



PureEdge 8x



PUREEDGE VIEWER

User's Manual v6.5



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For further documentation and up-to-date information, please visit our website at: **docs.PureEdge.com**

PureEdge Solutions **www.PureEdge.com**

tel. 1-888-517-2675

fax. 250-708-8010

email. info@PureEdge.com

address. 4396 West Saanich Rd., Victoria, B.C. V8Z 3E9

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Introduction

Welcome to the *PureEdge Viewer User's Manual*. PureEdge™ Viewer is a component of a powerful suite of software designed to make information gathering easy, quick, and cost-effective. This manual introduces you to the Viewer and its operations.

About the PureEdge Viewer

The Viewer provides a single interface for users to open, fill out, and save forms. The Viewer can display forms within its own window (standalone) or within your web browser. In either case, all of the Viewer's functionality is available.

Where the Viewer Fits into Your System

PureEdge Viewer is part of a powerful suite of forms software. Other components include PureEdge Designer and PureEdge API.

- **PureEdge Viewer** — The Viewer is the component that acts as the interface between XFDL forms and other parts of your system, such as web servers and databases. We recommend that you install the Viewer before installing other components of the PureEdge suite.
- **PureEdge Designer** — The Designer provides a drag-and-drop design environment for creating XFDL forms. Use the Designer to create forms quickly and easily.
- **PureEdge API** — The Application Programmer's Interface (API) enables programmers to incorporate XFDL forms and PureEdge technology into the applications.

About This Manual

This manual explains all aspects of the Viewer, including how to fill out forms, set user preferences, and submit completed forms. The manual also discusses form signing procedures.

This manual is divided into the following sections:

- **Introduction** — Introduces this manual and the Viewer.
- **Chapter One: Getting Started** — Explains how to install the Viewer and describes the Viewer's interface and Help tools.
- **Chapter Two: Using the Viewer** — Provides step-by-step instructions for the most common tasks you will need to perform using the Viewer. You will learn how to open, fill out, save, submit, and print forms.

- **Chapter Three: Setting Viewer Preferences** — Explains how to change the Viewer’s customized settings to suit your needs. You will learn how to specify your preferred browser, set up email and printing preferences, and more.
- **Chapter Four: Advanced Form Functions** — Explains important, but less frequently used features of the Viewer. You will learn how to email forms, manage attachments and dictionaries, and sign documents.
- **Chapter Five: Troubleshooting** — Provides solutions to some of the common problems faced by Viewer users and explains how to contact PureEdge Solutions for further assistance.

Who Should Use This Manual

The *PureEdge Viewer User’s Manual* is intended for anyone who wants to view, fill out, or otherwise work with forms. It explains how to set up the Viewer for optimum performance, and details how the Viewer works so that both users and designers can take full advantage of its functionality.

Document Conventions

For convenience, this manual uses the following conventions:

Viewer	Refers to the PureEdge Viewer.
Forms	Documents written in Extensible Forms Description Language (XFDL).
Network	Refers to any type of computer network, including local area networks (Loans), wide area networks (Was), entrants, or the Internet. If the specific type of network needs to be identified, it is named explicitly.
x.x	Represents the version number of the Viewer.
.xfd	The default filename extension for XFDL documents. Other supported filename extensions are .xfd , and .frm .
< >	Used as placeholders. For example, <i><Viewer directory></i> represents the directory in which you installed the Viewer.

Chapter One: Getting Started

This section explains how to install the Viewer on your computer, introduces you to the Viewer environment, and explains some of its Help features.

System Requirements

Before installing the Viewer, ensure that your computer meets the following system requirements:

- Operating Systems supported:
 - Windows 98/ME
 - Windows NT 4.0 sp6a
 - Windows 2000 sp2, sp3, sp4
 - Windows XP sp1, sp2
- Hardware Requirements:
 - Processor: 500 MHz
 - RAM: 128 MB
 - Disk space: 40 MB
 - Resolution: 800 x 600 in 16-bit color
- Web Browsers supported:
 - Internet Explorer 5.0 sp3, 5.5 sp2, 6 sp1
 - Netscape Communicator 4.5 - 4.8
 - Netscape 6.1, 6.2, 7, 7.1, 7.2
- 3rd Party Products supported (optional):
 - MSAA compliant screen readers, such as JAWS, Window-Eyes, or Narrator.
 - Entrust Desktop Solutions 6.0
 - Silanis ApproveIt Desktop 5.7.1
 - Interlink ePad Signature Pad with version 6.22 drivers
 - Topaz electronic signature hardware with version 3.61 drivers
 - Any signature capture device compliant with WinTab version 1.1
- Terminal Services supported (optional):
 - Windows Server 2003 Terminal Services (must be set to more than 8-bit color)

Installing and Licensing the Viewer

Before you can install the Viewer, you must log on to Windows using the correct user profile:

- **Windows 98/ME** — You can install the Viewer under any user profile.
- **Windows NT 4.0/2000/XP** — You must install the Viewer as an administrator.

In either case, the installer will create a copy of the Viewer that is available to all users on that computer, regardless of which profile they use to log on.

To install the Viewer:


1. Using Windows Explorer, double-click the Viewer's install package.
 - The Viewer Installer starts.
2. Follow the prompts to install the Viewer.
 - You must agree to the terms of the end-user license agreement or the Viewer installation will be cancelled.
 - Unless you have a specific reason to do otherwise, *we suggest you accept the default directory*; doing so simplifies file management.
3. When the installation is complete, select **Launch the Application** in the final dialog box and click **Finish**.
 - The Viewer launches and opens the PureEdge Viewer Help form.

Licensing the Viewer

Once you have installed the Viewer, you will have to license it for each user profile. To do this, you first need a serial number and license key for each user. If you have not purchased licenses, you can evaluate the Viewer for 30 days.

***Note:** If you are working exclusively with licensed forms, you do not need to license the Viewer.*

To license the Viewer:

1. Log on to Windows under the appropriate user profile.
2. Launch the Viewer.
 - A blank form opens.
3. Click the **About**  button in the toolbar, and then click **License**.
 - The PureEdge License Agreement appears.
4. Click **Accept** to agree to the terms of the license agreement.

- The **License Dialog** box appears.
5. Perform one of the following actions:
 - Select **30-day evaluation** to evaluate the Viewer software for a period of 30 days.
 - If you purchased a license to use the Viewer, enter your **Serial Number** and **License Key** in the appropriate fields.
 6. Click **OK** to apply your choice.
 - A confirmation message appears.
 7. Click **OK** to complete the licensing and return to the Viewer.

Once you have licensed the Viewer for a user profile, that profile will be able to open and work with forms freely. However, other user profiles on the computer will not be able to access forms until they are also licensed.

Using the Viewer Under Different User Profiles

Once the Viewer is installed, it will be available to all user profiles on that computer. When the Viewer is first launched under a new profile, the Viewer's preferences and dictionaries are copied to that profile. The preferences and dictionaries are then maintained separately for that profile, which means that each profile will have custom preferences and dictionary settings.

Using the Viewer with a Browser

Viewing forms in Microsoft and Netscape browsers requires an extension to be installed in those browsers. Normally, the Viewer's install package automatically installs this file. However, if the installer is unable to locate your browser, the extension file may not be installed correctly. In these cases, you will have to copy the extension file yourself. Refer to the readme.txt file included in the Viewer's installation for more information.

If you install a new browser after installing the Viewer, we recommend that you uninstall and re-install the Viewer. This will ensure that the correct software is installed for the browser version you are using, and will eliminate conflicts with the original installation.

Starting the Viewer

The Viewer can run in two different "modes":

- As a stand-alone application.
- Within a web browser.

To learn how to open a form in stand-alone mode, see "Opening Locally Stored Forms" on page 11.

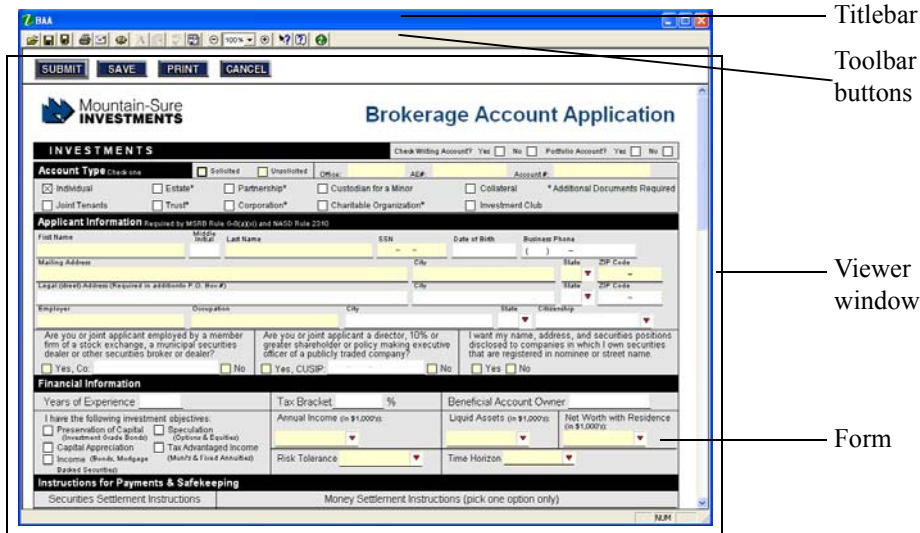
To learn how to open a form in a web browser, see “Opening Forms over the Internet” on page 12.

The Viewer Environment

The Viewer’s standard display environment includes a title bar, a toolbar and the Viewer window. These elements are explained in detail in the following section.

Title Bar

The title bar appears at the top of the Viewer window, and displays the name of the form. In the case of a multi-page form, the title bar may show the name of each page. For example, in the following diagram, the title bar shows the form’s title: **BAA**.



Note that when you are working on forms in a web browser, there is no title bar for the Viewer. Instead, the title bar of the browser displays the location or URL of the form, as shown in the following diagram:

The screenshot shows a Microsoft Internet Explorer window with the title bar displaying the file path: C:\Documents and Settings\shewchu\Desktop\CVS Docs\viewer\Viewer_3.2\English\Manual\Graphics\brokerage_3fd. The browser's address bar shows the same path. The form content includes a toolbar with buttons for SUBMIT, SAVE, PRINT, and CANCEL. The form title is "Mountain-Sure INVESTMENTS Brokerage Account Application". The form is divided into several sections: "INVESTMENTS" with checkboxes for "Check Writing Account?", "Portfolio Account?", "Solicited", and "Unsolicited"; "Account Type" with checkboxes for "Individual", "Estate", "Partnership", "Custodian for a Minor", "Collateral", "Joint Tenants", "Trust", "Corporation", "Charitable Organization", and "Investment Club"; "Applicant Information" with fields for "First Name", "Last Name", "SSN", "Date of Birth", "Business Phone", "Mailing Address", "Legal Street Address", "City", "State", "ZIP Code", "Employer", and "Occupation"; and "Financial Information" with fields for "Years of Experience", "Tax Bracket", "Beneficial Account Owner", and "I have the following investment objectives:".







Toolbar Buttons


Whether you are running the Viewer as a stand-alone application within a browser, it always displays a toolbar containing the following tool buttons:





To activate a tool, click the appropriate button. Depending on the form, some buttons may not always be active. When a button is not available, it appears dimmed.


The following list explains each tool:


-  **Open Form** — Opens a form in a new window.
-  **Save Form** — Saves the current form to the existing file.
-  **Save As** — Saves the current form, prompting the user for a location and filename.
-  **Print** — Prints the current form.
-  **Mail Form** — Emails the current form. For more information, see “Emailing Forms” on page 43.
-  **Preferences** — Opens the Viewer Preferences Form. For more information, see “Setting Viewer Preferences” on page 31.


 **Font Dialog** — Opens the font dialog. For more information, see “Changing the Font Settings” on page 19.


 **Paragraph Dialog** — Opens the paragraph dialog. For more information, see “Changing the Paragraph Settings” on page 19.


 **Check Spelling** — Checks the spelling within a single field. For more information, see “Checking Spelling” on page 23.

 **Check All Spelling** — Checks the spelling of all input text in the current page. For more information, see “Checking Spelling” on page 24.


 **Zoom Out** — Decreases the magnification of the form, making the form smaller. For more information, see “Zooming Forms” on page 22.

 **Select Zoom Factor** — Selects the zoom factor, making the form smaller or larger. For more information, see “Zooming Forms” on page 22.


 **Zoom In** — Increases the magnification of the form, making the form larger. For more information, see “Zooming Forms” on page 22.

 **Help Mode** — Enables context-sensitive help. For more information, see “Context-Sensitive Help” on page 9.

 **Viewer Help** — Opens the Viewer’s Help page.

 **About** — Displays version and registration information about the Viewer.

Viewer Window

The Viewer window is the area immediately below the toolbar in which forms are displayed. You can manipulate the Viewer window by clicking the context-menu button  at the upper left of the Viewer, and then selecting **Restore**, **Move**, **Size**, **Minimize**, **Maximize**, or **Close**. You can also change the size of the Viewer window by dragging its edges or corners.

Viewer Form

The forms displayed in the Viewer are XFDL forms. These forms are displayed in the Viewer window and are separate from the Viewer itself. You can identify forms that are Viewer-compatible by the file extension `.xfdl`, `.xfd`, and `.frm`.

Getting Help

The Viewer provides two help options: tooltips and context-sensitive help.


Tooltips

Tooltips are short notes that help you use the Viewer's toolbar. If you want to know what a button does, hold the cursor over that button (without clicking). Within a few moments, the button's description appears in a yellow box next to the button. Tooltips are only available for buttons in the Viewer's toolbar.



The following diagram shows the tooltip for the **Save** button:

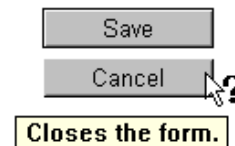


Context-Sensitive Help

Context-sensitive help is designed to provide help messages for individual form elements such as fields, check boxes, buttons, and so on. Context-sensitive help may not always be available, depending on how the form was designed. When a form contains context-sensitive help, the Help  button will be available in the Viewer's toolbar.

If context-sensitive help is available and you want to see the messages, follow this procedure:

1. From within the open form: click **Help** .
 - The cursor changes to: 
2. Position the mouse over a field, button or other item.
 - If the design of the form includes context-sensitive help for the item, a help text box appears below the cursor as shown in the diagram to the right.



Chapter Two: Using the Viewer

This chapter describes the procedures that you use most frequently when working with forms. You will learn how to:


- Open a form (see page 11)
- Fill out a form (see page 14)
- Zoom a form (see page 22)
- Check spelling (see page 23)
- Save a completed form (see page 25)
- Submit a form (see page 27)
- Print a form (see page 28)
- Close your form (see page 30)

For more advanced features and procedures, see “Advanced Viewer Functions” on page 45.

To help you understand the following procedures, a number of sample forms are available for download from PureEdge’s website at: www.PureEdge.com. Look for the link to **Sample Forms**.

Opening Forms

To view or fill out a form you must first open it in the Viewer. The Viewer can open forms in two different modes: in its own window or within a web browser. Which mode you use depends on whether the form is stored locally or available on the Internet.

The Viewer can open forms files with the extensions .xhdl, .xfd, or .frm. The default file extension is .xhdl and has the following icon: .

***Note:** The Viewer may be unable to display forms that contain errors affecting the form’s functionality or appearance. If so, the Viewer displays an error message on your screen.*

Opening Locally Stored Forms

The Viewer opens locally stored forms in stand-alone mode. There are three ways to open forms that are stored on your computer:

If the Viewer is not already running


1. Click **Start > Programs > PureEdge Viewer x.x> PureEdge Viewer**

- An **Open Form** dialog box opens.
2. Browse to select the form you want to view and then click **Open**.

Using Windows Explorer

1. Open Windows Explorer and use it to locate and select the form you want to open.
 - Windows will automatically run the Viewer and open the form.

If the Viewer is already running:

1. On the Viewer's toolbar, click the **Open Form**  button.
2. Use the **Open Form** dialog box to locate and select the form you want to view.
3. Click **Open**.

***Note:** You can have multiple forms open at once. However, each form appears in a new instance of the Viewer.*

Opening Forms over the Internet

When working in your web browser, you may click a link to a form. In these cases, the Viewer will open the form within your web browser.

To open a form over the Internet:

1. Start your browser.
2. Point your browser to a web page that contains links to forms. (Sample forms are available at **www.PureEdge.com** – look for the link to sample forms).
3. Click the link to a form.
 - The form automatically opens in your browser.

You can also open locally stored forms within your browser:

1. Start your browser.
2. From the **File** menu, select **Open** (or **Open Page**).
3. In the **Open** (or **Open Page**) dialog box, click **Browse**.
4. Locate and select the file you want to open and click **Open** (or **Open Page**).
 - The form automatically opens in your browser.

***Note:** If you fill out a form using a web browser, be sure to save your form before accessing another web page. Otherwise, you may lose the information you entered in the form.*

Clearing the Browser Cache

Web browsers can retain temporary copies of previously loaded files or web pages in a special cache. The next time you access one of these sites or files, your browser gets the information from the cache, rather than from the live web site. While this allows the browser to load files more quickly, it may result in the Viewer not displaying the correct or most up-to-date copy of a form. For instructions on how to clear your browser's cache, see "Chapter Five: Troubleshooting" on page 73.

Opening Forms from an Email

You can open forms that you have received as attachments in an email.

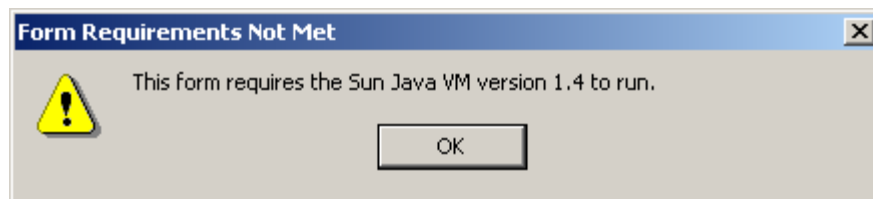
1. Using your email software, open the email that contains the form.
 - The form is usually included as an attachment.
2. You can open the attachment directly from within the email program (usually by double-clicking on it), or, you can save the attachment to your computer and then open it.

For more information on configuring your email, see "Mail Configuration" on page 34.

Opening Forms with Additional Requirements

In some cases, forms may require you to have special functionality available. For instance, some forms may require a Web Services extension for the Viewer or a Java Run-Time Environment before they will open properly.

If you do not have the required functionality, you will receive an error message when you attempt to open the form, similar to the one shown:

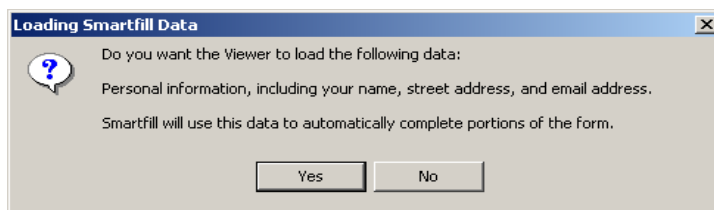


If you receive a message indicating that you require additional functionality, contact your System Administrator.

Opening Forms that Use Smartfill

Smartfill is a feature that helps you to complete forms quickly. Smartfill records frequently used information, such as your name and address, and can automatically add this information to forms that are designed to use it.

When you open a form that is designed to use Smartfill, you may see a dialog asking you if you want to load some information, as shown:



If you agree to load the information, Smartfill will automatically complete that portion of the form for you. If you refuse, Smartfill will leave the form blank for you to complete yourself.

In some cases, you may discover that Smartfill is completing the form incorrectly. For example, your address or email address may have changed. In these cases, simply correct the information manually. When you save or submit the form, Smartfill will update its own records, and will use the updated information next time.

For information on turning off the Smartfill feature, see “Smartfill” on page 37.

Filling out Forms

Filling out e-forms is similar to filling out paper forms except that you use the mouse and the keyboard to enter your information. For example, you type text into fields and select check boxes by clicking them with the mouse. On the form, move from item to item by pressing the TAB key or use the mouse to reposition the cursor.

Form Items

Because every form is designed to serve a specific purpose, forms can be very different from one another. However, all forms will contain some combination of the following items:

Field — A field allows you to provide information by typing text. Some fields allow only a single line of text while others support multiple lines. Additionally, some fields only support basic text while other fields support rich text. Rich text fields allow you to apply additional formatting, such as bolding, italics, indenting, and so on.

Home Address:

10 Downing Street
London, England

Check Box — Check boxes allow you to make selections from a list of choices. Depending on the form, you may be able to select one item from a group, or you may be able to make multiple selections. To make a selection, click the check box. To cancel (or clear) your selection, click the check box again. A selected check box is marked with either a red check mark or a black X.

Radio Button — Radio buttons are similar to check boxes, but you can only choose one button from a group and one button must be selected. When selected, a red dot appears in the button. Clear buttons are blank.

List — This item presents a list of choices. To make a selection, click the desired choice.

Popup List — A popup list offers the same functionality as a list, except that the list’s contents are not always visible. Normally, only the selected choice appears. Popup lists have a small button that, when clicked, causes the entire list to appear or “popup”.

Combobox — A combobox is a combination of a field and popup list. This allows you to make a selection from the list, or enter your own text. The combobox provides a small button that causes the list of selections to appear.

Calendar — A calendar looks similar to a popup list or combobox when closed, with a small square button on the right hand side. Clicking this button opens a small calendar from which you can select a date.

Check all that apply:

- Newspaper
- Radio
- Television

- Mr.
- Mrs.
- Ms.

Profession:

- Doctor
- Lawyer
- Engineer
- Accountant

Profession ▼

Doctor
Lawyer
Engineer
Accountant

Profession:

Profession ▼

Doctor
Lawyer
Engineer
Accountant

Date:

January, 2004


Sun	Mon	Tue	Wed	Thu	Fri	Sat
28	29	30	31	1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31
1	2	3	4	5	6	7

Button — Buttons perform specific functions and are activated when the user clicks them with the mouse. Typical functions include saving, printing, submitting, and signing forms. A button can display text or an image.




Keyboard Commands

The Viewer supports a number of keyboard commands that help with filling out forms and controlling the Viewer:

Key Combination	Result
TAB	Move forward from item to item in the form.
SHIFT + TAB	Move backward from item to item in the form.
ENTER	Press ENTER to activate a button.
SPACE	Press SPACE to select a check box or radio button, or to view the list for a popup or combobox. When in an open popup or combobox item, press Space to select the current choice and close the list.
ARROW KEYS	Use LEFT and RIGHT ARROW to move between letters in a field. Use Down Arrow to view the list of choices for a popup or combobox. Use Up and Down Arrow to move through the list of choices in a popup or combobox.
PAGE UP	Scroll up to the next portion of text within a field.
PAGE DOWN	Scroll down to the next portion of text within a field.
CTRL + TAB	Insert a tab within a field.
ALT + SPACE	This opens the context menu, and has the same effect as clicking the  icon in the title bar.
CTRL + O	Open a form.
CTRL + S	Save the form to the current file.
CTRL + SHIFT + S	Save the form, prompting the user for a filename and location.
CTRL + P	Print the form.
CTRL + M	Email the form.
CTRL + SHIFT + PLUS	Zoom in. This increases the size of the form.

Key Combination	Result
CTRL + MINUS	Zoom out. This decreases the size of the form.
CTRL + F	Open the Font dialog, which you can use to change font characteristics in rich text fields.
CTRL + G	Open the Paragraph dialog, which you can use to change paragraph characteristics in rich text fields.
CTRL + A	Select all text in a field.
CTRL + B	Toggle bold (rich text fields only).
CTRL + I	Toggle italics (rich text fields only).
CTRL + U	Toggle underline (rich text fields only).
CTRL + R	Right justify text (rich text fields only).
CTRL + SHIFT + L	Cycles through list type options (rich text fields only).
ALT + F7	Spell check the selected item.
SHIFT + F7	Spell check the current page in the form.
ALT + F1	Open the PureEdge Viewer Help.
CTRL + H	Toggle the Viewer's help mode. This allows you to read any context-sensitive help message that are in the form.
CTRL + SHIFT + ?	Open the About dialog.
ALT + F12	Open the Preferences form.

***Note:** The keyboard commands can be overridden by the form designer. In some cases, specific forms may produce different results when using the keyboard commands.*

Using Fields

Fields allow you to type information into a form. For example, you might type your name, or your address, or your work history. Fields also offer a number of helpful features, such as input checking. This means that some fields will check your entries as you type them to make sure they follow the correct format.

There are two types of fields: plain text fields and rich text fields. Plain text fields allow you type information but do not allow you to change the formatting. In contrast, rich text fields allow you to type

information and adjust the formatting in a number of ways. For example, you can make words bold or italic, set an indent for the paragraph, change the point size of the font, and so on.

Regardless of which type of field you are working with, each field can also restrict the type of data you can enter. For example, one field might accept any text while another might accept only dates. Finally, fields can also require that you complete them – these are called *mandatory* fields, because it is mandatory that you fill them out.

The following sections discuss how to:

- Select text.
- Cut, copy, paste, or delete text.
- Adjust the formatting of rich text.
- Identify mandatory fields and field data types.

Selecting Text

Before you can cut, copy, or delete text, you must first select the text you want to work with. You can use either the mouse or the keyboard to select text.

To select text using the mouse:

- To select a single word or a group of words, double-click the word or click and drag with the mouse to select a group of words.
- To select all the text in a field, right-click the field and choose **Select All** from the menu.

To select text using the keyboard:

- To select a single word or a group of words, press SHIFT and use the LEFT ARROW or RIGHT ARROW keys to select the text.
- To select all text in a field, press CTRL + A.

Cutting, Copying, Pasting, and Deleting Text

You can use either the mouse or the keyboard to work with text. Remember that:

- To cut, copy, or delete text, you must first select the text you want to work with.
- To paste text, you must first put the cursor in the position you want the text to appear.

You can then use the following commands:

Action	Mouse Command	Keyboard Command
Cut	Right-click the text and select Cut .	CTRL + X
Copy	Right-click the text and select Copy .	CTRL + C
Paste	Right-click the text and select Paste .	CTRL + V

Delete

Right-click the text and select **Delete**.

DELETE

***Note:** You can choose **Undo** from the right-click menu to recover from the last change you made. However, the Undo function remembers only the last action you took, and will not undo a series of changes.*

Working With Rich Text

In addition to the normal cut and paste functionality, rich text fields also allow you to format the text in different ways. For example, you might want some words to be bold or italic, or you might want to change the point size of the font.

You can recognize rich text fields by looking at the **Font** and **Paragraph** buttons in the Viewer's toolbar. These buttons control rich text fields, and are only active if you are working with rich text. If you are working with plain text, the buttons are grayed out and do not work.


Changing the Font Settings

You can either use the **Font** dialog or the keyboard commands to change the font settings in a rich text field. This allows you to change the font, the font style, the point size, and so on.

To change the font settings, you can either:

- Select the text you want to change. This will apply all changes to that text only.
- Select a new font and continue typing. Everything you type after the change will be in the new font.


Use the following commands to change the font settings:

Action	Mouse Command	Keyboard Command
Open the Font dialog	Click the Font button  in the Viewer's toolbar.	CTRL + F
Toggle Bold	Use the Font dialog.	CTRL + B
Toggle Italic	Use the Font dialog.	CTRL + I
Toggle Underline	Use the Font dialog.	CTRL + U

Changing the Paragraph Settings

The paragraph settings allow you to change the indentation and the alignment of the text in a field. For example, you could set the field to indent all text by 0.5 inches or to right justify all text. Any changes you make to the paragraph settings are applied to all text in the field.

To open the paragraph dialog, do one of the following:

- Click the **Paragraph** button  in the Viewer's toolbar.
- Press CTRL + R.

The paragraph dialog lets you make the following settings:

- **Indentation: Left** — The distance to indent the text from the left margin of the field. This is measured in inches.
- **Indentation: Right** — The distance to indent the text from the right margin of the field. This is measured in inches.
- **Indentation: First Line** — The distance to indent the first line of each paragraph in the field. This is measured in inches. Using a negative value will create a hanging indent, in which the first line of the paragraph begins at the left margin, and all subsequent lines are indented.
- **Alignment** — The justification of the text. This can be left, right, center, or full.

Setting List Types

You can create bulleted or numbered lists in rich text fields by using a special keyboard command. This allows you to create the following styles:

- bullet
- number
- lower case letter
- upper case letter
- lower case roman numeral
- upper case roman numeral

To create a list:

1. Type the lines you want in the list.
2. Select the lines.
3. Press CTRL + SHIFT + L.
 - The selected text becomes a bulleted list.
4. Press CTRL + SHIFT + L again to continue cycling through the list types.

Field Data Types and Field States

As mentioned earlier, fields can be set up to accept only certain types of data. For example, some fields might accept only dates or numbers. Furthermore, fields also have *states*, which reflect whether a field is mandatory and whether the information you typed into the field is valid or invalid.

The following table lists the data types available for fields:

Field Type	Description
-------------------	--------------------

Text	This field allows you to enter any keyboard character including letters, numbers, and punctuation. For example, this type of field can provide an area for a user to enter comments.
Numeric	This field limits your data to whole or decimal numbers. For example, in a credit card number field, you can enter a 12-digit numeric value. If you are entering a dollar value into a Numeric field, do not enter the dollar sign (\$).
Date	<p>These fields support dates in a wide variety of formats. To add the current date to any date field, you can type an asterisk (*) and then press the TAB or ENTER key. The Viewer automatically inserts the current date into that field.</p> <p>You can also enter dates manually. By default, the Viewer expects two digit dates to be entered in month, day, and year order. You can specify a different order in the field preferences (see page 36). Once you tab out of the completed date field, the Viewer will change a readable date to the format set in the form.</p>


The following table lists the states a field can have:


Field State	Description
Optional	The background color of these fields is white unless modified by the form designer. You can enter information into the field if you choose, but it is not required.
Mandatory	The background color of these fields is yellow . If you do not complete a mandatory field, the Viewer will stop you the first time you try to move to the next item by pressing TAB, and an error message will appear. If you press Tab again, you will move to the next form item.
Valid	Any field remains white if you enter information of the correct data type (see below).
Invalid	Any field turns red if you enter information that the Viewer cannot interpret according to its data type (see below). A mandatory field becomes invalid if you leave it blank.


Zooming Forms

Zooming forms can be useful if you have difficulty reading a form at its current size, or if you want to get an idea of what the form will look like when printed out. Zooming allows you to either increase or decrease the magnification, supporting sizes from 25% of normal ($\frac{1}{4}$ normal size) to 200% of normal (twice normal size).

Use the following toolbar controls to zoom the form:

 **Zoom In** — Increases the magnification of the form, making the form larger. Each time you zoom in, the size of the form will increase by one step. You cannot increase the size of the form past 200%, or double regular size. Increasing the size of the form is useful if the font in the form is too small to read. (You can also use CTRL + PLUS to zoom in.)

 **Zoom Out** — Decreases the magnification of the form, making the form smaller. Each time you zoom out, the size of the form will decrease by one step. You cannot decrease the size of the form past 25%, or $\frac{1}{4}$ regular size. Decreasing the size of the form is useful if the form is larger than your screen and you want to see how the form will look when printed out. (You can also use CTRL + MINUS to zoom out.)


 **Select Zoom Factor** — Selects a specific zoom factor. This lets you jump to the correct zoom factor immediately, rather than having to zoom in or out multiple times.


The Viewer remembers the last zoom factor you used, and will continue to use that zoom setting for all new forms. For example, you might zoom a form to 125% while working with it and then submit the form, causing the Viewer to close. The next time the Viewer opens a form, that form will also be zoomed to 125% since that was the last zoom setting you were using.

Checking Spelling

The Viewer includes a sophisticated spelling checker. Using its 100,000-word dictionary, it can find and correct spelling errors entered into forms. You can also create your own dictionaries or word lists if you want to include a large number of unusual words or names. For more information on working with dictionaries and word lists, see “Managing the Spelling checker” on page 51.

The Viewer provides two spell checking tools: one to verify the spelling of words within a single field, and one to spell check the contents of the entire form.

 **Check Spelling** — Click this button to check the spelling of the item that the cursor is in. This button is only active if you have selected an item that supports data entry (such as a field or a combobox) *and* the form’s design allows spell checking.


 **Check All Spelling** — Click to check the spelling of all input text in the current page. This button will only be active if the form’s design allows spell checking.

In either case, if any unrecognized words are found, a **Check Spelling** dialog box opens. You can then change the spelling, add new words to the dictionary, and so on.

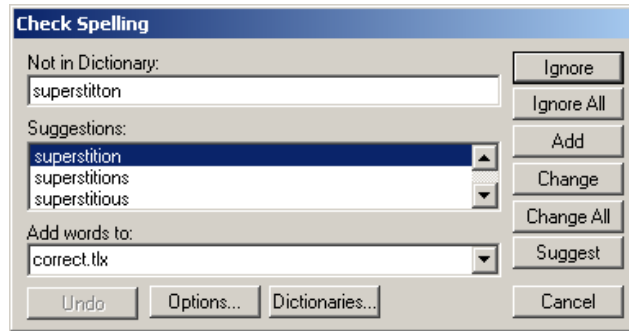
***Note:** For more information about the Check Spelling feature, including setup options and instructions for working with dictionaries and word lists, see “Managing Dictionaries” on page “Managing Dictionaries” on page 53.*

Checking the Spelling of Text within a Single Item

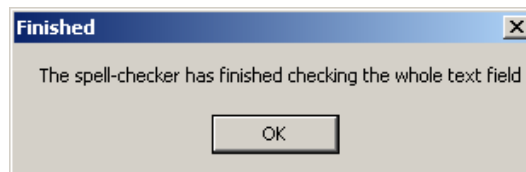
To check the spelling of a word or a block of text within a single field:

1. Select the field or a portion of its contents.
 - To select an item, click the item or press TAB until the item has the focus.
 - To select all the text in an item, right-click the item and choose **Select All** from the menu.
 - To select a portion of an item’s contents, double-click a single word, or drag the mouse to highlight a group of words. Alternatively, you can press SHIFT and LEFT ARROW or RIGHT ARROW to highlight a group of words.
2. Click the **Check Spelling**  button on the Viewer’s toolbar.

- If the spelling checker cannot recognize a word, the **Check Spelling** dialog box appears:



- If you want to replace the unrecognized word with the word highlighted in the **Suggestions** field, click **Change**. Click **Change All** to automatically replace all further occurrences of the unrecognized word.
 - In the **Suggestions** field, the spelling checker may suggest other words. To accept one of those suggestions, select the word and click **Change** or **Change All**.
 - To ignore the suggestion and proceed with the spell check, click **Ignore**. Click **Ignore All** to ignore all occurrences of that word.
 - To add the unrecognized word to the current dictionary, click **Add**. For more information, see “Managing Dictionaries” on page 53.
 - Each time you click **Suggest**, the suggestions will improve in accuracy. This is useful if you set the suggestions to low accuracy. See “Managing the Spelling checker” on page 51 for more information on setting your spell-checking options.
3. When the spelling checker finishes, a confirmation message appears:



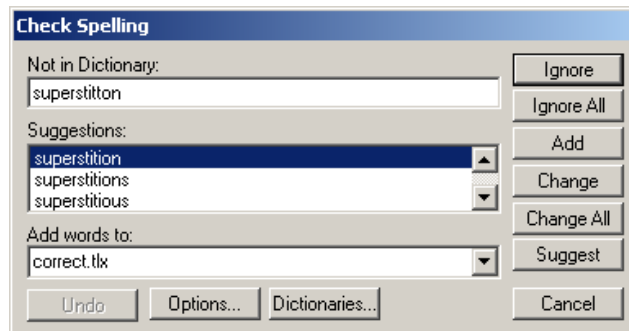
4. Click **OK** to end the spell check.

Checking the Spelling of All Items

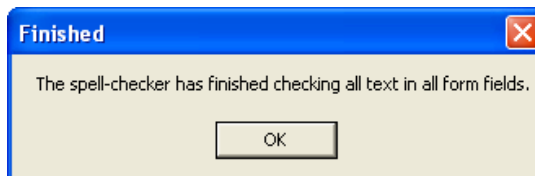
To check the spelling of all input text within the form:

1. Click the **Check All Spelling**  button on the Viewer’s toolbar.

- If the spelling checker cannot recognize a word, the **Check Spelling** dialog box appears:




- If you want to replace the unrecognized word with the word highlighted in the **Suggestions** field, click **Change**. Click **Change All** to automatically replace all further occurrences of the unrecognized word.
 - In the **Suggestions** field, the spelling checker may suggest other words. To accept one of those suggestions, select the word and click **Change** or **Change All**.
 - To ignore the suggestion and proceed with the spell check, click **Ignore**. Click **Ignore All** to ignore all occurrences of that word.
 - To add the unrecognized word to the current dictionary, click **Add**. For more information, see “Managing Dictionaries” on page 53.
 - Each time you click **Suggest**, the suggestions will improve in accuracy. This is useful if you set the suggestions to low accuracy. See “Managing the Spelling checker” on page 51 for more information on setting your spell-checking options.
2. Once the spell check for the selected text is complete, a confirmation message appears.



3. Click **OK** to end the spell check.

Saving Forms

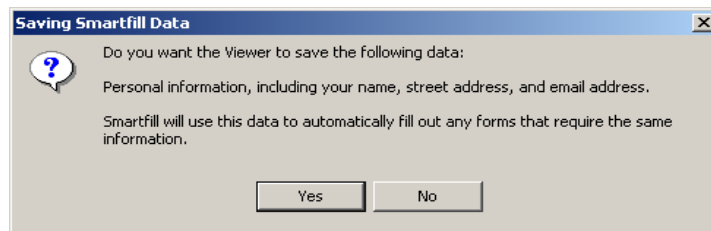
You can save a form locally to your computer’s hard drive or to any other location that your computer can access via a network connection. To save a form:

1. On the toolbar, click the **Save Form**  button.
 - A **Save Form** dialog box opens.
2. Browse to select where you want to save the form.
 - By default, the Viewer chooses the directory from which the form originated.
3. Enter the name of the file in the **File name** field, OR select a file name from the current directory.
 - You do not need to enter an extension. By default, the Viewer assigns the **.xfdl** extension when it saves a form.
4. Click **Save**.
5. If you are saving or replacing an existing form, a confirmation prompt will appear. Click **Yes** to continue.

The Viewer saves the form, and all the information you entered into the form, to the directory you specify. When you want to resume your work, you can open the saved form and continue working.

Saving Forms that Use Smartfill

When you save a form, you may also see a Smartfill dialog that asks you if you want to save some other information. The Smartfill dialog will look like this:



Smartfill is a feature that helps you complete forms by saving frequently used information, such as your name and address. This information is stored on your computer, and is accessed when you open other forms that require the information.

If you save the information when prompted, Smartfill will use that information to automatically fill out other forms that use the Smartfill feature. If you do not save the information, Smartfill will not be able to use it in future forms, and you will have to complete them manually.

For information on turning off the Smartfill feature, see “Smartfill” on page 37.

Note: *Before saving Smartfill information, be sure you read the dialog carefully so that you understand what information is being saved. In some cases, you may not want personal information saved on your computer.*

Submitting Forms

Many forms include a submit button. This button will vary in appearance, depending on how your organization designs their forms. When you click this button, the Viewer sends the form (including any information you entered) to a specific destination. This destination can be:

- Any computer or network that is connected to the Internet.
- Any computer that is part of your organization's local area network (LAN) or intranet.
- Your own computer.

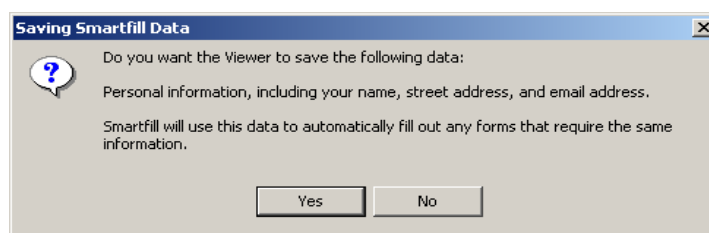
The destination of a submitted form is built into the form and cannot be changed by the user. Depending on your application, a form may simply disappear when you submit it, or you may receive a message informing you that the form was submitted successfully.

The Viewer also supports working offline. If you work offline, the Viewer will either prompt you to save your forms when you submit them, or it will automatically save your forms in an archive and will then send them with your next online transmission. For more information on working offline, see "Working Offline" on page 59.

***Note:** Provided your computer has access to an email server, you can email any form rather than submitting it. For more information about emailing forms, see "Emailing Forms" on page 43.*

Submitting Forms that Use Smartfill

When you submit a form, you may also see a Smartfill dialog that asks you if you want to save some other information. The Smartfill dialog will look like this:




Smartfill is a feature that helps you complete forms by saving frequently used information, such as your name and address. This information is stored on your computer, and is accessed when you open other forms that require the information.

If you save the information when prompted, Smartfill will use that information to automatically fill out other forms that use the Smartfill feature. If you do not save the information, Smartfill will not be able to use it in future forms, and you will have to complete them manually.

For information on turning off the Smartfill feature, see “Smartfill” on page 37.

Note: *Before saving Smartfill information, be sure you read the dialog carefully so that you understand what information is being saved. In some cases, you may not want personal information saved on your computer.*

Printing Forms


The Viewer’s toolbar always includes the **Print** button . When you click this button, the Viewer prints the form. Some forms also provide a custom print button somewhere within the form. The location and appearance of this button will vary.

Regardless of which button you use, in most cases Windows displays a **Print** dialog box that you can use to select the printer, configure its properties, and set the number of copies. However, some forms may be designed to print immediately, without allowing you to configure these options.

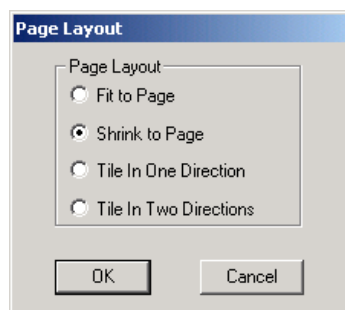
Here are some things to remember about printing forms:

- Toolbars never appear on a printed form.
- You cannot print select parts of the form – you must print the entire page or form.
- In the case of multi-page forms, the form’s design will determine whether the Viewer prints the entire form or only the page you are currently viewing.

To print a form:

1. Click **Print**  on the Viewer’s toolbar (or click the form’s print button if one is provided).
 - If a **Print** dialog box opens, go to step 2. Otherwise, the form will print.
2. Select the printer you want to use.
3. Click **Properties** to set the printer’s properties, if required.
 - Consult your printer’s documentation for more information.
4. Click **Layout** to modify the page layout.

- The **Page Layout** dialog box appears:



- The following layout choices are available:
 - **Fit to Page** scales the form up or down in size, so that it covers as much of one printed page as possible.
 - **Shrink to Page** scales the form down in size so that it fits on one printed page. If the form already fits on a single page, it will not be scaled.
 - **Tile in One Direction** adjusts the form's width and height so that it will only print across multiple pages in one dimension.
 - **Tile in Two Directions** does not adjust the form's dimensions. The printed form may print across multiple pages in both dimensions.
5. Click **OK** when you have selected the page layout.
 6. Set the number of copies.
 7. Click **OK**.

The form is printed on the printer you selected.

***Note:** Forms that consist of multiple pages may be designed to automatically print the entire form, or to print only the current page. If you want to print all of the pages in a form, you may have to repeat the print process for each page.*

Setting Default Print Settings

You can change the Viewer's default print behavior by setting the print preferences. The Viewer automatically uses these settings in the **Print** dialog box each time you print. You can override the default settings, however, by selecting different options in the **Print** dialog box.


To learn more about changing the default print preferences, see "Print Preferences" on page 37.

Note: To avoid potential printing problems, such as missing pages, make sure that you are using the latest printer driver, and that you select **Put all form pages in one print job** in the Viewer's **Printing Options**.

Closing Forms

You can close a form without submitting it. The Viewer also closes when you close the form.

To close a form:

1. Click the **Close Window**  button.
 - If you have not modified the form since it was last saved, the Viewer closes.
 - If you have entered any information into the form, the Viewer displays dialog that prompts you to save the form.
2. Click **Yes** to save your changes or click **No** to close the form without saving your changes. Click **Cancel** to cancel the close operation and return to the form.

Chapter Three: Setting Viewer Preferences


The preferences determine how the Viewer interacts with your web browser and email software, and how the Viewer handles working offline, entering dates, checking input, printing, and other advanced options.

The Viewer provides a special form called the Preferences form, with which you can view and edit the preferences. This chapter explains how to access the Preferences form and how to make changes to the settings. There are four groups of settings:

- **Basic** — Configure the basic features of your Viewer, such as browser and email configurations.
- **Input Options** — Configure how the Viewer's input controls and tabbing options.
- **Printing Options** — Configure how the Viewer prints forms.
- **Advanced** — Configure advanced settings including warning messages, boundaries, color schemes, signatures. Most users will not need to change these settings.

Opening the Preferences Form

To open the Preferences form:

1. Launch the Viewer from the Windows **Start** menu.
2. Click **Preferences**  on the toolbar.
 - The Preferences form opens at the **Basic** page.

You can now set the preferences as you like. When you save the preferences, the Viewer automatically update those preferences that do not affect the appearance of the form. To update the appearance of the form, you will have to close the form and open it again.

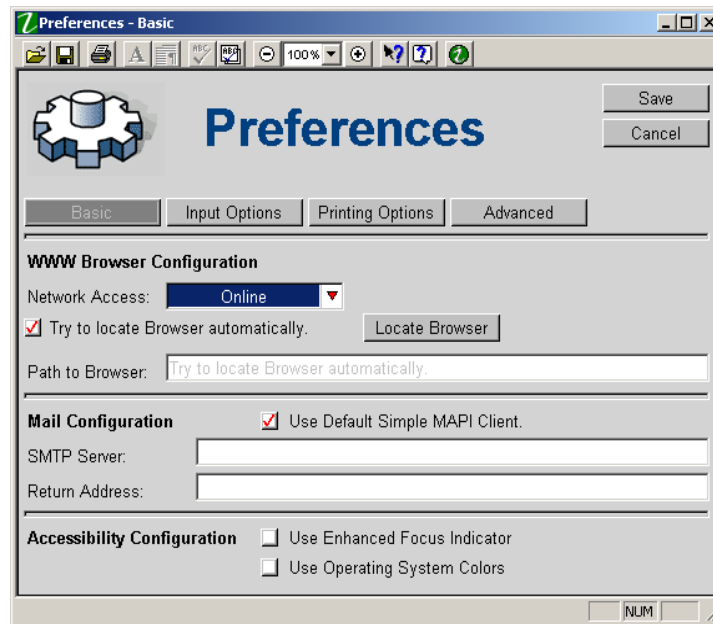
The following sections explain the preferences in detail.

Basic Preferences

Use the basic preferences page to configure your browser and email settings. Basic preferences are divided into the following sections:

- **WWW Browser Configuration** — Sets your browser preferences.
- **Mail Configuration** — Sets your email preferences.

- **Accessibility Configuration** — Sets which accessibility features to use.



WWW Browser Configuration

The Viewer works with both Internet Explorer and Netscape Navigator, allowing users to open and complete forms through a familiar browser interface.

Use the browser configuration preferences to set your default browser and the type of network access you prefer.

Network Access

The network access settings configure your Viewer to work in several different network environments. This is especially important when submitting forms.

The Viewer recognizes four types of network access:

- **Online**
- **Online with Backup**
- **Offline**
- **Offline with Archiving**

Note: *Not all access settings are available in all installations. If you do not see one or more of the access settings in the preferences form, then your organization has chosen not to make those settings available to its users.*

Online

Use this setting if you are currently connected to a network and can submit forms.

Online with Backup

Use this setting if you are currently connected to a network and you want to store a backup copy of each form as you submit it. This may be useful if something unexpected happens, such as your server accepting the form but being unable to process it. Note that this feature only stored a copy of the last form you have submitted. If you accepted the default installation, the backup file is stored in one of the following locations:

■ **Windows 98/ME**

Single User Mode:

```
c:\Windows\Application Data\PureEdge\Viewer x.x\Backup\
```

Multi-User Mode:

```
c:\Windows\Profile\\Application Data\
PureEdge\Viewer x.x\Backup\
```

■ **Windows NT 4.0**

```
c:\WINNT\Profiles\\Application Data\PureEdge\
Viewer x.x\Backup\
```

■ **Windows 2000/XP**

```
c:\Documents and Settings\\Application Data\
PureEdge\Viewer x.x\Backup\
```

Offline

Use this setting if you are not connected to a network and cannot submit forms. When you try to submit a form, the Viewer will prompt you to save the form instead.

Offline with Archiving

Use this setting if you are not connected to a network and you want to archive your forms as you submit them. The Viewer will save a copy of each form in an archive, and can then automatically submit all of the forms when you are once again connected to a network. For more information on archiving, see page 60.

Locating Your Browser

These settings allow you to specify your preferred browser. By default, the Viewer tries to locate a browser automatically.

- **Try to locate your Browser automatically** — If this option is selected, the Viewer locates and uses your computer's default browser to display forms.
- **Locate Browser** — Select this option if the Viewer cannot locate your default browser, or if you want to use a browser that is not the default browser. When you click this button a dialog box opens to let you select the browser you want to use.
- **Path to Browser** — Contains the path to your preferred browser, or the message “Try to locate automatically” if you have selected that option.

Mail Configuration

If you want to be able to email forms, you must complete the email configuration section.

- **Use Default Simple MAPI Client** — This option controls whether you use your default email client (called a MAPI Client) or whether you use the Viewer's built-in email service when emailing forms. Select this option to use your default email client. If you select this option, you are not required to change any information in the **SMTP Server** or **Return Address** fields.
- **SMTP Server** — If you are using the Viewer's built-in email service, you must provide the name of your SMTP server in this field. This name usually takes the form of *mailhost.companyname.com*. To obtain the name of your SMTP server, contact your system administrator.
- **Return Address** — If you are using the Viewer's built-in email client, enter your email address. It usually takes the form of **youremail@companyname.com**.

For more information on emailing forms with the Viewer, see the section on “Emailing Forms” beginning on page 43.

Accessibility Configuration

If you have vision impairments, the Viewer offers the following accessibility features:

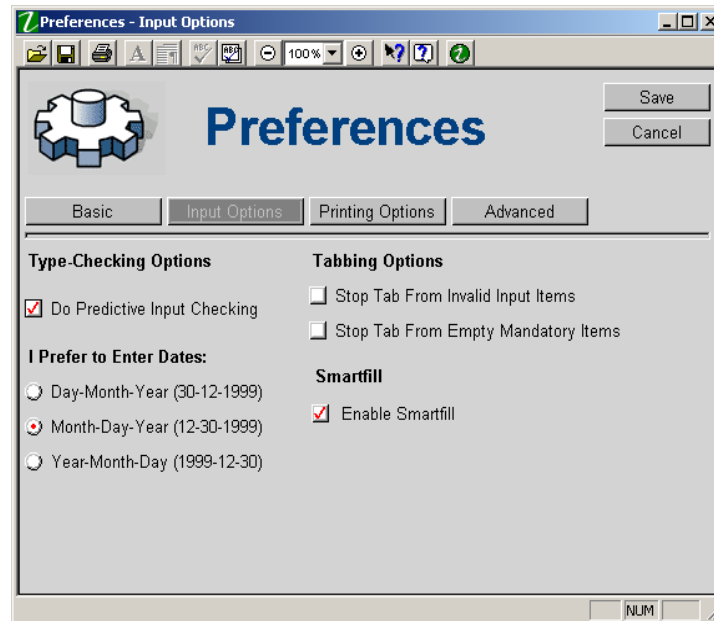
- **Use Enhanced Focus Indicator** — Enables the enhanced focus indicator, which draws a small, black square near the top-left corner of the item that currently has the focus. This square appears in addition to the normal focus indicators, and makes it easier to see which item has the focus.
- **Use Operating System Colors** — Makes the Viewer use the operating system colors when drawing a form, rather than those colors specified in the form itself. This is useful if you have set your operating system to have higher contrast colors, and want the Viewer to use those colors.

Note that the Viewer also supports MSAA-compliant screen readers for users with more significant vision impairments. For more information about the accessibility features, see “Accessibility Features” on page 69.

Input Preferences

Use these settings to configure how the Viewer handles input items. You can configure the type-checking and tabbing options, as well as your preferred date format.

The following diagram shows the input options preferences:



Type-Checking Options

The Viewer always checks the validity of data that you enter into fields, comboboxes, and so on. By default this occurs when you move the cursor to the next item in the form.

When predictive input checking is enabled, the Viewer checks for errors as you type. To enable this feature, select **Do Predictive Input Checking**.

Date Format

Date fields in forms will often be designed to automatically check and format dates. This means that when you enter a date, the Viewer will automatically verify that it is a valid date, and will often reformat the date to match the settings in the form. For example, you might enter 12/12/2001, and the Viewer might change this to December 12, 2001.

However, in some cases it may be unclear what date you have entered. For example, 07/06/2001 may be interpreted as either July 6, 2001 or June 7, 2001. The Date Format setting determines how the Viewer will interpret numeric dates.

If you specify in the Preferences form that you will enter dates in the format Day-Month-Year, then the form will interpret 03/04/97 as April 3, 1997. If you specify that you will enter dates in the format Month-Day-Year, then the form will interpret 03/04/97 as March 4, 1997.

To avoid confusion, you can also enter dates in long format, such as March 4, 1997. Moreover, if you enter a date that clearly follows a different format, the Viewer will interpret it correctly. For example, you might enter the date 14/12/2001 when the Viewer is set to accept dates in MM/DD/YYYY format. In this case, 14 is clearly not the month, so the Viewer will interpret it as DD/MM/YYYY despite the preference setting.

***Note:** To add the current date to any date field, you can type an asterisk (“*”) and then press the TAB key to move out of that field. The Viewer automatically replaces the asterisk with the current date.*

Tabbing Options

By default, you have to press the TAB key twice to leave input items that contain invalid information, or to move from empty mandatory items. You can override this behavior by selecting the appropriate tabbing option:

- **Stop Tab From Invalid Input Items** — When this option is selected, you will not be able to use the TAB key to move the focus from invalid input items.
- **Stop Tab From Empty Mandatory Items** — When this option is selected, you will not be able to use the TAB key to move the focus from empty mandatory items.

***Note:** Regardless of the tabbing options selected, you can always use the mouse to move the focus to another item.*

Smartfill

Smartfill is a feature that helps you to complete forms quickly. To do this, Smartfill records frequently used information, such as your name and address, and then automatically adds this information to forms that are designed to use it.

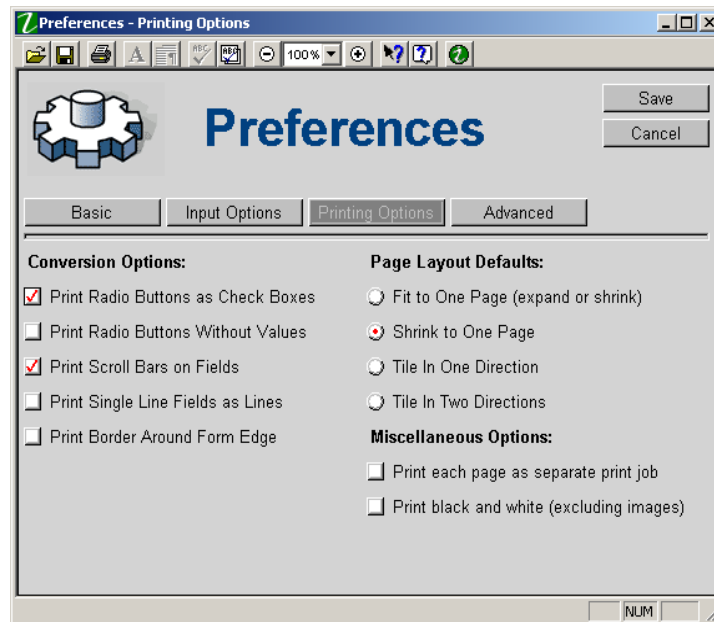
When you first save or submit a Smartfill-enabled form, you will be asked if you want to save the Smartfill data. Then, when you open another form that is set up to use that data, Smartfill will ask you if you want to automatically load that data. Once you agree, Smartfill will automatically complete some portions of the form for you.

To turn Smartfill either on or off, set the check box beside **Enable Smartfill** appropriately. Turning Smartfill off prevents the dialog boxes that ask you to save or load information from appearing.

Print Preferences

Print preferences allow you to customize how the Viewer prints forms. For example, the conversion options change the appearance of certain form elements when they are printed. Likewise, page layout options configure how the Viewer prints forms that span more than one page.

The following diagram shows the print preferences:



Conversion Options

These options alter the appearance of the form when printed, thereby “converting” the form. You may want to select some or all of these options if you are printing blank forms that will be filled out by hand. Select as many of the options as you need:

- **Print Radio Buttons as Check Boxes** — Prints radio buttons as check boxes. Use this option for visual consistency in the printed form, so that all choices appear uniformly as check boxes.
- **Print Radio Buttons Without Values** — Causes all radio buttons in a group to be printed as unsettled, or blank choices.
- **Print Scroll Bars on Fields** — Prints text fields with scroll bars. This is only a concern if the text fields on the screen display scrollbars.
- **Print Single Line Fields as Lines** — Instead of printing a single line field as an empty rectangle, the field will be printed as a blank line.
- **Print Border Around Form Edge** — Prints a border around the form. Use this option to visually frame the form.

Page Layout Defaults

- **Fit to One Page** — Prints the form page on a single piece of paper. This option scales the form up or down so that it will fit on a single page, and so that it covers as much of the page as possible.
- **Shrink to One Page** — Prints the form page on a single piece of paper. This option scales the form down so that it will fit on a single page. If the form already fits on a single page, it will not be scaled.
- **Tile In One Direction** — Prints the form on multiple pages in the longer dimension (either horizontal or vertical). This option scales the form so that the smaller dimension fits on a single page if necessary.
- **Tile In Two Directions** — Prints the form on multiple pages in both dimensions. This option prints the form in its true size.

Miscellaneous Options

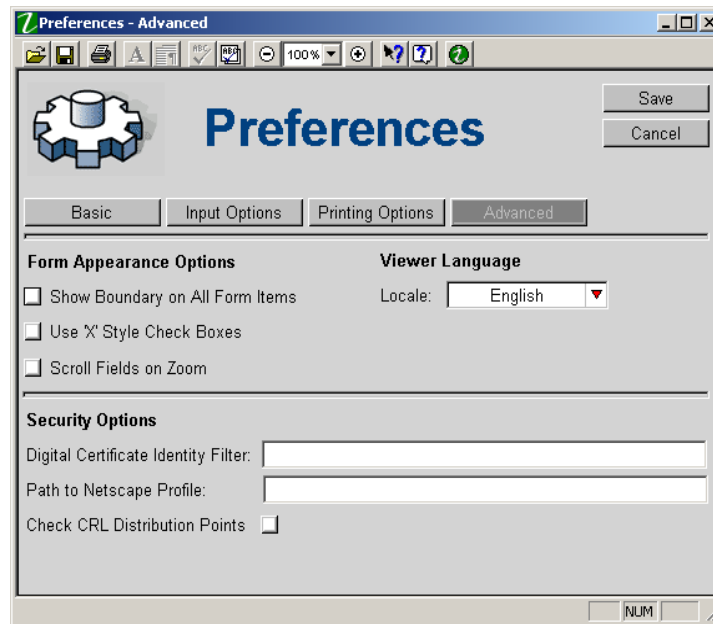
- **Print each page as a separate job** — Prints each form page as a separate print job rather than grouping all the pages of a form into a single print job. You should only select this option if your printer doesn't have enough memory to print a large form.
- **Print black and white (excluding images)** — Prints the form in black and white only. Select this option if your printer is having difficulty representing the form's colors in grayscale. Typical symptoms include: getting black boxes where the text should be; text not showing up; or whiteness appearing around the text of transparent labels.

Advanced Preferences

Advanced preferences allow you to configure miscellaneous options, such as whether to show boundaries on all form items or where to find your Netscape profile.

***Note:** The Viewer will not redraw the form when you change the preferences. If you adjust preferences that affect the appearance of the form (such as the GAMMA correction), you will have to close the form and open it again for the new preferences to take effect.*

The following diagram shows the advanced preferences:



Form Appearance Options

These options affect how the form appears on the screen as follows:

- **Show Boundary on All Form Items** — Draws a boundary line around the edge of all visible form items (for example, fields, buttons, labels, and so on). This option is intended primarily for form designers, and should be turned off except when designing the layout of a form.
- **Use ‘X’ Style Check Boxes** — By default, check boxes are drawn as a three-dimensional box with a red check mark when selected. Using ‘X’ style check boxes will instead draw a two-dimensional box with a black ‘X’ when selected.
- **Scroll Fields on Zoom** — Adds scrollbars to zoomed fields when they are required to see the complete text. In some cases, zooming may change the word-wrapping in fields slightly, which may cause some text to appear below the last line of a field. In fixed size fields, there is no way to see this text other than adding scrollbars to the field. This does not change the amount of text that can be entered into the field. Note also that this setting may be overridden by individual forms.

Note: This “Scroll Fields on Zoom” setting is not available in all installations. If you do not see this option in the preferences form, then your organization has chosen not to make this feature available to its users.

Viewer Language

This sets the language the Viewer uses for tooltips, dialog boxes, preferences, and so on. Note that changing the Viewer’s language does not change the language used in individual forms.

- **Locale** — Select the language you want the Viewer to use.

Security Options

The security options set a number of features related to digital certificates, as well as how the Viewer submits forms (through a browser, or through its own communication protocols). The options are:

- **Digital Certificate Identity Filter** — This setting allows you to filter the list of digital certificates available to the user. The value can be any part of a valid signing identity, such as an email address or first name. All certificates that match the entered value will be available to the user. For example, if you entered “Bob”, all certificates with the name Bob in the signing identity would be available. Use this option only if you have digital certificates installed on your computer that you do not need to access.
- **Path to Netscape Profile** — This sets the Viewer to use a specific Netscape profile for signing, and is useful if the Viewer cannot locate your profile itself. Enter the path to the folder containing your certificate. To locate your certificate, use Window’s Find or Search tool to conduct a search for cert*.db.
- **Check CRL Distribution Points** — Certificate Revocation Lists (CRLs) contain the names of digital certificates that are no longer valid. When you digitally sign a form, the Viewer checks its locally stored CRLs to verify that your certificate is valid. The Viewer can also access online CRLs that are maintained by the organization that issued the certificate. The Viewer finds these CRLs by accessing special URLs attached to the certificate.

Select this check box to have the Viewer verify on-line CRLs. However, you should only do so if you are sure that the Viewer can connect to the required URLs. In other words, your computer must have a functioning connection to your company’s network or the Internet.

Note: If this check box is selected and the computer is unable to connect to the required URL, there may be a delay of up to three minutes during which the Viewer will not respond to your requests. For this reason, this option is not selected by default.

Chapter Four: Advanced Viewer Functions

This chapter explains how to use the Viewer's more advanced functions. It contains instructions for:

- Emailing forms.
- Managing files attached to forms.
- Managing and creating dictionaries for the spelling checker.
- Working offline.
- Signing forms.
- Using the accessibility features.

Before attempting any of the procedures outlined in this section, you may want to familiarize yourself with the Viewer Preferences Form and how to adjust its settings. For more information, see "Chapter Three: Setting Viewer Preferences" on page 31.

Emailing Forms

Provided your computer can access an email server, you can email any form, regardless of its specific design.

The Viewer supports two ways to email forms:

- Using your preferred email client (such as Microsoft Outlook, Netscape Messenger, Eudora, and so on).
- Using the Viewer's built-in email support.

This section first explains how to set up the Viewer to use your existing email software or the Viewer's email support. You will then learn how to email forms, enclose attachments, and manage attached files.


Setting the Viewer's Email Preferences

To select the email software the Viewer uses, you must set the Viewer's email preferences. Follow the appropriate procedure provided below, depending on whether you want to use the Viewer's email support or your own email software. Both methods provide the same functions, but some people prefer to use the email program they already know.

Using Your Preferred Email Client

To use your preferred email client, you will need to set both the Viewer *and* your preferred email client to use the *Messaging Application Programming Interface*, or MAPI.

To set the Viewer to use MAPI:


1. From the Viewer's toolbar, click **Preferences** 
 - The Preferences form opens at the Basic page.
2. Under Mail Configuration, select **Use Default Simple MAPI Client**:
 - Do not change any information in the **SMTP Server** or **Return Address** fields.
3. Click **Save**.
 - The Preferences form closes.

The Viewer will now use MAPI to access your preferred email client. Now you must set your email client to use MAPI as well. To do this, consult the documentation that came with your email software. Once both programs are configured, the Viewer will email all forms using your preferred email client.

Using the Viewer's Email Support

To use the Viewer's email support, you will need set the Viewer preferences to include your mail server address and email address. In addition, you need to ensure that the Viewer is not configured to use the MAPI client.

To set the Viewer to use it's built-in email support:


1. From the Viewer's toolbar, click **Preferences** .
2. Under **Mail Configuration**, clear the **Use Default Simple MAPI Client** check box.
3. In the **SMTP Server** field, enter the name of the Simple Mail Transfer Protocol (SMTP) server you want to use (for example, *mailhost.companyname.com*).
 - To find the SMTP server name, look in the email account information of your email software, or consult your system administrator.
4. In the **Return Address** field, enter your email address (for example, *youraccount@company.com*).

Mail Configuration	<input type="checkbox"/> Use Default Simple MAPI Client.
SMTP Server:	<input type="text" value="mailhost.company.name"/>
Return Address:	<input type="text" value="youraccount@companyname.com"/>

5. Click **Save**.
 - The **Preferences form** closes and you are returned to your form.


Now, each time you email a form, the Viewer uses its built-in email support.

Sending Forms

You can email a copy of any form by clicking the **Mail Form**  button in the Viewer's toolbar. You can email a blank form or one that has been filled out. Depending on how your preferences are set (explained above), the Viewer emails the form using either your preferred email client or the Viewer's email support.


Using Your Preferred Email Client

If you have set your preferences to use your preferred email client:

1. Open and complete the form you wish to send.
2. From the Viewer's toolbar, click Mail Form 
 - Your preferred email client opens, and a copy of the form is automatically attached to a new email message.
3. Enter the recipient's email address and send the email as you would normally.

***Note:** You can also attach a completed and saved form as you would attach any other document to an outgoing email using your preferred email client.*

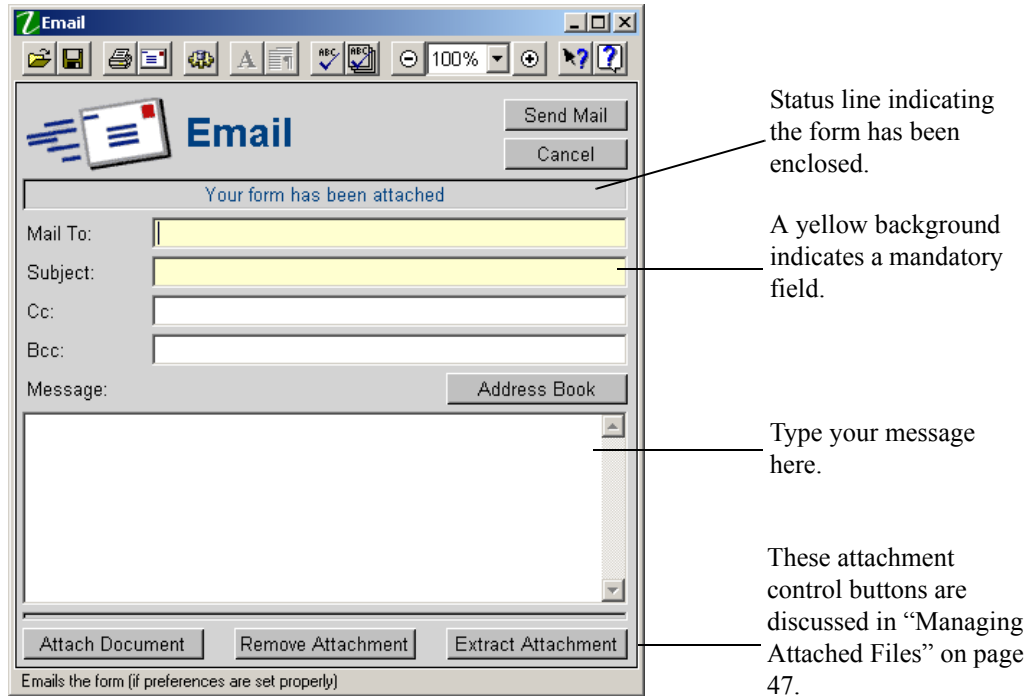
Using the Viewer's Email Support

The Viewer's built-in email support provides a special email form. This form appears when you click the **Mail Form**  button. The Viewer automatically attaches the form you want to send to the email form.

To send the email message:

1. From the Viewer's toolbar, click **Mail Form** .

- The Viewer's email form appears, as shown below. The Viewer automatically attaches your form to the email form.



2. Complete the mandatory fields:
 - In the **Mail To** field, type the email address of the recipient of the form. Separate the address of multiple recipients with a comma or semi-colon.
 - In the **Subject** field, enter a subject line.
3. If you want, you can also fill out the following optional fields:
 - In the **Cc** field, enter the email address of any other recipients. Use commas or semi-colons to separate multiple addresses.
 - In the **Bcc** field, enter the email address to which the Viewer sends a blind carbon copy of the form. Use commas or semi-colons to separate multiple addresses.
 - In the **Message** field, enter your message.

Note: You can click **Address Book** to access the address book of your preferred email client.

4. Click **Send Mail**.
 - The Viewer sends the email message and the Email form closes.

Attaching, Removing, and Extracting Documents

At the bottom of the Viewer's email form are three attachment-control buttons, as shown below. These buttons allow you to add, remove, or extract files from your email message. You can perform these operations for any type of file, including other forms.



For more information, see the following section, entitled "Managing Attached Files".

Managing Attached Files

Some forms may include attachments or provide the opportunity for you to attach your own files. Attachments can be any type of file, such as MS-Word documents, spreadsheets, graphics files, or even other forms. For convenience, the Viewer lets you group attachments into folders. This is useful if you are attaching several files and want to organize them in some way.

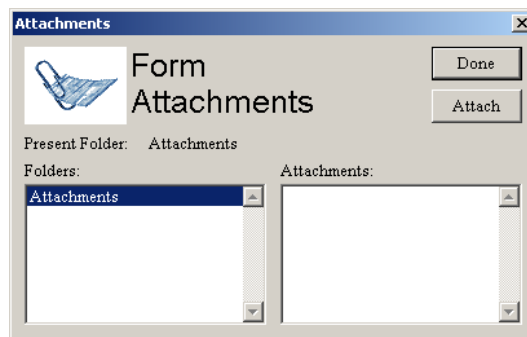
Forms that support attachments are specially designed to provide the necessary functions. Such forms include buttons that allow you to enclose, display, remove, and extract attachments. The location and appearance of these buttons can vary, depending on the form's design.

This section explains how to use these functions to manage attached files. The procedures that follow also apply to the buttons in the Viewer's email form.

Attaching Documents

To attach a document to a form:

1. On the form, click the **Attach** or attach-type button.
 - An **Attachments** dialog box opens, listing the documents and folders that are currently attached:

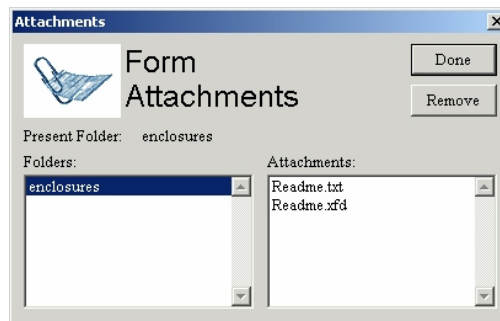


- To attach another document, click **Attach**.
 - An **Enclose File: Choose the File** dialog box appears.
- Select the document you want to attach and click **Open**.
 - The dialog box closes and the file you selected appears in the **Enclosures** list.
- Attach other documents by repeating steps 2 and 3 for each document.
- Click **Done** when you are finished.

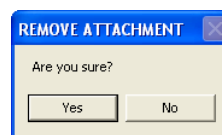
Removing an Attached Document

To remove an attached document from a form or from the Viewer's email form:

- On the form, click the **Remove** or remove-type button.
 - An **Attachments** dialog box opens listing the documents that are currently attached:



- From the **Folders** list, select the folder that contains the file you want to remove.
 - The files appear in the **Attachments** list.
- From the **Attachments** list, select the file you want to remove and click **Remove**.
 - A **Remove Attachment** confirmation dialog box appears:



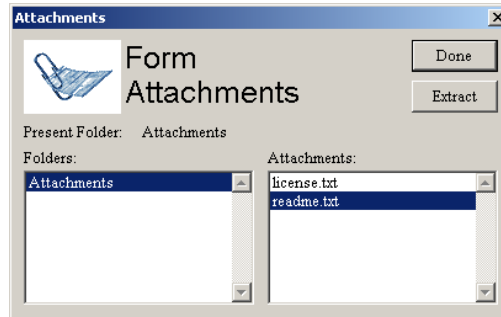
- Click **Yes** to remove the attachment, or click **No** to cancel the request.
- Click **Done** when you have finished removing the attached files.

Extracting an Attached Document

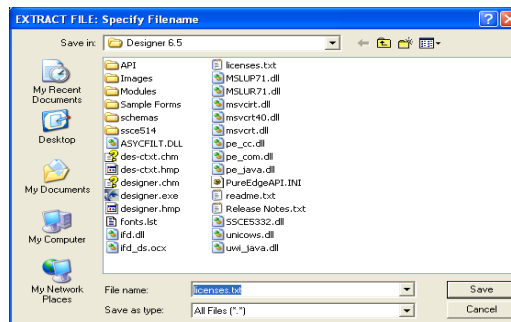
The Viewer lets you extract an attachment from a form and save it to a location of your choice. When you extract a document or file, the Viewer removes it from the form and saves it as an independent file.

To extract a document from a form:

1. On the form, click the **Extract** or extract-type button.
 - If the form contains more than one attached document, an **Attachments** dialog box opens listing the documents that are currently attached:



- If the form contains only one attached document, an **Extract File: Specify Filename** dialog box appears. Go to step 3.
2. From the **Folders** list, select the folder that contains the file you want to extract.
 - The files appear in the **Attachments** list.
 3. From the **Attachments** list, select the document you want to extract and click **Extract**.
 - An **Extract File: Specify Filename** dialog box opens:



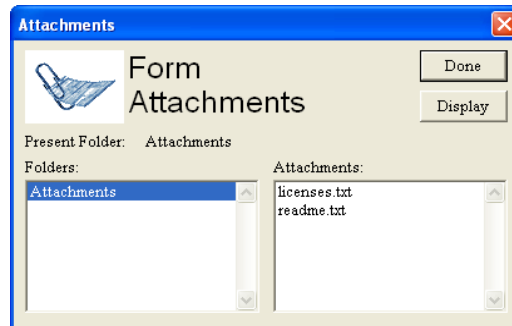
4. Choose the folder in which you would like to save the document and, next to **File name**, type the name of the file.
5. Click **Save**.
 - If a file with the same name already exists, you will be asked whether you want to replace the existing file. Select **Yes** if appropriate, or select **No** to return to the **Attachments** dialog box.
6. Extract other documents as needed and click **Done** when you are finished.

Displaying Attached Documents

Some forms that support attachments provide the capability to display the attached document. If this function is available, the form will include some type of **Display** button. The Viewer displays files by passing them to your web browser. Your browser will then either display the file, or prompt you to save or run the file if it can't be displayed (for example, .exe files cannot be displayed).

To display an attached document:

1. On the form, click the **Display** or display-type button.
 - If there is only one file attached, that file will be displayed in your browser.
 - If there are multiple files attached, the **Attachments** form appears, listing those files:



2. From the **Folders** list, select the folder containing the attached file you want to display.
 - The files appear in the **Attachments** list.
3. From the **Attachments** list, select the file you want to display.
4. Click **Display**.
 - The document opens in your browser.

Working with Forms Containing Attachments

Forms that contain attachments behave the same as any other form. You can submit, email, and save these forms as usual. Furthermore, attachments are stored as part of the form itself, and are always saved, emailed, and submitted with the form.

***Note:** Once a document or file is attached to a form, changes to the original file will not affect the attached copy. To update an attachment, you must delete the attachment and then attach the updated file.*



Managing the Spelling checker

You can customize the Viewer's spelling checker by setting it to ignore certain grammatical errors or by adding frequently used names and unusual words to the dictionaries.

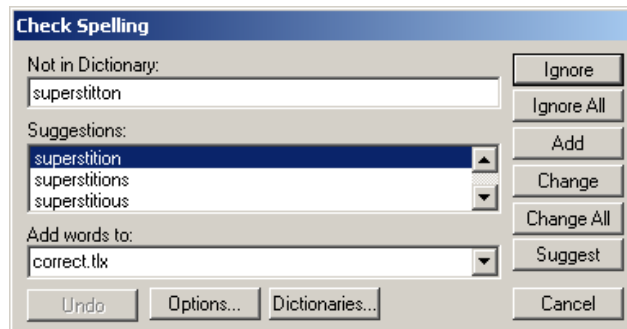
Setting Spell Check Options

The spelling checker's options allow you to control the rules the checker uses to verify the spelling of certain words. For example, if you use many acronyms, you can select the option that disregards words that are typed entirely in uppercase letters.

To set the spell-check options:

1. Start the spelling checker by clicking  or .

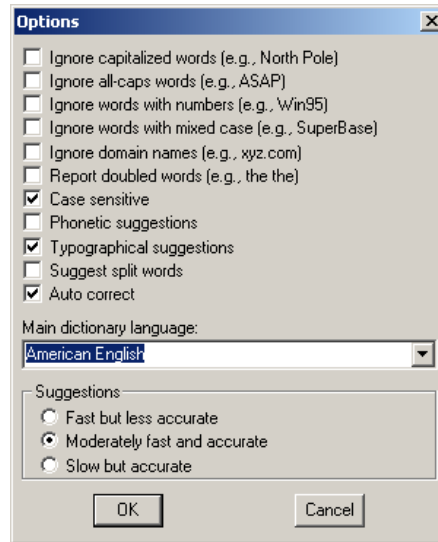
 - The spell-checking program begins. When it finds an error, the **Check Spelling** dialog box appears:



Note: You must access the **Check Spelling** dialog box to modify the spell-checker's options. If necessary, intentionally enter a misspelled word in a field before running the spelling checker.

2. Click **Options**.

- The **Options** dialog box opens:



3. Select the appropriate checkboxes:

- **Ignore capitalized words (e.g., North Pole)** — When selected, this option sets the spelling checker to ignore proper nouns, such as the name of a person or place. This option is useful if you use many proper names in your form.
- **Ignore all-caps words (e.g., ASAP)** — When selected, this option sets the spelling checker to ignore any words that are typed entirely in uppercase letters. This option is useful if you use many acronyms in your forms.
- **Ignore words with numbers (e.g., Win98)** — When selected, this option sets the spelling checker to ignore any words that have numbers in them.
- **Ignore words with mixed-case (e.g., Superpose)** — When selected, this option sets the spelling checker to ignore any words that have an uppercase letter appearing to the right of a lowercase letter. This option is particularly useful if you are including program code that uses a mixed-case style, and want the terms to be skipped by the spell-check program.
- **Ignore domain names (e.g., xyz.com)** — When selected, the spelling checker ignores any words ending with a period followed by two to four alphanumeric characters.

- **Report doubled words (e.g., the the)** — When selected, this option sets the spelling checker to identify the consecutive appearance of the same word.
 - **Case Sensitive** — When selected, the spelling checker matches case as well as spelling. For example, the spelling checker would report “canada” as a misspelled word, since the first letter should be capitalized.
 - **Phonetic suggestions** — When selected, the spelling checker suggests words that sound similar to the unrecognized word. This option tends to improve the suggestions for badly misspelled words.
 - **Typographical suggestions** — When selected, the spelling checker suggests words that are spelled like the unrecognized word. This is the normal behavior of most spelling checkers.
 - **Suggest split words** — When selected, the spelling checker will suggest two separate words that are spelled like the unrecognized word. For example, the spelling checker would suggest “is the” to replace “isthe”.
 - **Auto Correct** — When selected, the spelling checker will automatically replace words that are marked as *auto change* in the dictionary. See “Creating a New Dictionary File” on page 57 for more information about the *auto change* setting.
 - **Main Dictionary Language** — Select the language of the dictionary to use for spell checking. The drop down list includes all dictionaries installed on your computer.
 - **Suggestions** — Select the speed and accuracy of the suggestions. This may be important if you have a slow computer. If set to low accuracy, clicking the **Suggest** button in the spelling checker’s main dialog box will increasingly improve the accuracy of the suggestions.
4. Click **OK** to return to the **Check Spelling** dialog box.

Managing Dictionaries

The Viewer’s spelling checker contains a dictionary that includes most common words. If this dictionary does not meet your needs, you can open additional dictionaries or adjust the existing dictionaries. For example, you may want to open a French dictionary as well as an English dictionary, or you may want to import words from another dictionary you already use in a different application.

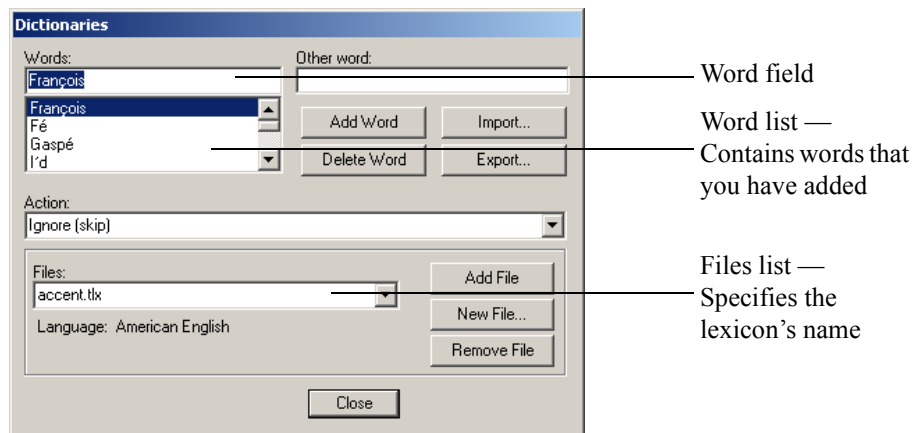
Adding or Deleting Words From a Dictionary

If you frequently use acronyms, abbreviations, or unusual proper names or words in your forms, you may want to add them to the dictionary to make your spelling checks run more smoothly. You can add words to, or delete words from your dictionary even if you haven’t encountered them during your spell checking.

Adding Words

To add a word to the dictionary:

1. Open the **Check Spelling** dialog box (see page 51).
2. Click **Dictionaries**.
 - The **Dictionaries** dialog box opens:



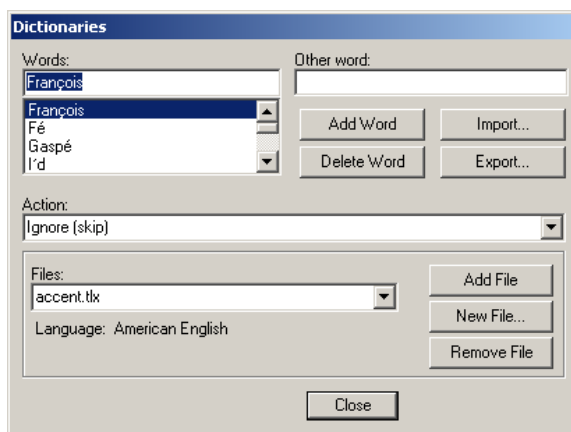
3. Ensure the correct dictionary is selected in the **Files** drop down list.
4. Type the word in the **Words** field at the top of the dialog box.
5. Select the correct action from the **Action** drop down list:
 - **Auto change (use case of checked word)** — The spelling checker will automatically change the misspelled word to the word you type in the **Other word** field. When changing the word, the spelling checker will keep the case of the misspelled word.
 - **Auto change (use case of other word)** — The spelling checker will automatically change the misspelled word to the word you type in the **Other word** field. When changing the word, the spelling checker will keep the case of the new word.
 - **Conditionally change (use case of checked word)** — The spelling checker will prompt the user to change the misspelled word to the word you type in the **Other word** field. When changing the word, the spelling checker will keep the case of the misspelled word.
 - **Conditionally change (use case of other word)** — The spelling checker will prompt the user to change the misspelled word to the word you type in the **Other word** field. When changing the word, the spelling checker will keep the case of the new word.
 - **Exclude (treat as misspelled)** — The spelling checker will treat the word as misspelled, even if one of the other active dictionaries lists it as correct.
 - **Ignore (skip)** — The word is spelled correctly, and spelling checker will skip past it.
6. If the action requires an alternate word, type that word in the **Other word** field.
 - For example, an *auto change* action requires that you provide the correct spelling of the word.
7. Click **Add Word**.

- Click **Close** to exit and save your changes.

Deleting Words

To delete a word from the dictionary:

- Open the **Check Spelling** dialog box (see page 51).
- Click **Dictionaries**.
 - The **Dictionaries** dialog box opens:



- Ensure the correct dictionary is selected in the **Files** drop down list.
- Select a word in the **Words** list.
- Click **Delete Word**.
- Click **Close** to exit and save your changes.

Using Multiple Dictionaries

The spelling checker can use multiple dictionaries at once. This is useful if you want to create special dictionaries for particular tasks, or if you work in a bilingual setting.

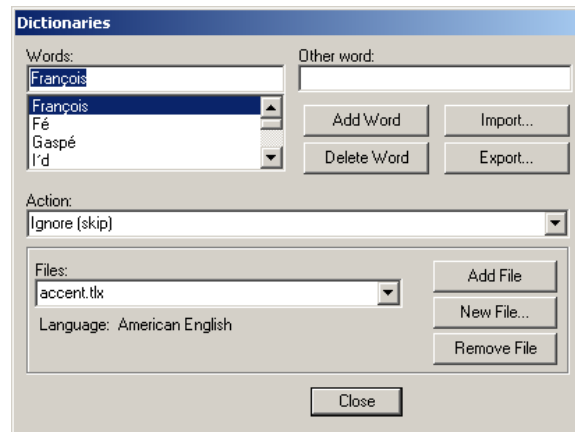
The spelling checker maintains a list of dictionaries that are in use. You can add and remove dictionaries from this list as you like. Whenever you check the spelling in a form, the spelling checker uses all open dictionaries to check your spelling.

Opening Dictionaries

To open a dictionary:

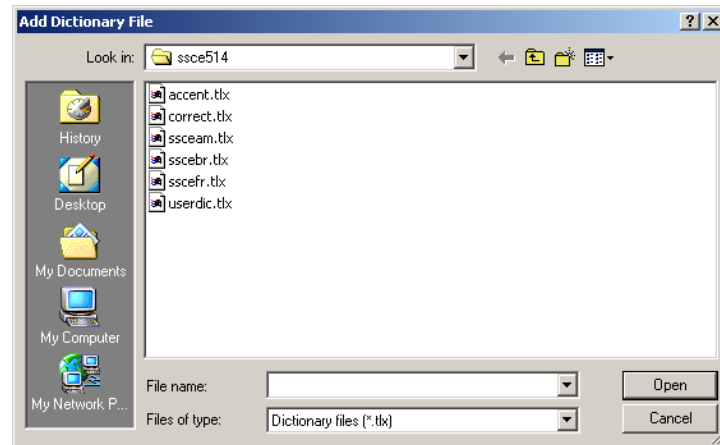
- Open the **Check Spelling** dialog box (see page 51).
- Click **Dictionaries**.

- The **Dictionaries** dialog box opens:



3. Click **Add File**.

- The **Add Dictionary File** dialog box opens:



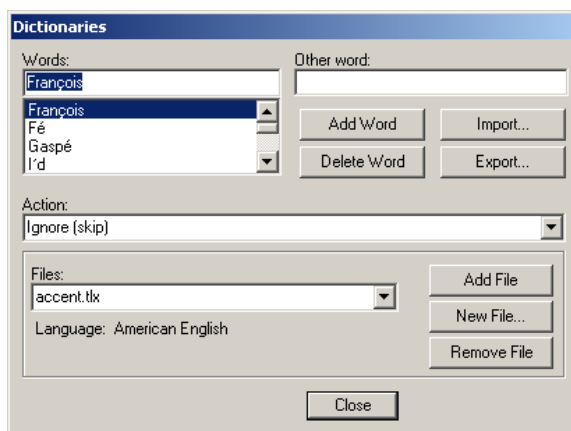
4. Browse to locate the dictionary you want to open, and select the file.
5. Click **Open** to open the dictionary.

Closing Dictionaries

To close a dictionary:

1. Open the **Check Spelling** dialog box (see page 51).
2. Click **Dictionaries**.

- The **Dictionaries** dialog box opens:



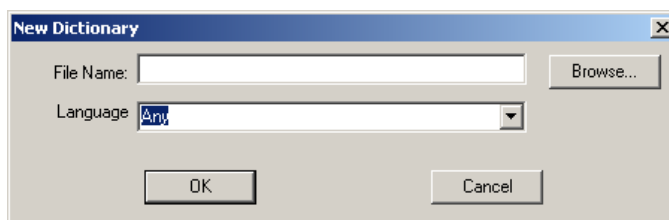
3. Under **Files**, select the dictionary you want to close from the drop down list.
4. Click **Remove File** to close the dictionary.

Creating a New Dictionary File

If there are certain words you want to group into a single, self-contained file, you can create a new dictionary. For example, you might have a dictionary that only includes specialized terms for one of your products or services. This way, you can easily add and remove words (in this case, names), without having to search through huge word lists.

To create a new dictionary file:

1. Open the **Check Spelling** dialog box (see page 51).
2. Click **Dictionaries**.
 - The **Dictionaries** dialog box opens.
3. Click **New File**.
 - The **New Dictionary** dialog box opens:



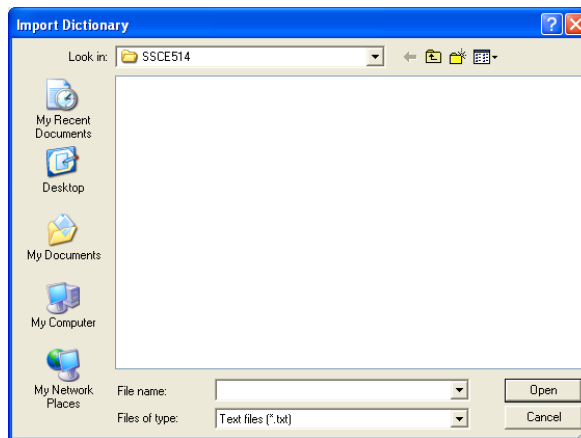
4. Enter a name for the new dictionary file in the **File Name** field.

5. Select a language from the **Language** list. If the language you want is not in the list, select **Any**.
6. Click **OK**.
 - You can now develop a word list for that dictionary file by adding words or importing files.
7. Click **Close** to exit and save your changes.

Importing a Word List

You may already have a file containing unusual words, acronyms, and abbreviations from another application that you would like to add to the Viewer's spelling checker. To import this list of words:

1. Open the **Check Spelling** dialog box (see page 51).
2. Click **Dictionaries**.
 - The **Dictionaries** dialog box opens.
3. Click **Import**.
 - The **Import Dictionaries** dialog box opens.



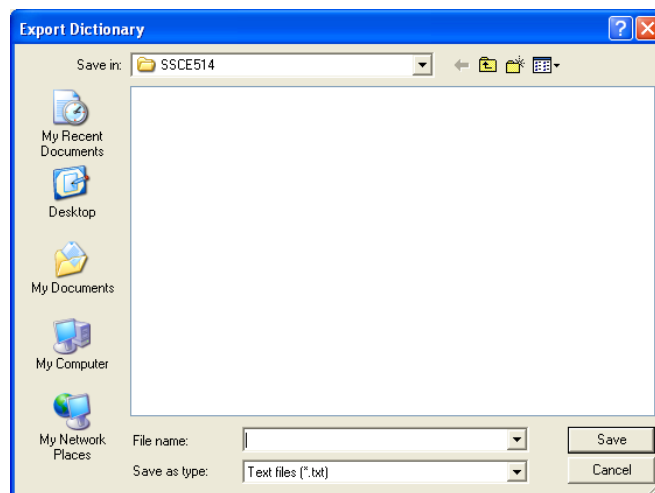
4. Locate and select the .txt file containing the word list you want to add.
5. Click **Open**.
 - The word list contained within that file is added to the word list in your **Dictionaries** dialog box.
6. Click **Close** to exit and save your changes.

Exporting a Word List to a File

You may want to share your dictionary word list with others. The Viewer makes this possible by allowing you to export a word list. When you export a word list, the Viewer saves all of the words in the selected dictionary file to a text file.

To export a dictionary word list:

1. Open the **Check Spelling** dialog box (see page 51).
2. Click **Dictionaries**.
 - The **Dictionaries** dialog box opens.
3. Select the correct dictionary file from the **Files** list.
4. Click **Export**.
 - The **Export Dictionary** dialog box opens.



5. Type a name for the file in the **File name** field.
6. Click **Save**.
7. Click **Close** to exit and save your changes.

Working Offline


If you do not have a network connection, you can still open and complete forms normally. You can then save the forms to your computer and submit them later when you once again have a network connection.

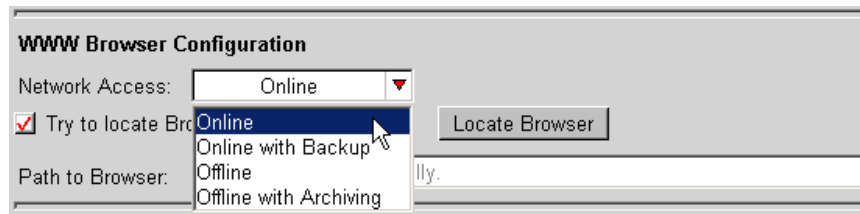
The Viewer offers two settings to make this process easier. When the Viewer is set to **Offline**, it will prompt you to save your form whenever you try to submit or email it. When the Viewer is set to **Offline with Archiving**, the Viewer will automatically store a copy of your form in a special archive when you try to submit or email it. Once you are online again, the Viewer will send all of the forms in the archive with your next submission.

You may decide to work offline even if your computer is able to connect to your network. This is useful if you have a slow connection and you want the Viewer to send all of the form at once, when you have finished filling them out.

Setting the Preferences to Work Offline

To set the Viewer for working offline:

1. On the Viewer's toolbar, click **Preferences** .
 - The Preferences form opens at the Basic page.



2. In the Network Access list box, select **Offline** or **Offline with Archiving**.
3. Click **Save**.
 - The Preferences form closes and you return to your form.

You will remain in offline mode until you change your preferences setting back to *Online*, even if you connect your computer to the network.


About Archived Forms

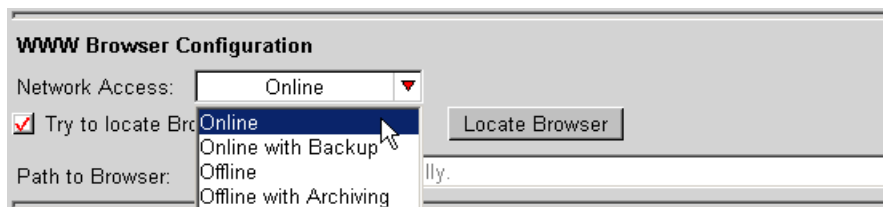
Archived forms are stored in your Windows user profile. The first archived form is stored in a “wrapper form” called Archive.xfdl, the second is called Archive2.xfdl, the third is called Archive3.xfdl, and so on. Once your forms are archived, you can close the Viewer and even shut off your computer. The Viewer will keep your archived forms until you decide to submit them.

Submitting Archived Forms

When you are ready to submit forms that are archived in the Viewer's Archive folder, you must change your **Network Access** preferences setting.

To reset the Viewer's preferences:

1. On the Viewer's toolbar, click **Preferences** .
 - The Preferences form opens at the Basic page.
2. In the **Network Access** popup, select **Online**.



3. Click **Save**.
 - The Preferences form closes and you are returned to your form.

You are now ready to submit your archived forms. There are two ways to do this:

- Submit all of the archived forms
- Submit the archived forms individually


The following sections explain these methods.

Submitting All Archived Forms

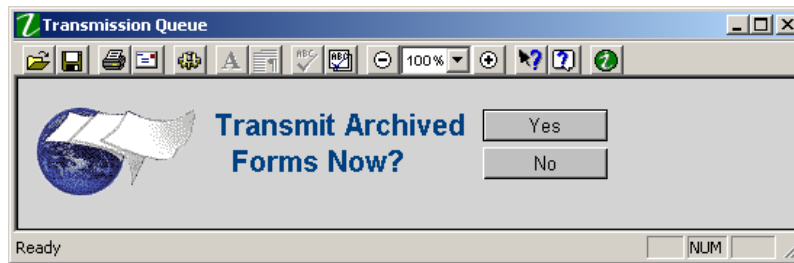
You can submit all of the archived forms at once. This is useful if you have a large number of forms archived, or if you need to submit the forms in the same order you originally processed them.

Before you can submit your archived forms, you have to set your network access to *online*. Once you have done this, the Viewer will send all of your archived forms with the next form you submit. The Viewer will submit the archived forms in the same order you originally processed them; however, the Viewer will send the new form that you submitted *before* the archived forms.

To submit all of your archived forms:

1. Open and complete a new form.
2. In the **Basic Preferences**, set your **Network Access** to **Online**.
3. In the open form, click **Submit** or the submit-type button. (Alternatively, you can click **Mail Form**  to email the form.)

- A **Transmission Queue** dialog box opens.



- To send only the current form, click **No**. To send the archived forms, click **Yes**.
 - The appropriate forms are sent.


Submitting Archived Forms Individually

You can submit the archived forms individually by opening the stored copies and manually submitting them. This is useful if you need to send a specific form, or if you need to send the forms in a different order than you originally processed them.

When doing this, you should be aware of the following:

- The Viewer will ignore a Network Access setting of *Offline with Archiving*. This means that even if the Viewer is still set to archive forms, it will submit your form rather than archiving it again.
- The Viewer will only submit the archived form you have opened. All other archived forms will remain in the archive, even if you have set the Viewer to work online again.

To submit an individual form:

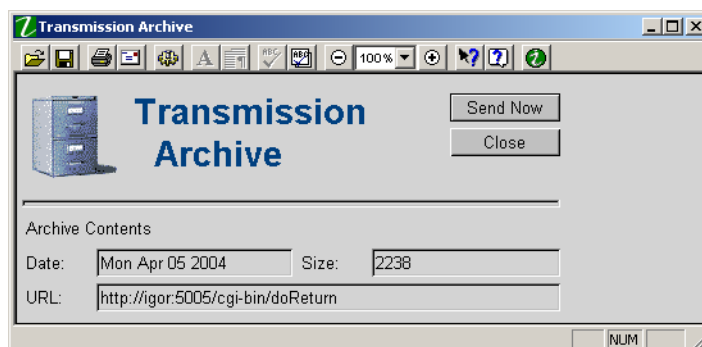
- Once you have reset the Viewer preferences to work online, click **Open Form**  on the Viewer's toolbar.

Note: You can also use Windows Explorer or your browser to locate and open archived forms.

- Open the **Archive** folder located in the following folder:

```
c:\Documents and Settings\\Application Data\PureEdge\
  Viewer x.x\Archive
```
- Open the **Archive.xfdl** (or, **Archive#.xfd**) form.

- A **Transmission Queue** form opens, as shown on the following page. This form provides you with information about the archived form's contents, including the date, size, and the URL to which it will be submitted.



4. Click **Send Now** to submit the form.
 - The Viewer submits the form to the addresses indicated in the URL field.

Signing Forms

As with paper forms, signatures allow you to show that you have reviewed and agree with the contents of a form. However, signatures on electronic forms can also provide security for the form by locking the data so that it cannot be changed once you have signed it. Furthermore, if the data is changed in some way, the signature breaks, making it obvious that the form has been tampered with.

Just as there are many types of pens that you can use to sign a paper document, there are many types of signatures that you use to sign an electronic form.

The Viewer supports a number of signature technologies:

- Clickwrap and Authenticated Clickwrap signatures.
- Signature Pad signatures.
- Digital signatures (also called PKI or RSA signatures).
- No-Lock signatures.

Clickwrap and Authenticated Clickwrap Signatures

Clickwrap and Authenticated Clickwrap signatures require the user to provide some information and then “click” to indicate that they accept the document they are signing. Once the document is signed, both types of signatures provide security by breaking if the document is changed.

Clickwrap signatures generally require the user to answer a number of questions, perhaps repeat some text, and then “click” to finalize the agreement. The identity of the signer is established by the answers the user gives while signing. While this is generally considered a weak way of establishing an identity, it can be useful in many cases.

Authenticated Clickwrap goes one step further, and identifies the user based on a *shared secret*, such as user ID and password. This secret is known only to the user and to the system they are interacting with, such as a bank or another institution. When the user signs the form, they include the shared secret in the signature (for instance, they may type in their user ID and password). When the form is submitted, the shared secret is then verified by a server, and if it is correct, the server uses a digital signature to further secure the form. In this way, Authenticated Clickwrap provides stronger proof of identity than regular Clickwrap.

***Note:** Authenticated Clickwrap is a separately licensed product. Please ensure that your company has the license to use Authenticated Clickwrap before you provide forms or functionality that rely on it.*

Signature Pad Signatures

Signature Pad signatures are created by using a special writing pad that is connect to your computer. You write your name on this pad as though you were signing a paper document, and that signature is then transferred to the document on your computer.

This provides a more familiar signing experience to users, and relies on the uniqueness of your signature to identify you. Furthermore, as with other types of signatures, any changes made to the form after it has been signed will break the signature. This makes it obvious to all users when changes have been made.

Digital Signatures

To create a digital signature on a form, you must first have a digital certificate. A digital certificate is like a digital pen. Just like you use a pen to create a hand-written signature, you use a digital certificate to create a digital signature.

Digital certificates are provided by the system you are working with. For example, your company might issue you a digital certificate that allows you sign all company documents, or your bank might issue you a digital certificate that gives you access to their internet banking.

Since each digital certificate is issued to only one person, it is a very good way of establishing identity. In general, only you will have access to your digital certificate, so any signature created by that certificate can be reliably traced back to you.

Signing a form with a digital certificate is a fairly simple process that involves selecting the correct certificate and clicking a few buttons. Since the certificate already identifies you, no additional

questions or information are required. Furthermore, if any changes are made to the document after you have signed it, the signature will break, making it apparent that the document should not be trusted.

Currently, the Viewer supports the following types of digital signatures:

- **Microsoft CryptoAPI** — Uses standard RSA digital signature technology.
- **Netscape** — Uses standard RSA digital signature technology.
- **Entrust** — Uses Entrust's digital signature technology.

Obtaining More Information About Digital Signatures

Several web sites provide detailed information about digital signatures. The following sites can help you understand how digital signatures work, and how they are used in a variety of applications:

- www.microsoft.com/
- www.verisign.com/

Protecting Your Digital Certificates

Because your digital certificate is used to identify you, you must ensure that it is kept secure. If it is not, other users may be able to sign forms using your identity or modify forms that you have already signed. The integrity of your digital certificate depends on your private key being controlled exclusively by you. It is your responsibility to protect your private key.

Other people can only access your private key if they have:

- Access to your computer and the file in which your private key is stored.
- Access to your login or private key password.

You should take the following steps to protect your private key:

1. If your digital certificate is stored on your computer's hard drive, you must control access to your computer. You should always use a login password.
2. When you install your digital certificate, you should protect it with a password. This password controls access to your private key. If you do not provide a password, you are trusting that no one will ever have unauthorized access to your computer. For Internet Explorer users, your private key is protected by your Windows password.
3. Your login and private key passwords should:
 - Contain at least 8 characters.
 - Consist of both letters and numbers.
 - Not be a word that can be found in a dictionary.
 - Not be obvious or based on personal information, such as telephone numbers or birth dates.
4. If you require additional security, you can store your private key on a physical token, such as a smart card. This provides greater protection for your private key, as other users must obtain the

token and its password before accessing your private key. This option replaces storing the private key on your computer's hard drive.

If Your Private Key Is Compromised

If your private key is compromised (for example, your computer is stolen, someone knows your login or private key password, or your smart card is lost) your digital certificate must be revoked and you must install a new digital certificate and private key. Contact your system administrator for assistance.

No-Lock Signatures

No-Lock signatures are a special type of signature that do not actually lock the data in the Viewer. Once data is signed with a No-Lock signature, any user can change that data. Such changes will still break the signature, but will be allowed by the Viewer.

Once the changes have been made to the signed data, the user can apply a second signature that covers the same data as the first. This will confirm the changes made to the data, and return the original signature to a valid state.

This allows you to create special workflows. For example, you might have an employee fill out a form and sign it. You might then want a manager to review the form, change any data necessary, and then sign it a second time to confirm the changes.

Currently, only the signature software from Silanis offers no-lock signatures.

What You Need to Use Digital Signatures with Forms

To sign forms and to verify signatures, you need the following software on your computer:

- If you are using Clickwrap or Authenticated Clickwrap signature, you do not need any additional software or hardware.
- If you are using Signature Pad signatures, you will need both the software and hardware from a signature pad vendor, such as Interlink or Topaz.
- If you are using Entrust signatures, you will need the signature software that Entrust provides.
- If you are using standard digital certificates, you will need either Microsoft Internet Explorer or Netscape. For more information about the browser version required, refer to "System Requirements" on page 3.
- If you are using Silanis signatures, you will need the signature software that Silanis provides.

Signing Forms

To sign a form:

1. Open a form that contains one or more signature buttons.
2. Click a signature button on the form.
 - The **Digital Signature Viewer** dialog box appears:



3. To sign the form, click **Sign**.
 - You will be stepped through the signing process appropriate to the signature type you are using.
 - If you are using a signature pad, this process will include clicking a button to start the signature capture, writing your signature on the pad, and then clicking a second button to end the signature capture.
4. When you have finished signing, click **OK** in the **Digital Signature Viewer** dialog box.
 - You return to your form. The signature button now shows the details of your signature. For example, if you used a Microsoft CryptoAPI signature to sign the form, the signature button would show your name and email address:

Steve Shewchuk, steve@pureedge.com

Once you have signed the form, the portions of the form that the signature applies to will be locked. This means that you will not be able to change those portions of the form unless you first remove the signature.

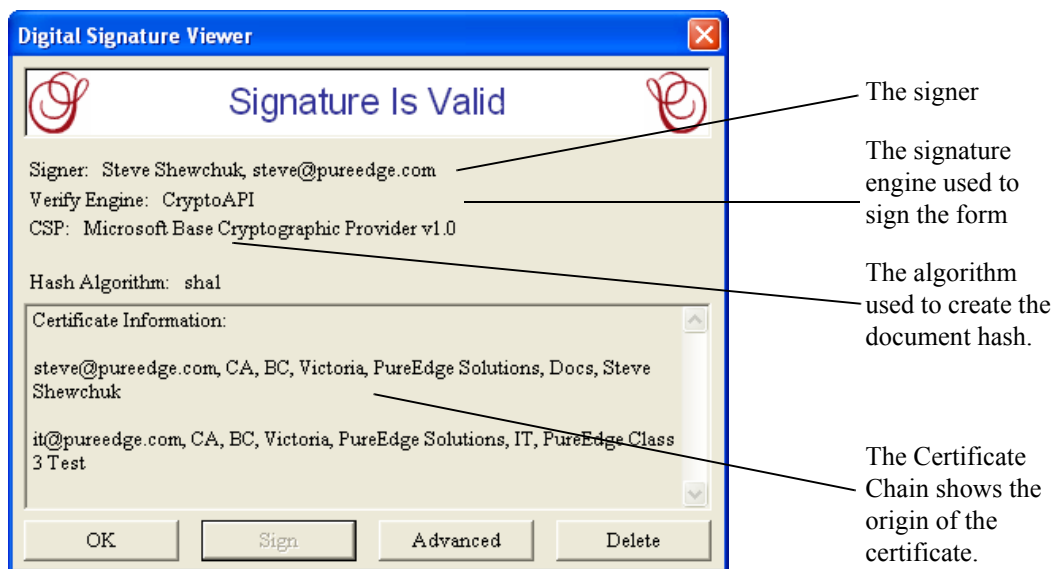
Note: *If your signature becomes invalid for any reason, the Viewer will unlock the signed portions of the form.*

Verifying Signatures

If you receive signed forms from coworkers or colleagues, you may want to verify their signatures. The Viewer provides a single interface that allows you to verify all signature types. In most cases, the signature button will indicate whether a signature is valid. However, to see the signature details, follow these steps:

1. Click the signature you want to verify.
 - The **Digital Signature Viewer** dialog box opens.
2. Check the heading in the **Digital Signature Viewer** dialog box. There are four possible headings:
 - **Signature Is Valid** — The form has not been altered since it was signed, and you can trust the content of the form.
 - **Signature Is Invalid** — The form has changed since it was signed. You should consider the form's contents unreliable. Note that if a signature is invalid, the portions of the form that are signed will not be locked, meaning that you will be able to change that information.
 - **Valid by Approval** — The data covered by this signature has been changed, but a second signature has been added to approve those changes. This means that you can trust the data in the form despite the changes. This state only occurs with No-Lock signatures.
 - **Verified, Not Authenticated** — The form has not been changed, but the signature has not been authenticated by the server. You may see this if you are using Authenticated Clickwrap signatures. You should decide whether you trust the signature based on the business practices in place.
 - **Unable To Verify Signature** — The form should not be trusted. The Viewer is unable to verify the signature because the certificate used to create the signature has either expired or been revoked. In either case, you should not trust the signature.

For example, the following dialog illustrates a valid signature:



Deleting Signatures

In general, you can delete most signatures even if you are not the person that signed the form. However, there are also some signatures that you cannot delete. These signatures appear no different from normal signatures. Instead, they simply disable the option to delete them.

To delete a signature from a form:

1. Click the signature you want to delete.
 - The Digital Signature Viewer dialog box opens.
2. If the **Delete** button is available, click it to delete the signature. If it is greyed out, then the signature cannot be deleted.
3. Click **OK**.

Once you have deleted a signature, you are free to make changes to the form and sign it again at any time.

Accessibility Features

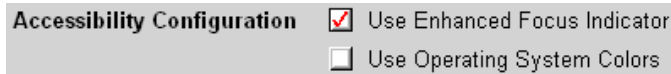
The Viewer offers the following features to help users with vision problems:

- An enhanced focus indicator that makes it easier to see which form item has the focus at any time.

- A “Use Operating System Colors” switch that allows the Viewer to respect high contrast color settings in the operating system.
- Integrated screen reader support that enables the Viewer to work with MSAA-compliant screen readers.


Using the Enhanced Focus Indicator

The enhanced focus indicator makes it easier to see which item has the focus by drawing a small, black square near the top-left corner of the item, as shown:



This enhancement appears in addition to the regular focus indicator, which normally outlines an item or places the cursor inside an item.


To enable the enhanced focus indicator:

1. Open a form in the Viewer.
2. Click **Preferences** .
 - The Preferences form opens to the Basic Preferences.
3. Beside **Accessibility Configuration**, select **Use Enhanced Focus Indicator**.
4. Click **Save** to close the Preferences form and save your changes.

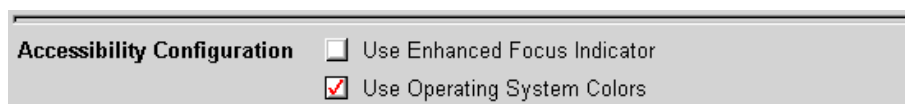
Using the Operating System Colors

You can set the Viewer to use the operating system colors rather than the colors defined by the form itself. This is useful if you have set your operating system colors to provide a higher contrast than normal.

To make the Viewer use the operating system colors:

1. Open a form in the Viewer.
2. Click **Preferences** .
 - The Preferences form opens to the Basic Preferences.

3. Beside **Accessibility Configuration**, select **Use Operating System Colors**.



4. Click **Save**.

Before this setting will take effect, you must first close and then re-open the Viewer.

Using a Screen Reader

The Viewer supports screen readers through the MSAA (Microsoft Active Accessibility) standard. Through this standard, the Viewer works with the JAWS screen reader from Freedom Scientific, as well as other MSAA-compliant readers, such as Window-Eyes from GW Micro and Microsoft Narrator.

Each item in a form can have an accessibility-specific message associated with it. When a screen reader is active, the Viewer checks items for these messages as each item receives the focus. The Viewer then passes the message to the screen reader, which reads the message aloud for the user, along with some general information about the item.

If a form does not have any accessibility-specific messages, the screen reader still reads general information about each item, but this information may not be clear to the user.

The Viewer automatically activates screen reader support when an MSAA-compliant screen reader is running.

Chapter Five: Troubleshooting

If you experience problems with the Viewer or an XFDL form, refer to this section for help.

I get a ‘working offline’ error when I click buttons while in “Offline” mode

Sometimes when buttons are added to a form, the action the button performs is not set properly (the type defaults to *link*, but in many cases should be changed to *select*). This is often true of buttons that trigger an action in the form, such as the creation of a new row of items. This can result in error messages while working in offline mode, since the Viewer cannot perform a link action when in “Offline” mode. As this is a mistake in form design, you should notify the appropriate personnel in your organization. You can work around this problem in two ways:


1. Ignore the error messages and continue working. The error messages will not affect the performance of the form.
2. Switch to “Offline with Archiving” mode. In this mode, the Viewer will allow link actions. However, remember that if you submit the form the Viewer will automatically archive it.

I cannot use my digital certificate to sign forms in Netscape

You may find that you are unable to use your digital certificate to sign forms in Netscape. This problem occurs when Netscape is upgraded to a newer version after you have installed your digital certificate.

Different versions of Netscape store the digital certificates in different locations. Because Netscape stores this location internally, it is not available to other software, such as the Viewer. This means that sometimes the Viewer cannot locate the Netscape’s digital certificate store.

To enable your Viewer to use your certificate, first use Window’s Find or Search tool to conduct a search for cert*.db. Once you determine the correct file path, follow these steps to change your Viewer preferences:

1. Open any form in the Viewer.
2. On the Viewer toolbar, click the **Preferences** button .
3. Click **Advanced**.
4. In the **Path to Netscape Profile** field, type the path to the folder containing your digital certificate.
5. Save the preferences.
 - The Viewer will update its preferences and locate the certificate.
6. Open a form containing a digital signature button and test your signature.

***Note:** If you locate more than one matching file, you may have to configure the Viewer to use each certificate in turn, and test whether that is the correct certificate by signing a form with it. If you do not find any matching files, you will need to obtain a new digital certificate.*

My browser is not displaying the correct version of the form

If you fill in a form using your browser and then close the browser window or use the **Back** button to exit the Viewer, your browser's cache still only contains the original version of the form. When you try to view the modified form, the browser gets the form from the cache and does not display the correct version of the form. To prevent this problem, you need to clear your browser's cache.

Netscape Navigator (version 4.x or higher)

In Netscape Navigator, you must clear both the memory cache and disk cache. To do this:

1. Open Netscape Navigator.
2. From the **Edit** menu, select **Preferences**.
 - The **Preferences** window opens.
3. From the **Category** list on the left side of the window, open the **Advanced** directory and select **Cache**.
 - The right side of the window displays the Cache settings option.
4. To clear the Cache, click both **Clear Cache** (or **Clear Memory Cache** and **Clear Disk Cache** for earlier versions of Netscape).
5. Click **OK** to save the settings.

Internet Explorer (version 5.0 or higher)

To clear the temporary cache:

1. Open Internet Explorer.
2. From the **Tools** menu, select **Internet Options**.
 - The **Internet Options** dialog box opens.
3. On the **General** tab, click **Delete Files** and click **OK**.

To change Internet Explorer's cache settings:

1. Open Internet Explorer.
2. From the **Tools** menu, select **Internet Options**.
 - The **Internet Options** dialog box opens.
3. Click **Settings** and select **Every visit to the page**.

4. Click **OK** to save the settings.


The digital certificates for all users on the computer are available

When signing a form in Internet Explorer under Windows 98, you may find that all digital certificates on the computer are listed as available, regardless of which user is trying to sign. To list only the current user's certificates when signing a form, follow these steps:

1. From the **Start** menu, point to **Settings**, and choose **Control Panel**.
2. Double-click the **Passwords** button.
3. Select the **User Profiles** tab.
4. Choose the radio button that allows users to customize their settings.
5. Click **OK**.

If you see an error message stating that there is no signature certificate associated with your email address, it means the address in your Viewer preferences does not match the address you specified when you obtained your certificate. Change the Viewer preferences to reflect the address in the certificate.

The Check Spelling icon is not active (I cannot check the spelling of a certain field)

The **Check Spelling**  button will only be active if you are in a Viewer item that allows data entry (for example, a text field) *and* the form's design allows spell checking. Ensure your cursor is in the field you want to spell check. See page 23 for more information.

The date field will not accept the date I enter.

The Viewer will try to interpret any numeric date you enter. However, since you can enter dates in a number of formats, such as DD/MM/YYYY or MM/DD/YYYY, the Viewer is not always able to interpret the date correctly. When a date is ambiguous, the Viewer will interpret it in the format specified in the Viewer preferences. Also, remember that once you tab out of a completed date field, the form will often convert the date to a different format.

To quickly add the current date to any date field, you can type an asterisk (*) and then press the TAB key to move out of that field. The Viewer automatically inserts the current date into that field.

For more information on entering dates in the Viewer, see page 36.

When I enter a dollar value, the field won't accept anything after I enter the dollar sign (\$).

Some fields that call for a dollar value may actually be formatted to handle numeric values only. In other words, they cannot accept dollar signs. If this is the case, you should only enter numbers, even if the field represents a dollar value. See page 20 for more information.

When I display an attached file, my browser opens but the attached file does not.

The Viewer first attempts to display attached files using your preferred browser, which can usually pass the file to other programs on your computer. For instance, a JPEG image would be displayed in the browser, while a .pdf file would be passed to Acrobat Reader.

In some cases, your browser may be unable to locate an appropriate application. For example, multimedia files can appear as broken images in your browser when your browser does not have a the correct plugin to view that file type.

To correct this, note the location of the file (on the browser's address line) and use Windows Explorer to open that file directly. If the file still does not open, you may not have the appropriate software installed on your computer. Contact support@PureEdge.com for assistance.

The web services in the form are not working properly

This may occur if you are using version 1.5 of the Sun Java Virtual Machine (JVM). The Viewer will not work with version 1.5 of the JVM.

To correct this problem, you can set the Viewer to use version 1.4 of the JVM instead (assuming you have both versions installed). To do this, locate the file `prefs.config` file in the following folder:

`C:\Documents and Settings\All Users\Application Data\PureEdge\Viewer x.x\Prefs`

If you do not have access to the "All Users" folder, you will have to locate the file separately for each user on the computer, as shown:

`C:\Documents and Settings\<user ID>\Application Data\PureEdge\Viewer x.x\Prefs`

Open the configuration file and add the following line to the end of it:

```
javaVM=Sun VM 1.4.*
```

The * is a wildcard, so this string will match any version of the JVM beginning with "Sun VM 1.4.", such as "Sun VM 1.4.2_03 JDK". The actual string that identifies the version is defined by the JVM during installation.

Note: Do not link the Viewer to “Sun VM 1.4”. JVM version 1.5 overwrites the registry entry for JVM version 1.4 so that it points to the 1.5 JVM. This means that linking to version 1.4 will not solve the problem.

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