

Forms

Con-nect enables you to design forms that meet the requirements of the information structure in your company. Natural programs are used to handle the forms. For example, a form can be a standard memo layout used for internal mailing within your company or perhaps a standard billing form you send to your customers.

Important:

When using forms, the library SYSCNT2 must be defined as a steplib.

This chapter covers the following topics:

- Types of Forms
 - Adding a Form
 - Working with Forms
 - Managing Your Forms
 - Commands for Forms
 - Integrating Forms into the Con-nect Office
-

Types of Forms

There are three types of forms:

- **User Form**

A form which is created via an interactive series of screens. A user form can contain a maximum of 16 lines.

- **Natural Form**

A form which is created via a program and associated maps. A Natural form can contain as many lines as the buffer will support.

- **Entry Form**

A form which is created via an interactive series of screens. An entry form is used in connection with a document containing Con-form variables. This Con-form (Cnf) document can contain as many lines as the editor buffer can support. When you want to use the entry form, you must add an additional document and specify the form name in the "Add Document" screen. The form will then be displayed and you can fill the variables with the actual information. This information will be included in the resulting document. Optional - you can send the document which has been created using the entry form.

A user form or a Natural form can be used to create a document, or to send mail. When you use a form to send mail, you can predefine addressees or use global variables to pass the addressee information from the form program to the Send function.

Adding a Form

When you add a form in Con-nect, you interactively design a user form or an entry form. You can also link an existing Natural program to a form name which can later be identified by Con-nect.

Issue the following command sequence from any point in Con-nect:

```
ADD Form
```

As a result, the "Add Form" screen appears.

```

11:01 AM          * * * C O N - N E C T 3 * * *          26.Mar.2001
Cabinet LS              Add Form                          Monday

      Folder Work_____ File _____

      Form Name _____
      Description _____
      _____
      _____

      User Form _
or Entry Form _          Cnf Document _____
or Program _____
      Library SYSCNT2_

      Addressee(s) _____

      Private use _ or Security Read 7 Modify 7 Copy 7

Complete the information above and press ENTER to add
Command /
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      Help Menu Quit In Send Foldr Docs Note Cal Flip Last Home

```

In addition to the information which you enter in every "Add" screen (see *The "Add" Screens*), you must specify the following form definition criteria in the "Add Form" screen.

Form Name

A unique name which identifies the form within Con-nect. This name must not exceed 32 characters.

User Form

To add a user form, you mark this field with any character.

Entry Form

To add an entry form, you mark this field with any character. In addition, you must enter the name of a Cnf document in the "Cnf Document" line.

Cnf Document

When you add an entry form, you must enter the name of an existing Cnf document from your cabinet.

If the document name contains blanks, you must replace the blanks by the blank substitute character. By default, the blank substitute character is a slash (/). See *Language, Command Sequence and Autosave*.

You can also enter an asterisk (*) in this line to display a list of all available Cnf documents. To select a document, mark it with any character and press ENTER.

When you later modify the text of the original document, the modifications are *not* applied to the document which has been linked to the entry form. If you want to use the modified version of the document, see the description of the MODIFY command in this section for further information.

Program

To add a Natural form, you enter the Natural program name in this line. In addition, you must enter the library name in the "Library" line.

The Natural program must have been defined previously (by the Con-nect administrator, yourself or another user).

Do not enter a name in this line, if you are adding a user form or entry form. For these types of form, Con-nect automatically generates programs where the name start with "F99".

Library

The name of the current library is displayed by default. You can specify another library by typing over the default.

You can also enter an asterisk (*) in this line to display a list of all available libraries. To select a library, mark it with any character and press ENTER. The list provides the following options: the current library, the *STEPLIB library and up to 8 steplib libraries as defined in Natural Security.

When you add a user or entry form, the Natural program is created and cataloged in the current library. If you specified a library different than the current library, the Natural program is moved to the specified library after it has been cataloged.

When you add a Natural form, you must specify the Natural library in which the program is cataloged.

Addressee(s)

When you add a user form or Natural form, you can predefine addressees. You specify the addressees in the same way as you do when sending a memo. The addressees must be separated by a blank. See *Sending a Memo* for further information.

The address list created at this point is stored with the form. It can be changed when the form itself is modified.

When you send the form, the address list is copied. You can modify the copied address list before sending the form (e.g. you can define additional addressees or remove predefined addressees). These modifications are only valid for the current send process. They are not applied to the original address list which is stored with the form.

This field does not apply for entry forms.

Press ENTER to add the form.

The next sections describe the remainder of the procedure, depending on whether you are adding a user form, an entry form or a Natural form.

- Creating a User Form
- Creating an Entry Form
- Creating a Natural Form

Creating a User Form

If you specified "User Form" in the "Add Form" screen and press ENTER, one of the following occurs, depending on whether you have specified addressees or not:

- **One or more addressees have been specified:**

The "Modify Form" screen appears.

If a selected user has set a mail status message, the message is displayed in a window as soon as you press ENTER. You must then press ENTER again to close that window.

The number of addressees is shown adjacent to the "Selected" indicator. The name of the last addressee that was entered is shown below the "Addressee(s)" line.

If a selected user has defined a Cc in the mail status message and/or a Cc or Cc 2 in the user address (see *Modifying Your Own User Address*), this is also added to the list of addressees. Thus, when you specify one addressee, up to three Cc addressees may also be added.

```

11:26 AM          * * * C O N - N E C T 3 * * *          26.Mar.2001
Cabinet LS              Modify Form                      Monday

      Folder Work_____ File _____

      Form Name Interoffice_____
      Description _____
      _____
      _____

      User Form X
      or Entry Form _          Cnf Document _____
      or Program F9997028
      Library SYSCNT2_          Mark to compile _

      Addressee(s) _____          Selected 2
                          Eshberry,George

      Private use _ or Security Read 7  Modify 7  Copy 7

      2 addressee(s) selected - press ENTER to access the form editor
      Command /
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      Help Menu Quit              Mod          Addr Frmat Flip Last Home

```

You can add more addressees at this point by entering them in the "Addressee(s)" line and pressing ENTER.

You can also issue the ADDRESS command to access the address management system. You can then select further addressees from a selection window or remove addressees from the list. You can also define that an addressee is to receive a copy, a blindcopy or private mail. See *Address Management System* for further information.

To access the Con-nect user form editor, press ENTER while the "Addressee(s)" line is empty.

- **No addressees have been specified:**

The Con-nect user form editor is displayed immediately and you must design the form as described below.

The Con-nect User Form Editor

```

-----
                          Con-nect User Form Editor

You can use this screen to define a form by entering text lines, input
fields or by using one of the standard fields shown below. This explanation
will disappear when you press ENTER.
To create input fields on the form, mark the start of the field with a plus
symbol (+) and follow it with a series of Xs. If you want a field filled in
by Con-nect, use a '+' followed by one of the symbols below:

+SUBJ Memo subject      +DATE in your format    +TIME hh:mm      +FROM your name
+DAY Day of week       +FULL Month dd,yyyy    +DASH dashes     +TO  addressee
Enter a command, press a PF-key, or enter * to display commands
  Command /                                                    /
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      Help  Menu  Quit                                Dflt          Flip  Last  Home
    
```

The editor screen contains instructions on how to create the form. These instructions will disappear the first time you press ENTER, i.e. all 16 lines of the screen will then be available for the form.

Note:

Two user form examples are included later in this section. See *Using a User Form to Send Mail* and *Using a User Form to Create a Document*.

A user form contains two components: text lines and input fields. You can define a maximum of 16 lines for a user form.

Enter each text line at the position you want it to appear on the form.

Define input fields on the form. Each input field must start with a plus sign (+).

For example:

```

                                INTER-OFFICE MEMO

      To: +TO
      From: +FROM
Subject: +SUBJ
      Date: +DATE
      File: +XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX

+DASH
    
```

If you want an input field to be filled in by Con-nect (e.g. with the current date), you mark the beginning of the field with a plus sign (+) and then enter the symbol (e.g. DATE) representing the information Con-nect is to supply.

To define an input field in which you can later enter information, mark the beginning of the field with a plus sign (+), and then enter an X for each character to specify the field length.

If you specify +TO and +SUBJ in the form editor, you can send mail directly, using the form, without intervening screens.

The following table lists all symbols you can use in the user form editor. The "Length" column contains the default field length for each symbol.

Symbol	Length	Description
+SUBJ	60	Used to send mail. Interpreted as the "Subject" line of the "Send" screen. You can then enter a subject. If +SUBJ is not specified, "Form" and the date and time, when your mail was sent, is automatically entered as the subject.
+DAY	10	The current day of the week is automatically provided (e.g. Tuesday).
+DATE	12	The current date is automatically provided in the format which was specified in your user profile.
+FULL	20	The current date is automatically provided in the format "month-name dd,yyyy" (e.g. June 16,1992)
+TIME	8	The current time is automatically provided in the format which was specified in your user profile (e.g. either 14:45 or 2:45 PM).
+DASH	75	Con-nect automatically inserts a 75 character long dashed line.
+FROM	20	Your name is automatically provided (e.g. Long,Sonya).
+TO	60	Used to send mail. Interpreted as the "Addressee(s)" line of the "Send" screen. You can then enter the addressees.
+XXXX	user-defined	Input field in which you can enter text. To define the field length, you must enter an X for each character (e.g. if the input field is to be 10 characters long, you must enter "+XXXXXXXXXX").

The addressees that are specified using +TO are not saved in the address list of the form. +TO can be used to specify additional addressees when sending the form.

If you specify more than one input field in the same line, the total length of the fields (and associated text lines) must not exceed 77 characters.

Note:

If you enter several fields in one line and the total length of the fields exceeds 77 characters, the appropriate error message appears and the cursor is positioned on the name of the field which caused the error.

The number of fields and words you can specify depends on the Natural profile parameter FSIZE (see the Natural documentation). You can use the following calculation to determine the number of fields that are allowed:

(FSIZE - 12000) / 40

You can use the following line commands:

,C (to copy a text line)
,D (to delete a text line)
,I (to insert a text line)

In contrast to the "Modify *Document-name*" screen, the above line commands only act upon a single line in the user form editor; i.e. you *cannot* specify the number of lines such as ,D(3). See *Text Processing* for further information on line commands.

After you have defined the form components, press ENTER to create the form.

Each time you press ENTER, Con-nect validates your input, i.e. Con-nect checks the line length and the FSIZE.

When a message appears indicating that the form is too complex, the FSIZE parameter is too small. In this case, you can finish editing the form and save it by issuing the QUIT command. However, the form is not cataloged (i.e. you cannot work with it, until the FSIZE parameter is increased). See your administrator for further information.

Optional - you can modify the defaults for the user form (see below).

Issue the QUIT command to save the form.

For comprehensive examples, see *Using a User Form to Send Mail* and *Using a User Form to Create a Document*.

Defaults for the User Form

You can modify the defaults for the user form.

Issue the following command from the user form editor.

DEFAULT

As a result, the "Modify Defaults for User Form" window appears.

```

+-----+
!  Modify Defaults for User Form  !
+-----+
!                                     !
!  Mark to:                          !
!                                     !
!  _  Permit input only in fields    !
!  _  Permit usage of command line   !
!  _  Use filler character for fields !
!  _  Expand the 'TO' field          !
!                                     !
-----
Con-nect
You can use this screen to define
fields or by using one of the sta
will disappear when you press ENT
To create input fields on the for
symbol (+) and follow it with a s
by Con-nect, use a '+' followed b

+SUBJ Memo subject   +DATE in you
+DAY Day of week    +FULL Month
Enter a command, press a PF-key, or enter * to display commands
Command /
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      Help Menu Quit                Dflt                Flip Last Home

```

The defaults only apply to this specific user form. You can mark the following fields with any character:

Permit input only in fields

Optional - you can enter information only in the fields you have defined. All other fields are protected fields in which you cannot enter text.

When you do *not* mark this field, you can enter text in all 16 lines of the user form.

Permit usage of command line

Optional - the command line will be provided.

Use filler character for fields

Optional - the length of the defined input fields is indicated by underscores.

Expand the "TO" field

Optional - when you use the form to send mail and the mail item is displayed, for example, in the Inbasket or Outbasket, each specified addressee is shown in an extra line. The addressees with the mail type "Original" are shown first, followed by those who receive copies of your mail item.

When you do *not* mark this field, only the first addressee you entered (and who receives an original mail item) is shown on the form. Therefore, if you use the form to send a mail item to more than one addressee, it is recommended that you mark this field.

Issue the QUIT command to close the window and to return to the user form editor.

Creating an Entry Form

Since the entry form logic differs from the logic of the other form types, it is recommended that you first read *Using an Entry Form to Create a Document* before you continue with this section.

If you specified "Entry Form" in the "Add Form" screen, the Con-nect entry form editor is displayed.

The Con-nect Entry Form Editor

```

-----
                          Con-nect Entry Form Editor

You can use this screen to define an entry form by entering text lines
and the Con-form variables defined in the Cnf document. A variable must
begin with an ampersand (&). Its length is specified by the length of the
variable name. If the variable length is greater than the name, enter a
series of periods (.) after the variable name to specify the length.
(e.g. Name (A20)  :   &NAME.....  )

This explanation will disappear when you press ENTER.

Enter a command, press a PF-key, or enter * to display commands
  Command /
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      Help Menu Quit Orig Confm                      Flip Last Home

```

The screen shows an explanation on how to create an entry form; the explanation disappears the first time you press ENTER.

An entry form consists of two components: text lines and input fields. The input fields are the Con-form variables of the Cnf document that you specified for this entry form. A variable name must not exceed 32 characters. The variable names must be the same in the entry form editor and in the document.

A maximum of 16 lines is available in the entry form editor. This restriction does not apply to the documents that are used with the entry form.

Enter the text lines and the Con-form variables in the positions where you want them to appear on the form.

You can also select the Con-form variables from a window (see *Selecting the Variables from a Window*).

Each variable must begin with an ampersand (&). If the number of characters following the ampersand is not sufficient to define the length of the input field, enter periods (.) after the variable name (for example, if the input field is to be twenty characters long, specify "&NAME.....").

The length of an input field must not exceed 77 characters. If you specify more than one input field on the same line, the total length of the fields (and associated text lines) must not exceed 77 characters.

Note:

If you enter several fields in one line and the total length of the fields exceeds 77 characters, the appropriate error message appears and the cursor is positioned on the name of the field, which caused the error.

Since the entry form is used to substitute variables in the document with the information you specify, you must not specify a variable more than once in the entry form editor. However, in the document, the same variable can appear several times and it is always filled with the same value.

Do *not* specify Con-nect system variables (such as &YFNAME) or Con-form system variables (such as &\$DT) in the entry form editor. If you want to use these variables, specify them in the original Cnf document (i.e. the document that you specify in the "Add Form" screen). Later, when you add the second document (i.e. the document for which you have to specify the entry form in the "Add Document" screen), the system variables will be filled with the actual values.

You can use the following line commands:

,C (to copy a text line)
,D (to delete a text line)
,I (to insert a text line)

In contrast to the "Modify *Document-name*" screen, the above line commands only act upon a single line in the entry form editor; i.e. you *cannot* specify the number of lines such as ,D(3). See *Text Processing* for further information on line commands.

After you have defined the form components, press ENTER to create the form.

Each time you press ENTER, Con-nect validates your input, i.e. Con-nect checks the line length and the FSIZE.

When a message appears, indicating that the form is too complex, the FSIZE parameter is too small. In this case, you can finish editing the form and save it by issuing the QUIT command. However, the form is not cataloged (i.e. you cannot work with it, until the FSIZE parameter is increased). See your administrator for further information.

Issue the QUIT command to save the form.

Selecting the Variables from a Window

When you issue the ORIGINAL command, the "Mark Variables to Select" window is displayed, listing all Con-form variables which have been defined in the document (except the system variables).

Creating a Natural Form

If you entered a program name and library for a Natural form in the "Add Form" screen, the form is created when you press ENTER; it is stored in the folder and file you specified in the "Add Form" screen.

If you have predefined addressees or if the program contains global variables with which you can pass the addressee and subject information from the form program to the Send function of Con-nect, you can send mail directly, using the form.

If the program does not contain a global variable for the subject, "Form" and the date and time, when your mail was sent, is automatically entered as the subject.

See *Using a Natural Form to Create a Document* for an example.

Working with Forms

You can perform many of your daily office tasks using either the forms you create or those which have been created by your administrator.

The following step-by-step descriptions show you how to use forms:

- Using a User Form to Send Mail
- Using a User Form to Create a Document
- Using an Entry Form to Create a Document
- Using a Natural Form to Create a Document

Using a User Form to Send Mail

When you issue the command sequence "SEND Memo", the "Send" screen appears (see *Sending A Memo*) and you can enter text for the memo. However, you may want to create and use your own layouts for different types of mail which you send within your organization.

Note:

Using a form to send mail is not the same as sending the form (i.e. the form definition) to another user. If you want another user to be able to use a form you create, you must COPY the form to that user's cabinet.

To send mail using a user form, the following steps are necessary:

ADD a user form as discussed in section *Creating a User Form*.

The example below describes a user form for an internal memo which can be sent directly to other users.

```

12:30 PM          * * * C O N - N E C T 3 * * *          26.Mar.2001
Cabinet LS              Add Form                          Monday

    Folder Work_____ File _____

    Form Name Inter-office_____
    Description _____
    _____
    _____

    User Form x
    or Entry Form _          Cnf Document _____
    or Program _____
    Library SYSCNT2_

    Addressee(s) _____

    Private use _ or Security Read 7 Modify 7 Copy 7

Complete the information above and press ENTER to add
Command /
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
    Help Menu Quit In Send Foldr Docs Note Cal Flip Last Home

```

If you want, you can also predefine addressees at this point.

Press ENTER to access the user form editor.

Enter the text lines and define the input fields in the positions where you want them to appear on the form.

```

                                INTER-OFFICE MEMO

    To: +TO
    From: +FROM
    Subject: +SUBJ
    Date: +DATE
    File: +XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX

+DASH
-----
                                Con-nect User Form Editor

You can use this screen to define a form by entering text lines, input
fields or by using one of the standard fields shown below. This explanation
will disappear when you press ENTER.
To create input fields on the form, mark the start of the field with a plus
symbol (+) and follow it with a series of Xs. If you want a field filled in
by Con-nect, use a '+' followed by one of the symbols below:

+SUBJ Memo subject      +DATE in your format   +TIME hh:mm      +FROM your name
+DAY Day of week       +FULL Month dd,yyyy   +DASH dashes     +TO  addressee
Enter a command, press a PF-key, or enter * to display commands
Command /
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      Help Menu Quit                Dflt                                Flip Last Home

```

The words "INTER-OFFICE MEMO", "To", "From", "Subject", "Date" and "File" have been entered as text lines. Except for the line INTER-OFFICE MEMO, these text lines are followed by input fields.

The "From" and "Date" fields will be filled in automatically by Con-nect.

The "To" and "Subject" fields must be filled in by the user, and will be treated like the "Addressee(s)" and "Subject" lines of the "Send" screen.

The "File" line is an input field which can be filled in by the user.

Below the "File" field, Con-nect will automatically insert a dashed line (+DASH).

Optional - issue the DEFAULT command from the user form editor to access the "Modify Defaults for User Form" window.

```

                                INTER-OFFICE MEMO

    To: +TO
    From: +FROM
    Subject: +SUBJ
    Date: +DATE
    File: +XXXXXXXXXXXXXXXXXXXXXXXXXXXXX

+DASH
-----
                                Con-nect
                                !   _   Permit input only in fields
                                !   x   Permit usage of command line
                                !   x   Use filler character for fields
                                !   x   Expand the 'TO' field

You can use this screen to define
fields or by using one of the sta
will disappear when you press ENT
To create input fields on the for
symbol (+) and follow it with a s
by Con-nect, use a '+' followed b

+SUBJ Memo subject   +DATE in you
+DAY Day of week    +FULL Month
Enter a command, press a PF-key, or enter * to display commands
Command /
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      Help Menu Quit                                Dflt                                Flip Last Home

```

In this example, the following fields have been marked in the "Modify Defaults for User Form" window:

Permit usage of command line

The command line will be provided.

Use filler character for fields

The length of the defined input fields will be indicated by underscores.

Expand the "TO" field

When the mail item is displayed, each specified addressee will be shown in an extra line. The addressees with the mail type "Original" are shown first, followed by those who receive copies of your mail item.

The "Permit input only in fields" field has not been marked. Thus, when you send the form, you can enter text in all 16 lines of the form.

Issue the QUIT command to close the "Modify Defaults for User Form" window.

After you have defined all form components, press ENTER to create the form.

Issue the QUIT command to save the form.

To send mail using the user form, issue the SEND command in conjunction with the form name:

```
SEND Form name
```

As a result, the blank form is displayed on your screen.

```

12:30 PM                * * * C O N - N E C T 3 * * *                26.Mar.2001
Cabinet LS                                                    Monday
-----
                        INTER-OFFICE MEMO

  To: _____
  From: Long, Sonya
  Subject: _____
  Date: 26.Mar.2001
  File: _____

-----

Command /
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      Help  Menu  Quit          Confm      Dflt  Addr

```

Fill in the "To" and "Subject" fields. You can optionally fill in the "File" field.

You can access the address management system by issuing the ADDRESS command (see *Address Management System*).

You can modify the send defaults by issuing the DEFAULT command (see *Modifying the Send Defaults*).

Issue the CONFIRM command to send your mail.

If you have specified one or more addressees (either in the +TO field or by accessing the address management system), the form is sent to the specified addressee(s) as soon as you issue the CONFIRM command.

If you have *not* specified an addressee, the "Send" screen appears and you must enter the addressee(s). You can optionally attach a cover note to the form. You must then issue the CONFIRM command once more to send your mail.

If you did not specify a subject (+SUBJ), "Form" and the date and time when you sent the form is automatically entered as the subject. The subject (and not the form header or name) is shown in the Inbasket of the addressee(s).

Using a User Form to Create a Document

When you ADD a document, you access the "Modify *Document-name*" screen. However, you can also create and use standard layouts for documents prepared within your organization.

To create a document using a user form, the following steps are necessary:

ADD a user form as discussed in section *Creating a User Form*.

```

13:45 PM          * * * C O N - N E C T 3 * * *          26.Mar.2001
Cabinet LS              Add Form                          Monday

      Folder Work_____ File _____

      Form Name Visitform_____
      Description _____
      _____
      _____

      User Form x
      or Entry Form _          Cnf Document _____
      or Program _____
      Library SYSCNT2_

      Addressee(s) _____

      Private use _ or Security Read 7 Modify 7 Copy 7

Complete the information above and press ENTER to add
Command /
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      Help Menu Quit In Send Foldr Docs Note Cal Flip Last Home

```

Press ENTER to access the user form editor.

Enter the text lines and define the input fields in the positions where you want them to appear on the form.

```

                                Customer Visit Report

By:          +FROM
Customer:    +XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX
Date:       +DATE

-----

                                Con-nect User Form Editor

You can use this screen to define a form by entering text lines, input
fields or by using one of the standard fields shown below. This explanation
will disappear when you press ENTER.
To create input fields on the form, mark the start of the field with a plus
symbol (+) and follow it with a series of Xs. If you want a field filled in
by Con-nect, use a '+' followed by one of the symbols below:

+SUBJ Memo subject      +DATE in your format    +TIME hh:mm      +FROM your name
+DAY Day of week       +FULL Month dd,yyyy    +DASH dashes     +TO  addressee
Enter a command, press a PF-key, or enter * to display commands
Command /
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      Help Menu Quit                                Dflt          Flip Last Home

```

Optional - issue the DEFAULT command from the user form editor to access the "Modify Defaults for User Form" window.

```

                                Customer Visit Report

By:          +FROM
Customer:    +XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX
Date:       +DATE

-----

                                Con-nect

You can use this screen to define
fields or by using one of the sta
will disappear when you press ENT
To create input fields on the for
symbol (+) and follow it with a s
by Con-nect, use a '+' followed b

+SUBJ Memo subject      +DATE in you
+DAY Day of week       +FULL Month
Enter a command, press a PF-key, or enter * to display commands
Command /
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      Help Menu Quit                                Dflt          Flip Last Home

! -----+
! Modify Defaults for User Form !
! -----+
! Mark to:
!
! x Permit input only in fields !
! x Permit usage of command line !
! x Use filler character for fields !
! _ Expand the 'TO' field !
!
!
! -----+

```

In this example, the following fields have been marked in the "Modify Defaults for User Form" window:

Permit input only in fields

When you press ENTER in the "Add document" screen, a new screen appears showing the document which has been created by the form. When this field has been marked, you can enter information only in the fields you have defined. All other fields are protected fields in which you cannot enter text. However, when you issue the MODIFY command to place the document in the "Modify *Document-name*" screen, you can enter text in all lines of the document.

Permit usage of command line

The command line will be provided.

Use filler character for fields

The length of the defined input fields will be indicated by an underscore.

Issue the QUIT command to close the "Modify Defaults for User Form" window.

After you have defined all form components, press ENTER to create the form.

Issue the QUIT command to save the form.

ADD a document. In addition to the document definition criteria, enter the name of the user form in the "Add Document" screen.

```

13:46 PM          * * * C O N - N E C T 3 * * *          26.Mar.2001
Cabinet LS          Add Document                          Monday

    Folder Work_____ File _____

Document Name Acme-Visit_____

Create with Visitform_____ ( Form / Program )

Description _____
_____
_____

Keywords _____
_____

Private use _ or Security Read 7 Modify 7 Copy 7 Print 7

Expiration Date 26.Mar.2002 Archive on Expiration _
Complete the information above and press ENTER to add
Command /
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
Help Menu Quit Mod Frmat Flip Last Home

```

Press ENTER to display the document created by the form.

```

13:47 PM          * * * C O N - N E C T 3 * * *          26.Mar.2001
Cabinet LS                               Monday
-----
                                Customer Visit Report

By:           Long,Sonya
Customer:     _____
Date:        26.Mar.2001

-----

Command /
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      Help Menu Quit          Mod

```

Note:

If the "Permit input only in fields" field has not been marked in the "Modify Defaults for User Form" window, you can enter information in all lines in the above screen.

Issue the MODIFY command to place the document in the "Modify *Document-name*" screen, where you can complete it using the editor functions (see *Text Processing*).

```

13:48 PM          * * * C O N - N E C T 3 * * *          26.Mar.2001
Cabinet LS      Modify Acme-Visit                               Monday
Folder Work          File          Page      1 Line      1
.....+.....10...+.....20...+.....30...+.....40...+.....50...+.....60...+.....70...+
                                Customer Visit Report

By:           Long,Sonya
Customer:
Date:        26.Mar.2001

Enter a command, press a PF-key, or enter * to display commands
Command /
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      Help Menu Quit Set          X      Top Bot Y      Flip CX-Y Home

```

After you have completed your document, issue the QUIT command to save it.

Using an Entry Form to Create a Document

To create a document using an entry form, the following steps are necessary:

ADD a document which contains all required information (the document text and Con-form variables). Do not define the values for the variables.

```

13:50 PM          * * * C O N - N E C T 3 * * *          26.Mar.2001
Cabinet LS      Modify Birthday                          Monday
Folder Work    File                                     Page 1 Line 1
...+...10...+...20...+...30...+...40...+...50...+...60...+...70...+
.rm 60;.lm 2
.sl 2
                                     Sun Valley, &$DT

.sl 2
&SALUT
&FIRST &LAST
&NUM &STREET
.sl 1
&CITY, &STATE &ZIP
.sl 3
Dear &SALUT &LAST,
.sl 1
A nice little birthday present is waiting for you in my office.
.sl 1
We're all looking forward to another year of perfect cooperation
with you.
Enter a command, press a PF-key, or enter * to display commands
Command / / used 1 % Dir + Del ,
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
Help Menu Quit Set X Top Bot Y Flip CX-Y Home

```

ou can also specify Con-form system variables (such as &\$DT) or Con-nect system variables (such as &YFNAME).

Note:

See *Con-nect System Variables* in section *Text Processing*. For a description of the Con-form system variables, see the *Con-form User's Guide*.

ADD an entry form as discussed in section *Creating an Entry Form*. Specify the name of the Cnf document you have previously created in the "Cnf Document" line.

```

14:10 PM          * * * C O N - N E C T 3 * * *          26.Mar.2001
Cabinet LS              Add Form                          Monday

    Folder Work_____ File _____

    Form Name Birthday_____
    Description _____
    _____
    _____

    User Form _
or Entry Form x          Cnf Document Birthday_____
or   Program _____
    Library SYSCNT2_

    Addressee(s) _____

    Private use _ or Security Read 7  Modify 7  Copy 7

Complete the information above and press ENTER to add
Command /
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
    Help  Menu  Quit  In   Send  Foldr Docs  Note  Cal   Flip  Last  Home

```

Press ENTER to access the entry form editor.

```

-----
                          Con-nect Entry Form Editor

You can use this screen to define an entry form by entering text lines
and the Con-form variables defined in the Cnf document. A variable must
begin with an ampersand (&). Its length is specified by the length of the
variable name. If the variable length is greater than the name, enter a
series of periods (.) after the variable name to specify the length.
(e.g. Name (A20) :   &NAME..... )

This explanation will disappear when you press ENTER.

Enter a command, press a PF-key, or enter * to display commands
Command /
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
    Help  Menu  Quit  Orig  Confm          Flip  Last  Home

```

Enter the text lines and the Con-form variables in the positions where you want them to appear on the form.

If the number of characters following the ampersand (&) is not sufficient to define the length of the input field, enter periods (.) after the variable name.

If you want to select the Con-form variables from a window, issue the ORIGINAL command to display the "Mark Variables to Select" window.

```

-----+-----+-----+
!      Mark Variables to Select      !
+-----+-----+-----+
!  ___ SALUT                          !
!  ___ FIRST                          !
!  ___ LAST                            !
Con-nect Ent !  ___ NUM                  !
!  ___ STREET                          !
!  ___ CITY                            !
You can use this screen to define !  ___ STATE                          !
and the Con-form variables define !  ___ ZIP                            !
begin with an ampersand (&). Its  !
variable name. If the variable le !
series of periods (.) after the v !
(e.g. Name (A20) : &NAME..... !
!
This explanation will disappear w +-----+-----+
0 variable(s) selected - press ENTER for next page
Command /
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      Help Menu Quit Orig Confm                               Flip Last Home

```

Mark all variables in the window and press ENTER. Issue the QUIT command to close the window.

Enter your text and move the cursor to the position on the form where the variable is to appear. Press the PF-key which has been assigned to the CONFIRM command to position the variable at the cursor position.

```

          B I R T H D A Y   L E T T E R
          *****

Salutation : &SALUT

-----+-----+-----+
Con-nect Entry Form Editor
Use ORIGINAL to select the variables used in the Con-form document.

7 variable(s) - position cursor for FIRST and confirm
Command /
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      Help Menu Quit Orig Confm                               Flip Last Home

```

If the number of characters following the ampersand (&) is not sufficient to define the length of the input field, enter periods (.) after the variable name.

Repeat this process for each variable you selected from the window.

```

          B I R T H D A Y   L E T T E R
          *****

Salutation : &SALUT

Firstname  : &FIRST.....

Lastname   : &LAST.....

Number     : &NUMB                Street   : &STREET.....

City       : &CITY.....

State      : &STATE.....   Zip Code : &ZIP..
-----
          Con-nect Entry Form Editor
Use ORIGINAL to select the variables used in the Con-form document.

Entry form was modified, use QUIT to save it
Command /
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      Help Menu Quit Orig Confm                Flip Last Home

```

After you have defined the form components, press ENTER to validate the input.

Issue the QUIT command to save the form.

ADD another document. In addition to the document definition criteria, enter the name of the entry form in the "Create with" line.

```

14:30 PM          * * * C O N - N E C T 3 * * *          26.Mar.2001
Cabinet LS              Add Document                      Monday

    Folder Work_____ File _____

Document Name Birthday-JMA_____

Create with Birthday_____ ( Form / Program )

Description _____
_____
_____

Keywords _____
_____

Private use _ or Security Read 7 Modify 7 Copy 7 Print 7

Expiration Date 26.Mar.2002 Archive on Expiration _
Complete the information above and press ENTER to add
Command /
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
Help Menu Quit              X              Y Flip CX-Y Home

```

Press ENTER to display the entry form.

```

14:31 PM          * * * C O N - N E C T 3 * * *          26.Mar.2001
Cabinet LS              Monday
-----
                B I R T H D A Y   L E T T E R
                *****

Salutation : _____

Firstname  : _____

Lastname   : _____

Number    : _____ Street   : _____

City      : _____

State     : _____ Zip Code : _____
-----

Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
Help Menu Quit              Mod

```

Fill in the form as appropriate.

```

14:33 PM          * * * C O N - N E C T 3 * * *          26.Mar.2001
Cabinet LS                               Monday
-----
                B I R T H D A Y   L E T T E R
                *****

Salutation : Mr.___

Firstname  : John_____

Lastname   : Martin_____

Number     : 45__          Street   : Park View_____

City       : Maplewood_____

State      : Minn._____   Zip Code : 55109
-----

Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      Help  Menu  Quit      Mod

```

Press the PF-key which has been assigned to the MODIFY command to place the document in the "Modify *Document-name*" screen.

```

14:35 PM          * * * C O N - N E C T 3 * * *          26.Mar.2001
Cabinet LS          Modify Birthday-JMA                Monday
Folder Work        File                               Page    1 Line    1
....+.....10...+.....20...+.....30...+.....40...+.....50...+.....60...+.....70...+

                               Sun Valley, 26. 3.01

Mr.
John Martin
45 Park View

Maplewood, Minn. 55109

Dear Mr. Martin,

Enter a command, press a PF-key, or enter * to display commands
Command /                               / used 1 % Dir + Del ,
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      Help  Menu  Quit  Set      X    Top  Bot  Y    Flip CX-Y Home

```

The variables have been filled with the information you specified in the previous screen. All Con-form system variables and Con-nect system variables you specified in the original document, are automatically replaced with the appropriate values. In the above example, &\$DT has been replaced with the current date. You can now further modify the document text (see *Text Processing*).

Issue the QUIT command to save the document.

Optional - to send the document which has been created using the entry form (i.e. the document containing all information you just filled in) to another user, issue the SEND command in conjunction with the document.

Using a Natural Form to Create a Document

You can also create a document using a Natural form.

The following example uses a program to create a Natural form, which is in turn used to create a document. The document contains information from the database, and can be modified in the editor.

A Natural program must be created.

```

0010 *****
0020 * Program Name : SAMPLE-PROGRAM NATURAL FORM SMPL9
0030 * Created by   : Sonya Long
0040 * Date        : 4.Feb.1999
0050 *
0060 * Creates A Natural Form
0070 *****
0080 DEFINE DATA LOCAL
0090 01 #DEPARTMENT (A10)
0100 01 BEST-VIEW VIEW OF EMPLOYEES
0110    02 DEPT
0120    02 NAME
0130    02 FIRST-NAME
0140    02 LEAVE-DUE
0150 01 #COUNTER      (N2)
0160 01 #FIRSTNAME    (A20/100)
0170 01 #LASTNAME     (A20/100)
0180 01 #LEAVEDAY     (N2/100)
0190 01 #NUMBER       (N2/100)
0200 01 #USER-NAME    (A20)
0210 01 #MONTH        (A22)
0220 01 #SENDNAME     (A20)
0230 END-DEFINE
0240 *
0250 SET CONTROL 'Z'
0260 INPUT 'DEPT = ' #DEPARTMENT
0270 *
0280 MOVE 1 TO #COUNTER
0290 *                               /* SELECT DATA
0300 READ BEST-VIEW BY NAME WHERE (DEPT=#DEPARTMENT)AND (LEAVE-DUE > 23)
0310 *
0320 MOVE #COUNTER      TO #NUMBER   (#COUNTER)
0330 MOVE NAME          TO #LASTNAME (#COUNTER)
0340 MOVE FIRST-NAME    TO #FIRSTNAME(#COUNTER)
0350 MOVE LEAVE-DUE     TO #LEAVEDAY (#COUNTER)
0360 ADD 1 TO #COUNTER
0370 *
0380 END-READ
0390 *                               /* SELECTED DATA IN MAP
0400 *
0410 INPUT USING MAP 'FORM9 '
0420     #DEPARTMENT #FIRSTNAME(*) #LASTNAME(*) #LEAVEDAY(*) #MONTH
0430     #NUMBER(*) #SENDNAME #USER-NAME
0440 *
0450 SET CONTROL 'C'                               /* MAP IN ESIZE
0460 *
0470 END

```

You can also use other methods to produce text in the Con-nect editor. For example, you can create a Natural program containing the following statement:

DEFINE PRINTER (1) OUTPUT 'SOURCE'

ADD a Natural form as discussed in section *Creating a Natural Form*. Specify the name of the Natural program and the library in which it is cataloged.

```

15:15 PM          * * * C O N - N E C T 3 * * *          26.Mar.2001
Cabinet LS          Add Form                               Monday

    Folder Work_____ File _____

    Form Name Vacation-Form_____
    Description _____
    _____
    _____

    User Form _
or Entry Form _          Cnf Document _____
or Program SMPL9____
    Library SYSCNT2_

    Addressee(s) _____

    Private use _ or Security Read 7 Modify 7 Copy 7

Complete the information above and press ENTER to add
Command /
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
    Help Menu Quit In Send Foldr Docs Note Cal Flip Last Home

```

ADD a document and enter the name of the form in the "Create with" line.

```

15:20 PM          * * * C O N - N E C T 3 * * *          26.Mar.2001
Cabinet LS          Add Document                          Monday

    Folder Work_____ File _____

    Document Name Vacation-01_____

    Create with Vacation-Form_____ ( Form / Program )

    Description _____
    _____
    _____

    Keywords _____
    _____

    Private use _ or Security Read 7 Modify 7 Copy 7 Print 7

    Expiration Date 26.Mar.2002 Archive on Expiration _
Complete the information above and press ENTER to add
Command /
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
    Help Menu Quit In Send Foldr Docs Note Cal Flip Last Home

```

Press ENTER to display the following message from the program:

DEPT =

Enter the name of the department (COMP02) and press ENTER.

As a result the form created by the program appears.

```

Information about Vacation Plan (Monthly Report : February          )

Department :  COMP02
From       :  PERSONNEL
Worked out :  SONYA LONG

Here is the monthly list of vacation of employees and their days
of leave this year:

1   ROGER           BESSON           33
2   ANNIE           GODEFROY        33
3   DANIEL          GREGOIRE        33
4   WALTER          HAMSON          25
5   GORKA           NIEDA           24
6   WALTER          REDMAN          26
7   ANTONIO         VILLAR          25
8   WILFRED         WILDE           24
9   FRANK           WOOD            27

```

Press ENTER to place the form in the "Modify *Document-name*" screen.

```

15:30 PM          * * *  C O N - N E C T  3  * * *          26.Mar.2001
Cabinet LS        Modify Vacation-01                          Monday
Folder Work      File                                         Page      1 Line    1
.....10.....20.....30.....40.....50.....60.....70.....+

Information about Vacation Plan (Monthly Report : February          )

Department :  COMP02
From       :  PERSONNEL
Worked out :  SONYA LONG

Here is the monthly list of vacation of employees and their days
of leave this year:

1   ROGER           BESSON           33
2   ANNIE           GODEFROY        33
3   DANIEL          GREGOIRE        33
4   WALTER          HAMSON          25
5   GORKA           NIEDA           24

Enter a command, press a PF-key, or enter * to display commands
Command / / used 1 % Dir + Del ,
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10---PF11---PF12---
Help Menu Quit Set      X      Top Bot Y      Flip CX-Y Home

```

Managing Your Forms

Issue the following command sequence from any point in Con-nect to display a list of all available forms:

```
DISPLAY Form
```

As a result, the "Display Forms by Name" screen appears.

```

16:31 PM          * * * C O N - N E C T 3 * * *          26.Mar.2001
Cabinet LS          Display Forms by Name                Monday

Cmd Form Name          Program Library Folder          Date Filed
-----
__ Birthday            F9997028 SYSCNT2 Work          26.Mar.2001
__ Inter-office        F9997031 SYSCNT2 Work          26.Mar.2001
__ Orders              F9997030 SYSCNT2 Work          26.Mar.2001
__ Vacation-Form       F9997029 SYSCNT2 Work          26.Mar.2001
__ Visitform           F9997032 SYSCNT2 Work          26.Mar.2001

Cmds are 1 or 2 characters from the list below (FLIP for PF-keys)
Command /
Address Copy      Display Erase   File    Modify  Send    Top

```

The forms are arranged alphabetically. Your own forms are displayed first, followed by those created by the Con-nect administrator. The columns display the following information:

Form Name

The name of the form.

Program

The name of the Natural program that creates the form. The F99... programs are Natural programs which Con-nect generates to create a user form or entry form. If you erase the form, the program is also erased. If you copy the form, the program is also copied.

Library

The name of the Natural library in which the program is cataloged.

Folder

The name of the folder in which the form is stored.

Forms which have been created by the Con-nect administrator are marked with (S); you can use these forms, but cannot erase, file or modify them.

Date Filed

The date when the form was first filed in the cabinet.

Commands for Forms

The command prompting line of the "Display Forms by Name" screen shows all the commands which apply to forms. The commands are described in section *Commands*. The following exceptions apply when working with forms:

- ADDRESS
- COPY
- DISPLAY
- ERASE
- MODIFY
- SEND

ADDRESS

The ADDRESS command displays all addressees you specified when adding or modifying the form.

If you want to display only those addressees who have activated a mail status message, see the description of the DISPLAY command.

Valid commands for users, cabinets and transport service addressees: you can mark the name of an addressee with CO, DI or UN:

- The COPY command creates a nickname for this addressee. The "Copy Mail Address to Nickname" window is displayed. You can modify the suggestion for the nickname in this window and then press ENTER to access the "Modify Address" screen.
- The DISPLAY command displays the full address of the addressee (depending on the addressee type, a screen appears containing the user or cabinet address, or a window containing information such as the e-mail address or external node).
- The UNDO command removes this addressee from the list of predefined addressees.

COPY

The COPY command allows you to send a copy of the form definition criteria to another user - provided that the user has authorized you to access his cabinet (see *Adding Shared Users to Your Private Cabinet*). The Natural program which created the form is also copied.

When you copy an entry form to another user's cabinet, the Cnf document is also copied to this cabinet.

When you copy a form, the address list is not copied.

DISPLAY

The DISPLAY command displays the form definition criteria you specified when the form was added. The only way to display the actual user form or entry form is to issue the MODIFY command in conjunction with the form. For a Natural form, you must access the Natural program.

If you want to display the Cnf document which has been linked to an entry form, you can mark the "Display Cnf Document" field. Then, you can also PRINT the document.

If you want to display the addressee list, you can mark one of the following fields:

- **Mark _ to display all selected addressee(s)**
Displays all predefined addressees. Alternatively, you can also issue the ADDRESS command with a form.
- **only with active mail status message**
Displays only those predefined addressees who have activated a mail status message.

ERASE

The ERASE command erases the form definition and places it in your Wastebasket. The Natural program which created the form is also deleted. Other users (for example, those who received a copy of your form) can still work with this form, since the program which created the form is also copied.

MODIFY

The MODIFY command allows you to modify the form definition criteria. You can change a user form into a Natural form, but you cannot change a Natural form into a user form.

When you just want to modify, for example, the form name, description or library of a user form or entry form, you can specify that the form is to be recompiled without accessing the form editor. To do so, mark the field "Mark to compile".

User Form

If you are modifying a user form and press ENTER, the user form editor is accessed and you can modify the fields and/or the text of the form. To save the modifications, you must first press ENTER and then issue the QUIT command.

If you issue the DEFAULT command from the user form editor and modify the defaults, the form is automatically changed according to the new criteria.

Entry Form

If you are modifying an entry form and press ENTER, the entry form editor is accessed and you can modify fields and/or the text of the form. You can also define new fields which have been added to the Con-form document. To save the modifications, you must first press ENTER and then issue the QUIT command.

If you modify the original document, these changes are *not* applied to the document which has been linked to the entry form.

If you want to use the modified version of the document, you must specify the document name once more in the "Modify Form" screen; i.e. you must type over the document name shown in the "Cnf Document" line with the *same* name.

If the modified document contains additional variables, you *must* also modify the entry form and define the new variables in the entry form editor.

You can also specify another document for the entry form; for example, a German translation of the document which uses the *same* variables.

If you specify another document which uses different variables, and if you do not define these variables in the entry form, an error will occur when you try to add a document which uses this form.

SEND

The SEND command allows you to send mail using a standard form. This can either be a user form or a Natural form.

If addressees have been predefined or if the global variables with which you can pass the addressee and subject information from the form program to the Send function of Con-nect were specified when the form was created, you can send mail directly, using the form.

When you add or remove addressees at this point, the modifications only apply to the current send procedure. The address list that has been stored with the form itself is not modified.

You cannot send an entry form itself, but you can send the document which has been created by the entry form.

You must use the COPY command to send a copy of the form to another user.

Integrating Forms into the Con-nect Office

The following suggestions may be useful in integrating forms into your Con-nect office.

You can assign a command alias to the command sequence "SEND Form *name*" (see *Command Aliases*).

You can assign the command sequence "SEND Form *name*" to a PF-key (see *PF-Key Assignments*).

You can create a new menu that contains the form, or incorporate the form into an existing menu (see *Creating Your Own Menus*). You can then choose to have that menu displayed as your "Menu" each time you access Con-nect (see *Menu and Overlay Calendar*).

