

ImageNow eForms

Getting Started Guide

ImageNow Version: 6.7.x

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Overview

This guide is designed to provide you with step-by-step instructions on how to create, implement, and use forms. How you use forms depends on your role. This guide contains the following sections:

- “Overview” introduces the forms feature to the ImageNow owner, managers, and ImageNow and WebNow Client users.
- “Basic Procedures for ImageNow or WebNow” explains basic procedures such as how to search for a form and complete information in form fields. This information is of interest primarily to users with privileges to view, modify, create, or delete forms.
- “ImageNow Form Designer” defines the high-level steps to implement forms and explains how to use Form Designer to create, save, and publish forms. This information is of interest primarily to the owner and managers.
- “Administering Forms” explains some basic administration procedures and provides a high-level view of the administration process including assigning privileges and deploying forms. This information is of interest primarily to the owner and managers.
- “Advanced Form Functionality for Developers” describes in technical terms how to enhance existing forms. This information is of interest primarily to owners or managers familiar with scripting.

More specialized topics on working with forms are provided on the Perceptive Software website, in the Customer Portal, under Product Documentation.

What is a form?

In ImageNow, a form is a set of fields that contain information entered by a user. Depending on your system configuration, each field can be mapped to a custom property, making each field searchable in the system.

Student Address	
House Number (ie. 123.46)	<input type="text"/>
P.O. Box (ie. 123.46)	<input type="text"/>
Street Name	<input type="text"/>
City	<input type="text"/>
State	<input type="text"/>
Zip Code (ie. 123.46)	<input type="text"/>
College/Program	<input type="text"/>
Evaluator	<input type="text"/>
Program Decision/Action	<input type="text"/>
Class Rank	<input type="text"/>
High School	<input type="text"/>

To complete a form, a user enters data into the fields of the form. Form data might also be pre-populated by other ImageNow components. If you purchased the Document Management license of ImageNow, you can add your documents, including forms, to version control.

Form types

Depending on your system configuration, you may be using the following types of forms:

- **A form displayed as a stand-alone document or on a folder.** Depending on your system configuration, each field can be mapped to a corresponding custom property. After you fill in the fields and save the form, the system can automatically complete the values for the corresponding custom properties on ImageNow Server, allowing you to search for forms just as you would search for documents. You can publish the following types of stand-alone forms:
 - **Stand-alone forms as documents.** When you open a document, this form appears independently of a document in ImageNow Viewer.
 - **Stand-alone forms on folders.** You can select this form as the folder type when you create a folder. The form appears independently of a document in the ImageNow Folder Viewer.
- **A form displayed as supplemental information for a document or folder.** This type of form allows you to capture additional data for your documents or folders. You can use supplemental forms in the following ways:
 - **Supplemental forms for documents.** When viewing a document in the ImageNow Viewer, these forms appear in the Forms pane. You can select from the available forms and fill out the fields to provide additional information about a document.

- **Supplemental forms for folders.** When viewing a folder in the ImageNow Folder Viewer, these forms appear in the Forms pane. You can select from the available forms and fill out the fields to provide additional information about a folder.

What is ImageNow Forms Server?

Use the ImageNow Forms Server and Forms Viewer applet to make a form available online using an embedded URL. You can only embed form types that are standalone on folders or documents. The user clicks the URL to access the form, enters information in the fields, and then saves the form. The system sends the saved form to ImageNow and WebNow as a document or on a folder.

The following examples show how you might use forms in your portal or business application.

(Higher Education) Students submit forms online to Admissions. The school intranet is secure. Students who are graduating this year must submit a form to apply for graduation. They use the URL that contains a pointer to the Forms Viewer applet, which integrates the applet into the intranet. After a student fills out the form, it is sent to a workflow queue in ImageNow that is accessible by the Registrar's office. This example shows where you might need a form to display as a document by associating it with a document type.

(Human Resources) Employees working remotely can fill out the form for their flexible spending accounts. Each employee fills out the form online and itemizes the expenses. After the employee submits the form online, the system responds with a submission number. The employee then faxes the receipts using the submission number so that the receipts can be matched to the form later. To receive and import the receipts into ImageNow, the company uses ImageNow Fax Agent. This example shows where you might need a form to display on a folder.

For more information on Forms Server, refer to the *ImageNow eForms Forms Server Installation and Setup Guide* available on the Customer Portal.

Form roles

Users assume one of the following roles in forms:

- **Manager (or owner).** An ImageNow manager grants and denies privileges to view, create, modify, or delete forms. A manager can create custom properties in Management Console that make fields available to choose from when creating a form in Form Designer. A manager can also create and view all saved form designs in Form Designer. The manager can publish forms to the ImageNow and WebNow clients. If Forms Server is installed, the manager may choose to publish forms online using an embedded URL. For simplicity, when this guide refers to a *manager*, it may be taken to mean manager or owner.
- **ImageNow or WebNow Client User.** This user completes form fields, adds forms as documents, views completed forms, or associates forms to existing documents. To add a form to ImageNow, the user creates a new document with the form document type or folder type and completes the form

fields. To associate a form to an existing document or folder, the user opens a document in the Viewer, and selects a form from the list in the Forms pane.

- **Online User.** This user accesses a form from a web site using an embedded URL and enters information in the form fields. When this user saves the form, the system sends the form to ImageNow or WebNow where an ImageNow or WebNow client user can access the form data.

Basic Procedures for ImageNow or WebNow

This section explains how to perform basic steps associated with forms. In addition, you will learn how to complete, save, print, and delete information in the form fields. These steps are relevant for all types of forms that are published in WebNow or ImageNow.

Note Before you can view a form, a manager or owner must have granted you the Forms View privilege, access to the drawer, and document type or folder type privileges.

View a form as a standalone document

A form that is displayed as a standalone document appears in the Viewer and is not associated with a scanned image or imported file.

1. On the **ImageNow** toolbar, click **Documents**.
2. In **ImageNow Explorer**, conduct your search, and then, in the search results grid, open the document.

Note The configuration of a form determines where a form is displayed. If a form does not appear in **ImageNow Viewer**, you may be attempting to view a form associated with a document.

View a form displayed as supplemental information for a document

This form allows you to capture additional data for existing documents or folders. When you open a document in the ImageNow Viewer, this type of form appears in the Forms pane.

1. On the **ImageNow** toolbar, click **Documents**.
2. In **ImageNow Explorer**, conduct your search, and then, in the search results grid, open the document.
3. If the form does not display, perform one of the following options:
 - To display the **Forms** pane, in **ImageNow Viewer**, on the **View** menu, click **Forms**.
 - To select a different form, In the **Forms** pane, in the **Select a form** list, select the form.

View a form displayed as a stand-alone on a folder

A form that is displayed as a standalone folder is a form that appears in Folder Viewer.

1. On the **ImageNow** toolbar, click **Folders**.
2. In **ImageNow Explorer**, conduct your search, and then, in the search results grid, open the document.

Note The configuration of a form determines where a form is displayed. If a form does not appear in **ImageNow Folder Viewer**, you may be attempting to view a form associated with a folder.

View a form displayed as supplemental information for a folder

This form allows you to capture additional data for your documents or folders. When you open a document in ImageNow Viewer, this type of form appears in the Forms pane.

1. On the **ImageNow** toolbar, click **Folders**.
2. In **ImageNow Explorer**, conduct your search, and then, in the search results grid, open the document.
3. If the form does not display, perform one of the following options:
 - To display the **Forms** pane, in **ImageNow Folder Viewer**, on the **View** menu, click **Forms**.
 - To select a different form, In the **Forms** pane, in the **Select a form** list, select the form.

What users can do with forms

After a manager or owner creates a form template, the ImageNow or WebNow user can enter information in form fields and save the data, print the forms, or delete form data.

To complete a form

1. View the form
2. Type your data into the fields on the form.
3. On the **File** menu, click **Save**. Note that closing **ImageNow Viewer** or **ImageNow Folder Viewer** also saves your changes.

To print a form

1. View the form.
2. Click the **Print Form** button.
3. In the **Print** dialog box, click **Print**.

To save form data

1. View the form.
2. Modify information in the fields of a form.
3. On the **File** menu, click **Save**.

Note Closing ImageNow Viewer or ImageNow Folder Viewer also saves your changes.

To delete form data

Note After you click **Save** or close the Viewer in this procedure, your form data is deleted from ImageNow Server. There is no undo feature to restore your data.

1. View the form.
2. On the **Forms** toolbar, click the **Clear Form Data** button.
3. In the confirmation dialog box, click **Yes** to save your changes.
4. On the **File** menu, click **Save**.

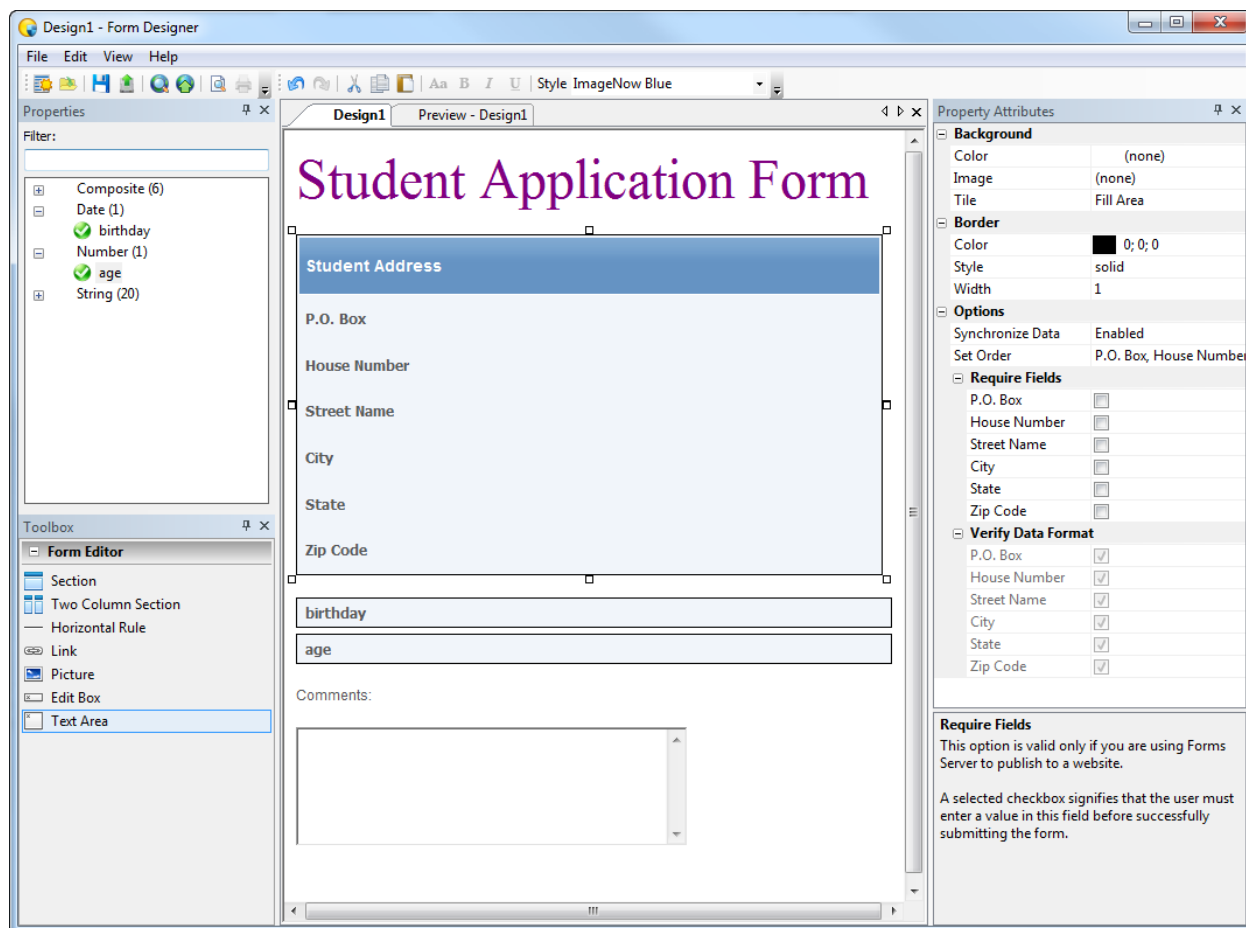
Note Closing the **ImageNow Viewer** or **ImageNow Folder Viewer** also saves your changes.

ImageNow Form Designer

In this section, a manager or owner will learn how to use Form Designer to create a customized form design that can contain images, links, customized headings and fonts, and so on. You will learn how to save and retrieve designs for later use. Additionally, this section explains how to publish form designs based on the published location.

What is ImageNow Form Designer?

ImageNow Form Designer gives you the ability to create, preview, and publish forms. Form Designer allows you to customize elements of a form (such as images, links, and section titles) without the need for scripting or technical development.



To add fields to a form, Form Designer allows you to select custom properties that a manager created in Management Console. Creating fields from custom properties optionally allows the system to complete custom properties using the data a user enters in the form fields. This synchronization makes the form field data searchable.

The Form Designer window is divided into four functional areas:

- **Properties pane.** View the custom properties that you can utilize to create fields on a form. Custom properties are organized by type. You can enter text in the Filter field to quickly find a custom property.
- **Toolbox pane.** You can drag and drop tools from this pane to add elements to your form such as links, columns, and images.
- **Design tab in the center of the screen.** This tab is the work area where you construct the form. The tab label varies based on the name of a saved form design or a system default name for an unsaved form design. If you are working on multiple forms simultaneously, multiple tabs are shown in this work area.

- **Property Attributes pane.** This pane allows you to specify information for each form field or composite set. This pane enables you to customize the appearance of each form field, define the movement of data between the ImageNow Server and the form, and reorder composite properties.

Custom Properties in the Properties pane

The Properties pane in Form Designer organizes the custom properties created in Management Console by type. The custom property type affects the behavior of fields in the form. You can use the following types of custom properties to create different types of fields in a form:

- **Composite.** A composite property type can contain a set of custom properties. This property type allows a user to enter multiple values for each property in the set.
- **Date.** The accepted number format that a user can enter when completing date fields is based on the settings chosen when creating the custom property.
- **Flag.** When you add this custom property type to a form, the field appears as a drop-down select of two values. The system can automatically display either a selected or a cleared check box based on the settings defined for the custom property.
- **List.** When you add this custom property type to a form, a list box is displayed on the published form. On the form, the user can select one value from the existing custom property.
- **Number.** Number fields allow both positive and negative numbers. The accepted number format that a user can enter when completing number fields is based on the settings chosen when creating the custom property.
- **String.** The text fields support all printable ASCII characters within the character set. These fields have a character limit of 128 characters.
- **User.** When you add this custom property type to a form, the field appears as a list in the form.

Create a form design

You use Form Designer to create a form design. You create a form design by adding elements such as custom properties, links, pictures, and more. Using Form Designer, you can save a form design to the ImageNow Server or you can publish the form design to ImageNow or to a website. This section explains how to add elements in order to create a unique form design.

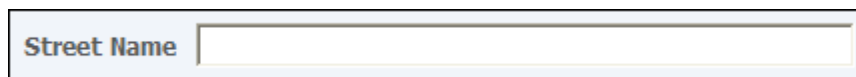
Open a Design tab

To create a new form design, you must open a Design tab.

- In Form Designer, on the **File toolbar**, click the **New**  button.

Add a field to a form

A field appears as a blank box on the form and is a space where a user can enter information. You can choose whether the fields you add to a form require the user to enter data in order to successfully save a form.



To add a field

Note You can use each field on a form one time only.

1. Click and drag a custom property from the **Properties** pane to an open Design tab in the center of the screen.
2. Optional. To choose the configuration of the rows for a composite property, right-click and drag a composite property from the **Properties** pane to the **Form** tab:
 - To display each property on individual rows, click **Singular**.
 - To display the properties as multiple fields on one row, click **Repeating**.

To make fields required

A user must complete all required fields before successfully submitting a form.

Note Required fields are enforced only by forms published to Forms Server.

1. In an open Design tab in the center of the screen, select a field or a composite set.
2. In the **Property Attributes** pane, in the **Required Fields** list, select one or more field name check boxes.

Reorder composite properties

Composite properties are groups of custom properties that are created in Management Console. When you add a composite property to a form, each included custom property is a field in the form design. The composite property appears in the order that it is created in Management Console. Complete the following steps to reorganize the order of the fields in a composite property:

1. Add a composite field to an open Design tab in the center of the screen.
2. In the tab in the center of the screen, select the composite property.
3. In the **Attributes** pane, select the **Set Order** row and click the **ellipsis** button.
4. In the **Set Order** dialog box, select a property and click **Move Up** or **Move Down** to change the order of the property, as needed.
5. Click **OK**.

Add sections to a form

You can create forms with sections that separate areas of a form, such as a customer data section and an invoice section. To divide your fields into columns, you can create a section with two columns.

To create a customized form section

1. Drag **Section** from the **Toolbox** pane to an open Design tab in the center of the screen.
2. Select and delete the default text, and then enter new text to describe the section.
3. Drag a custom property from the **Properties** pane to the new section.

To create a section with two columns

1. Drag **Two Column Section** from the **Toolbox** pane to an open Design tab in the center of the screen.
2. Optional. In the **Property Attributes** pane, do the following:
 - To evenly distribute the width of both columns, select the **Balance Column** check box.
 - To size the column according to the content size, clear the **Balance Column** check box.

Add a picture to a form

1. Drag **Picture** from the **Toolbox** pane to an open Design tab in the center of the screen.
2. In the **Picture** dialog box, select the picture and click **Open**.

Add a link to a form


1. Drag **Link** from the **Toolbox** pane to an open Design tab in the center of the screen.

2. In the **Hyperlink** dialog box, select a prefix in the **Type** list.
3. In the **URL** field, enter the address.
4. Click **OK**.

Add text to a form

1. Click in a blank section of an open Design tab in the center of the screen.
2. Type the text you want to display.
3. Optional. To change the font, do the following actions:
 - Highlight the text. On the **Edit** toolbar, click the **Font** button.
 - In the **Font** dialog box, change the appearance of the text, including color, style, and size as needed.


To copy text from another application

1. Copy the appropriate text from the third-party application.
2. Place your cursor in a blank section of the open Design tab in the center of the screen.
3. In **Form Designer**, on the **Edit** toolbar, click the **Paste**  button.

Change the formatting of a form

You can customize the font style, size, and color of the text you type in a form, or you can select a different style that updates the colors and fonts for all of the elements in a form design.

To select the font for text

1. In the open Design tab in the center of the screen, ensure you do not have a field or composite set selected.
2. On the **Edit** toolbar, click the **Font**  button.
3. In the **Font** dialog box, select the font type, style, size, and color.
4. Click **OK**.

To select a style

- On the **Edit** toolbar, select an option in the **Style** list box.

To add a background to a property

1. In the open Design tab in the center of the screen, select a field or composite set.
2. In the **Property Attributes** pane, select one of the following options:
 - Optional. Under **Background**, in the **Color** field, select a color.
 - Optional. To select an image, complete the following steps:
 1. Under **Background**, in the **Image** field, select **Open Image**.
 2. In the **Picture** dialog box, select a picture.
 3. Optional. Under **Background**, in the **Tile** field, select a repeating pattern for the image.
 4. Click **Open**.

To modify a border around a field or composite set


1. In the open Design tab in the center of the screen, select a field or a composite set.
2. In the **Property Attributes** pane, complete any of the following options:

- Optional. Under **Border**, in the **Color** field, select a color.
- Optional. Under **Border**, in the **Style** field, select a style.
- Optional. Under **Border**, in the **Width** field, enter a positive number to represent the thickness of the border in pixels.

Working with existing forms




When you create a design in Form Designer, you can save the design, retrieve it, and then modify it at a later time. If you publish the form, you can open the saved design and modify it to publish another form.

To save a form design


1. On the **File** toolbar, click the **Save**  button.
2. In the **Save Design** dialog box, in the **Name** field, enter a file name and an optional description.
3. Click **OK**.

Note A user with access to Form Designer can open any saved form design.


To copy a saved form design

1. On the **File** toolbar, click the **Open** button.
2. In the **Open Design** dialog box, select the form and click **Open**.
3. On the **File** toolbar, click the **New**  button.
4. Copy the previously saved form:
 - Click the tab in the center of the screen.
 - Select any elements you want to copy.
 - On the **Edit** toolbar, click the **Copy**  button.
5. Paste to the new form:
 - In the **Form** tab, click the tab.
 - On the **Edit** toolbar, click the **Paste**  button.


To preview a form

1. Open a form in the tab in the center of the screen.
2. On the **File** toolbar, click the **Form Preview**  button.

To open a saved form design

1. In **Form Designer**, on the **File** toolbar, click the **Open**  button.
2. In the **Open Design** dialog box, select the name of your saved form design.
3. Click **Open**.

To export form files

1. Open a saved form design.
2. On the **File** toolbar, click the **Export**  button.
3. In the **Browse For Folder** dialog box, select a folder destination for the files.
4. Click **OK**.

Note You cannot export the individual form files to your computer after a form is published .

What is data synchronization?

You can choose how to synchronize information between the form fields on the form design and the custom properties in ImageNow. You can configure the synchronization separately for each custom property added to your form. For composite properties, you synchronize composite properties fields as a group. To synchronize the data, you must be the owner, a manager, or a user with the Forms Manage privilege.

You can set the system to automatically update the associated custom property in ImageNow based on the information a user enters in the form field. This allows the system to index any information a user enters in form fields. When you set this automatic update, if any custom property information is entered in ImageNow, the form information overwrites it. You can also remove the synchronization so that the system does not update custom properties in ImageNow Server based on the information a user enters in the form fields. This setting maintains the current custom property set in ImageNow regardless of the form field data.

To synchronize data

1. Select a property in the tab in the center of the screen.
2. In the **Property Attributes** pane, in the **Synchronize Data** list, select **Enabled** or **Disabled**.

About formatting in fields

When you enable synchronization between the form fields and the custom properties in ImageNow, the system automatically verifies the required formatting. If a user enters an unaccepted value and selects another field, the system automatically clears the field. If the user enters an accepted value in the field and the format is incorrect, the system automatically updates the information to reflect the correct format. For example, if a user enters a letter in a field that accepts only numbers, the system clears the field of the value. However, if the correct numerical format includes a decimal, after the user enters a number without a decimal in a field, the system automatically adds a decimal value of .00.

Verify formatting in fields

When you disable data synchronization, you can choose to verify or disregard the format of the information a user enters in a field. When you enable data synchronization, the system automatically verifies formatting.

1. In the Design tab in the center of the screen, select a field.
2. In the **Property Attributes** pane, in the **Synchronize Data** field, select **Disabled**.
3. Do one of the following actions:
 - To verify the formatting of the information a user enters in a field, in the **Use Format** list, select the check box for the field.
 - To disregard the formatting of the information a user enters in a field, in the **Use Format** list, deselect the check box for the field.

Publish forms in Form Designer


To publish a form in Form Designer, a publishing wizard guides you through each step of publication. You can select several options based on the publishing location and type of form. Based on your initial selections, the publishing wizard varies the information you are required to complete. For example, if you choose to use Forms Server to publish a document type form online, the publishing wizard requires you to enter a document type name, select a drawer, and enter at least one document key. Alternatively, if you select to publish a document type form only in ImageNow, the only required information is a document type name.

Note You cannot modify a form after you complete the publication process. However, prior to publishing, you can save a form design in order to modify and publish the design at a later time.


Publish a form in ImageNow

This type of form is published in ImageNow. Depending on their privileges, ImageNow users can create new instances of the form, modify and save form data, and complete associated tasks.

To publish a form as a document in ImageNow

1. To open the publishing wizard, on the **File** toolbar, click the **Publish**  button.
2. In the **Published Location** page, select **ImageNow** and click **Next**.
3. To create the document type, in the **New Item** page, complete the following options:
 1. In the **Type** field, select **Document**.
 2. In the **Name** field, type the name of the new document.
 3. Optional. In the **Description** field, type a description.
4. Click **Finish**.


To publish a form on a folder in ImageNow

1. On the **File** toolbar, click the **Publish**  button.
2. In the **Published Location** page, select **ImageNow** and click **Next**.
3. To create the folder type, in the **New Item** page, complete the following options:
 1. In the **Type** field, select **Folder**.
 2. In the **Name** field, type the name of the new folder type.
 3. Optional. In the **Description** field, type a description.
 4. Click **Finish**.

Publish a form to Forms Server

When you publish this type of form, you can embed a link on a website that opens the form. Users with access to the URL can open the form, enter information in form fields, and submit the form to ImageNow. Depending on privileges, ImageNow users can then view the form and complete associated tasks in ImageNow.

To publish a form as a document to Forms Server

1. To open the publishing wizard, on the **File** toolbar, click the **Publish**  button.
2. In the **Published Location** page, select **Forms Server and ImageNow**, and click **Next**.
3. To create the document type, in the **New Item** page, complete the following options:
 1. In the **Type** field, select **Document**.
 2. In the **Name** field, type the name of the new document.
 3. Optional. In the **Description** field, type a description.
 4. Optional. In the **Queue** field, select a queue.
 5. Optional. Select or clear the **Allow attachments to submitted forms** check box.

Note Attachments appear as additional pages in ImageNow.
6. Click **Next**.
4. To populate document keys when submitting a form from an embedded URL, in the **Document Keys** page, complete the following options:
 1. Select from the following options in the **Source** column and enter the appropriate corresponding information in the **Details** column. Then, click **Next**.


Source Column Available Selections	Corresponding Details Column
System drawer. Associates a drawer created in Management Console to the Drawer document key.	Select a system drawer.
Literal. Uses static text.	Type static text.
Unique ID. Generates a Unique ID number.	No information necessary.
Form field. Uses a field included on the form.	Select a field.
Sequence number. Assigns numbers based on a defined sequential order.	Select a predefined sequence or create a sequence.
Timestamp. Assigns the time and date when the user submits the form.	No information necessary.

Notes

- You must select a drawer and at least one document key for forms that a user will submit from an embedded URL.
 - To view the drop-down list in the column rows, click in the row.
5. Optional. To map URL parameters to form elements, in the **Publish URL Parameters** page, complete the following options:
 1. Click **Add**.
 2. In the **Name** column, enter parameters that you want to map to form elements.
 3. In the **Form field** column, select the field in the form.
 4. Optional. Click **Add** to add rows and URL parameters.
 5. Click **Finish**.

Publish a form on a folder to Forms Server

This type of form is embedded using a URL so that a user can access the form on a web application server as well as on the **ImageNow Folder Viewer**, **WebNow Folder Viewer**, or the **Forms** pane. To perform this procedure, you must be the owner, a manager, or a user with the Forms Manage privilege.

1. On the **File** toolbar, click the **Publish**  button.
2. In the **Published Location** page, select **Forms Server and ImageNow**.
3. To create the folder type, in the **New Item** page, complete the following options:
 1. In the **Type** field, select **Folder**.
 2. In the **Name** field, type the name of the new folder type.
 3. Optional. In the **Description** field, type a description.
 4. In the **Queue** field, select a queue.
4. Click **Next**.
5. To populate the folder name when a user submits a form from an embedded URL, in the **Folder Name** page, complete the following options:
 1. Select from the following options in the **Source** column and enter the appropriate corresponding information in the **Details** column. Then, click **Next**.

Source	Details
Literal. Uses static text.	Type static text.
Unique ID. Generates a Unique ID number.	No information necessary.

Source	Details
Form field. Uses a field included on the form.	Select a field.
Sequence number. Assigns numbers based on a defined sequential order.	Select a predefined sequence or create a sequence.
Timestamp. Assigns the time and date when the user submits the form.	No information necessary.

Notes

- You must populate the folder name when submitting a form from an embedded URL.
 - To view the drop-down list in the column rows, click in the row.
6. Optional. To map URL parameters to form elements, in the **Publish URL Parameters** page, complete the following options:
 1. Click **Add**.
 2. In the **Name** column, enter parameters to map to form elements.
 3. In the **Form field** column, select the field in the form.
 4. Optional. Click **Add** to add rows and add additional URL parameters.
 5. Click **Finish**.

Note When you publish a form, you must choose a unique form name. You cannot replace an existing form name.

Administering Forms

This section describes the basic procedures to complete the administration for implementing forms, including the following topics:

- **Implementation Process.** Provides the high-level steps required to successfully deploy forms.
- **Common administrative tasks.** Describes common tasks that a manager or owner in ImageNow can complete in Management Console.
- **Assigning Privileges.** Details what privileges an owner or manager in ImageNow must grant a user or group in order to view or perform tasks for forms.
- **Manual Deployment.** Explains manually uploading form components to publish a form. You may find it necessary to manually deploy forms when you upgrade existing forms to a newer version of ImageNow or make advanced modifications to form files created in Form Designer.

- **Manually Modify Form Components.** Explains the procedure for manually modifying form components and general form information.

Implementation Process

The following topics provide the high-level steps required to successfully deploy forms. The tasks that you must complete vary based on the publishing location. If you are publishing to the Forms Server (giving users access to the form online), the required publishing steps are different from publishing to ImageNow only.

Implementing forms in ImageNow only

The following steps outline the high-level procedures that you need to perform to deploy forms in ImageNow.

1. Install the Forms license. If you need a Forms license, contact your Perceptive Software representative.
2. Create the form files using Form Designer. For more information, refer to “ImageNow Form Designer” section in this guide.
3. Publish the form using Form Designer. For more information, refer to “Publish forms in Form Designer” in this document.

4. Select from the following form privileges for users or groups:
 - To view the form and its data, grant the View privilege.
 - To modify the data for that form, grant the Modify privilege.
 - To enter data into that form, grant the Create privilege.
 - To clear all form data, grant the Delete privilege.

For more information, refer to “Administering Forms” in this document.

5. To access the form, grant a user or group access to the folder type or document type. For more information, refer to Administrator Help.
6. Optional. Associate the form to the workflow queue where the **imagenowforms.xml** file is configured to route the forms. To learn more about routes, refer to Workflow Designer Help.

Note Instead of using Form Designer, you can use external editing tools to manually create and publish form files. For more information on manually deploying forms, refer to “About manual deployment” in this document.

Implementing forms on a website and in ImageNow

The following steps outline the high-level procedures that you need to perform to deploy forms embedded with a URL in ImageNow Forms Server.

1. Install the Forms license and restart ImageNow Server.
 - Note** The system automatically creates the ImageNow Forms group and gives the group access to view and submit a form embedded with a URL.
2. Install and configure the ImageNow Forms Server and Forms Viewer applet. For more information, refer to the *ImageNow Forms Server Installation Guide*, which is available on the Customer Portal.
3. Create the form files using Form Designer. For more information, refer to the “ImageNow Form Designer” section of this guide.
4. Publish the form using Form Designer. For more information, refer to the “Publish forms in Form Designer” section of this guide.
5. Grant any of the following form privileges to ImageNow or WebNow users or groups. Note that the ImageNow Forms group is capable of viewing and submitting forms from an embedded URL regardless of the following privileges:
 - To view the form and its data, grant the **View** privilege.
 - To modify the data for that form, grant the **Modify** privilege.
 - To enter data in an initial instance of that form, grant the **Create** privilege.

- To clear all form data, grant the **Delete** privilege.

For more information, refer to the “Administering Forms” section of this guide.

6. To access the form in ImageNow or WebNow, grant a user or group access to the folder type or document type. For more information, refer to Administrator Help.
7. Optional. Associate the form to the workflow queue where the Forms Viewer applet is configured to route the forms. To learn more about routes, refer to Workflow Designer Help.
8. Embed the forms URL in your portal or business application. For more information, refer to the ImageNow Forms Server Installation Guide available on the Customer Portal.

Note Instead of using Form Designer, you can use external editing tools to manually create and publish form files. For more information, refer to the “Advanced Form Functionality for Developers” section of this guide.

Common administrative tasks

The tasks in this section are common tasks that a manager or owner in ImageNow can complete in the Management Console.

Delete a form

You can only delete forms that have no associated data and are not associated to a conversion queue in workflow. You can make a form that has associated data inactive.

1. In the **Management Console**, in the left pane, click **Forms**.
2. In right pane, on the **Forms** tab, select a form and then click **Delete**.
3. In the confirmation dialog, click **Yes**.

To make a form inactive

1. In right pane, on the **Forms** tab, select a form and then click **Delete**.
2. In the **Delete Form** dialog box, click **Yes** to **Mark Form as inactive and retain existing form data** and then click **OK**.

Display or hide an inactive form

You cannot delete a form template that has existing instances; however, you can mark the form inactive and remove the form from the list. After you have made forms inactive, you can hide or view inactive forms.

1. In the **Management Console**, in the left pane, click **Forms**.

2. In the right pane, on the **Forms** tab, select the **Show inactive forms** check box to display inactive forms or clear the check box to hide inactive forms in this list.

Associate a form with a workflow queue

1. In **Management Console**, in the left pane, click **Workflow**.
2. On the **Workflow** tab, select a process and then click **Modify**.
3. In the **Workflow Designer** dialog box, select a queue and then press ENTER.
4. In the **Queue Properties** dialog box, in the left pane, click **Forms**.
5. Perform any of the following associations:
 - To attach forms to this queue, click **Add**, in the **Select Forms** dialog box, select the forms you want to add, and then click **OK**.
 - To remove a form from this queue, select the form in the list and then click **Remove**.
 - To change the default form associated with this queue, select the form in the list and click **Set as Default**.
6. Repeat the previous step for any additional queues.
7. When you are done associating forms, click **OK**.

Assigning Privileges


An owner or manager in ImageNow must grant a user or group the appropriate privileges in order to view or perform tasks for forms.

Assign Manage Forms privilege


This privilege is required to deploy and maintain ImageNow Forms.

1. To assign a user to manage forms, perform the following steps:
 1. In the **Management Console**, in the left pane, click **Users**.
 2. In the right pane, click the **Security** tab.
 3. On the **Security** tab, perform one of the following actions:
 - In the **Select a user** list, select a user and click **Modify**.
 - In the **Search for users** box, type all or some of a user name, first or last name and then click **Search**. In the **Select a user** list, select a user and then click **Modify**.

Note To sort the **Select a user** list in ascending or descending order, click the **Name, Last Name, First Name, or Status** column headers.

4. In the **Security Settings** dialog box, in the left pane, click **Global Privileges**.
 5. In the **Privileges** list, under **Manage**, click the column to the left of the **Forms** privilege so that  is displayed to grant the privilege.
2. To assign a group to manage forms, perform the following steps:
 1. In the **Management Console**, in the left pane, click **Groups**.
 2. In the right pane, click the **Security** tab.
 3. On the **Security** tab, perform one of the following actions:
 - In the **Select a group** list, select a group and click **Modify**.
 - In the **Search for groups** box, type all or some of a group name, and then click **Search**. In the **Select a group** list, select a group and then click **Modify**.

Note To sort the **Select a group** list in ascending or descending order, click the **Name** or **Description** column headers.

3. In the **Security Settings** dialog box, in the left pane, click **Global Privileges**.
4. In the **Privileges** list, under **Manage**, click the column to the left of the **Forms** privilege so that  is displayed to grant the privilege.


Set privileges for a form

1. On the **ImageNow** toolbar, click **Manage**.
2. In the **Management Console**, in the left pane, click **Forms**.
3. In the right pane, in the **Form** list, select the form you want and then click **Modify**.
4. In the **Form** dialog box, in the left pane, click **Security**.
5. In the right pane, in the **Select a presentation** box, select a presentation.
6. Under **Users/Groups**, click **Add**.
7. In the **Select Users and Groups** dialog box, perform one or both of the following options:
 - On the **Users** tab, to assign a user form privileges, perform one of the following:
 - In the **Search results** list, select one or more users, click **Add** and then click **OK**.
 - In the **Search for users** box, type all or some of a user name, first or last name and then click **Search**. In the **Search results** list, select one or more users, click **Add** and then click **OK**.

Note To sort the **Search results** list in ascending or descending order, click the **User Name, Last Name,** or **First Name** column headers.

- On the **Groups** tab, to assign a group form privileges, perform one of the following:
 - In the **Search results** list, select one or more groups, click **Add** and then click **OK**.
 - In the **Search for groups** box, type all or some of a group name and then click **Search**. In the **Search results** list, select one or more groups, click **Add** and then click **OK**.

Note To sort the **Search results** list in ascending or descending order, click the **Group Name** column header.

8. In the **Form** dialog box, under **Users/Groups**, select the user or group you want to grant privileges to.
9. In the **Privileges** list, click the column to the left of the **Forms** privilege so that  is displayed for the following privileges as needed:
 - To view the form and its data, grant the **View** privilege. The **View** privilege is required to make the other privileges effective.
 - To modify the data for that form, grant the **Modify** privilege.
 - To enter data into that form, grant the **Create** privilege.
 - To delete data in that form, grant the **Delete** privilege.
 - Repeat these steps for each user and group who needs access to the form.

About manual deployment

If you choose not to use Form Designer to publish a form, you can manually upload form components to publish a form. You may find it necessary to manually deploy forms when you upgrade existing forms to a newer version of ImageNow or make advanced modifications to form files created in Form Designer.

The following files are used in forms in ImageNow, although you can optionally use CSS, graphics, and JavaScript.

- **Presentation Template** This XSL file describes how to present the XML data in the form.
- **Data Definition** This XML file contains the schema used to save data instances in data content record files.

- **Data Content Record** This XML file contains individual instances of form data based on a corresponding data definition file.

Note For more information on using external tools to create forms, refer to Enhanced Forms Help, which is available in the Product Documentation tab on the Customer Portal area of the Perceptive Software website.

Manually load form components and create a form in ImageNow

Form Designer automatically creates and uploads the form components in ImageNow. You can export those files or create your own components to upload into ImageNow. This section gives instruction on manually loading the required form components successfully in ImageNow.

To upload the XML data definition file

1. On the **ImageNow** toolbar, click **Manage**.
2. In the **Management Console**, in the left pane, click **Forms**.
3. In the right pane, click **Manage Components**.
4. On the **Manage Form Components** dialog box, in the **Data Definitions** pane, click **Add**.
5. In the **File Open** dialog box, navigate to the folder where your local form files are stored, select the XML file you created for this form, and then click **Open**.
6. Optional. Upload files to share with more than one presentation:
 1. In the **Shared Files** pane, click **Add**.
 2. In the **Shared Files** dialog box, select the optional files you created that you want to share with more than one presentation and then click **Open**.

To upload XSL files, supporting files, and organize your files into presentations

1. On the **Presentations** pane, click **Create**, type a name for your presentation, and then press ENTER.
2. Select the presentation you just created and click **Modify**.
3. Optional. In the **Presentation** dialog box, in the **General** pane, type a description for your presentation.
4. In the **Files** pane, click **Add**, select the XSL file and any optional files you created for this presentation and then click **Open**.
5. If you previously added shared files that you want to use in this presentation, click **Select Shared Files**, in the **Select Shared Files** dialog box, select the files you want and then click **OK**.
6. If you created more than one XSL file to use with your XML file, repeat these steps for each XSL file.

7. Click **OK**.


To create your form from your data definition file and presentations

1. On the **ImageNow** toolbar, click **Manage**.
2. In the **Management Console**, in the left pane, click **Forms**.
3. In the right pane, on the **Forms** tab, click **New**.
4. Type a unique name for your form and then press ENTER.
5. Select the form you just created and click **Modify**.
6. Optional. In the **Form** dialog box, in the **General** pane, in the **Description** box, type a description for your form.
7. In the **Components** pane, under **Data Definition**, in the **Data definition** list box, select the XML file you created for this form.
8. Click **Select** to choose presentations you want to be available for use with this form, in the **Select Presentations** dialog box select the presentations and then click **OK**.
9. Click **OK**.

To set user or group privileges for your form

1. On the **ImageNow** toolbar, click **Manage**.
2. In the **Management Console**, in the left pane, click **Forms**.
3. In the right pane, in the **Form** list, select the form you want and then click **Modify**.
4. In the **Form** dialog box, in the left pane, click **Security**.
5. In the right pane, in the **Select a presentation** box, select a presentation.
6. Under **Users/Groups**, click **Add**.
7. In the **Select Users and Groups** dialog box, perform the following:
 - On the **Users** tab, to assign a user form privileges, perform one of the following:
 1. In the Search results list, select one or more users, click **Add** and then click **OK**.
 2. In the Search for users box, type all or some of a user name, first or last name and then click **Search**. In the Search results list, select one or more users, click **Add** and then click **OK**.

Note To sort the **Search results** list in ascending or descending order, click the **User Name**, **Last Name**, or **First Name** column headers.
 - On the **Groups** tab, to assign a group form privileges, perform one of the following:

1. In the **Search results** list, select one or more groups, click **Add** and then click **OK**.
2. In the **Search for groups** box, type all or some of a group name and then click **Search**. In the **Search results** list, select one or more groups, click **Add** and then click **OK**.
Note To sort the **Search results** list in ascending or descending order, click the **Group Name** column header.
8. In the **Form** dialog box, under **Users/Groups**, select the user or group you want to grant privileges to.
9. In the **Privileges** list, click the column to the left of the **Forms** privilege so that  is displayed for the following privileges as needed:
 - To view the form and its data, grant the **View** privilege. The **View** privilege is required to make the other privileges effective.
 - To modify the data for that form, grant the **Modify** privilege.
 - To enter data into that form, grant the **Create** privilege.
 - To delete data in that form, grant the **Delete** privilege.
10. Repeat this procedure for each user and group who needs access to the form.

Optional. To associate the form with a workflow queue

1. On the **ImageNow** toolbar, click the **Manage** down arrow and then click **Workflow**.
2. On the **Workflow** tab, select a process and then click **Modify**.
3. In the **Workflow Designer** dialog box, double-click the queue.
4. In the **Queue Properties** dialog box, in the left pane, click **Forms**.
5. Click **Add**, in the **Add Form** dialog box, select the forms you want to add, and then click **OK**.
6. When you are done associating forms, click **OK** and then click **Close**.

Manually Modify Form Components

Once a form has been loaded in ImageNow, you can modify form components manually. The following steps explain the procedures to manually modify and replace form components and general form information.

To manually modify general form information

1. On the **ImageNow** toolbar, click **Manage**.
2. In the **Management Console**, in the left pane, click **Forms**.

3. In the right pane, select a form and then click **Modify**.
4. In the **Form** dialog box, you can make the following changes to your form:
 - In the **General** pane, you can modify the form name, description, and set the form to active or inactive.
 - In the **Components** pane, you can change the data definition file to use with this form and which presentations are available for this form.
 - In the **Security** pane, you can grant or deny form privileges to users and groups. When you are done modifying the form, click **OK**.

To manually replace a data definition file

1. In the **Management Console**, in the left pane, click **Forms**.
2. In the right pane, on the **Forms** tab, click **Manage Form Components**.
3. In the left pane, select **Data Definitions**.
4. Select the existing data definition in the forms list and then click **Replace**.
5. In the **Replace** confirmation dialog box, click **Yes**.
6. Navigate to the XML file you wish to use to replace the existing one and then click **Open**.

Warning Replacing your data definition file can cause existing XML instances to become corrupted. This is especially true if you removed or modified an existing element. Adding new elements should not corrupt data, but the elements in the existing XML instances will not be populated, so you need to populate them.

7. To remove a data definition file, select the existing data definition in the form list and then click **Remove**.

Note Changes to form files do not affect users who are currently logged in until they log out and in again.

To manually replace a shared file

1. In the **Management Console**, in the left pane, click **Forms**.
2. In the right pane, on the **Forms** tab, click **Manage Form Components**.
3. In the left pane, select **Shared Files**.
4. To replace an optional file, select the existing file in the list and then click **Replace**.
5. In the **Replace** confirmation dialog box, click **Yes**.
6. Navigate to the file you wish to use to replace the existing one and then click **Open**.

To manually remove a shared file

1. In the **Management Console**, in the left pane, click **Forms**.
2. In the right pane, on the **Forms** tab, click **Manage Form Components**.
3. In the left pane, select **Shared Files**.
4. To replace an optional file, select the existing file in the list and then click **Remove**.

Note Changes to form files do not affect users who are currently logged in until they log out and in again.

To manually replace a presentation

1. In the **Management Console**, in the left pane, click **Forms**.
2. In the right pane, on the **Forms** tab, click **Manage Form Components**.
3. In the left pane, select **Presentations**.
4. To modify a presentation, select the presentation in the list and click **Modify**.
 - In the **General** pane, you can change the presentation name and description.
 - In the **Files** pane, to add files to an existing presentation, click **Add**, navigate to the file and then click **Open**.
 - To add shared files on the ImageNow Server to the presentation, click **Select Shared Files**, select the files and then click **OK**.
 - To replace a file, select the file in the list, click **Replace**, navigate to the new file and then click **Open**.
 - To remove a file, select the file in the list and then click **Remove**.
 - In the **Presentation** dialog box, when you are finished making changes, click **OK**.
 - To **remove** a presentation, select the presentation in the list and click **Remove**.

Note Changes to form files do not affect users who are currently logged in until they log out and in again.

5. When you are finished modifying components, click **OK**.

To manually add a form to a document type

Use the following procedure to select a form to associate with a document displayed in ImageNow Viewer or WebNow Viewer.

1. In the **Management Console**, in the left pane, click **Document Types**.
2. Select a document type and then click **Modify**.
3. In the **Document Type** dialog box, in the **General** tab, check the **Is a form** check box and then select a form in the **Form** list.
4. Click **OK**.

To manually add a form to a folder type

Use the following procedure to select a form to associate with a folder displayed in Folder Viewer.

1. In the **Management Console**, in the left pane, click **Folder Types**.
2. Select a folder type name and then click **Modify**.
3. In the **Folder Type** dialog box, in the **General** tab, check the **Is a form** check box and then select a form in the **Form** list.
4. Click **OK**.
5. Whenever you create a new folder based on this folder type, you must add it to a workflow queue. Otherwise, the folder cannot be accessed by the user of the folder.

To add shared form files

1. In the **Management Console**, in the left pane, click **Forms**.
2. In the right pane, click **Manage Components**.
3. In the **Manage Form Components** dialog box, in the left pane, click **Shared Files**.
4. Click **Add**.
5. In the **File Open** dialog box, navigate to the folder where your local form files are stored, select the files you want to add, and then click **Open**.
6. Click **OK**.

Advanced Form Functionality for Developers

Using standard HTML, XSL, and XML, you can use external editing tools, such as Microsoft FrontPage or Adobe Dreamweaver to extend the functionality of forms that you create using Form Designer. Form Designer builds a Presentation Template and one Data Definition file. You can expand this by building

multiple Presentation Templates for each Data Definition file. You can provide external Cascading Style Sheets (CSS) files or add in-line CSS to the XSL file. In addition, you can use JavaScript files for standard numeric functions, data validation functions, or other common functions, such as context-sensitive help.

To deploy a modified form, you load the form files onto the ImageNow Server. If you are deploying a form to use with the ImageNow Forms Server, you associate the form with a folder type or document type. If you are deploying a form to use in the Forms pane, you can optionally associate the form with any appropriate workflow queues.

The following files are used in forms in ImageNow, although you can optionally use CSS, graphics, and JavaScript:

Presentation Template This XSL file describes how to present the XML data in the form. You can use many presentations with a single XML source file, so you can create different formatting or views of the data for each form you create. Each presentation can have different security settings. Through these settings, you can control access to your forms. Additionally, external ODBC access is provided through iScript, a scripting language available with ImageNow.

Data Definition This XML file contains the schema used to save data instances in data content record files. You can also add data to elements in this file to pre-populate fields in your form the first time it is displayed to a user.

Data Content Record This XML file contains individual instances of form data based on a corresponding data definition file. The data captured during form processing is stored for viewing, editing, searching, and archiving purposes. ImageNow creates and maintains the data content record files for you based on your data definition file. ImageNow stores these records as subobjects.

Notes

- If you are using external editing tools to create form files, the system does not support files encoded with UTF-8 with BOM.
- For more information on using external tools to create forms, refer to Enhanced Forms Help, which is available in the Product Documentation tab on the Customer Portal area of the Perceptive Software website.

Getting started with extending forms

After you create form files using Form Designer, you can use an external editor to make enhanced modifications to the form files. You deploy the extended forms in ImageNow Client. Advanced modification of a form requires a basic knowledge of HTML, XML, Cascading Style Sheets, iScript, and JavaScript.

The following steps outline the high-level procedures that you need to perform to use forms in ImageNow:

1. Install your required Forms license if you have not installed it already. If you need a Forms license, contact your Perceptive Software representative.
2. Ensure that you are an owner or manager, or are assigned the Manage Forms privilege. For more information, refer to “Assigning Privileges” in this document.
3. Create your form files using Form Designer. For more information, refer to “Create a form design” in this document.
4. Save the form in Form Designer. For more information, refer to “Save a form design” in this document.
5. Export the form files from Form Designer. For more information, refer to “Export form files” in this document.
6. Use external editors to modify the form files. For more information, refer to “Advanced Form Functionality for Developers” in this document.
7. Manually deploy the form. For more information, refer to “About manual deployment” in this document.
8. Set privileges for documents associated with forms and privileges for any workflow queues. For more information, refer to Administrator Help.
9. Optional. Associate the form to the workflow queue where the **imagenowforms.xml** file is configured to route the forms. To learn more about routes, refer to Workflow Designer Help.

Form design and planning

The following lists contain areas to consider when designing your form files:

Specific file design considerations

- Is it best to use HTML tables inside your Form elements to position your HTML controls? Will you need to dynamically add or delete rows to the table? You must use the controls provided in ImageNow to add or delete rows in tables. Do you need to dynamically repeat rows or entire sections in a form table? These features only work inside HTML tables. We recommend using tables to align your HTML controls.
- Since you can share the optional, supporting files between forms in ImageNow, consider creating supporting files in a manner that facilitates the sharing of duplicate formatting and graphics. For example, you can share a company logo.
- Are there repeating HTML controls? Some of this can be handled by the controls provided with ImageNow. In other cases, you must write your own code.

- Do you want to provide context-sensitive JavaScript help content for your forms? Basically, this is help that describes to the user how to fill out individual form elements or that describes the purpose of a particular form.
- What editing and authoring tools do you want to use for your form files? You can use standard tools, such as Microsoft FrontPage or Adobe Dreamweaver.
- ImageNow does not yet support a full browser environment, so plug-ins such as ActiveX, Java applets, and Flash are not currently supported by Perceptive Software Product Support.

Data validation considerations

- How much client-side validation do you need on fields during data entry? This type of validation requires JavaScript in the XSL file. ImageNow provides some controls for validation, but you may have to write your own validation code as well.
- Do you need to perform validation of data from external data sources? For example, you need to enter a Vendor ID in a form and then have that value checked against an external table of valid vendor IDs. If the value does not match, the user gets an error message and form data is not submitted until the value is valid.

Business application integration considerations

- Plan your XML schema according to the mapping your business application requires if you plan to integrate data.
- Do you want to provide ODBC access to your form data? You must add specific ImageNow tags to your XML file for ODBC access.

HTML and XSL form control considerations

- Do you need any numerical calculations done by your form?
- Do you need any hidden controls? Hidden controls can temporarily store variables while a form is in use.
- Do you want any fields to be pre-populated with values from the XML schema?
- Do you need conditional control content such as the selection of a radio button dynamically dictating the values in a list box?

Integration with other ImageNow features

- Are database lookups needed to pre-populate list boxes with data from your existing databases?
- Do you want any of the entered data to populate document keys or custom properties? You need to add specific tags to your XML file to populate these items.

- Do you want to perform searches on any of the data entered into forms? If so, which fields? You must add these fields to custom properties to enable searching in ImageNow. To enable this type of search, create the basic form using Form Designer.
- Do you require the ability to access internal ImageNow data and use that data to populate form elements? For example, you can populate a list box with document key values. To enable this data exchange, you need to create the basic form using Form Designer.

About form data binding

The following list describes how ImageNow forms presentation and data definition files work together to store your data:

- The data definition XML files are only XML fragments.
- The main presentation file is HTML generated by an XSL stylesheet.
- The generated XML structure of a presentation file must match the XML data definition structure in order for ImageNow to correctly automate the data extraction process.
- The `<xsl:value-of select="/<path>/<to>/<node>">` syntax reference is used to map a display element from a presentation XSL file to a data element in the data definition XML file.
 - If you reference any variable or function in the select attribute of the element in the XSL file, data binding cannot occur for that element.
 - These custom attributes are available for the supported HTML form controls of INPUT type.
 - repeat
 - delete
 - deleterow
 - newInstanceRows
- The `<xsl:value-of>` only works to bind data in the following HTML form controls:
 - INPUT type=button
 - INPUT type=hidden
 - INPUT type =text
 - INPUT type=check
 - INPUT type=radio (But all of these radio buttons must be children of a DIV tag.)
 - TEXTAREA

- The relative position or order of nodes is not guaranteed.
- Repeating elements of a single type must exist under a single parent node for that type.
- XSLT version 1.0 is fully supported for data binding except for the preceding exceptions.

The generated form that a user views in ImageNow is an HTML document. Remember this when you are creating your data definition and presentation files. When you create your data definition, first consider what data you need and how the data is related. After you have these requirements, you can determine how to represent this data in the XML data definition that facilitates data mapping and data display.

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