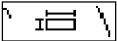
4. Click the Standard Cursor SmartIcon.
5. If necessary, click and drag each field to move it to the desired position.

Tip You can precisely position an object by selecting it and then moving it with the cursor keys.

Create fields for the Social Security Number

Another way additional fields can be created is with Copy and Paste. To copy and paste additional fields, follow these steps:

1. Click the field created for the middle initial in the name field.
2. Choose Edit - Copy.
3. Choose Edit - Paste.
4. Position the cursor over the first Social Security number area and then click the mouse button to add the field to the first section of the Social Security number.
5. Click the Paste SmartIcon, position the cursor over the second Social Security number, and click the mouse button. Repeat this process for the third field.
6. Position and size the fields.



To position objects precisely, click the Position tab of the properties box and enter numeric placement values. The width for the three Social Security fields should be .38, .35, and .45 respectively. Position them so that the vertical lines on the underlying bitmap appear between the fields.

Create fields for the address

The address fields also can be created using Copy and Paste. To add these fields, follow these steps:

1. Click the field created for the last name in the name field.
2. Click the Copy SmartIcon.
3. Click the Paste SmartIcon.
4. Position the cursor over the area for Home address and click the mouse button.
5. Repeat steps 3 and 4 for the city, state, and zip field.
6. If necessary, position and size the fields.



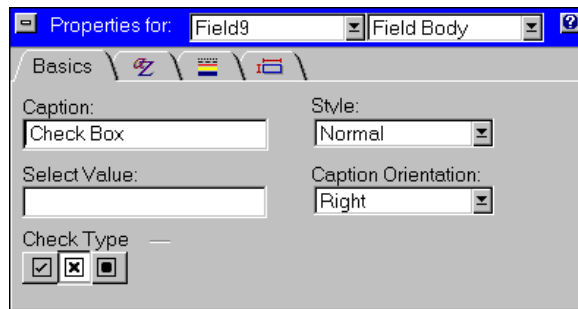
Create a check box for the marital status

cc:Mail Forms lets you easily change the object type. To change a text field to a check box, follow these steps:



1. With the last name field still copied to the clipboard, click the Paste SmartIcon.
2. Position the cursor near the marital status area of the form and click the mouse button.
3. Click the Style tab of the properties box.
4. Click the list for Object Type and select Check Box.
5. Click the list in the Selection area and select Field Body.

The Basics panel for field body properties appears.



6. Press Delete.
7. Click the Background and Line tab.
8. Click the list for Background Color.
9. Select White from the color palette.



Using White hides the existing check box on the W-4 image.

Size and position the check box

To choose the size and position of the check box, follow these steps:

1. Click the list in the Selection area and select Field Frame.
2. Click the Position tab.
3. Enter .4 in the Width field.
4. Click the check box and position the frame over the W-4 image's check box for the category Single.

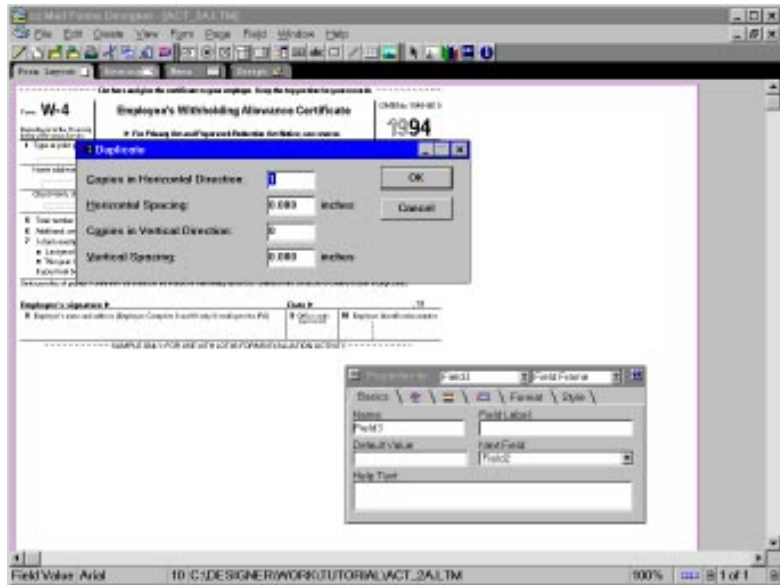


Tip To position objects more precisely, select the object and move it with ↑↓← and →.

Duplicate the check box

To duplicate the check box you just created, follow these steps:

1. With the field frame for the check box selected, choose Edit - Duplicate.
The Duplicate dialog box appears.



2. Enter 2 in the Copies in Horizontal Direction field.
3. Enter .35 in the Horizontal Spacing field.
4. Click OK.
5. Click the check boxes and position them over the two remaining marital status check boxes.

Tip To position an object precisely, select it and then move it with $\uparrow\downarrow\leftarrow$ and \rightarrow .

Add an additional check box

To create the last check box on this form, follow these steps:

1. Click one of the check box fields.
2. Choose Edit - Copy.
3. Choose Edit - Paste.
4. Position the cursor over the check box for item 4 on the form and click the mouse button.
5. Position the check box.

Add the remaining fields to the form

The remaining fields can be added to the form by following the procedures listed in the preceding section. Select, copy, and paste the fields. Size the fields so that they accept the information required. If you wanted to use this form, you would want to use the properties box to specify field formats.

Note A completed version of this form (ACT_2B.LTM) is included with the tutorial files.

Add a print button

The W-4 form can be printed in either the Designer or the Filler by selecting the Print option on the File menu. You can facilitate the printing of the form in the Filler by adding a print button for users. A quick way to add a print button is to use one of the objects in the object library.

1. Choose File - Object Library.

The Object Library window appears.

2. Under Category, choose Filler Menu Items.
3. Under Object, choose File Print Button.
4. Click Copy To Form.

The cursor shape changes.

5. Position the cursor on the form and click to place the Print button.

Note The button should be placed in a convenient spot on the form. The button will not print when a user prints the W-4 form.

6. To close the object library window, click Close.

The form can now be printed from the Filler by clicking the Print button.

See Chapter 4 in *Lotus cc:Mail Forms Application Developer's Guide* for information on the object library.

Test the form in the Filler

To test the form, switch to Filler mode by following these steps:

1. Click the Switch to Filler SmartIcon.

The W-4 form appears and accepts input in the fields created.

2. Click the Print button.

The Print dialog box appears.

3. Click OK.



Return to the Designer

When you are done, return to Designer mode by choosing File - Close Form. If you are asked to save the form, choose No.

Close the form template

To close the form template, follow these steps:

1. Choose File - Close Form Template.
2. Choose No to end the work session without saving the template.

Note The template ACT_2B.LTM is a completed version of this form.

Using Other Features of This Form

- The fields of the completed version of this form, ACT_2B.LTM, have been formatted to accept the appropriate type of information. For example, the Social Security number field accepts only the correct number of digits. All formatting for this form was done using the properties box for the respective fields.
- The signature field for the completed form uses the cc:Mail Forms electronic signature feature. This guarantees that only an authorized signature is accepted for this form.

Note Information on electronic signatures can be found in Chapter 5 of this tutorial, Appendix C of *Lotus cc:Mail Forms Application Developer's Guide*, and Chapter 14 of *Lotus cc:Mail Forms Getting Started with Sample Forms*.

- When the completed form is run in the Filler, the date field is automatically filled in.

Chapter 5

Modifying Field Properties

This lesson uses the Mercury Sports merchandise order form to show how fields on forms can control the information entered, determine field contents, and ensure form security.

The lesson includes step-by-step instructions for the following tasks:

- Creating a mask to assist entry of telephone numbers
- Limiting input into fields
- Defining a signature field
- Calculating order totals
- Specifying the tab order of objects on the form

Completing This Lesson

Before you begin this lesson, cc:Mail Forms Designer should be open and the Form Directory field (in the cc:Mail Forms Preferences dialog box) set to the path \DESIGNER\WORK\TUTORIAL on the drive where you installed cc:Mail Forms.

Set cc:Mail Forms preferences

1. Choose File - cc:Mail Forms Preferences.
2. Set the Form Directory field to *drive*\designer\work\tutorial where *drive* is the letter of the disk drive where cc:Mail Forms is installed.
3. Click OK.

Open the form template

To open the form template ACT_3A.LTM, follow these steps:

1. Choose File - Open Form Template.
The Open Form Template dialog box appears.
2. Select ACT_3A.LTM.
3. Click OK.

The lesson form appears.

The screenshot shows the 'cc:Mail Forms Designer - [ACT_3A.LTM]' window. The form is titled 'Merchandise Order' and features a logo for 'Mercury Sports International Tour Division'. It includes a table for items with columns: Catalog Number, Quantity, Code, Size, Item Description, Price, and Total. Below the table are input fields for Name, Address, City, State, Zip, Telephone, and Signature. To the right of these fields is a summary section with labels: Total, Shipping, Sales Tax, and Total Due. At the bottom, there are checkboxes for 'Method of Payment' (VISA, MasterCard, Check or m.o.) and a 'Credit Card #' field. The status bar at the bottom indicates 'Field Values: Avoid', the file path 'D:\C:\DESIGNER\WORKING\TUTORIAL\ACT_3A.LTM', and '100%' zoom.

Limit the input for the State field

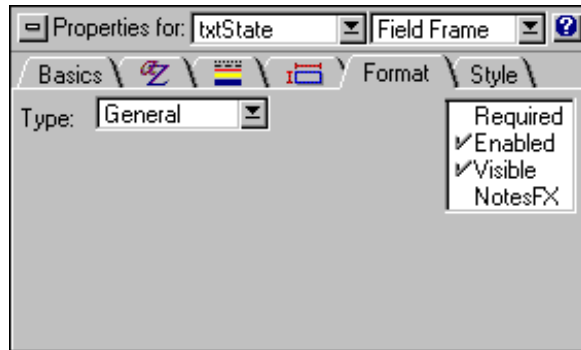
To limit input to the State field to the standard two-letter, uppercase format, follow these steps:

1. Click the State field (the second field in the City, State, Zip sequence).
2. Choose Field - Properties.

The properties box appears.

Tip You can also display the properties box by clicking the right mouse button on an object and selecting Properties from the Quick menu.

3. With the Field Frame displaying in the Selection area for the field txtState, click the Format tab.

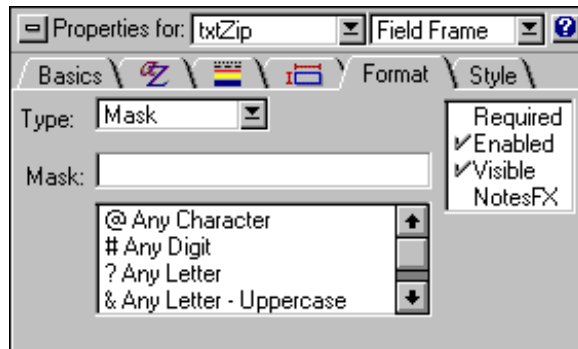


4. Click the Type list and select String.
5. Click the Format list and select UPPER CASE.
6. Click the Max. Characters field and enter 2.

Limit the input for the Zip Code field

To limit the input for the Zip Code field to five numbers, follow these steps:

1. With the properties box open, click the Zip Code field.
The properties for the object txtZip field frame appear.
2. With the Field Frame displaying in the Selection area for the field txtZip, click the Format tab.
3. Click the Type list, scroll down, and select Mask.



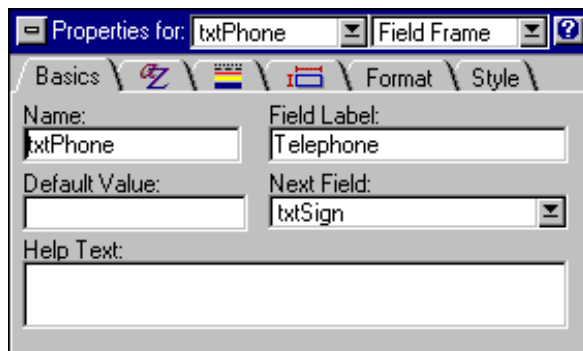
4. In the Mask box, click # Any Digit five times.
This tells cc:Mail Forms to accept only five digits in this field. You could also type five pound signs in the Mask edit field.

Mask the Telephone field

To limit the input for the Telephone field to accept domestic area codes and telephone numbers in the format (800)555-1212, follow these steps:

1. With the properties box open, click the Telephone field.

The properties for the object txtPhone field frame appear.



Note If the properties box covers an object, position the pointer on the title bar of the properties box, press the mouse button, and drag it to a desired location.

2. With the Field Frame appearing in the Selection area for the field txtPhone, click the Format tab.
3. Click on the Type list and select Mask.
4. Enter the mask ; (###;)###; -#### by selecting the items from the box or by typing the mask string into the Mask edit field.

Note cc:Mail Forms provides a number of masking options, including the ability to make certain characters optional, such as the "(" in the area code.

Define a Signature field

To define a field so that it accepts only authorized signatures and secures the information in a form when signed, follow these steps:

1. With the properties box open, click the Signature field.

The properties for the object txtSign field frame appear.

2. With the Field Frame displaying in the Selection area for the field txtSign, click the Format tab.

3. Click the Type list, scroll down, and select Signature.

A box appears with the label For Fields. You select the fields that you want to be affected by the signature in this list.



4. Click the Check All button.

This selects all the fields on the form.

5. Click the box at the bottom of the panel and select the Lock Fields when Signed option.

Selecting this option means that once the form is signed with an authorized signature, all fields are locked and no information can be changed.

Note To use signatures, the person signing must have a proper ID.

See Appendix C in *Lotus cc:Mail Forms Application Developer's Guide* for more about electronic signatures.

The sample Post Office in the directory drive\designer\work\samples contains ID's that can be used to sign this form.

Set the form's tab order

To ensure that the tab order moves the cursor sequentially from field to field and complete all fields before signing, follow these steps:

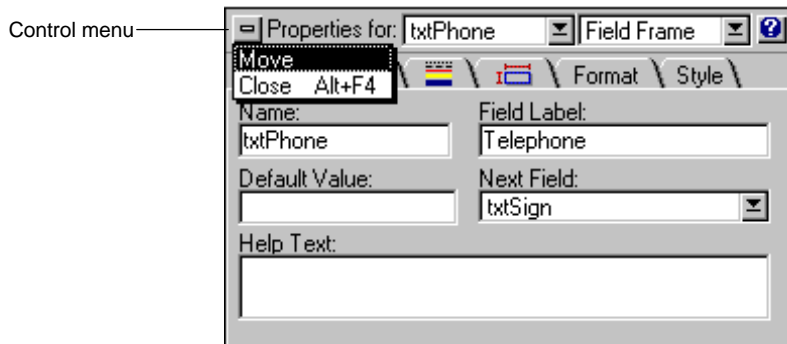
1. Click the Telephone field.
2. With the Field Frame displaying in the Selection area for the field txtPhone, click the Next Field list and select chkMOP.

Instead of going to the Signature field, the cursor moves from the Telephone field to the Method of Payment check boxes when a user presses Tab in the Filler.

Close the properties box

To close the properties box, follow these steps:

1. Click the properties box control menu.



2. Select Close.

Automatically calculate the sales tax

To define a formula event that automatically calculates the sales tax, follow these steps:

1. Click the Script tab.

The Script view appears.



2. Click the Object list.
3. Scroll down and click txtTax to select the form's tax field.
Formula appears in the Procedure list.
4. Type the following LotusScript statement in the Script area and then press ENTER:

```
txtTax.Value = .05 * txtTotal.Value
```

This sets the sale tax amount equal to 5% of the total. The LotusScript for this activity is already entered as commented code. You may either enter the LotusScript or remove the comments from the existing LotusScript.

Calculate the total order

To have the form calculate the order total using LotusScript, follow these steps:

1. Click the Object list and select txtDue.

Formula appears in the Proc list.

2. Enter the following LotusScript statement in the Script area.

```
txtDue.Value = txtTotal.Value + txtShip.Value  
+ txtTax.Value
```

This sets the total due equal to the sum of the total, the shipping cost, and the sales tax. The LotusScript for this activity is already entered as commented code. You may either enter the LotusScript or remove the comments from the existing LotusScript.

You can now view the form in the Filler.

View the form in the Filler

To switch to Filler mode, follow these steps:

1. Click the Switch to Filler SmartIcon. The form appears.
2. When you are done, return to Designer mode by choosing File - Close Form. If you are asked to save the form, click No.

Close the form template

To close the form template, follow these steps:

1. Choose File - Close Form Template.
2. Choose No to end the work session without saving the template.

Note The template ACT_3B.LTM is a completed version of this form.



Using Other Features of This Form

- This form uses a bitmap graphic for the background. This is accomplished by creating the picture object and then placing it in the background using Edit - Send to Back.
- The order table uses properties that control the color of the background and 3D effects. These are set in the properties box for the fields in the table.
- The size column of the order table demonstrates how cc:Mail Forms can employ different types of field objects within a table. This form uses a combo box for the Size fields populated using Pick List property settings.

Chapter 6

Setting Mail Stops and Routing

This lesson demonstrates how cc:Mail Forms creates the workflow for a form. It shows routing alternatives, return receipts, priority determination, and creation of form copies for tracking.

The lesson includes step-by-step instructions for the following tasks:

- Adding mail stops to the routing view
- Specifying mail stops to be used with a sample Post Office
- Adding roles to a routing view
- Specifying role properties
- Specifying stop return properties
- Specifying route properties
- Specifying stop tracking properties

Completing This Lesson

Before you begin this lesson, cc:Mail Forms Designer should be open and the Form Directory field (in the cc:Mail Forms Preferences dialog box) set to the path \DESIGNER\WORK\TUTORIAL on the drive where you installed cc:Mail Forms.

Set cc:Mail Forms preferences

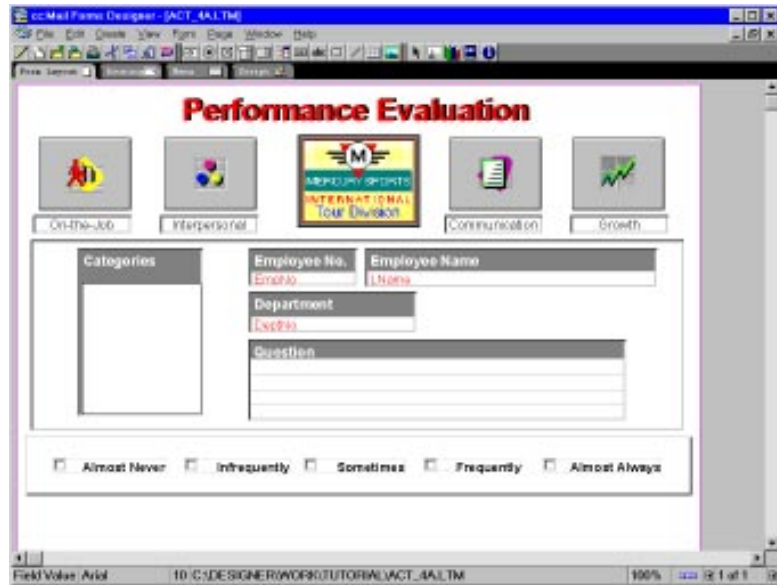
1. Choose File - cc:Mail Forms Preferences.
2. Set the Form Directory field to *drive*\designer\work\tutorial where *drive* is the letter of the disk drive where cc:Mail Forms is installed.
3. Click OK.

Open the form template

To open the form template ACT_4A.LTM, follow these steps:

1. Choose File - Open Form Template.
The Open Form Template dialog box appears.
2. Select ACT_4A.LTM.
3. Click OK.

The lesson form appears.



The screenshot shows the 'cc:Mail Forms Designer - (ACT_4A.LTM)' window. The form is titled 'Performance Evaluation' in red. It features five icons at the top: 'On-the-Job', 'Interpersonal', 'Mercury Sports International Tour Division', 'Communication', and 'Growth'. Below these is a 'Categories' list box. To the right are input fields for 'Employee No.' (with a red 'E' icon), 'Employee Name' (with a red 'N' icon), 'Department' (with a red 'D' icon), and 'Location' (with a red 'L' icon). Below these is a 'Question' list box. At the bottom, there are five radio buttons: 'Almost Never', 'Infrequently', 'Sometimes', 'Frequently', and 'Almost Always'. The status bar at the bottom shows 'Field Values: Arial', '10: C:\DESIGNER\WORK\TUTORIAL\ACT_4A.LTM', and '100% 1 of 1'.

Add a mail stop

To begin defining a form route by adding a mail stop, follow these steps:

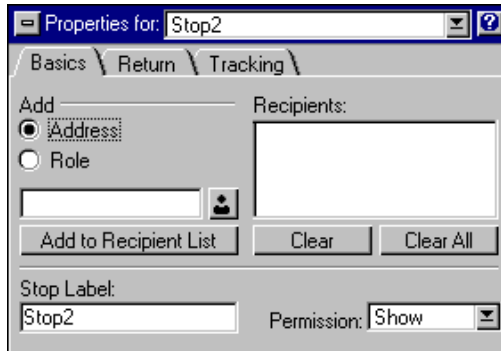
1. Click the Routing tab.
The routing view appears.
2. Choose Create - New Stop.

A new mail stop appears on the routing view. You can also create a new mail stop by clicking the Create New Stop SmartIcon.

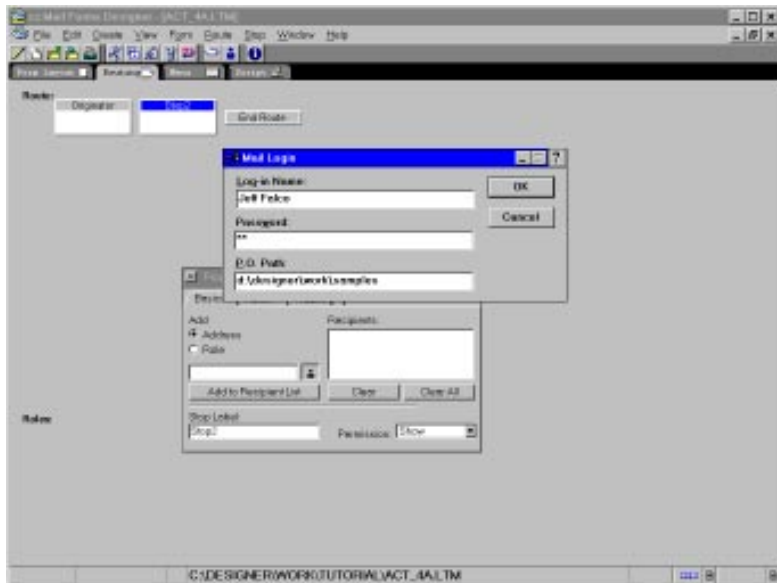


Specify the mail stop address

1. Choose Stop - Properties.
The properties box appears.
2. Click the Address option button.
3. Click the Address list icon.



The Mail Login dialog box appears if cc:Mail isn't running.



4. In the Mail Login dialog box , type the following information:
Login Name: Jeff Falco
Password: jf
P. O. Path: drive\designer\work\samples

5. Click OK.

The Choose Address dialog box appears.

6. Select Pam Ressler from the Address List and click Add.
7. Click Done.

Pam Ressler now appears in the Recipients list of the properties box.

Specify return receipts

Return receipts are one of the ways cc:Mail Forms helps you keep track of who has received your forms. To specify a return receipt, follow these steps:

1. Click the Return tab of the Stop properties box.
2. Click Return Receipt from Next Stop.
3. Click Return Copy to Stop.

In this example there is only one previous mail stop, the Originator, but as workflows become more complex, the recipients of copies can be specified.

Specify tracking information

To add tracking information, follow these steps:

1. Click the Tracking tab of the Stop properties box.
2. Click Mail Copy of Form to.
3. Click the Address list icon.

The Choose Address dialog box appears.

4. Select Zac Blanchette from the Address list and click Add.

Zac Blanchette now appears in the Mail Copy of Form to field. cc:Mail Forms provides additional tracking options including the use of tracking databases.

See Chapter 14 in *Lotus cc:Mail Forms Getting Started with Sample Forms* for information about the use of tracking databases.

Add roles to the route

cc:Mail Forms provides additional routing power with the use of roles to represent job functions within an organization. To add a role to the route, follow these steps:

1. Choose Create - New Role.

The roles icon appears in the lower section of the routing view and the properties box displays information concerning the role.

2. Select Role1 and enter **Supervisor**.

3. Click Stop2.

The properties box changes and information for the mail stop appears.

4. Click the Role option button.

Supervisor appears in the list for roles.

5. Click Add to Recipient List.

The role Supervisor now appears in the recipient list and a parallel route has been created.

Close the properties box

To close the properties box, follow these steps:

1. Click the properties box control menu.

2. Select Close.

Control menu —

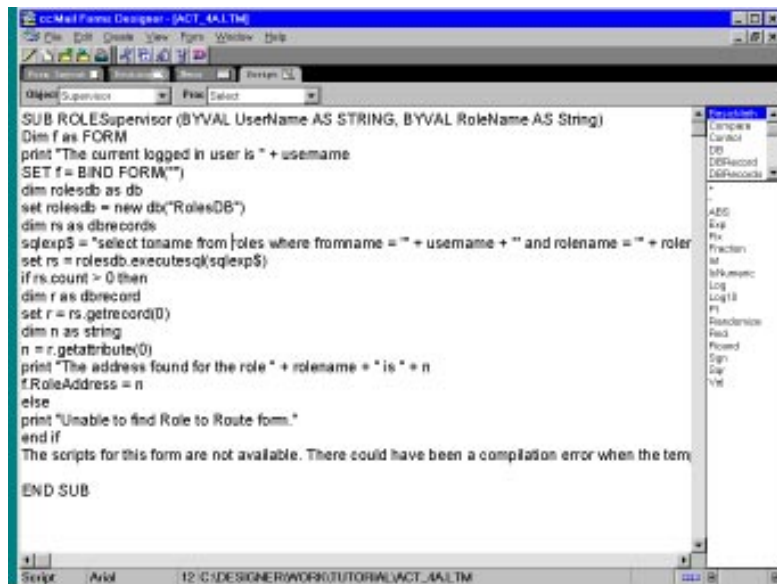
The screenshot shows a window titled "Properties for: Stop2". It has three tabs: "Basics", "Return", and "Tracking". The "Basics" tab is active. In the "Add" section, there are two radio buttons: "Address" and "Role". The "Role" radio button is selected. Below it is a dropdown menu showing "Supervisor". To the right, there is a "Recipients:" list box containing two entries: "Pam Ressler" (with a person icon) and "Supervisor" (with a person icon). Below the list box are three buttons: "Add to Recipient List", "Clear", and "Clear All". At the bottom, there is a "Stop Label:" field with "Stop2" and a "Permission:" dropdown menu set to "Show". A line points from the text "Control menu" to the small square icon in the top-left corner of the dialog box.

Specify the roles database

Since a role represents a job function that is performed by different people in an organization, a roles database includes tonames, fromnames, and rolnames. To specify the roles database to be used in this activity, follow the following steps:

1. Position the pointer over the Supervisor role icon, click the right mouse button, and select Script from the Quick menu.

The script view appears.



2. Change the SQL expression (line 8 of the LotusScript statements for the object Supervisor) as follows:

Change from: "select toname from roles"

Change to: "select toname from exproles"

This specifies that you want to use exproles as the roles database (instead of the default, roles).

Note The form template ACT_4B.LTM contains the proper LotusScript statements.

Specify properties for the route

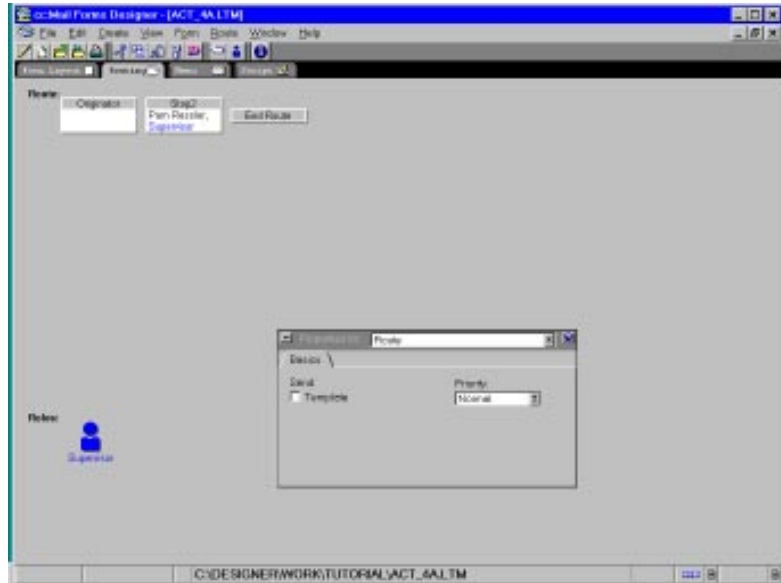
Forms can be sent with the form template or as information only. The priority of the form can also be specified. To specify route properties, follow these steps:

1. Click the Routing tab.

The routing view appears.

2. Choose Route - Properties.

The properties box appears.



3. Click the Template check box.

This indicates that the cc:Mail Forms template is to be mailed along with the form information. In environments where users can access the templates from a server or through a cc:Mail Bulletin Board, there is no need to send the template.

4. Click the Priority list.

5. Select Urgent.

This indicates that the form should go through the mail system with the highest priority.

6. Close the properties box.

The form is now ready to be sent. When the form is sent to the next stop, it will be sent to Pam Ressler as specified by the address and to Zac Blanchette who is the Supervisor for Jeff Falco in the roles database.

If you want to follow the form through its routing, switch to the Filler, send the form, and then follow the form and the return receipts through Lotus cc:Mail.



View the form in the Filler

The form is now ready to use. To switch to Filler mode, follow these steps;

1. Click the Switch to Filler mode SmartIcon. The form appears.
2. When you are done, return to Designer mode by choosing File - Close Form. If you are asked to save the form, choose No.

Close the form template

To close the form template, follow these steps:

1. Choose File - Close Form Template.
2. Choose No to end the work session without saving the template.

Note The template ACT_4B.LTM is a completed version of this form.

Using Other Features of This Form

- This form uses check boxes to assign ratings. This is done by setting the number of check boxes to 5 on the Style tab of the properties box.
- This form uses cc:Mail Forms database links to automatically populate the employee information fields. When the form is used in the Filler, entering a number in the range of 001 to 006 will populate these fields.

See Chapter 7 of this tutorial and Chapter 5 of *Lotus cc:Mail Forms Application Developer's Guide* for more information on database links.

- This form uses command buttons to control the display of the performance categories in the list area of the form. The LotusScript statements for each command button are included.
- This form demonstrates the variety of user interfaces possible with cc:Mail Forms.
- You can use the Roles Database Editor to set up your roles database.

See Chapter 14 in *Lotus cc:Mail Forms Getting Started with Sample Forms* for more information about the Roles Database Editor.

Chapter 7

Linking Databases

This lesson shows how easily information from different database applications can be incorporated into forms. It demonstrates how to link one database to personal information fields of the form and to link another database to a combo box

The lesson includes step-by-step instructions for the following tasks:

- Creating a database link
- Identifying a data source
- Specifying a database table
- Setting the database access mode
- Linking database fields to form objects
- Defining Pick List properties
- Specifying database variables to display in a combo box

Completing This Lesson

Before you begin this lesson, cc:Mail Forms Designer should be open and the Form Directory field (in the cc:Mail Forms Preferences dialog box) set to the path \DESIGNER\WORK\TUTORIAL on the drive where you installed cc:Mail Forms.

Set cc:Mail Forms preferences

1. Choose File - cc:Mail Forms Preferences.
2. Set the Form Directory field to *drive*\designer\work\tutorial where *drive* is the letter of the disk drive where cc:Mail Forms is installed.
3. Click OK.

Open the form template

To open the form template ACT_5A.LTM, follow these steps:

1. Choose File - Open Form Template.
The Open Form Template dialog box appears.
2. Select ACT_5A.LTM.

3. Click OK.

The lesson form appears.

The screenshot shows a window titled "cc:Mail Forms Designer - [ACT_SAL.TM]". Inside, there is a form titled "Travel Advance Request Form". The form has a logo on the left that says "M" and "AMERICAN SPORTS INTERNATIONAL TOUR DIVISION". The form fields are organized into two columns. The left column contains: "Emp. No." (text box), "Last Name" (text box), "First Name" (text box), "Location" (text box), "Dept. No." (text box), "Tel. Ext." (text box), and "Signature" (text box). The right column contains: "Destination" (text box), "Reason" (dropdown menu), "Approver" (text box), a section header "Advance Amount", "Lodging" (text box), "Meals" (text box), "Transportation" (text box), "Miscellaneous" (text box), and "Total Advance" (text box). At the bottom of the form are "Send" and "Print" buttons. The status bar at the bottom of the window shows "FieldValue Arial", "10/12/1995 5:51:43 PM", "100%", and "1 of 1".

Create a database link

The first step in linking to a database is to create a link window. To create a link window, follow these steps:

1. Choose Create - Database Link.

The database link window "New Table" appears.

2. Position the mouse pointer on the database link window, click the right mouse button, and then select Properties from the Quick menu.

The properties box for the object DBLink appears.

The screenshot shows a dialog box titled "Properties for: DBLink". It has three tabs: "Basics", "Options", and "Advanced". The "Basics" tab is selected. Inside the "Basics" tab, there are two text boxes: "Data Source:" and "Table Name:". Below the "Table Name:" text box are two buttons: "New..." and "Edit...".

3. Click the Data Source list.

A list of Open Database Connectivity (ODBC) data sources appears.

4. Select cc:Mail FormsEmployees.

cc:Mail FormsEmployees is a data source that specifies databases using a Paradox format.

5. Click the Table Name list.

6. Scroll down and select EMPLOYEE - TABLE.

Set the database link options

cc:Mail Forms provides a number of options associated with database use.

To select the database options for this activity, follow the steps below:

The screenshot shows the 'cc:Mail Forms Designer' window with the title 'Travel Advance Request Form'. The form contains several input fields: 'Emp. No.', 'Last Name', 'First Name', 'Location', 'Dept. No.', 'Tel. Ext.', and 'Signature'. There are 'Send' and 'Print' buttons at the bottom. On the right, the 'Properties for cc:Mail' dialog box is open, showing the 'Options' tab. The 'Access Mode' section has 'Read Only' selected. The 'Logon TimeOut' is set to 75 seconds. Below this, the 'Advance Amount' section has five input fields: 'Lodging', 'Meals', 'Transportation', 'Miscellaneous', and 'Total Advance'. The status bar at the bottom indicates 'Field Wise: Auto', the file path '10: C:\DESIGNER\WORK\90\TUTORIAL\ACT_5A1.TM', and '100%' zoom level.

1. Click the Options tab of the properties box.
2. If necessary, click the Read Only option button under access mode.
The form will now *read* information from the database table, but will not *write* information to it.
3. Click the check boxes so that only Share DB Connection and Automatic Query are checked.

By default, all options are selected. The option for Automatic Write does not apply here because the database is being used in a read only mode. Clicking this option removes the check.

The option for Auto Commit applies to transaction processing and databases. Auto Commit makes a transaction a part of the database as it is processed. This does not apply to the example and clicking the check box removes the check.

Link database fields to form objects

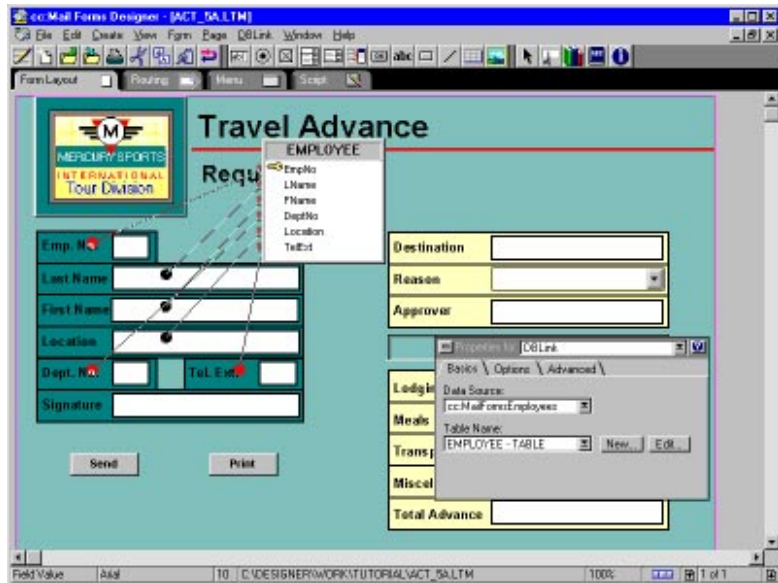
When the database source table has been attached, you are ready to link the fields in the table to objects on the form. To link the fields, follow these steps:

1. Position the EMPLOYEE database table link and its property box so that the personal information fields on the left side of the form are visible.
2. Position the mouse pointer on EmpNo in the database link table, press and hold the left mouse button, and drag the mouse pointer over the Emp. No. field.

Notice that the mouse pointer changes to indicate that the field is a valid link field.

- Repeat step 2 for the remaining items in the database link table, connecting each item to the appropriate form object.

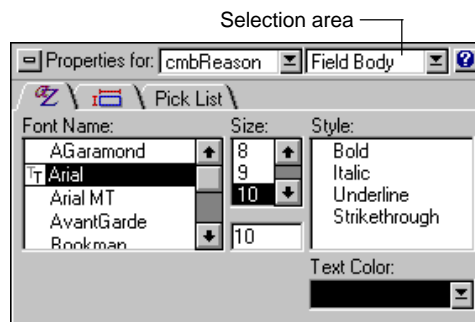
When this step is complete, the form should look like the following illustration.



Define the Pick List for the combo box

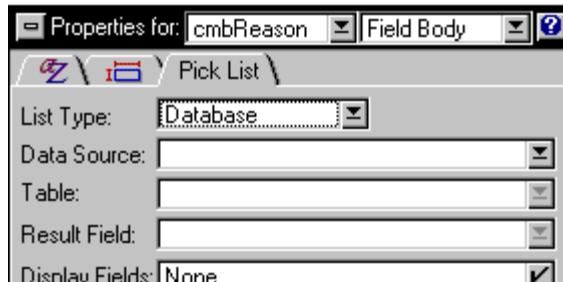
To define the Pick List for the Reason combo box, follow these steps:

- Position the database link table and the properties box to the left or top of the form for access to the Reason combo box.
- Click the Reason field object.
The properties box displays the properties for the object cmbReason.
- Click the Selection area list of the properties box and select Field Body.



4. Click the Pick List tab.
5. Click the List Type list and select Database.

Additional items are added to the Pick List tab so that it looks similar to the next illustration.



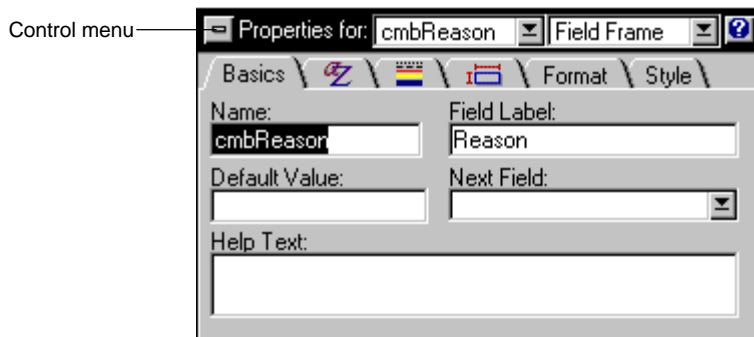
6. Click the Data Source list and select cc:Mail FormsEmployees.
7. Click the Table Name list, scroll down, and select APPROVER - TABLE.
8. Click the Result Field list and select Reason.
9. Click the Display Fields check and select Reason.

The form is now ready to run in the Filler. When you run the form in the Filler, entering an employee number in the range 001 through 006 automatically populates the other personal information fields with relevant data. The list for the Reason combo box is populated with items from the table Approver.

Close the properties box

To close the properties box, follow these steps:

1. Click the properties box control menu.
2. Select Close.



Hide the DBLink Window

To hide the DBLink window, follow these steps:

1. Choose View - Show.
2. Click DBLink Windows.

Test the form in the Filler

To test the database links, follow these steps:



1. Click the Switch to Filler mode SmartIcon.

The form appears as it would be seen by a user, with the cursor in the Emp. No. field.

2. Type 001 and press the Tab key.

The personal information fields automatically fill with information concerning the employee Pam Ressler.

3. Type **Boston** in the Destination field and press the Tab key.

4. Click the list for Reason and click to select Equipment Purchase.

The Approver field automatically fills in, based on the travel reason.

The LotusScript statements to accomplish this are in the After Edit procedure for the combo box.

5. When you are done, return to Designer mode by choosing File - Close Form. If you are asked to save the form, choose No.

Close the form template

To close the form template, use the following steps:

1. Choose File - Close Form Template.
2. Choose No to end the work session without saving the template.

Note The template ACT_5B.LTM is a completed version of this form.

Using Other Features of This Form

- When this form is run in the Filler, both the Print and Send buttons are active. The Send button uses the LotusScript Send method to send the form to the approver based on the name that appears in the Approver field of the form. The Print button uses the LotusScript Print method. The LotusScript statements for each button can be viewed in the Script view of the form.
- The combo box object uses a post-processing event (After Edit) to locate the appropriate approver for the travel, based on the reason for the travel. This is accomplished by using LotusScript to interact with a database in another manner. Again the LotusScript statements can be reviewed in the Script view of this form.
- The cc:Mail Forms table containing the expense information has several customized features. The automatic calculation of column totals has been set using the properties box for the table tblAdvAmt. The expense category has a limit of \$800, which was set by specifying a maximum value on the format panel for the properties box for each field in the table. A LotusScript After Edit procedure for the object tblAdvAmt_B5 conditionally displays a signature field based on the advance amount. In addition, a message box appears if total expenses are greater than \$3000. Another LotusScript After Edit procedure for the object tblAdvAmt_B5 accomplishes this task.

Chapter 8

Customizing Forms

You can customize the menu bar for the cc:Mail Forms Filler. You may want to do this to limit the scope of what a user can do or to give access to additional functions.

The lesson includes step-by-step instructions for the following tasks:

- Removing existing menu items
- Adding a new pop-up menu
- Adding a new item to a menu
- Adding a button for an existing menu item
- Adding buttons that use LotusScript

Completing This Lesson

Before you begin this lesson, cc:Mail Forms Designer should be open and the Form Directory field (in the cc:Mail Forms Preferences dialog box) set to the path \DESIGNER\WORK\TUTORIAL on the drive where you installed cc:Mail Forms.

Set cc:Mail Forms preferences

1. Choose File - cc:Mail Forms Preferences.
2. Set the Form Directory field to *drive*\designer\work\tutorial where *drive* is the letter of the disk drive where cc:Mail Forms is installed.
3. Click OK.

Open the form template

To open the form template ACT_6A.LTM, follow these steps:

1. Choose File - Open Form Template.
The Open Form Template dialog box appears.
2. Select ACT_6A.LTM.
3. Click OK.

The lesson form appears.

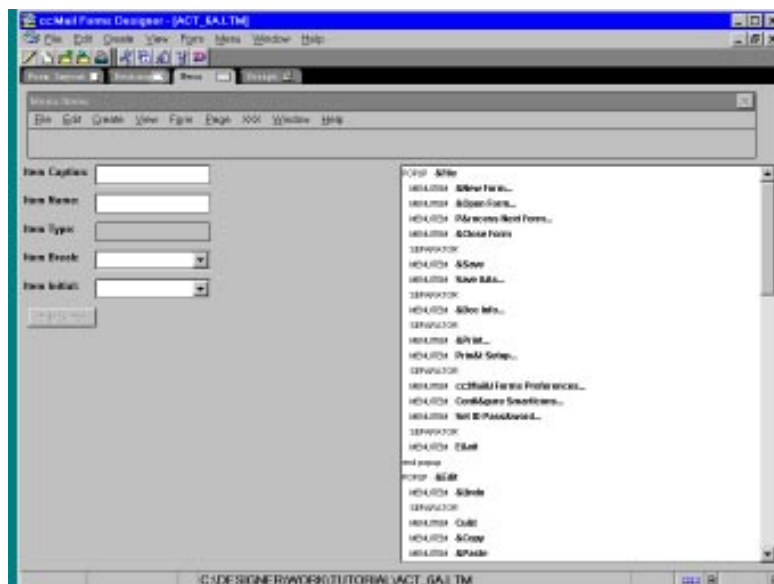
The screenshot shows the cc:Mail Forms Designer window titled "cc:Mail Forms Designer - [ACT_6A.LTM]". The form is titled "Returns from" and features the Mercury Sports International Tour Division logo. It contains a table with the following columns: Quantity, Product Description, Invoice No., Unit Price, and Reason for Return. The table has several empty rows for data entry. Below the table, there are buttons for "Show Totals", "Clear", and "Send", along with a "Total" field. The status bar at the bottom indicates "Field Value Arial", "10/12/1995 3:28:22 PM", "100%", and "1 of 1".

A database link is used to complete the vendor information section of this form. If the database link window appears, follow these steps to hide the window:

4. Choose View - Show.
5. Click DBLink Windows.

To remove main menu items, follow these steps:

The Menu view appears.

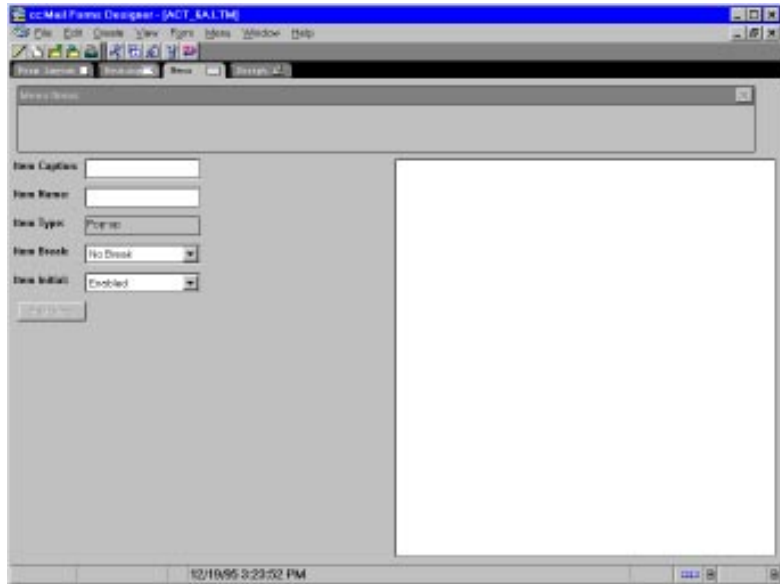


- The File pop-up menu and its menu items are removed from the form.

- The Edit pop-up menu and its menu items are removed. Notice that the menu sample area of the Menu view shows the current status of the form's menu.

4. Repeat the procedure of selecting pop-up menu items and deleting them until the entire menu is clear.

The Menu view should now look like the following illustration.



Add a custom pop-up menu item

To add the custom pop-up menu item Form, follow these steps:

1. Choose Create - Custom Popup Menu Item.

The Item Caption field displays NewPopup, which is added to the menu sample area as well as the menu list box.

2. Select NewPopup in the Item Caption field.

3. Type **&Form**.

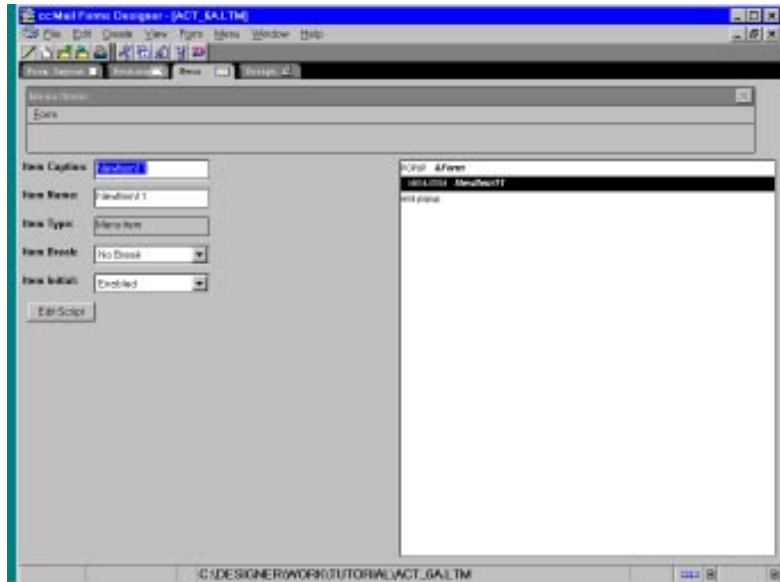
The new pop-up caption **&Form** (the ampersand indicates the next character should be underlined) is added to the menu list box and **F**orm appears in Menu Items.

Add a Calculate Total item to the pop-up menu

To add custom menu items under the new pop-up Form, follow these steps:

1. Choose Create - Custom Menu Item.

NewItem (followed by a number) appears in both the menu list box and the Item Caption field.



2. Select NewItem in the Item Caption field and enter **&Calculate Total**.

The caption for the new menu item appears.

3. Select NewItem in the Item Name field, enter **mnuCalc** (the name used by LotusScript for the field) , and press Tab.

Add a Clear Form item to the pop-up menu

To add custom menu items under the new pop-up Form, follow these steps:

1. Choose Create - Custom Menu Item.

NewItem (followed by a number) appears in both the menu list box and the Item Caption field.

2. Select NewItem in the Item Caption field and enter **Clear &Form**.

The caption for the new menu item appears.

3. Select NewItem in the Item Name field, enter **mnuClear**, and press Tab.

Activate the new menu items

To activate the Calculate Total and Clear Form menu items, follow these steps:

1. Click the MENUITEM Calculate Total in the menu list box.

The appropriate item caption and name appear.

2. Click the Edit Script button.

The Script view appears for the object mnuCalc.

3. Enter **TblTot**.

TblTot is a LotusScript procedure that calculates the extension of a returned item's quantity and unit price, and a total for all returned merchandise. To view this procedure, select (general) in the object list and TblTot in the Proc list.



4. Click the Menu tab.

The Menu view appears.

5. Click the MENUITEM Clear &Form in the menu list box.

The appropriate item caption and name appear.

6. Click the Edit Script button.

The Script view appears for the object mnuClear.

7. Enter **ClearForm**.

ClearForm is a LotusScript procedure that clears all information from the form.

Add a Help menu

To add a Help menu that offers cc:Mail Forms Help, follow these steps:

1. Click the Menu tab.

The Menu view appears.

2. Click “end popup” in the menu list box.

3. Choose Create - Custom Popup Menu Item.

The Item Caption field displays NewPopup, which is added to the menu sample area as well as the menu list box.

4. Select NewPopup in the Item Caption field.

5. Type **&Help**.

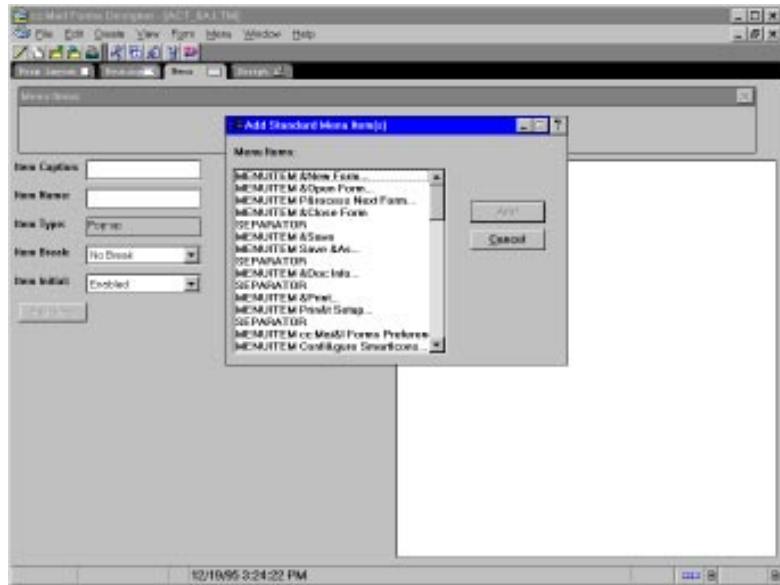
The new pop-up caption &Help is added to the menu list box and the menu sample area.

Add standard Help menu items

To add standard Help menu items, follow these steps:

1. Choose Create - Standard Menu Item.

The Add Standard Menu Item(s) dialog box appears.



2. Scroll down to the bottom of the list and click MENUITEM &Contents.
3. Press and hold the Shift key and click MENUITEM &Search and MENUITEM &Using Help.
4. Release the Shift key and click the Add button.

The standard cc:Mail Forms Help menu items Contents, Search, and Using Help are added to the form menu.

Activate the Clear button

By using a LotusScript procedure, you can activate the Clear button so that it performs the same function as the menu item. The button can also execute the menu command. To activate the Clear button by executing the menu command, follow these steps:

1. Click the Script tab.

The Script view appears.

2. Click the Object list and select cmdClear.

3. Click in the Script area and enter **mnuClear.Execute**.

The LotusScript statements for this activity are entered as commented code. You may either enter the LotusScript statements or remove the comments from the existing LotusScript statements.

Activate the Send Mail button

To activate the Send Mail button so that the form is mailed to the vendor whose name appears in the combo box, follow these steps in the Script view:

1. Click the Object list and select cmdSend.
2. Click in the Script area and enter **SendVend**.

The LotusScript statements for this activity are entered as commented code. You may either enter the LotusScript statements or remove the comments from the existing LotusScript statements.

Test the form in the Filler

To test the customized form, follow these steps:



1. Click the Switch to Filler SmartIcon.

The form appears as it would be seen by a user.

2. Click the combo box and select a vendor.

The vendor information fields automatically fill with information concerning the selected vendor.

3. Enter return information in the appropriate fields.

You may enter any quantity, description, invoice, unit price, and reason information.

4. Click the Total (Σ), Hide, and Show buttons.

5. Use the modified menu to calculate totals and clear the form.

6. Click the Send button (the mailbox in the lower left part of the form) to send the form to the selected vendor.

Note To close the form, click the Control menu and select Close or press Ctrl+F4. The standard File menu item was removed as part of this lesson.

Close the form template

To close the form template, follow these steps:

1. Choose File - Close Form Template.
2. Choose No to end the work session without saving the template.

Note The template ACT_6B.LTM is a completed version of this form.

Using Other Features of This Form

- This form demonstrates a number of visual features that should be noted, including the use of the rounded edge style for rectangle objects to create a label effect. This effect is set on the style panel of the rectangle properties box.
- The mail button uses two bitmap images to produce animated button effects. This is accomplished by specifying both an up bitmap and a down bitmap on the button properties box.
- The Show and Hide buttons control the visible property through LotusScript's cmdHide and cmdShow.
- The angled text of selected form labels is set on the dimensions tab of the properties box for field labels.
- This form also uses a cc:Mail Forms database link to populate vendor information fields.

Chapter 9

Using the Filler

When a form is developed, cc:Mail Forms users enter information using the Filler. cc:Mail Forms allows you to switch between the Designer and the Filler as you develop a form so that you can test it.

This lesson demonstrates features that facilitate the use of forms throughout an organization. Users can highlight information and attach it to a form, add comments directly to a form, and perform ad hoc queries of information as the form continues through its routing.

This lesson includes step-by-step instructions for the following tasks:

- Marking with the Red Pen
- Creating a pop-up note
- Performing a data query

Completing This Lesson

Before you begin this lesson, cc:Mail Forms Designer should be open and the Form Directory field (in the cc:Mail Forms Preferences dialog box) set to the path \DESIGNER\WORK\TUTORIAL on the drive where you installed cc:Mail Forms.

Set cc:Mail Forms preferences

1. Choose File - cc:Mail Forms Preferences.
2. Set the Form Directory field to *drive*\designer\work\tutorial where *drive* is the letter of the disk drive where cc:Mail Forms is installed.
3. Click OK.

Open the form template

To open the form template ACT_7A.LTM, follow these steps:

1. Choose File - Open Form Template.
The Open Form Template dialog box appears..
2. Select ACT_7A.LTM.
3. Click OK.

The lesson form appears.

The screenshot shows the Lotus cc:Mail Forms Designer interface. The title bar reads "cc:Mail Forms Designer - [ACT_7A.LTM]". The menu bar includes File, Edit, Format, View, Form, Data, Window, and Help. The toolbar contains icons for various form design functions. The main workspace displays a form titled "Internal Proposal" with a subtitle "New Tours". On the left, there is a logo for "MICHIGAN CHARTER INTERNATIONAL TOUR DIVISION". Below the logo, there are navigation buttons: "Back", "Next", and "Record". The form itself has several input fields: "Activity", "Description", and "Region". The status bar at the bottom shows "Field Values: Actual", the date and time "10/12/1995 4:15:02 PM", and "100% 1 of 1".

A database link is used to complete the tour information sections of this form. If the database link window appears, follow these steps to hide the window:

4. Choose View - Show.
5. Click DBLink Windows.

Switch to the Filler

To view the form in Filler mode, click the Switch to Filler SmartIcon. The form appears as it would be seen by a user.

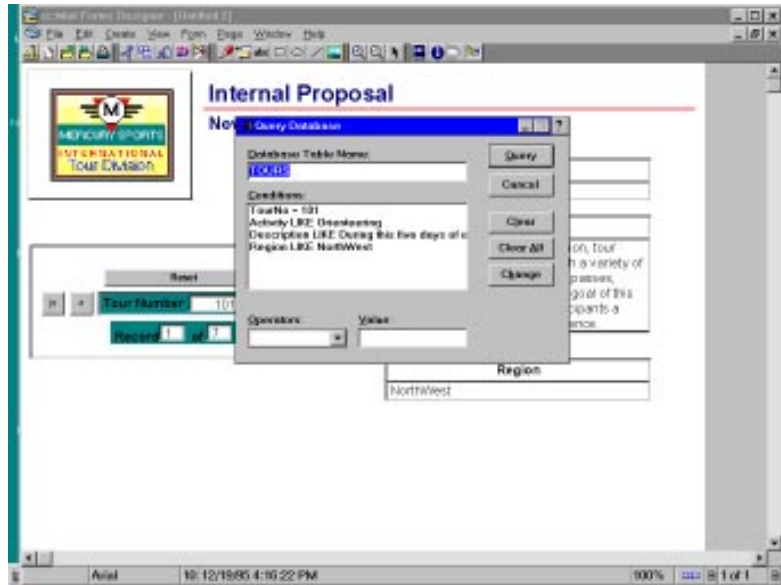


Perform a data query

This form presents information about proposed tours by displaying records from a Mercury Sports database. To query this information, follow these steps:

1. Click the Data Query SmartIcon.

The Query Database dialog box appears.



2. Click the Clear All button.
The Conditions list resets.
3. Click Activity in the Conditions list.
4. Click the Operators list and select the LIKE operator.
5. Click the Value field and enter **Mountaineering**.
6. Click the Change button.

The Conditions list displays the entry “Activity LIKE Mountaineering”.

7. Click the Query button.

A message states that more than one record has been found.

8. Click the Yes button.

The Choose Record From Query dialog box appears. The database has been searched and all records that contain Mountaineering in the activity field are listed.

9. Choose “106, Mountaineering” and click OK.

Highlight the form using the Red Pen

The data query showed that there are two proposed Mountaineering tours. To highlight this on the form, follow these steps:



1. Choose Create - Red Pen.

The red pen cursor appears. The Red Pen can also be used by clicking the Red Pen SmartIcon.

2. Position the cursor on the form, press and hold the left mouse button, and then draw a circle around the Activity and Description areas of the form.

The form should look like the following illustration.

The screenshot shows the 'cc:Mail Forms Designer - (Untitled 2)' window. The form is titled 'Internal Proposal' and 'New Tours'. It features a logo for 'Mercury Sports' on the left. The form contains several fields: 'Activity' (containing 'Mountaineering'), 'Description' (containing a paragraph about a three-week trek), and 'Region' (containing 'International'). A red circle is drawn around the 'Activity' and 'Description' fields. Below the 'Description' field, there is a 'Region' field. At the bottom of the form, there is a 'Tour Number' field with the value '108.00' and a 'Record' field with the value '1 of 1'.

Add a pop-up note

The data query showed that two similar trips are proposed. To attach a pop-up note indicating this, follow these steps:

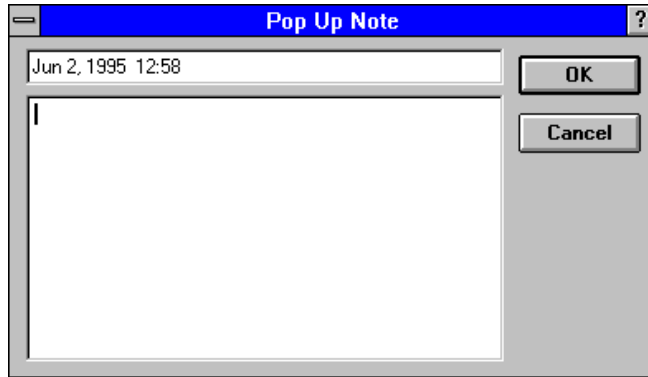


1. Choose Create - Pop Up Note.

The pop-up note cursor appears. The pop-up note can also be used by clicking the Pop Up Note SmartIcon.

2. Position the note cursor on the form and click the mouse button.

The Pop Up Note dialog box appears.



3. Enter an appropriate note and click OK.

The pop-up note icon appears on the form.

Both the red pen marking and the pop-up note will be attached to the form as it continues through its route. To read pop-up notes, double-click the pop-up note icon.

Return to the Designer

When you are done, return to Designer mode by choosing File - Close Form. If you are asked to save the form, choose No.

Close the form template

To close the form template, follow these steps:

1. Choose File - Close Form Template.
2. Choose No to end the work session without saving the template.

Using Other Features of This Form

- This form uses cc:Mail Forms database links to list tours and descriptions. This allows Mercury Sports to review proposed tours by accessing the most current records from a form with a visual interface. LotusScript for the Form object generates the initial display of the tour information.
- This form uses visual controls to navigate the database. The control buttons allow users to move through the database one record at a time or to move from beginning to end with a single mouse click. This is accomplished with LotusScript statements for the command buttons, cmdTop, cmdBot, cmdNext, cmdPrev, and cmdReset.
- You can also use Edit - Spell Check to verify the spelling of text in the form document.