

## **FormFlow Quick Start Filler Guide (excerpt-1)**

### **Step 1: Open Form**

#### **To Open a Form**

- From the File menu, select the Open command. Note: you may have a front end menu application which gives button choices for forms instead of the Open Dialog.
- Specify the drive and directory in which the form you want to open is located.
- To narrow the list of displayed file names, choose a filter from the List Files of Type list box. Select Forms (\*.fr\*) or FormFlow Forms (\*.frp).
- Double-click the file name, or click the file name, then click OK. You will now have a blank form open.

### **Step 2: Create Data File**

#### **To create a data file:**

- Use the Default Data option to specify a file name in which you want to save your data. Use the same name as the form file to make it easier to remember which data files go with which form files. For example, a form called Form.FRP should have a datafile called Form.DBF. Type in the name and the .DBF extension if using dBASE.
- If your forms are stored on a locked (write protected) network drive you must also specify the path (either local or on the network somewhere you have write access).
- A message will appear stating the Data File doesn't exist - Create? Yes, create and open the new file. Suppose you had already created the file and you get this message, it is an indicator to you FormFlow can't find the file in the current directory. Thus, you would have to use the Open Data option to find it.
- Once you create the new default datafile a file with the extension of .FDB will be placed in the same directory as the form file. You MUST have write access to the directory where the form files are stored. If not, see your administrator to create the default data files for you.

### **Step 3: Fill-in the Form**

#### **Entering Text/Data Into a Form by:**

- Typing it from the keyboard,
- Selecting the Paste command from the Edit menu to insert text copied from another form or another Windows application,
- Selecting the Load Text command from the Edit menu and specifying an external file (from a word processor) to load into the field.

### **Step 4: Save Your Record**

- Go the View Menu and ensure you have checked (On) Show Ribbon and you will see (New Record)
- When you have completed part or all of the form, choose Update or Ctrl + U from the Data Menu. This option adds the current form data to the opened data file. The record is placed at the end of the open data file. This is the same as Add Record or Ctrl + S, except it leaves you on the current record. If you use Add Record you are given a New Record (blank) and you must go the Locate Menu and choose Previous to view the saved record.
- If for some reason you do not have an open data file you will get the Save Data As menu as the application is not exactly sure where to place your data. You can Add the record to an existing database or create a new one if needed.
- Any further changes to this particular record should be done with Update or Ctrl + U. This option allows you to pull up existing records and modify them after they have initially been stored. Simply go

back to the original data record and make any necessary changes. Then, instead of adding a new record, merely update the existing one

- When you need a blank record, use the New Record or Ctrl + N option.
- Each time you press the TAB key, the cursor moves from field to field, following the path defined during the form's design.
- You cannot change the tabbing order of a form you are filling, but you can use the mouse to click in any particular field.
- As you tab from field to field, FormFlow automatically repositions the view of the form on the screen, if necessary, so you can always see the field you are working on.

### **Step 5: Print the Form**

#### **To print a form and a single record**

- Display the form and record you want to print.
- From the File menu, select the Print command
- From the Pages options, select All.
- In the Copies field, enter the number of copies you want to print.
- From the Form and Data Options list box, choose Both.
- From the Data list box, choose Current Record.
- Click OK.

Once you have made a certain set of selections in the Print Dialogue these settings will be retained the next time you go to print. Ensure Current Record is selected to print the current form only.

### **Step 6: Locating Saved Records**

#### **Query By Form**

This option gives the user a chance to use the actual form as a data element entry screen.

Once selected, go to the block you where you wish to locate information and type the search criteria. Once entered, click on the first set of double arrows at the top left of the screen to locate any matching records. The other arrows will allow you to traverse your selected records. See the FormFlow Task section for more details on locating records.

#### **Search on Index Field**

Use this item to do a selected search using an index field. In order to utilize this option -search criteria must be present by using an index. This option can only be used on dBASE records and must be set up prior under the Data menu - Select Index. Indexes will greatly reduce the amount of time it takes to locate a record. This is very helpful when dealing with many records. Note: If you are using ASCII this option will not be available.

#### **Search on Expression**

Like the previous two choices this is another way of locating completed forms from your data file. You must know the field name of the section in which you intend to search. To find this simply click your mouse in that field and read the name off of the Ribbon bar. If you do not see it, go to the View menu and enable Show Ribbon.