

InternetForms VIEWER

User's Manual v4.4
for Windows ®

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Contents

CHAPTER 1: INTRODUCTION.....	1
About This Manual.....	1
About the Viewer.....	2
Installing the InternetForms Viewer.....	5
Starting the Viewer.....	8
Getting Help	10
How to Contact PureEdge Solutions.....	10
CHAPTER 2: SETTING VIEWER PREFERENCES	13
Opening the Preferences Form.....	14
Basic Preferences.....	15
Field Preferences	17
Print Preferences.....	19
Advanced Preferences	23
CHAPTER 3: THE VIEWER ENVIRONMENT.....	27
Title Bar.....	28
Toolbar Buttons.....	29
Viewer Window.....	31
Viewer Form.....	31
CHAPTER 4: BASIC FORM FUNCTIONS.....	33
Opening Forms	33
Filling out Forms	38
Checking Spelling	44
Saving Forms	58
Submitting Forms	59
Closing Forms	60
CHAPTER 5: ADVANCED FORM FUNCTIONS	61
Printing Forms	61
Emailing Forms	64
Managing Attached Files	68
Working Offline.....	75
Using Signatures.....	80

TROUBLESHOOTING	97
GLOSSARY	101
INDEX	109

Chapter 1: Introduction

This chapter introduces you to the manual and to InternetForms Viewer™. After a brief overview of the manual's layout, you will learn about the Viewer's features and system requirements. Other topics include how to install and start the Viewer, where files are stored on your system, and how to get help when working with forms.

About This Manual

This manual is designed to show you how to efficiently use the Viewer. It explains all aspects of the Viewer, including how to fill out forms, set user preferences, attach digital signatures, and submit completed forms.

This manual is divided into the following chapters:

- ❑ **Chapter 1: Introduction** – Introduces both this manual and the Viewer, and explains how to install the Viewer. It also describes how you can access the Help tools, and how to contact PureEdge for further support.
- ❑ **Chapter 2: Setting Viewer Preferences** – Explains how to change the Viewer's customizable settings to suit your needs. You will learn how to specify your preferred browser, set up email and printing, and more.
- ❑ **Chapter 3: The Viewer Environment** – Describes the Viewer's interface and tools.
- ❑ **Chapter 4: Basic Form Functions** – 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 close InternetForms.
- ❑ **Chapter 5: Advanced Form Functions** – Explains important, yet less frequently used features of the Viewer. You will learn how to print and email forms, manage attachments, and use digital signatures.
- ❑ **Troubleshooting** – Lists some of the common problems faced by Viewer users and provides solutions.
- ❑ **Glossary** – Provides useful definitions for specialized terms used in this manual.

Who Should Use This Manual

The Viewer User's Guide is intended for anyone who wants to view, fill out, or design InternetForms. It explains how to set up the Viewer for optimum performance. It also details how the InternetForms Viewer works so that both users and designers can take full advantage of its range of functions.

Document Conventions

For convenience, this manual uses the following conventions:

- **Viewer** – refers to InternetForms Viewer
- **Forms** – used in place of InternetForms
- **Network** – refers to any type of computer network, including local area networks (LANs), wide area networks (WANs), intranets, or the Internet. If the specific type of network needs to be identified, it is named explicitly

About the Viewer

InternetForms Viewer provides a single interface for all users to fill, save, sign, and submit legally-binding XML InternetForms from their web browsers.

InternetForms Viewer reduces the costs associated with securely distributing, processing, and maintaining forms systems, eliminating the need for paper. The Viewer ensures that users fill in forms correctly the first time, allows users to work online or offline, and creates signed, legally-binding XML InternetForms.

With the Viewer you can:

- Fill out and save your forms in XFDL, the first open, XML protocol for secure, legally-binding XML documents.
- Digitally sign part of a form or the whole form to produce a legally-binding document.
- Apply multiple, sequential, or overlapping signatures during a form's approval process.

- Use any major vendor's digital and electronic signatures on your InternetForms, including VeriSign, Netscape, Entrust, PenOp, GTE CyberTrust, and Datakey smart cards.
- Save a form, fill it out offline, and queue it for later submission online.
- Save the form and its data as a single, unalterable entity.
- Rely on intelligent input validation to ensure forms are filled in correctly the first time.
- Automatically reformat input into standard data formats, like Y2K-compliant dates, currency values, and more.
- View context-sensitive help messages that assist you to fill out the form.
- Automatically calculate totals, annuities, compound interest, and virtually any other equation.
- Save time and effort filling out forms while dynamic logic customizes the form for your needs. Automatically hide or create entire sections as needed.
- Attach any type of file (for example, Excel, Word, or graphics files). You can also sign the attachments to make them part of your legally-binding submission.
- Group related attachments within folders inside a form.
- Include database lookups in your InternetForms.
- Submit forms using built-in email controls or http transmissions. Send forms to databases, workflow processes, and other e-commerce systems. Secure submissions using SSL (secure socket layer).
- Print high-quality, precision forms.
- Supply users with free forms or free use of forms, with PureEdge's groundbreaking Internet pricing model.

InternetForms Viewer for Windows is a component of the InternetForms Commerce System™ (ICS). The Viewer runs on your computer and allows you to view and work with InternetForms, in the same way that a web browser allows you to work with HTML documents.

InternetForms are sophisticated forms designed for doing day-to-day business, such as filling out insurance applications and expense reports, over the Internet. An InternetForm contains all of its layout, logic, and data in a single document file. Using the Viewer, users can view, fill out, save, and transmit InternetForms.

The Viewer can function as a standalone application, and as an extension (an added feature) to your web browser. The InternetForms Viewer plugin extension is installed when you install the Viewer, and is placed in a directory named Plugin, located within the InternetForms Viewer directory.

Note There are several filename extensions that can be used with InternetForms files. The default filename extension is **.xfd**. Other supported filename extensions are **.frm**, **.xfdl**, **.ufd**, and **.ufdl**. This manual uses **.xfd** as the filename extension for InternetForms.

Where the Viewer Fits into Your System

The InternetForms Viewer is a component of the InternetForms Commerce System (ICS), a powerful suite of forms software. The two other components are InternetForms Designer and InternetForms Link.

- **InternetForms Viewer** – The Viewer is the component of the ICS suite that acts as an interface between InternetForms and the other parts of your system, such as web servers and databases. It is recommended that you install the Viewer before other components of the ICS suite.
- **InternetForms Designer** – The Designer provides a drag-and-drop design environment for creating InternetForms. Use the Designer to create InternetForms quickly and easily.
- **InternetForms Link** – Use Link to connect your InternetForms to Open Database Connectivity (ODBC) compliant databases. Link provides InternetForms with full access to ODBC compliant databases.

Installing the InternetForms Viewer

System Requirements

To install the Viewer, your system must meet the following minimum requirements:

- Microsoft Windows 95/98/2000 or NT 4.0
- Pentium 133Mhz processor (Pentium 200Mhz recommended)
- 24 MB of RAM (32 MB recommended)
- 25MB of free disk space
- Web browser: Netscape navigator/Communicator 4.0 or Internet Explorer 4.0 or higher.

Installing and Registering the Viewer

Install the Viewer

1. Using Windows Explorer, double-click the install package file.
 - The Viewer Installer starts.
2. Read the terms of the license agreement.
 - You must agree to the terms of the end-user license agreement.
3. Select an installation directory.
 - Unless you have a strong reason to do otherwise, *we suggest you accept the default directory*; doing so simplifies file management.
4. Accept the remaining prompts.
 - Once the program is installed, a final dialog box opens. Use this dialog box to launch the application and register your copy of the Viewer.
5. Select **Launch the Application**.
6. When the registration dialog box appears, enter your serial number and registration key.

- If you do not have a serial number and registration key, you can evaluate this version of the Viewer for 30 days. See the section below for more information.

The installation program installs the Viewer in the specified directory.

Evaluating the Viewer

If you have not yet purchased a license to use the InternetForms Viewer, you may evaluate one copy of the Viewer for 30 days from the time you install it. First, however, you must read and agree to the terms set forth in the PureEdge End-User License Agreement (the “license agreement”).

Note If you are working with licensed forms, you do not need to license the Viewer. If you are going to work with forms that are not licensed, you will need to license the Viewer.

To evaluate the Viewer:

1. Launch the application.
 - If your copy is not already registered and you have not previously selected the 30-day evaluation, a registration dialog box opens.
2. Select the 30-day evaluation option.
3. If during the 30-day evaluation period you decide to purchase a license for the Viewer, contact PureEdge at:
 - Email: info@PureEdge.com
Telephone: 1-888-517-2675

Register the Viewer

If you have purchased a license to use the InternetForms Viewer, you will receive a registration number and a license key. Use these to register your copy of the Viewer.

1. Launch the Viewer.
2. When prompted for a form, select any form. If you do not have any forms, you can open the **Readme.xfd** form from the Viewer 4.4 directory.

3. Click **About** .
4. Click **License**.
5. **Accept** the InternetForms License Agreement.
6. Enter your **Serial Number** and **License Key**.
7. Click **OK**.

Location of Installed Viewer Files

Provided you installed the full version of the Viewer and accepted the default file locations, all necessary files will be installed on your computer in the appropriate directories. The following sections introduce some important files you should know about. If you are missing any of these files, contact support@PureEdge.com for more information.

The default directory on your local computer for the Viewer files is:

C: \Program Files\UWI. Com\Viewer 4. 4

Preferences Form

The Preferences form for the Viewer (see “Chapter 2: Setting Your Preferences” on page 13 for more information) is stored in the Viewer’s Prefs directory. If you accepted the default location (recommended) during the installation, the path to attached files will be:

C: \Program Files\UWI. Com\Viewer 4. 3\Prefs

Browser Application Extension Files

The installer automatically installs the Viewer as an extension for web browsers. The installer tries to locate Netscape and Microsoft browsers installed on your computer. If it locates either one, the installer places the InternetForms Viewer browser extension in the browser’s Plugins folder.

If the installer could not locate your web browser, or if you install one of these browsers later, you can still use the Viewer without running the installer again. A copy of the browser extension (NPMFV.dll) is placed in the Viewer’s Plugin directory.

Copy this file to the Plugins directory for the web browser you want to use. Then open your browser and register the Viewer as a helper application. The MIME type for InternetForms is application/uwi_form. The file extension is .xfd.

Note In order to see Npmfv.dll, you need to set up Windows to display all file types. To do this:

1. In the directory window, choose **View** and then **Options**.
 2. Click the **View** tab.
 3. Click **Show All Files**.
 4. Click **OK**.
-

Signature “.ifx” files

The full installation of the Viewer places signature .ifx files on your computer, which you use for signing and verifying signatures (see “Chapter 2: Setting Viewer Preferences” on page 13 for more information). The DS_capi.ifx, DS_Netscape.ifx, DS_penop.ifx, and DS_Entrust.ifx files should be located in your Windows\System\ifs\43\ folder. The full installation also places a DefaultSigningCeremony.ifx in the Viewer’s Extensions folder.

Starting the Viewer

The Viewer runs on any version of Microsoft Windows®, including Windows 3.1, Windows 95, Windows 98, Windows NT and Windows 2000. The Viewer can run in two different “modes”:

- As a stand-alone application
- As an accessory (or plugin) to a web browser

If you installed the Viewer according to the procedure described on page __, you will be able to use the Viewer in either mode. The following sections explain how to run the Viewer in either mode.

Running the Viewer as a Stand-Alone Application

To run the Viewer as a stand-alone application, start the program in the same way you would start any other Windows application. The following describes two common ways to start the Viewer as a stand-alone application:

1. Click **Start**, point to **Programs**, point to **InternetForms Viewer 4.4**, and then click **InternetForms Viewer**.
 - An **Open Form** dialog box opens. Browse to locate the InternetForm you want to view and click **Open**.
 - You cannot start the Viewer without opening a form. If you have no other form, you can open the form `Readme.xfd` located in:

`\Program Files\PureEdge\Viewer 4.4`

– Or –

2. In Windows Explorer, double-click the file name of an InternetForm you want to view (InternetForm files have an extension of `.xfd`, `.ufd`, `.xfdl`, or `.ufdl`).
 - The Viewer starts and automatically opens the form.

Running the Viewer as Browser Plugin

The Viewer can run as a *plugin* for a web browser. A plugin is an accessory program that provides additional functions to the web browser. The ability to run the Viewer as a plugin lets you instantly view InternetForms that are available on the Internet or your organization's intranet. You do not need to download the form, save it, and “manually” run the Viewer. Instead, the form opens in your browser. You can then fill it in, submit it, and print it, without leaving your web browser.

To run see how this works, try the following procedure:

1. Start your browser and open PureEdge's homepage at: www.PureEdge.com
2. Click **Sample Forms**.
 - A web page containing links to a number of sample InternetForms opens.
3. Click **Medical Statement**.
 - The Viewer runs as a plugin and displays the Medical Statement form within your web browser.
 - All the Viewer's functions are available – there is no difference in using the Viewer as a stand-alone program or as a plugin.

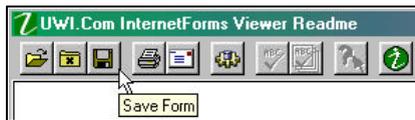
Getting Help

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 the name of a button in the toolbar, hold the cursor over that button (without clicking). Within a few moments, the button's name 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 – it is part of the design of each particular form. 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** .
2. The cursor changes to: .
3. Position the mouse over a field, button or other item.
4. If the design of the form includes context-sensitive help for the item, a help text box appears below the cursor.



How to Contact PureEdge Solutions

Electronically

To learn more about the Viewer or other components of InternetForms Commerce System products, or to contact us, visit our web site at: www.PureEdge.com/.

For frequently asked questions, visit: www.PureEdge.com/faq/.

For Viewer support, send email to: support@PureEdge.com.

For Purchase information, send an email to info@PureEdge.com.

You can also find documentation for other PureEdge products on our documentation web site at: <http://docs.PureEdge.com/>

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Chapter 2: Setting Viewer Preferences

This section discusses the preferences settings of the Viewer. The preference settings 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 full installation of the Viewer allows you to adjust all preference settings. If you are not running the full installation, some of the preferences will not be available.

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

- **Basic** – configure the basic features of your Viewer, such as browser and email configurations
- **Field Options** – configure how the Viewer displays information in fields
- **Printing Options** – configure how the Viewer prints forms
- **Advanced** – configure advanced settings including warning messages, boundaries, color scheme, signature. Most users will not need to change these settings

Opening the Preferences Form

To open the Preferences form using Windows Explorer:

1. Using Windows Explorer, locate the Viewer's **Prefs** folder.
2. Double-click **prefs.xfd**.
 - The Viewer opens and automatically displays the Preferences form.

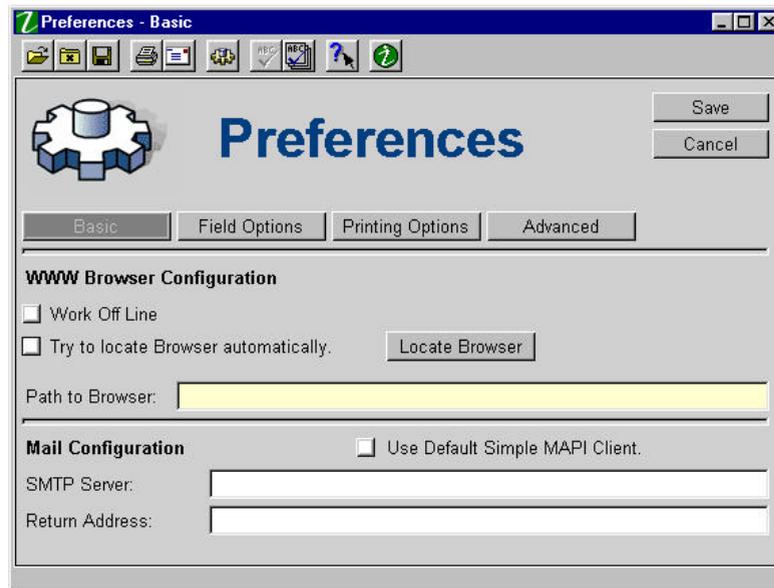
Alternatively, if you are already running the Viewer, you can access the Preferences form from the toolbar. In that case, follow these steps:

1. Open a form in the Viewer.
 - If you don't have a form, open the Readme.xfd form that was installed on your computer when you installed the Viewer; if you need assistance opening a form, see the section on Opening Forms on page 33.
2. Click **Preferences**  on the toolbar.

The Preferences form opens at the Basic page.

Basic Preferences

Use the Basic preferences page to configure your browser and email settings. Basic preferences are divided into two sections: **WWW Browser Configuration** sets your browser preferences; **Mail Configuration** sets your email preferences.



WWW Browser Configuration

When using the Viewer with Netscape Navigator or Internet Explorer, you can work online, and transmit forms over the Internet.

You can configure the Viewer so that whenever you submit forms, the Viewer opens within the web browser and establishes a connection to the Internet. To do so, you must first specify whether you want the Viewer to automatically search for a web browser, or if you want to locate the web browser yourself. Finally, you must name which web browser you want to use. You can configure the Viewer to automatically find the web browser when it opens a form.

- **Work Offline** – Select this option to work offline. This option is not active in all installations of the Viewer. Once you have set the Viewer to work offline, any forms you submit (either by clicking controls in the form or by using the Viewer's Mail

Form command) will be queued for later submission. For more information on working offline, see page 75.

- **Try to locate your Browser automatically** – If this option is selected, the Viewer locates your computer’s default browser.
- **Locate Browser** – Select this option 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. If this field contains the message “Try to locate automatically”, the Viewer will try to locate a web browser to use.

Mail Configuration

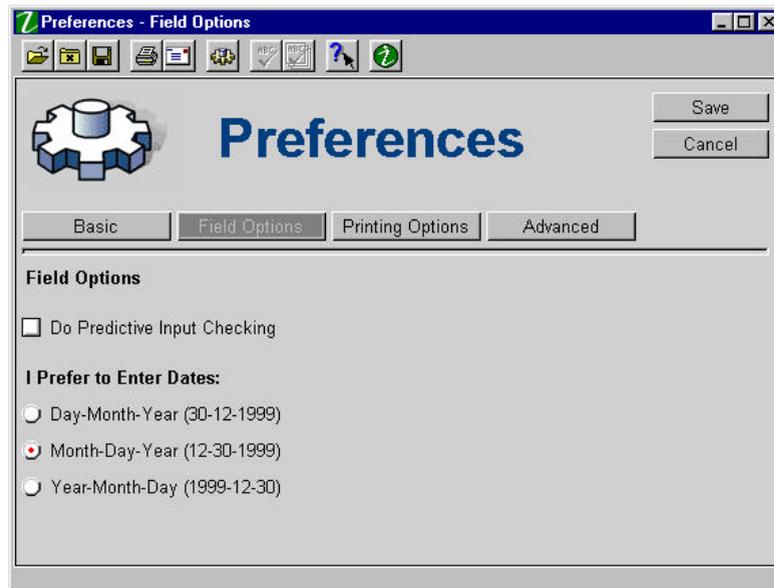
If you want to be able to email forms, you must complete the email configuration section. Unless the full installation of the Viewer is installed, the program defaults to the **Use Default Simple MAPI Client** setting.

- **Use Default Simple MAPI Client:** 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:** Complete this field and the Return Address field to use the Viewer’s email form. Enter the name of your SMTP server. It usually takes the form of *mailhost.companyname.com*. To obtain the name of your SMTP server, contact your system administrator.
- **Return Address:** Enter your email account. It usually takes the form of **youraccount@companyname.com**.

For more information on emailing forms with the Viewer, see the section on “Emailing Forms” beginning on page 64.

Field Preferences

Use these settings to configure how the Viewer handles text fields. You can configure predictive input checking, which causes the Viewer to check fields as you type. You can also set your preferred date format.



Predictive Input Checking

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

This option tells the form how to interpret dates that you enter in numeric format. For example, 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.

Date checking occurs only in fields to which the form developer added error checking.

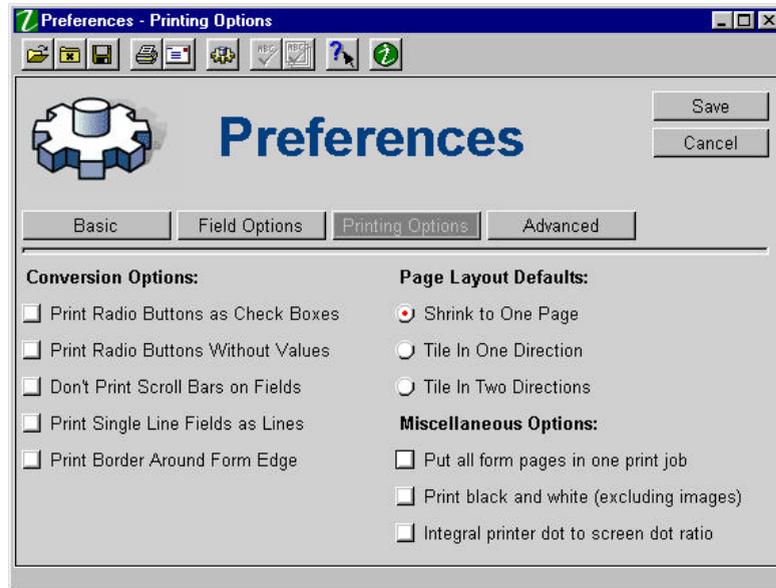


Tip To add the *current date* to any date field, you can type an asterisk (“*”) and then press the TAB key to move out of that field. The Viewer automatically inserts the current date into that field.

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, when set, give your printed forms a more “traditional” appearance. This may be desirable if you are printing blank forms that will be filled out by hand. Select as many checkboxes as you need:

- **Print Radio Buttons as Check Boxes** – Prints radio buttons as check boxes. Use this option for visual consistency of the printed form, so that all check options appear uniformly as check boxes.
- **Print Radio Buttons Without Values** – Causes the selected radio button in each group to be printed blank like all the other radio buttons in the group. Use this option

to set the printed version to show all choices as unselected choices. This gives you the option to print and complete a hard copy of a blank form.

- **Don't Print Scroll Bars on Fields** – Prints text fields without scroll bars. Use this option to print out a blank copy of the form without displaying the scroll bars. Note that if you print a *completed* form, text in some fields may not appear in the printout.
- **Print Single Line Fields as Lines** – Replaces single-line fields with a line. Use this option when you want to print a blank form that will be filled out by hand, as this provides more space for handwriting.
- **Print Border Around Form Edge** – Prints a border around the form. Use this option to visually frame the form.

Page Layout Defaults

- **Shrink to One Page** – Prints the form page on a single piece of paper. Select this option when the form exceeds the size of the paper, such as when you want to print a legal-sized form on letter-sized paper.
- **Tile In One Direction** – Tiles the form in the longer dimension (either horizontal or vertical). Select this option when one dimension of the form exceeds the size of the printer paper.
- **Tile In Two Directions** – Select this option when the printed form exceeds both the length and the width of the printer paper. This option prints each page of the form in its true size, without fitting it to either the height or the width of the paper.

Miscellaneous Options

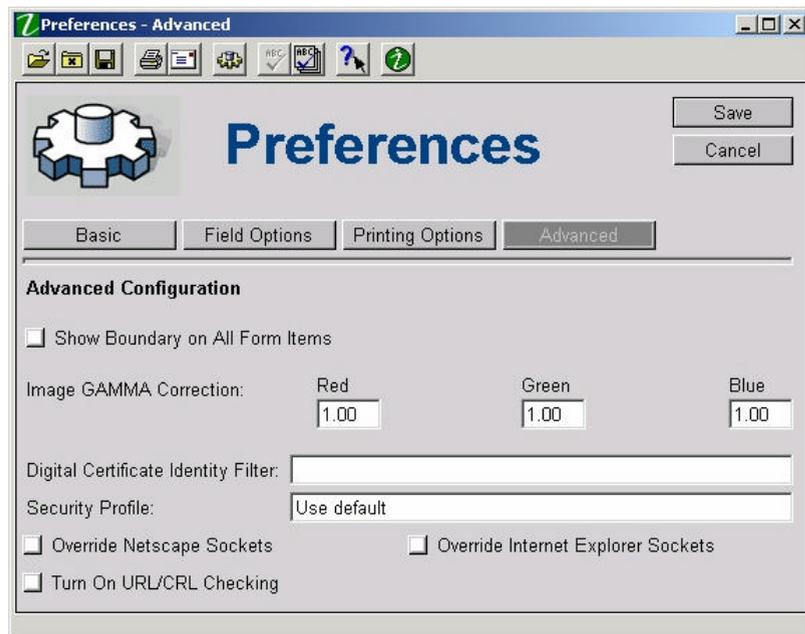
- **Put all form pages on one print job** – Groups all the pages of a form into a single print job. You should only clear this checkbox if your printer doesn't have enough memory to print a large form.
- **Print black and white** (excluding images) – Prints the form in black and white only. Select this option if your printer is having difficulty printing form's colored items using shades of gray. Typical symptoms include getting black boxes where the text should be, non-black text not showing up on the printout, and whiteness appearing around the text of transparent labels that are on a grayscale color background.

- **Integral printer dot to screen dot ratio** – Prints the form as large as possible while still maintaining an integral printer dot-to-screen ratio. Use this option if you have an older printer *and* there are lines missing from the form printout. A small number of old printers have trouble when the ratio of printer dots to screen dots is not an integer. The logical screen dpi used by the Viewer is 120, so the typical example is an older, non-postscript 300 dpi printer that uses 2.5 printer dots per screen dot. The main symptom is missing layout lines in a form printout. If this happens, then turn this option on.

Advanced Preferences

Advanced preferences allow you to configure miscellaneous options, such as whether to show form-warning messages, or whether to override browser sockets. Not all installations of the Viewer allow you to override the browser sockets.

Note You must restart the Viewer (that is, close the form you have opened, and re-open it) before the changes in the Advanced Preferences take effect.



- **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.

- **Image GAMMA Correction** – Adjusts the color of images in forms, by changing the numbers in the Red, Green, and Blue fields. A value higher than 1.00 increases the selected color intensity, while a value below 1.00 decreases the intensity.
- **Digital Certificate Identity Filter** –Filters out unwanted signing certificates, preventing them from appearing when the user is presented with a list of signing identities. Only select this option if you have more than one digital signature certificate. If this field is selected, the value must appear as any part of the one-line signing identity of a certificate or the signing identity will not be included in the list. For example, if you want to sign with a particular certificate that is set up to sign using *F. Name, accountname@company.com*, entering either *F. Name* or *accountname@company.com* will call the corresponding certificate and exclude any others you might have.
- **Security Profile** – In this field, you would enter the path to your digital certificate. This path lets the Viewer locate the file-based digital-signature certificate. For example, if you had a digital-signature certificate called **cert7.db** in the *accountname* directory in Netscape Navigator's Users folder, the path to your security profile would be:

C: \Program Files\Netscape\Users\accountname\cert7.db

To locate your certificate, use Window's Find or Search tool to conduct a search for cert*.db.

- **Override Netscape Socket** – Causes the Viewer to use its own web communications library rather than routing requests through Netscape Navigator. Use this option only if you have problems submitting forms using Netscape Navigator. This option is only available in the full installation of the Viewer.
- **Override Internet Explorer Socket** – Causes the Viewer to use its own web communications library rather than routing requests through Internet Explorer. Use this option only if you have problems submitting forms using Netscape. This option is only available in the full installation of the Viewer.
- **Turn On URL/CRL Checking** – 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

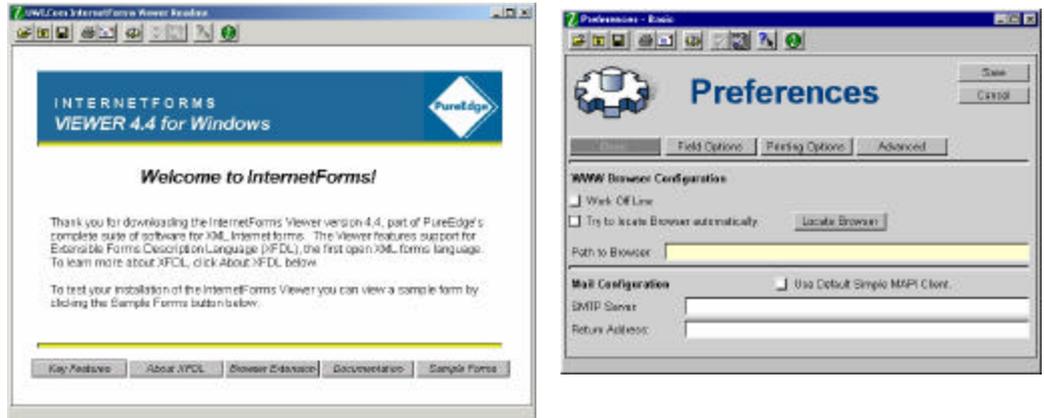
attached to the certificate.

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 an intranet or to 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 in which the Viewer cannot respond to your requests. For this reason, this option is not selected by default.

Chapter 3: The Viewer Environment

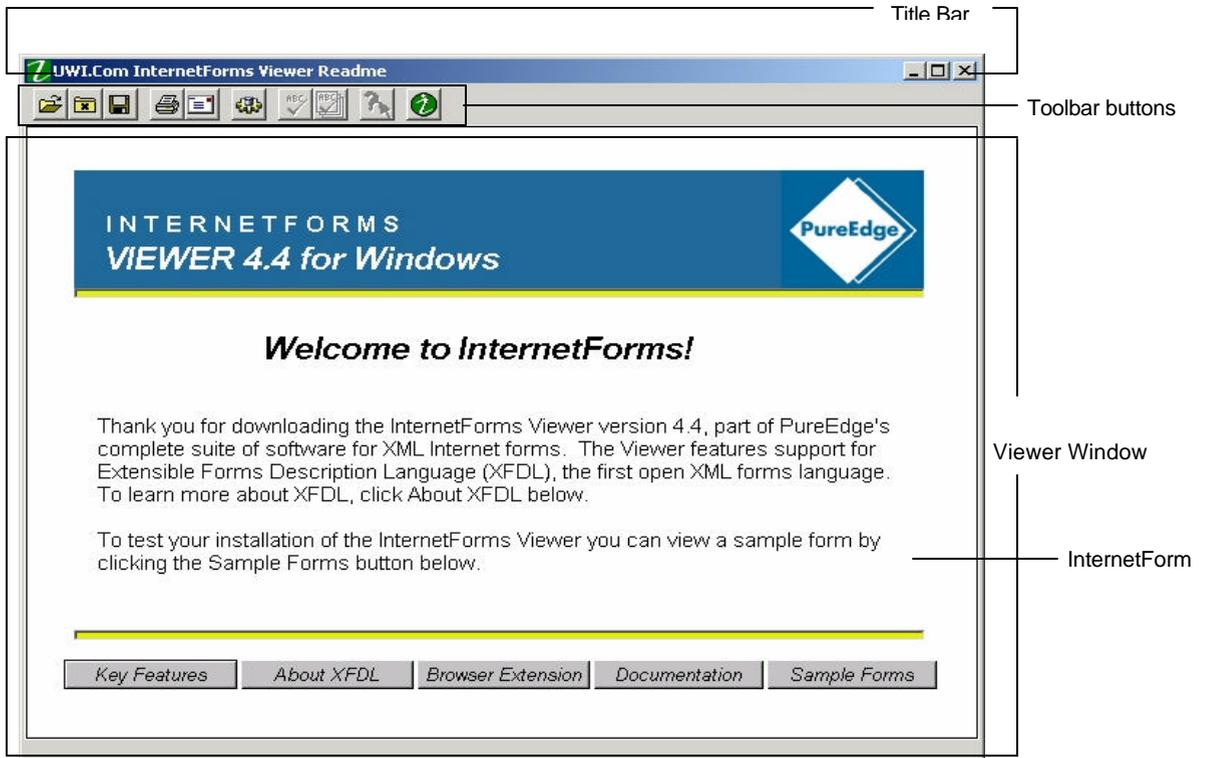
Consider two forms that you may have already encountered: Readme.xfd and Prefs.xfd:



While these two forms are different (the readme form is primarily informational and requires minimal user interaction; the Preferences form requires user input), the environment in which they are displayed is similar. The Viewer's standard display environment includes:

- Title bar – identifies the form
- Toolbar – provides buttons that activate tools to perform specific functions
- Viewer window – displays the form

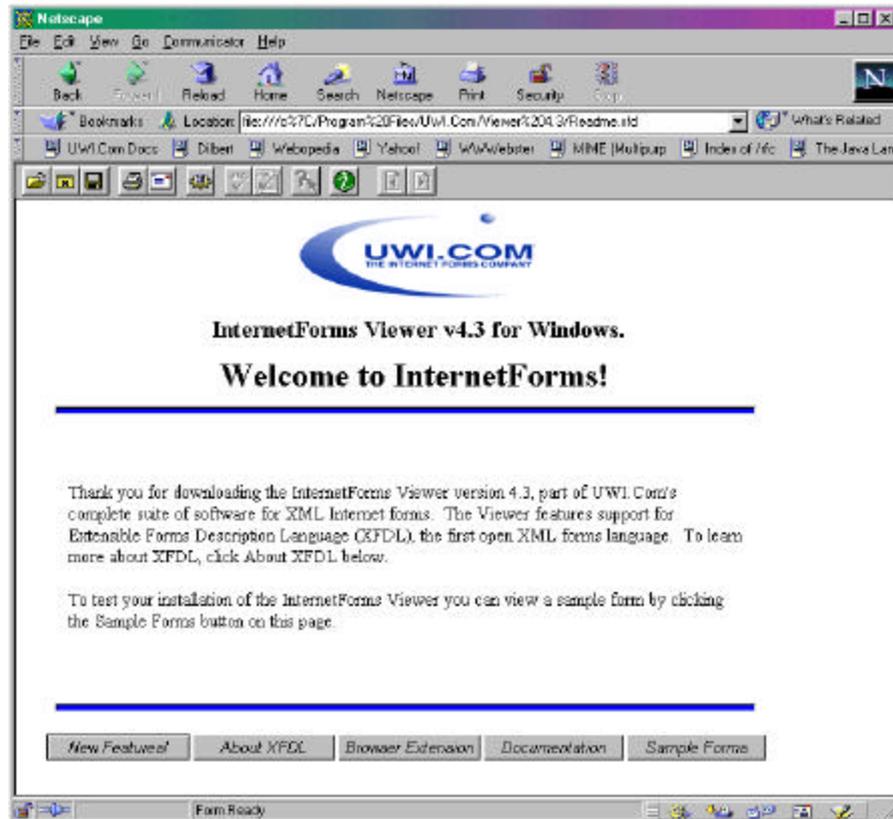
These items are shown in the diagram on the following page:



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 preceding diagram, the title bar shows the form's title: **UWL.Com InternetForms Viewer Readme**.

Note that when you are using the Viewer as a plugin in a web browser, there is no title bar for the Viewer, as shown in the following diagram:



Toolbar Buttons

Whether you are running the Viewer as a stand-alone application or as a plugin, there always is 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** – Click to open another form. An **OPEN FORM** dialog box opens, where you can select the next form you want display in the Viewer. Note that every form you open appears in a new instance of the Viewer.

 **Close Form** – Click to close the current form. If you have made changes and not saved the form, a dialog box asks you whether you want to save the form before closing it. You can click **Yes**, **No** or **Cancel**. If you have already saved your form or not made any changes, when you click the **Close Form** button, the form and that instance of the Viewer close immediately.

 **Save Form** – Click to save the current form. A **Save Form** dialog box opens asking you to specify a filename. Select an existing filename, or give it an original filename, and click **Save**. To exit this option, click **Cancel**.

 **Print** – Click to print the current form. A print dialog box opens. Ensure the print settings are correct and click **OK**. To exit this option, click **Cancel**.

 **Mail Form** – Click to mail the current form. Depending on the Mail Configuration specified in your basic preferences, either a Viewer email form or your preferred MAPI client email opens. The current form is automatically attached to the email. For more information on setting the Mail Configuration Preferences, see page 16. For more information on the Viewer's E-Mail form, refer to the section on Sending Forms by Email on page 64.

 **Preferences** – Click to set your Viewer preferences. For more information, see the chapter on Setting Viewer preferences on page 13.

 **Check Spelling** – Click to check the spelling of text you typed into a field. You can check the contents of the entire field or just a word or block of highlighted text. When checking an entire field, ensure you have selected the desired field before clicking the Check Spelling button. This button will only be active if you are in a form item that allows data entry (such as a field or combobox) *and* the form's design allows spell checking.

 **Check All Spelling** – Click to check the spelling of all input fields on the form. If any unrecognized words are found, a Check Spelling dialog box opens. This button will only be active if the form's design allows spell checking.

 **Help Mode** – Click this button to enable context-sensitive help. If this button is dimmed, then no help is in this form. If it is active, some or all the form items provide help messages. For more information, see the section on context sensitive help on page 10.

 **About** – Click to display information about the Viewer software. An About window opens. If you are using an evaluation version and want to register the Viewer, click **License**. See page 5 for more information on registering your Viewer.

Other toolbar buttons are only present when using the Viewer in your browser. These are:

 **Next Form** – Click to view the next form. This button is available when more than one form is available.

 **Previous Form** – Click to view the previous form. This button is available when more than one form is available.

Viewer Window

The Viewer window is the area immediately below the toolbar in which InternetForms 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. In the diagram on page 29, the InternetForm Viewer Readme.xfd file appears in the Viewer window.

Viewer Form

The forms displayed in the Viewer are InternetForms, also known as 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 .xfd, .xfdl, .frm, .ufd or .ufdl.

Chapter 4: Basic Form Functions

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

- Open forms
- Fill in forms
- Checking spelling in forms
- Save completed forms

A number of sample forms are available free of charge 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. There are different ways of doing this, depending on whether you are accessing forms that are stored locally or available over the Internet.

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

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

There are three ways to open forms that are stored on your computer:

First, you can run the Viewer and have it open the form for you:

1. From the **Start** menu, choose **Programs**, choose **InternetForms Viewer 4.4**, and then click **InternetForms Viewer**.

2. An **Open Form** dialog box opens. Browse to locate the InternetForm you want to view.
3. Click the file you want to view and then click **Open**.

Alternatively, you can first double-click the form and have Windows run the Viewer automatically:

1. Using Windows Explorer, locate the InternetForm you want to view (InternetForm files end with an extension of .xfd, .xfdl, .frm, .ufd and .ufdl).
2. Double-click the file's name.
 - Windows automatically runs the Viewer and opens the form.

Or, 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 InternetForm you want to view (InternetForm files end with an extension of .xfd, .xfdl, .frm, .ufd and .ufdl).
3. Click **Open**.

Note You can have multiple forms open at once. However, a new copy of the Viewer runs each time you open a form. Each instance of the Viewer can only display one form at a time.

Opening Forms over the Internet

By using the Viewer within Netscape Navigator or Microsoft Internet Explorer, you can open forms that you access on the Internet.

To open a form in your web browser:

1. Run Netscape Navigator or Internet Explorer (versions 4.0 or higher).
2. Point your browser to a web page that contains links to InternetForms. (Sample forms are available at www.PureEdge.com – look for the link to sample forms).
3. Click the link to an InternetForm.

- The browser automatically runs the Viewer as a plugin and opens the form.

You can also open locally stored Internet forms from your browser:

1. Run Netscape Navigator or Internet Explorer (versions 4.0 or higher).
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 browser automatically runs the Viewer and opens the form.

Note If you fill in a form using the Viewer while within 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. If so configured, the next time you access one of these sites or files, your browser gets the page from the cache, rather than from the live web site. This allows the browser to load files more quickly.

If you fill in a form using the Viewer in a browser and save the form, the cache still only contains the original version of the form. Therefore, when you try to view the modified form, the browser gets the form from the cache and you are unable to see the modified form. To prevent this problem you need to clear the cache to view the most recent version of your form.

Netscape Navigator (version 4.0 or higher)

In Netscape Navigator, you must clear both the memory cache and disc 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 Memory Cache** and **Clear Disk Cache**.
5. Click **OK** to save the settings.

Internet Explorer (version 4.0 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.

Opening Forms from an Email

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

1. Using your usual 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 that form as described on page 33.

For more information on configuring your email, see “Mail Configurations” on page 16.

Filling out Forms

Filling out InternetForms 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 the mouse. On the form, move from item to item by pressing the TAB key or move 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 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:

Home Address:

10 Downing Street London, England

Fields are explained in detail on page 40.

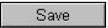
- **Check Box** – Check boxes allow you to make selections from a list of choices. Depending on the form, you may be able to select one item from a group, or you may be to make multiple selections. To make a selection, click the check box. A check mark appears: To cancel (or clear) your selection, click the check box again.
- **Radio Button** – Radio buttons are similar to check boxes. However, multiple selections within a group of radio buttons are never allowed. In other words, only one radio button can ever be selected at a time. When selected, a red dot appears in the button: . Clear buttons are blank: .
- **List** – This item presents text selections arranged as a list. To make a selection, click the desired item:

Professions

Doctor
Lawyer
Accountant
Rocket Scientist

- 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 provides both 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:
 

- Button** – Buttons perform specific functions and are activated when the user clicks the button using the mouse. Typical functions include saving, printing, submitting, and signing. A button can have a text or image face. For example, a **Save** button might look like this: .

Keyboard Commands

You can use the following keyboard commands to help you fill out forms.

Key or Key Combination	Result
TAB	Move forward from item to item in the form .
SHIFT + TAB	Move backward from item to item in the form .
ARROW KEYS	Move between letters in a field .
CTRL + TAB	Insert tabs within a field .
SPACE	If you have tabbed to a button , check box or radio button , press the spacebar or the Enter key to select the item.
ENTER	If you have tabbed to a button , press the Enter key to click (or activate) the button.
SPACE	If you have tabbed to a popup or combobox item, press the spacebar to view the list; press it again to make a selection and close the list.

DOWN ARROW KEY	If you have tabbed to a popup or combobox item, press the down arrow key to view the list and highlight an entry.
UP AND DOWN ARROW KEYS	If in a popup or combobox menu, use the arrow keys to highlight list entries.
ALT + SPACE	This has the same effect as clicking the  icon in the title bar. This opens the context menu.

Fields

Fields are more versatile than lists, checkboxes, and radio buttons because they allow you to enter and edit text and numbers. The Viewer provides a number of features to make it easier to enter text from the keyboard. In addition, some forms verify that the information you enter is of the appropriate type and format for the field. Other fields may be mandatory or optional.

The following sections explain how to enter information into fields and how the Viewer handles this data.

Manipulating Text (Cutting, Copying, Pasting, and Deleting Text)

The Viewer provides several features to make it easy to enter and edit text in fields. With just a few keystrokes or click of the mouse, you can copy text from one field to another, correct mistakes, or clear entries.

To cut text from a field:

1. Using the mouse, position the pointer over a field and click the mouse. Using the keyboard, you can press the **TAB** key until the cursor appears in a field.
2. Select the text you want to cut.
 - You can double-click a single word, or drag the mouse to highlight a group of words. To select all the text in a field, click the right mouse button, and choose **Select All** from the menu. Alternatively, using the keyboard, press **SHIFT** and the left or right arrow keys.
3. Click the right mouse button, and choose **Cut**. You can also press **CTRL+X**. Both methods remove the text from the field and place it in the clipboard.

To copy text from a field:

1. Position the pointer over a field and click the mouse. You can also press the **TAB** key until the cursor is in a field.
2. Select the text you want to cut.
 - You can double-click a single word, or drag the mouse to highlight a group of words. To select all the text in a field, click the right mouse button, and choose **Select All** from the menu. Alternatively, using the keyboard, press **SHIFT** and the left or right arrow keys.
3. Click the right mouse button, and choose **Copy**. You can also press **CTRL+C**. Both methods leave the text in the field and place a copy in the clipboard.

To paste text that you have cut or copied into a field:

1. Place the cursor in the field at the location where you want to paste the text.
2. Click the right mouse button and choose **Paste** from the menu. You can also use **CTRL+V** to paste the text.
 - Both methods paste the text on your clipboard into the field.

Note You can copy and paste text from one form to another and even to or from other applications.

To delete text from a field:

1. Select the text you want to delete.
 - You can double-click a single word, or drag the mouse to highlight a group of words. To select all the text in a field, click the right mouse button, and choose **Select All** from the menu. Alternatively, using the keyboard, press **SHIFT** and the left or right arrow keys.
2. Click the right mouse button, and choose **Delete**.
 - You can also use the keyboard command **CTRL+D** or the **Delete** key. Both methods delete the selected text.

Note You can choose **Undo** from the menu to revert to the last change you made. The Undo function retains only the last modification and does not undo a series of modifications. For instance, if you cut a selected word and selected Undo, the function undoes the cut and returns the word. If you do another Undo, the last modification in memory is the cut, and undo will redo the cut.

Behaviors and Types

Every field has two main properties: one determines the behavior of the field (that is, whether it is optional, mandatory, or invalid) and the other determines the field's data-entry type (that is, whether it is text, numeric or date). The following tables provides more details:

Field Behavior	Description
Optional	The default 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 . You must enter information into the field to continue.
Invalid	Any field turns red if you have entered information that the Viewer cannot interpret according to its type (see below). A mandatory field becomes invalid if you leave it blank.

Field Type	Description
Text	This field allows you to enter any keyboard character including letters, numbers, and punctuation. For example, this type of field is used to 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-

Field Type	Description
Date	<p>digit numeric value. If you are entering a dollar value into a Numeric field, do not enter the dollar sign (\$).</p>
	<p>These fields support dates in a wide variety of formats. To add the <i>current date</i> 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 17). Once you tab out of the completed date field, the Viewer converts a readable date into a predetermined format.</p>
<hr/> <p>Note In certain forms, the amount of text you can enter into a field might be restricted by the design of the form. If unrestricted, the maximum amount of text you can enter is 32K. This is equivalent to about 500 lines of text in a 60-character wide field.</p> <hr/>	

Checking Spelling

The Viewer includes a sophisticated spell checker. Using its 100,000-word dictionary, it can find and correct spelling errors in information entered in forms. In addition, you can also create your own dictionaries if you often use unusual words or names.

The Viewer provides two spell checking tools: use the first to verify the spelling of words within a single field. Use the second tool to spell check the contents of the entire form.

 **Check Spelling** – Click this button to check the spelling of text in a single item (such as a field or combobox). To only check a portion of the text, select the desired word or block of text. To spell check the contents of the entire item, select the item but be sure to not select its contents. 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 form. If any unrecognized words are found, a **Check Spelling** dialog box opens. This button will only be active if the form’s design allows spell checking.

Note If the Check Spelling buttons do not appear on your Viewer, your installation might be missing an .ifx file. This is normal if you installed a “light” or “thin” version of the Viewer. Contact support@PureEdge.com for assistance.

Checking the Spelling of Text within a Field

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

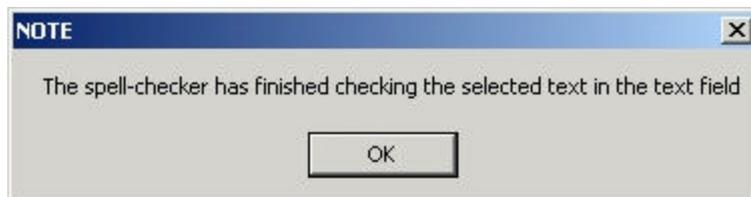
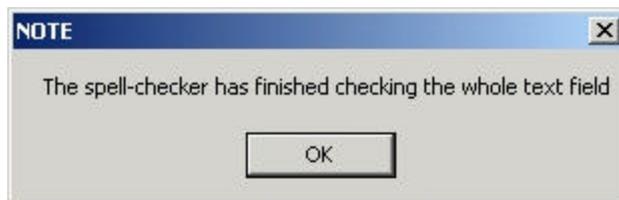
1. Select the field or a portion of its contents.
 - To select a field, click the field once, so that a blinking cursor appears. To select all the text in a field, click the right mouse button, and choose **Select All** from the menu. To select a portion of the contents, double-click a single word, or drag the mouse to highlight a group of words. Alternatively, using the keyboard, press **SHIFT** and the left or right arrow keys. To select all the text in a field, click the right mouse button, and choose **Select All** from the menu.
2. Click the **Check Spelling**  button on the Viewer’s toolbar.
 - If the spell checker cannot recognize a word, the following dialog box appears:



- If you want to replace the unrecognized word with the one that appears in the **Change To** field, click **Change**. Click **Change All** to automatically replace all further occurrences of the unrecognized word.
- In the **Suggestions** field, the spell checker may suggest other words. To accept one of those words, highlight the desired word and click **Change** or **Change All**.
- To disregard the correction and proceed with the spell check, click **Ignore**, or **Ignore All** to disregard all occurrences of that word.
- To add the unrecognized word to the selected dictionary, click **Add**.
- To find suggested words, click **Suggest**.

Note The **Suggest** button is only active if you do not have your options set to **always suggest**. See page 55 for more information on setting your spell-checking options.

3. When the spell checker finishes checking the field or selected text, one of the following messages appears:

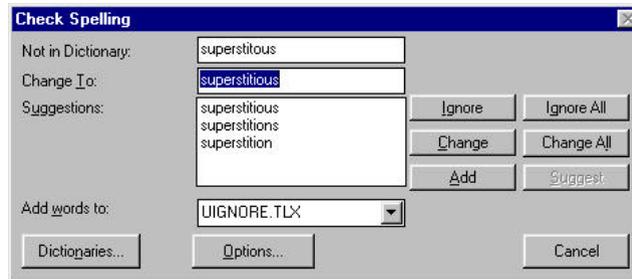


4. Click **OK** to complete the spell check.

Checking the Spelling of All Fields

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

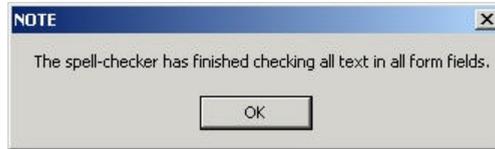
1. Click the **Check All Spelling**  button on the Viewer's toolbar.
 - If the spell checker cannot recognize a word, the following dialog box appears:



- If you want to replace the unrecognized word with the one that appears in the **Change To** field, click **Change**. Click **Change All** to automatically replace all further occurrences of the unrecognized word.
- In the **Suggestions** field, the spell checker may suggest other words. To accept one of those words, highlight the desired word and click **Change** or **Change All**.
- To disregard the correction and proceed with the spell check, click **Ignore**, or **Ignore All** to disregard all occurrences of that word.
- To add the unrecognized word to the selected dictionary, click **Add**.
- To find suggested words, click **Suggest**.

Note The **Suggest** button is only active if you do not have your options set to **always suggest**. See page 55 for more information on setting your spell-checking options.

2. Once the spell check for the selected text is complete, the following dialog box appears:



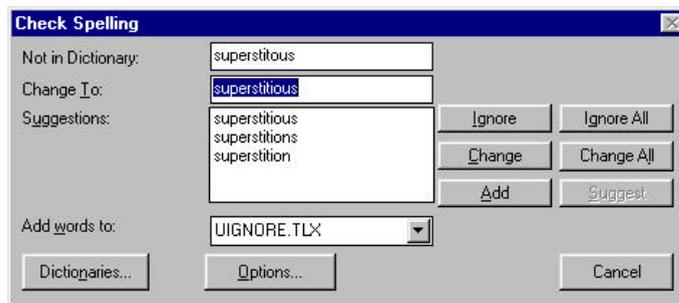
3. Click **OK** to complete the spell check.

Adding or Deleting Words

If you frequently use acronyms, abbreviations, or unusual proper names or words in your forms, you may want to add them to the dictionary. This will make your spell 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. To do this:

1. Start the spell checker by clicking  or .

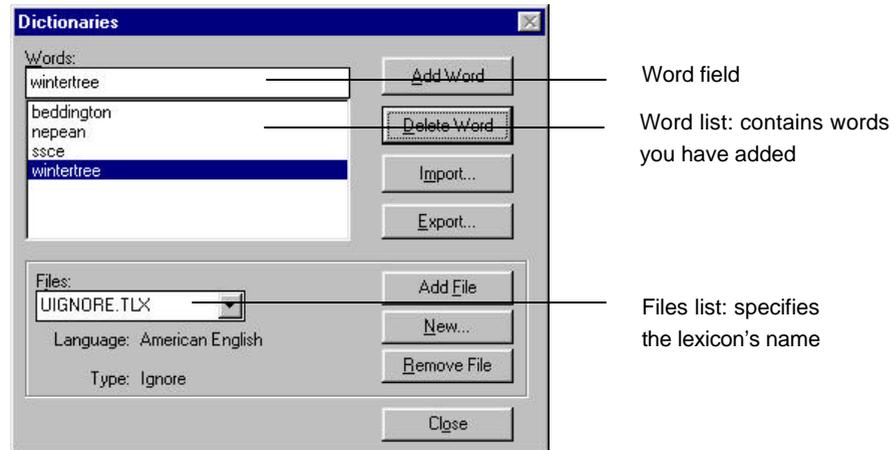
 - The spell-checking program begins. When it finds an error, the following dialog box appears:



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

2. Click **Dictionaries**.

- A **Dictionaries** dialog box, similar to the following, opens:



- To add a word to the dictionary, enter the word in the word field at the top of the dialog box and click **Add Word**.
- To delete a word from the dictionary, select a word from the word list and click **Delete Word**.

3. 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 spell checker. To import this list of words:

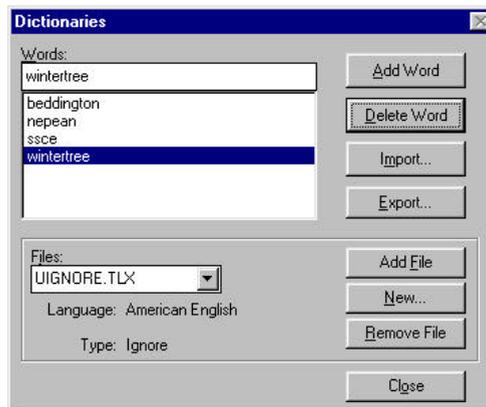
1. Start the spell checker by clicking  or .
 - The spell-checking program begins. When it finds an error, the following dialog box appears:



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

2. Click **Dictionaries**.

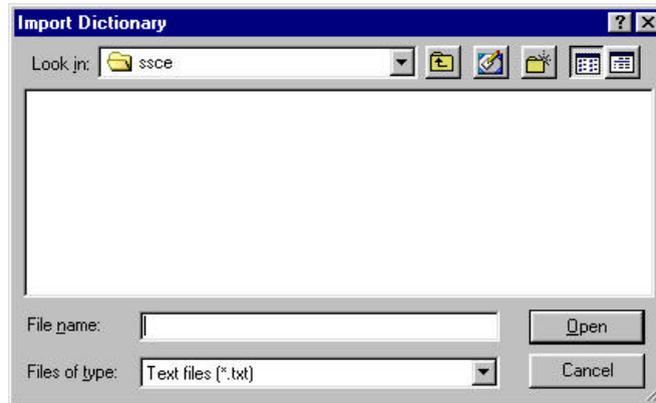
- A **Dictionaries** dialog box, similar to the following, opens:



3. Select the appropriate file type the **File** list. Also, ensure the dictionary type reflects the word type you are importing.

- For example, make sure that words to be ignored are imported into the Ignore type in the dictionary.

4. Click **Import**.
 - An **Import Dictionaries** dialog box opens.



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

Exporting a Word List to a File

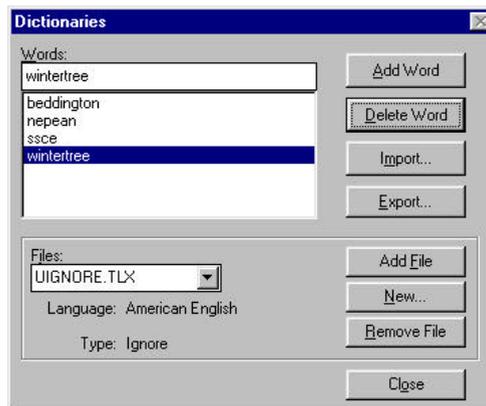
You may want to share your dictionary word list with others. To do this, the Viewer lets you export a word list. When you export a document, you are saving the word list of the selected dictionary file as a text document. To export a dictionary word list:

1. Start the spell checker by clicking  or .
- The spell-checking program begins. When it finds an error, the following dialog box appears:



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

2. Click **Dictionaries**.
 - A **Dictionaries** dialog box, similar to the following, opens:



3. Select the appropriate type of file from the **File** list.

4. Click **Export**.
 - An **Export Dictionary** dialog box opens.



5. Enter a name for that file in the **File name** field.
 - If you want to save it as a text file, include the extension `.txt`.
6. Click **Save**.
7. Click **Close** to exit and save your changes.

Creating a New Dictionary File

You can create new dictionary files. This can be used if there are certain words you want to group into a single, self-contained file. For example, you might have a dictionary that only includes your colleague's names. 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. Start the spell checker by clicking  or .

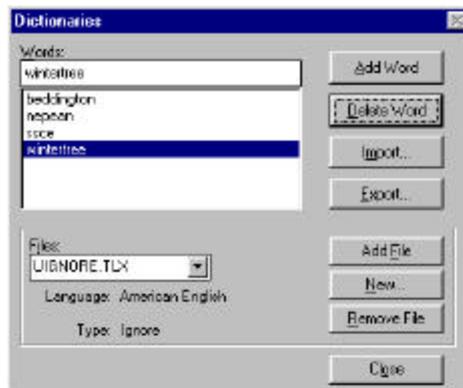
 - The spell-checking program begins. When it finds an error, the following dialog box appears:



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

2. Click **Dictionaries**.

- A **Dictionaries** dialog box opens, similar to the following, opens:



3. Click **New**.
 - A **New Dictionary** dialog box opens.



4. Enter a name for the new dictionary file in the **File Name** field.
5. Select the type of dictionary:
 - **Auto-Change** – contains words and their replacements. When a word is located in an auto-change type dictionary file, the spelling checker automatically substitutes the replacement word. Entries in this type of dictionary take the format of “word:replacement”.
 - **Exclude** – contains words that should be considered misspelled, even if they are listed in a main dictionary. Words in exclude-type dictionary file never appear in suggestion lists. Entries take the format of a single word (accepts all characters except spaces).
 - **Ignore** – contains words that should be considered correctly spelled, and should therefore be ignored (skipped) by the spelling checker. Entries in this dictionary take the format of a single word (accepts all characters except spaces).
 - **Conditional Change** – contains words and their replacements. When a word is located in a conditional-change dictionary file, the spell-checker asks for your confirmation before making the replacement. Entries in this type of dictionary take the format of “word:replacement”.
6. Select a language from the **Language** list.
7. Click **OK**.

- The file name appears as the currently selected dictionary file.
 - You can now proceed to develop a word list for that dictionary file by adding words or importing files (see above).
8. Click **Close** to exit and save your changes.

Setting Spell-Check Options

When you use the spell checker, you can customize the configuration options to better suit your needs. 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:

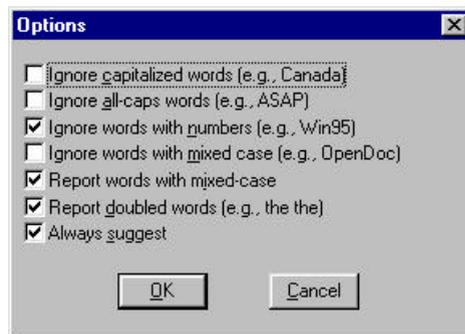
1. Start the spell checker by clicking  or .
- The spell-checking program begins. When it finds an error, the following dialog box appears:



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 spell checker.

2. Click **Options**.

- The following **Options** dialog box opens:



3. Select the appropriate checkboxes:

- **Ignore capitalized words (e.g., Canada)** – when selected, this option sets the spell checker to ignore proper nouns, such as the name of a person or place.
- **Ignore all-caps words (e.g., ASAP)** – when selected, this option sets the spell 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., Win95)** – when selected, this option sets the spell checker to ignore any words that have numbers in them.
- **Ignore words with mixed-case (e.g., OpenDoc)** – when selected, this option sets the spell 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.
- **Report words with mixed-case** – when selected, this option sets the spell check to report words that have an uppercase letter appearing to the right of a lowercase letter. Select this option to check both the spelling and the case. If this option is not selected, the spell checker only considers the spelling of the words and will ignore mixed cases. When used in conjunction with **Ignore words with mixed-case option above**, this option will not report mixed cases.
- **Report doubled words (e.g., the the)** – when selected, this option sets the spell checker to identify the consecutive appearance of the same word.

- **Always suggest** – when selected, this option sets the spell checker to always produce a list of alternative spellings for any word it cannot recognize. When selected, the **Suggest** button in the Spell-Checking dialog box is inactive. Clearing this option activates the **Suggest** button, which you can click when you want a suggestion.
4. Click **OK** to return to the **Check Spelling** dialog box.

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 on your local computer or network you want to store 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 **.xfd** 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.

Note Another way to save a form is to submit it while working offline. This saves the form to the Viewer's archive directory. This directory acts as a temporary repository for forms that will be transmitted over the Internet once the computer is online again. For more information, see "Submitting Forms" on page 59.

Submitting Forms

Many forms include a submit button. 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

If the appropriate software is installed on the receiving computer, submitted forms become available to other programs. For example, the information in the form may be stored in a database, where it then becomes available to a variety of other programs.

The destination of a submitted form is built into the form and cannot be changed by the user of the Viewer. Similarly, because submit buttons are also part of the form's design, their appearance and location on the form may vary. In most cases, however, submit buttons look something like this: .

If you submit a form while your computer is offline (or, in other words, is unable to access the network) the form is stored in an archive folder on your local computer. When you reestablish a connection to the network, the Viewer transmits any submitted forms it finds in the Archive folder. (For more information on working offline, see "" on page 75.)

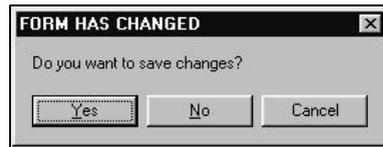
Depending on a form's design, it may automatically close when you submit it. In other cases, another form appears to inform you that the form was successfully submitted.

Closing Forms

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

To close an open form:

1. On the toolbar, click the **Close Form**  button.
 - If you have entered any information into the form, the Viewer displays a **Form Has Changed** dialog box.



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.
 - If you have not modified the form since it was last saved, the Viewer closes without displaying the **Form Has Changed** dialog box.

Chapter 5: Advanced Form Functions

This chapter explains how to use the Viewer's more advanced functions. You will learn how to:

- Print forms
- Email forms
- Manage files attached to forms
- Work offline
- Digitally sign forms

Printing Forms

The Viewer's toolbar always includes the **Print** button . When you click this button, the Viewer sends the form to the printer.

Some forms also provide a custom print button somewhere within the form. The location and appearance of this type of button can vary. Print buttons on forms generally look something like this: .

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. Some forms may be designed to print immediately.

Toolbars never appear on the 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 determines whether the Viewer prints the entire form or only the page you are currently viewing.

You can print forms on a printer that is attached directly to your computer or on a shared network printer. Contact your system administrator if you need more information about your network printers.

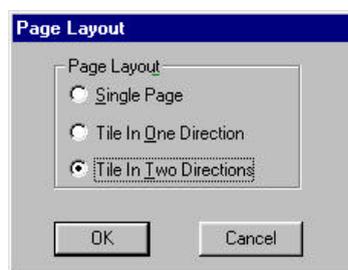
To print a form:

Click **Print**  on the Viewer's toolbar. (Or you can click the form's print button similar to , if one is provided.)

- Depending on the design of the form, a **Print** dialog box opens *or* the form is sent directly to your computer's default printer.

If a **Print** dialog box opens:

1. Select the printer you want the Viewer to use to print the form.
2. Click **Properties** to set the printer's properties, if required.
 - Consult the printer's documentation for more information.
3. Click **Layout** to modify the page layout.
 - The **Page Layout** dialog box appears:



- The following layout choices are available:
 - **Single Page** adjusts the form's width and height so that it fits on one printed page.
 - **Tile in One Direction** only adjusts the form's width or height. The printed form can only span multiple pages in one dimension.
 - **Tile in Two Directions** does not adjust the form's dimensions. The printed form may span multiple pages in both width and length.
- Click **OK** when you have selected the page layout.

4. Set the number of copies.
5. Click **OK**.
 - The form is printed on the printer you selected.

Note You cannot alter the **Print Range** setting. Instead, use the **Layout** button and select **Single Page** to print a form's page on a single page, or set the Viewer preferences **Printing Options** to modify the **Page Layout Defaults**. See page 20 for more information.

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

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 19.

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

Emailing Forms

You learned on page 59 that some forms provide a **Submit** button that you can use to send a form directly to networked computers. On the other hand, provided your computer can access an email server, it is always possible to email any form, regardless of its specific design.

The Viewer supports two ways to email forms:

- Using your existing email program such as Microsoft Outlook, Netscape Messenger, Eudora, and so on
- Using the Viewer's built-in email program

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

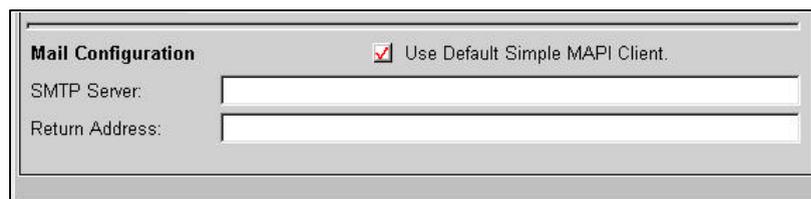
Setting the Viewer's Email Preferences

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 program 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 present email client, you will need to set up your Preferences form *and* your preferred email client to use the *Messaging Application Programming Interface*, or 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**:



Mail Configuration Use Default Simple MAPI Client.

SMTP Server:

Return Address:

- Do not change any information in the **SMTP Server** or **Return Address** fields.
3. Click **Save**.
 - The Preferences form closes.

Now, each time you send a form using the **Mail Form** toolbar button , the Viewer uses your preferred email software.

Note MAPI (Messaging Application Programming Interface) must be enabled in your email software for this configuration to work. Check the settings in your email software to enable MAPI, if necessary.

Using the Viewer's Email Client

To use the Viewer's email program, you will need to provide your email configuration information in the Viewer preferences. In addition, you need to ensure that the Viewer is not configured to use the MAPI client

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*).
 - Your Preferences form might resemble this:



Mail Configuration		<input type="checkbox"/> Use Default Simple MAPI Client.
SMTP Server:	<input type="text" value="mailhost.companyname.com"/>	
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 own email software (discussed in the following section).

Sending Forms

You can email a copy of any form by clicking the **Mail Form**  button on 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 client.

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 open form is automatically placed as an attachment in an email message.
3. Enter the recipient's email address and send the email as you would normally.

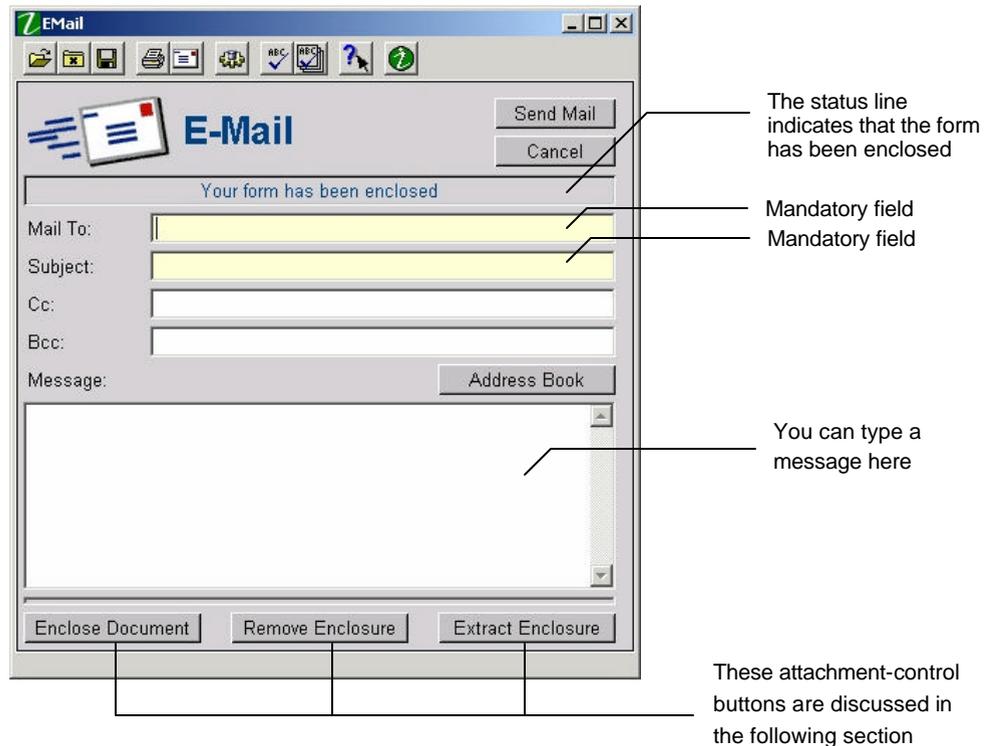
Note You can also attach a completed and saved form as you would attach any other document to an outgoing email using your preferred email client.

Using the Viewer Email Client

The Viewer's email program 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 you need to fill out the email form and click **Send**. Here is the procedure in more detail:

1. From the Viewer's toolbar, click **Mail Form** 
 - The Viewer's email form, shown below, appears. The Viewer automatically attaches your form to the email form. The following diagram shows the

Viewer's email client with a message indicating that your form is attached.



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.
- In the **Subject** field, enter a subject line.

3. If you want, you can also fill out the following optional fields:

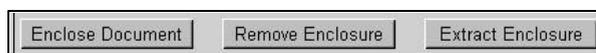
- In the **Cc** field, enter the email address of any other recipients. Separate multiple addresses with a comma.
- In the **Bcc** field, enter the email address to which the Viewer sends a blind carbon copy of the form. Separate multiple addresses with a comma.
- In the **Message** field, enter your 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 documents to your email message. You can perform these operations for any type of document file, including other forms.



The next section explains how to use these functions.

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 InternetForms.

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. Although the location on the form and the appearance of these buttons can vary, they usually look something like this:



For convenience, the Viewer also lets you group attachments into folders. This is useful if you are attaching several files and want to organize them in some way.

This section explains how to use these functions to manage attached files.

Note The Viewer's special email form, used to send forms by email, provides these attachment functions:

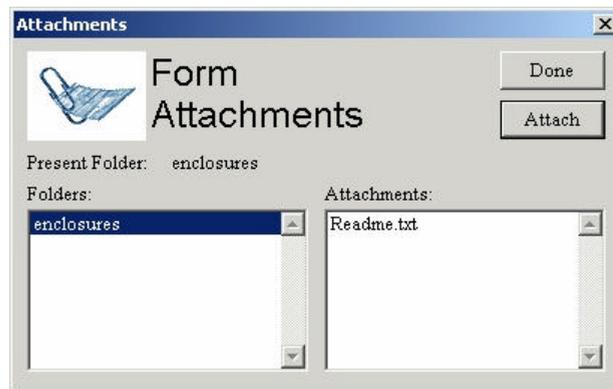


Therefore, the procedures that follow also apply to the email form.

Attaching Documents

To attach a document to a form or to the Viewer's Email form:

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

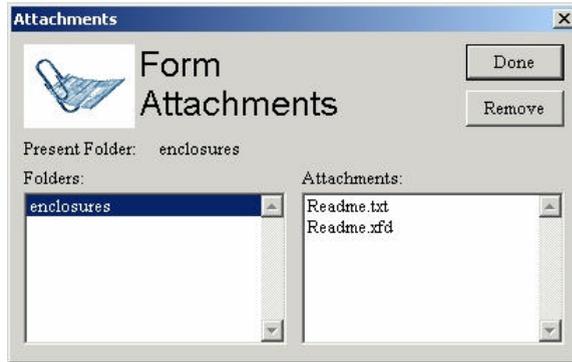


2. To attach another document, click **Attach**.
 - An **Enclose File:Choose the File** dialog box appears.
3. Select the document you want to attach and click **Open**.
 - The dialog box closes and the file you selected appears in the **Enclosures** list.
4. Attach other documents by repeating steps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

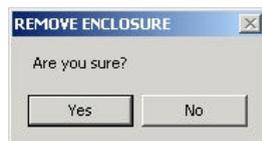
Removing an Attached Document

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

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



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



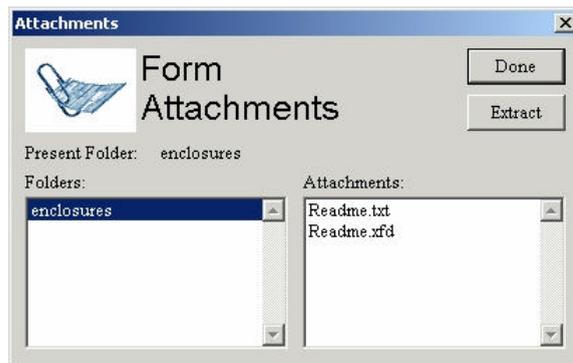
4. Click **Yes** to remove the attachment, or click **No** to cancel the request.
5. Click **Done** when you have finished removing the attached forms.

Extracting an Attached Document

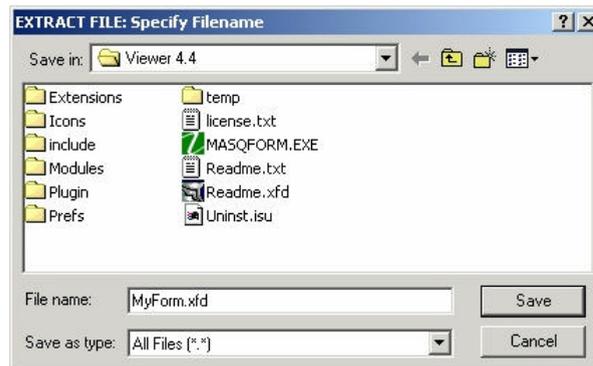
The Viewer lets you remove an attachment from a form and save it to a location of your choice. This process is called extracting a document. When you extract a document or file, the Viewer removes it from the email message and saves it as an independent file.

To extract a document from a form or from the Viewer's email form:

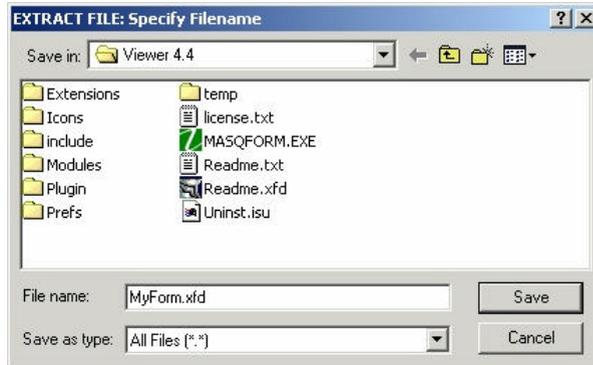
1. On the form, click the **Extract** or extract-type button.
 - If the form contains more than one attached document, an **Attachments** dialog box opens listing the documents that are currently attached:



- 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:



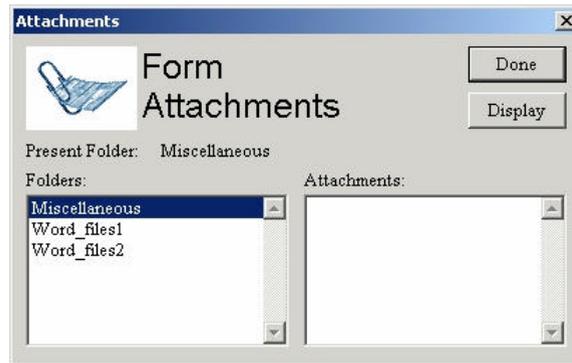
4. Chose the folder where you would like to save the document and next to **File name**, type the name of the file.
5. Click **Save**.
 - If a file with the same name already exists, you will be asked whether you want to replace the existing file. Select **Yes** if appropriate, or select **No** to return to the **Attachments** dialog box.
6. Extract other documents as needed and click **Done** when 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. This feature is not available on the Viewer's email form.

To display an attached document:

1. On the form, click the **Display** or display-type button.
 - An **Attachments** form appears, listing the documents that are currently attached:



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 the browser specified in the Viewer's preferences.

Working with Forms Containing Attachments

Forms that contain attachments behave the same as any other form. You can submit, email, and save these forms. The Viewer treats a form that contains attachments as a single document. When you attach documents to a form, those files are stored along with the form when you save that form, and the files are transmitted when you submit or email the form.

Note If you make modifications to an attached form, you *must* remove the copy from the form's attachment form and re-attach it. Otherwise, you will submit the original, unmodified copy of the file.

Working Offline

With the full installation of the Viewer, you can submit forms even when your computer is offline, or not presently connected to a network.

While offline, you can view, fill in, and submit forms as you would normally. The Viewer saves the submitted forms in a temporary archive until you reestablish your computer's connection to the network. Archived forms will not be lost even if you close the Viewer and shut down your computer.

Once your computer's network connection is reestablished, the Viewer can submit your archived forms or further postpone their transmission. You can also submit other forms without submitting the archived forms.

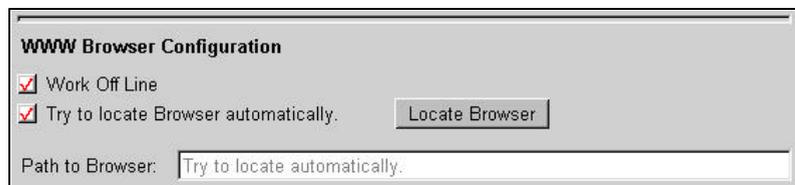
You may decide to work offline even if your computer is able to connect to your network. This is useful if you have a slow connection and you want the Viewer to transmit submitted forms when you are not using your computer.

This section explains how to use the Viewer when working offline.

Setting the Preferences to Work Offline

To set the Viewer preferences to use the Viewer offline:

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



WWW Browser Configuration

Work Off Line

Try to locate Browser automatically.

Path to Browser:

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

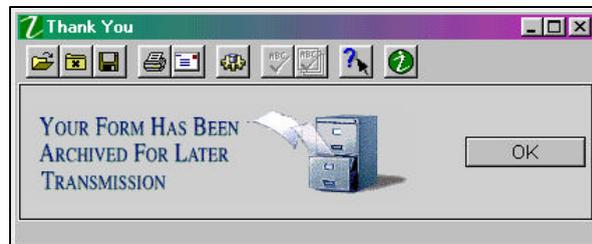
Once you have set the Viewer to work offline, any forms you submit are queued for submission. Queued forms are saved in the Viewer's Archive folder, where they remain until you reset the Viewer's preferences.

Note Even when working offline, forms submitted to your local network will not be archived as long as you are connected to the network. Forms submitted to your own computer will also not be archived. When you work offline, the Viewer archives any forms submitted to an inaccessible destination.

Archiving a Form

Once your Viewer is set up to work offline, you can fill in forms and submit them as you normally would.

1. Open and complete a form as you normally would.
2. If you have not yet set the Viewer preferences to work offline, do so now (see page 13) and return to your form.
3. Submit the form by clicking the **Submit** or submit-type button. If you are emailing the form, click **Mail Form** , complete and send the message (see page 64).
4. A **Thank You** dialog box opens.



5. Click **OK** to return to your form.

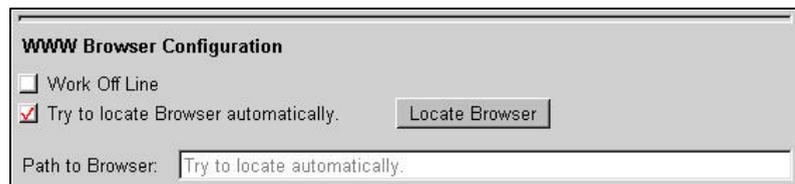
Queued forms are stored in a directory called Archive inside your Viewer program directory. The first form you queued is stored in a “wrapper form” called Archive.xfd, the second is in Archive2.xfd, the third is called Archive3.xfd, and so on. Once your forms are submitted, you can close the Viewer and even shut off your computer. The Viewer will keep your queued forms until you decide to submit them.

Submitting Queued Forms

When you are ready to submit forms that are queued in the Viewer's Archive folder, you must clear the **Work Offline** preference setting.

To reset the Viewer's preferences:

1. On the Viewer's toolbar, click **Preferences** .
 - The Preferences form opens at the Basic page.
2. Clear the **Work Off Line** check box.



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

You are now ready to submit any previously queued archived forms. You can do this in a number of ways. For example, you can submit archived forms by opening one of the queued wrapper forms stored in the Viewer's Archive folder and submitting it individually.

Alternatively, you can submit all the queued forms at once by opening a new form and submitting it. This occurs because when you submit a form, the Viewer displays a reminder dialog box if the following two conditions are in effect:

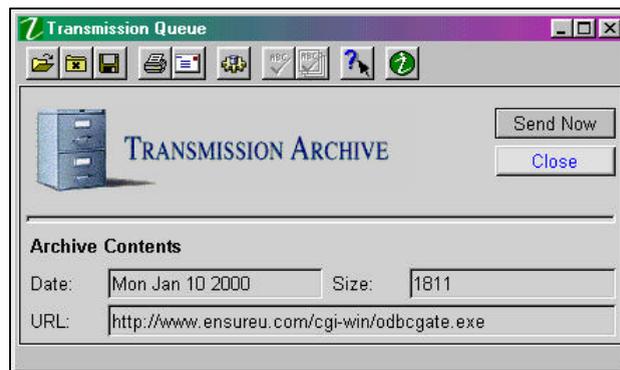
- The Viewer is set to work online
- There are queued forms in the Archive folder

To submit an individual form:

1. 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.

2. Open the **Archive** folder located in the Viewer directory.
3. Open the **Archive.xfd** (or, **Archive#.xfd**) form.
 - A **Transmission Queue** form opens, as shown below. 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.

While working offline, you may have submitted several forms that the Viewer has queued in the Archive folder. Once the Viewer is online again, you can submit these forms all at once using the following procedure:

1. Open a form, and set the Viewer preferences to work online.
2. On the open form, click **Submit** or the submit-type button. Alternatively, you can click **Mail Form**  to email the form. For more information on mailing forms, see the section on "Emailing Forms" beginning on page 64.
 - A **Transmission Queue** dialog box opens.



3. To send the queued forms, click **Yes**.

- This submits all the queued Archive forms along with the current form.

If you click **No**, the Viewer only submits the current form. The Viewer will display the preceding message whenever you submit forms and:

- the Viewer is set to work online
 - there are queued forms in the Archive folder
- The Viewer sends submitted forms to the network destination (URL) that is built into the form. Forms that are sent via email are sent to the email addresses you provided.

Using Signatures

The Viewer supports the use of digital signatures. Digital signatures enhance the security of your forms by preventing unauthorized access to the information they contain. This section introduces digital signatures in general and explains how to use them with the Viewer and InternetForms.

About Digital Signatures

The answer to the following frequently asked questions will help you understand how digital signatures protect your forms.

What is a digital signature?

A digital signature is a unique digital code that is appended to a document for security purposes. Just like a regular signature, a digital signature identifies the sender and authenticates the data. If someone tries to tamper with a digitally signed document, the signature “breaks”. All subsequent users of the document are aware that the document has been altered.

What is a digital certificate?

A digital certificate, sometimes called a digital ID, enables you to digitally sign electronic documents. Essentially, the certificate provides proof of your identity. You can only obtain a digital certificate from an authorized organization called a Certificate Authority (CA).

Are there different types of digital signatures?

There are several different types of digital signatures. The standard type, however, is the RSA signature. It can be used with most browsers and is built into both Microsoft Internet Explorer and Netscape Navigator. For the purposes of this document, RSA signatures will be referred to as Microsoft or Netscape signatures, depending upon the browser with whom the signature is being used. Two other examples are Pen-Op and Entrust signatures.

What does it mean when I digitally sign a form?

Digitally signing a form is just like physically signing a form. You are authorizing the form by attaching your “signature” to it. In this case, however, your signature is stored

electronically within the form, and is in fact more difficult to forge than a written signature.

What do digital signatures mean for Internet business systems?

Digital signatures remove the need for business forms to be printed so that they can be authorized. This results in savings in the total cost of ownership for forms-based business systems. Since forms can remain digital throughout their lifetimes, they can be filled in, processed, and archived on the computer.

Where can I learn more about digital signatures and certificates?

Several web sites provide detailed information on issues pertaining to 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/
- www.penop.com/

What signature types do InternetForms support?

Currently, the following signature types are supported:

- Microsoft
- Netscape
- PenOp
- Entrust

What You Need to Use Digital Signatures with InternetForms

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

- If you are using standard RSA signatures, you will need either Microsoft Internet Explorer version 4.0 or greater or Netscape Navigator/Communicator 4.0 or greater.

- If you are using PenOp or Entrust signatures, you will need digital signature software associated with either PenOp or Entrust type signatures, as appropriate.

Note For the purposes of this document, RSA signatures will be referred to by the name of the browser with which they are used. For example, if the RSA signature is being used in Netscape Navigator, it will be referred to as a Netscape signature.

- Your own digital certificate, for signing forms.

If you do not have a digital certificate, see the sections on “Obtaining and Using Netscape and Microsoft Digital Signatures” on page 83, “Signing Forms with PenOp Signatures” on page 87, or “Obtaining and Setting Up an Entrust Signature” on page 90, according to the type of signature you plan to use.

- The following files, for either signing or verifying:

for using signatures of type:	you will need to install:
Microsoft	DS_capi.ifx
Netscape	DS_Netscape.ifx
PenOp	DS_penop.ifx
Entrust	DS_Entrust.ifx

These files must be located in the following folder on your computer:

Windows\System(32)\I fs\44\System

If you do not have these files, contact our Service and Support department at **support@PureEdge.com**.

- InternetForms Viewer version 4.1 or greater. InternetForms Viewer 4.0 is only compatible with Microsoft signatures.

Obtaining and Using Netscape and Microsoft Digital Signatures

In order to sign a form, you must have your own digital certificate. You can obtain a trial certificate from several sites on the Internet. The following instructions explain how to obtain a trial certificate from VeriSign. You will need access to the Internet and a valid email address.

1. Open Internet Explorer or Netscape Navigator, and go to: **www.verisign.com**.
2. From VeriSign's home page, go to the products page and click the link to **Individual certificates for email**.
3. At the "Digital ID Center", click the link to **Try a Digital ID FREE for 60 days**.
4. Click the link for a **Class 1 Digital ID**.
 - Complete Verisign's enrollment process by following the instructions provided.
5. Check your email Inbox for a message from VeriSign. This message contains your digital ID PIN, which is necessary to install your certificate into your browser.

Installing Your Certificate

To install your certificate, follow the instructions provided by Verisign in the email message.

Using Certificates with Enhanced Security

If you are in Canada or the United States and want to use enhanced security certificates that contain 1024-bit key pairs, then you need to either:

- Obtain your certificate using the 128-bit version of Microsoft Internet Explorer, which includes the Microsoft Enhanced CSP that does 1024-bit signatures, or
- Obtain a class 2 Netscape certificate.

Obtaining the 128-bit Version of Internet Explorer

You can either upgrade your existing browser or download the 128-bit version. Both pieces of software are available from Microsoft by going to:

www.microsoft.com/ie/download

and clicking the **Internet Explorer 128-bit** link.

Security Restrictions and Digital Signatures

Due to U.S. government regulations, you may only download the 128-bit Internet Explorer on a computer that is located within Canada or the U.S. Certain residency and citizenship rules apply. Similar restrictions exist for security-enhanced Netscape products. Check for details at the Microsoft and Netscape web sites. The export restrictions on security products also apply to the DS_Netscape.ifx file. You may not use this file outside of North America.

Upgrading Netscape and Configuring Your Signature Preferences

If you've recently upgraded your Netscape browser, you may find that you are unable to use your Netscape signature to sign forms. This problem occurs when a newer version of Netscape is installed. Netscape itself keeps track of the location of your certificates, but stores the location internally, so it is unavailable to other programs, such as the Viewer.

To enable your Viewer to find your certificate, you will have to determine the correct file path and change your Viewer preferences accordingly. To locate your certificate, use Window's Find or Search tool to conduct a search for cert*.db.

Updating the Viewer Preferences

1. Open any form in the Viewer.
2. On the Viewer toolbar, click the **Preferences** button .
3. Click **Advanced**.
4. In the **Security Profile** field, type the file path (including the file name) of your Netscape certificate.
5. Save the preferences and close the form.
 - You must restart the Viewer (that is, close the form you have open, and reopen it) before the change will take effect. The changes are stored in a file that is only read when the Viewer opens.
6. Open a form containing a digital signature button and test your signature.

- If the Find or Search tool found more than one matching file, you may have to test each one by configuring the preferences for each. If it did not find any matching files, you will need to obtain a new digital signature certificate. To do so, see “Obtaining and Using Netscape and Microsoft Digital Signatures” on page 83.

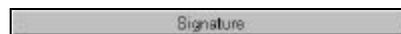
Signing Forms with Netscape or Microsoft Signatures

This section provides instructions for signing with standard RSA signatures using Netscape Navigator or Internet Explorer. If you are using PenOp or Entrust signatures, then you can skip this section.

Note If you did not obtain a certificate according to the steps in “Obtaining and Using Netscape and Microsoft Digital Signatures”, you need to do so before signing the sample form. If you have a digital signature, but are experiencing difficulties using it, check the section on “Obtaining and Using Netscape and Microsoft Digital Signatures “ on page 83.

Signing the Sample Form

1. Open a sample form that contains a signature button.
 - If you do not have one on your computer, you can download one from PureEdge’s documentation web site at <http://docs.PureEdge.com/>. Click the link to **Documentation in XFDL**, and under the **Digital Signature Section** click the link to **sample forms**.
2. If you are using the sample form provided, click the gray button to sign the form; otherwise, click the **Signature** or signature-type button.



- The **Digital Signature Viewer** dialog box appears, informing you that there is no signature associated with the button.



3. Click **Sign**.
 - If you have more than one certificate installed, select the one you want to use and click **OK**.

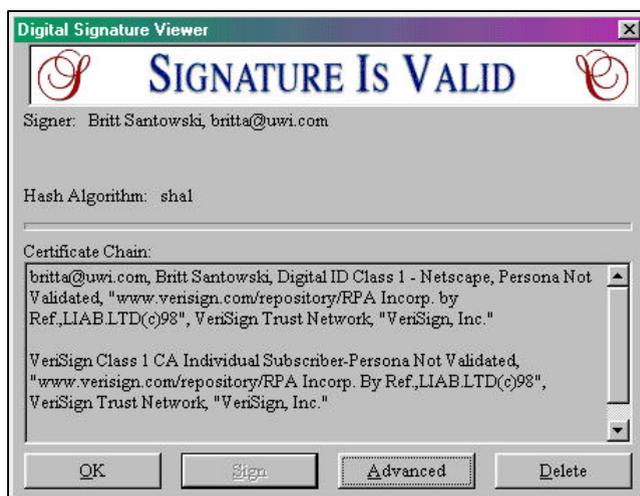


If you have just one signature, the Viewer automatically uses that one.

- If you choose a Netscape signature, you may be asked to enter a password for your certificate's database.



4. Enter your password and click **OK**.
 - The **Digital Signature Viewer** dialog box reappears, and indicates that the signature is valid:

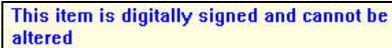


5. Click **OK**.
 - You are returned to your form. The signature button now lists your name and email address, indicating that you have signed the form:



Britt Santowski, britta@uw.edu

- When you position your cursor over a signed item, the following warning window will appear just below the cursor:



This item is digitally signed and cannot be altered

Some Additional Notes

When signing a form in Internet Explorer under Windows 95/98, you may find that all of the digital certificates on the computer are listed as being available, regardless of which user is trying to sign. To change it so that only the current user's certificates are listed when signing a form:

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.

Signing Forms with PenOp Signatures

This section explains how to use PenOp digital signatures with InternetForms. If you use another type of digital signature, you can skip this section.

About PenOp Digital Signatures

A PenOp digital signature works much like other digital signatures except it also associates your handwritten signature – the same one you use to sign paper forms – to the document. If someone tries to tamper with the signed document, the signature breaks, alerting subsequent users that the form has been altered.

What You Need to Use PenOp Digital Signatures with InternetForms

To sign InternetForms with PenOp signatures, or to verify documents signed with PenOp signatures, you must install the following software and hardware on your computer:

- PenOp digital signature software (from PenOp, Inc.) and a PenOp Sign License.
- An electronic pen/pad device, with the appropriate drivers.
- InternetForms Viewer version 4.1 or greater.
- The file **DS_penop.ifx** in your Windows\System\ifs\system\44\ directory. If you do not have this file, contact PureEdge's Support department at: **support@PureEdge.com**.

Signing a Form

This section will help you get started signing forms with your PenOp signature. The form you are signing must be designed to work with PenOp signatures. You can obtain a sample form from PureEdge's documentation web site at <http://docs.PureEdge.com/> Click **Documentation in XFDL**, and under the **Digital Signature Section** click **sample forms**.

To sign a form with a PenOp signature, follow this procedure:

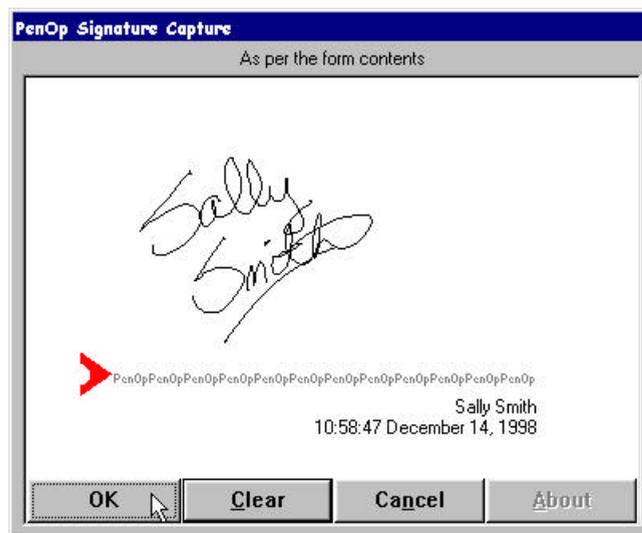
1. Open the sample form that contains a signature button for PenOp signatures (sigsampo.frm).
2. Click the signature button.
 - The **Digital Signature Viewer** dialog box appears, indicating that there is no attached signature, as shown below.



3. Click **Sign**.
 - The **Signature Identification** dialog box appears:



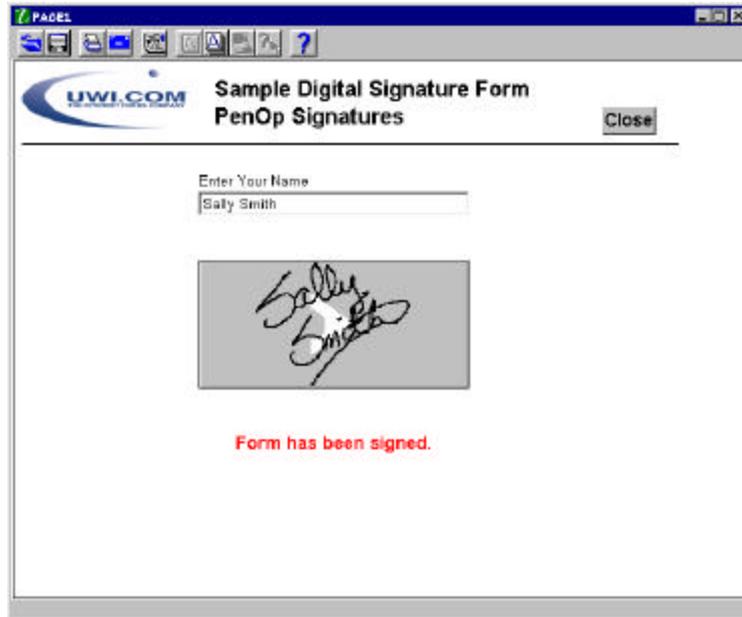
4. Enter your name and click **OK**.
 - The **PenOp Signature Capture** dialog box appears.
5. Using the electronic pen/pad device, write your signature.



6. When you have finished, click **OK**.
 - The **Digital Signature Viewer** appears, showing information about the signature:



7. Click **OK** to return to the sample form.
 - The image of your signature appears within the signature button.



- If you are not satisfied with the appearance of your handwritten signature, click the signature button to start again. Since using the pen/pad device takes some practice, you may need to try a number of times. Make sure that your signature is not too large or too small.

Signing Forms with Entrust Signatures

This section describes how to use Entrust signatures with InternetForms. If you are not going to use Entrust signatures, you can skip this section.

Obtaining and Setting Up an Entrust Signature

To use Entrust signatures with InternetForms, you must:

- Obtain single-user logon signature software from Entrust Technologies, Ltd., install it on your computer, and set up your profile according to the manufacturer's directions.

- Be sure that the file DS_Entrust.ifx is installed in your computer's Windows\System\ifs\system\44\ directory. (If you do not have this file, contact PureEdge's Service and Support department at: support@PureEdge.com.)

Using Your Entrust Signature with InternetForms

Once your Entrust signature is set up, you can use it to sign forms that are designed to support Entrust signatures.

You can find a sample Entrust signature form at PureEdge's documentation website at <http://docs.PureEdge.com/xflddocs/>

Signing a Form with an Entrust Signature

1. Open the sample form (sigsamentrs.frm) in the Viewer.
2. Type your name in the name field.
3. Click the gray signature button.
 - The **Entrust Login** dialog box appears.



4. Select a profile and enter your password. If your profile name does not appear, click **Browse** to find it. Click **OK**.
 - The **Digital Signature Viewer** appears, confirming that the signature is valid



5. Click **OK** to continue.

Note This procedure for signing forms using Entrust signatures is not the same as signing a document using the Entrust options in the right-click menu in Windows. InternetForms signature buttons are specially configured to allow the forms to be viewed and sometimes resubmitted, even after they have been signed. Signing a form using the Entrust right-click option in Windows will disable these special features.

Signing Forms with a Smart Card

A smart card is a small, portable electronic card that can be used to store a variety of digital information. If it contains a digital certificate, you can use it to sign documents with it.

Essentially, signing forms with a smart card is similar to signing forms with a certificate on your computer. However, the computer must be connected to a suitable smart card reader.

To sign forms with your smart card, you will need to:

1. Connect the smart card reader to your computer
2. Install the manufacturer's software for the smart card reader
3. Insert the smart card containing your digital certificate in the reader

4. Follow the instructions appropriate to the type of certificate that is on your smart card. For example, if you are using a Microsoft signature, follow the instructions in “Obtaining and Using Netscape and Microsoft Digital Signatures” on page 85.

Checking Signatures

If you receive digitally signed forms from coworkers or colleagues, you may want to verify that the signatures are authentic and that the form has not been altered. This section describes how to check signatures. The procedure is essentially the same for all digital signature types.

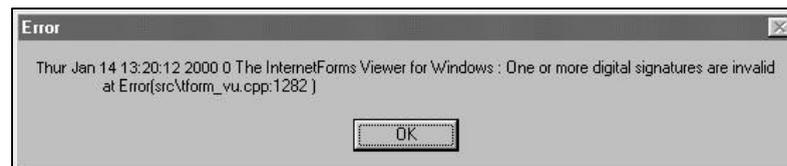
What You Need to Check Digital Signatures

To check a digital signature, the .ifx file that corresponds to the signature type must be installed on your computer. For a list of these files, see the section on “What You Need to Use Digital Signatures” on page 81.

Note As both Netscape and Microsoft use standard RSA signatures, the signatures are cross-verifiable. For example, if you have the Netscape .ifx file on your computer, you will be able to check both the Netscape and Microsoft certificates, and vice versa.

Checking a Digital Signature

When you open a signed form that has been tampered with, you will see the following warning:

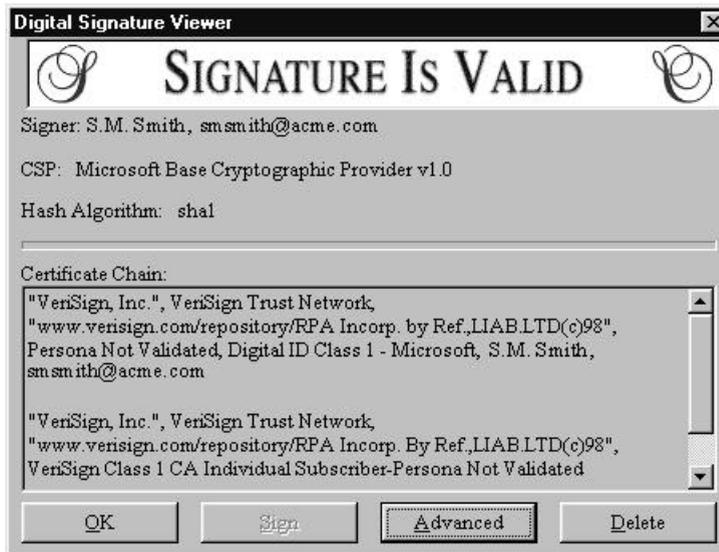


Essentially, the message advises you that at least some part of the form or its contents has changed since it was signed. You should assume that the form is not reliable.

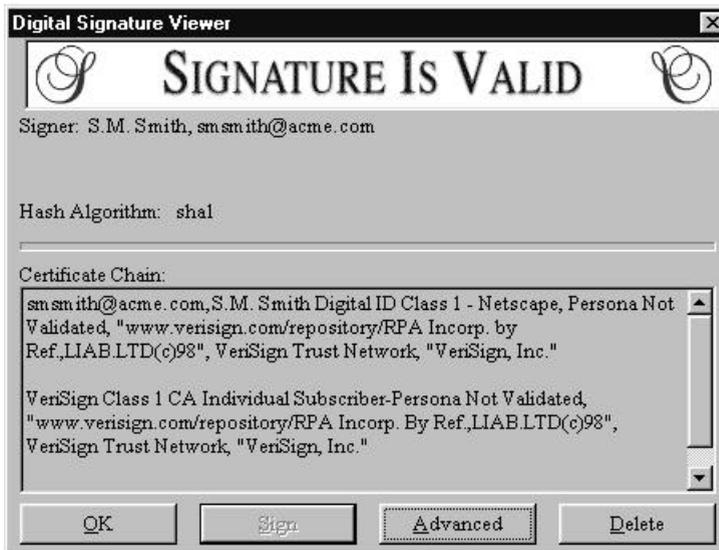
The form will still open, however. When it does, you will see that the digital signature button does not contain the signer's name (Netscape, Microsoft, or Entrust signature types) or the signer's signature (PenOp type). If it is a text-based signature, the digital signature button will contain the word “INVALID”. If it is a PenOp signature, the form an “invalid signature” image will appear.

If the form has not been tampered with, the signatures remain intact. You can click on the signature button to get information about the signer and the signature. You can use this information to verify the signer's identity through the certificate authority.

The information provided by the **Digital Signature Viewer** dialog box varies depending on the signature type. Here is the information that appears for a Microsoft signature:



The following diagram shows the information that appears for a Netscape signature:



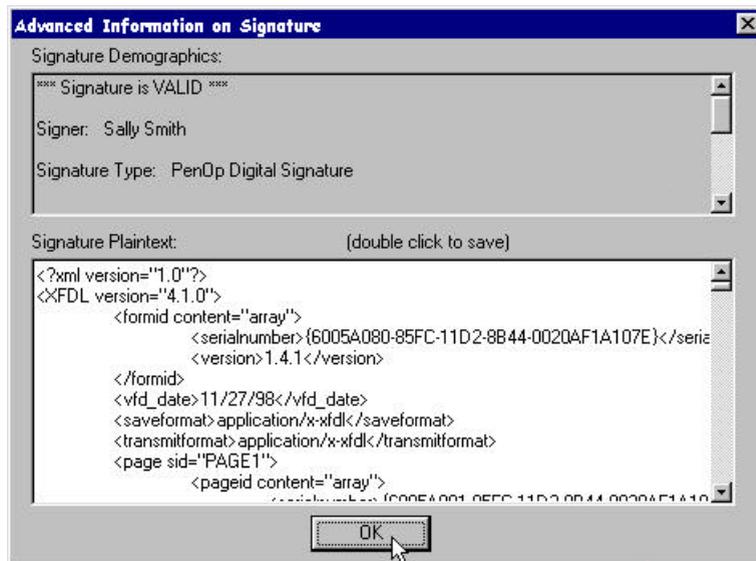
This diagram shows the information for a PenOp signature:



This following diagram shows the information that appears for an Entrust signature:



Each dialog box provides an **Advanced** button. The **Advanced Information on Signature** dialog box, shown below, provides similar information in each case:



You can double click on the text of the source code to save it in another file.

Deleting Signatures

To delete a signature from a form that has been signed:

1. Click the signature button.
2. Click **Delete**.

The signature will be removed, and you can alter the form as you wish. The form can be resigned at any time.

Troubleshooting

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

Lines are missing from my printout.

A small number of old printers have trouble when the ratio of printer dots to screen dots is not an integer. The logical screen dpi used by the Viewer is 120, so the typical example is an older, non-postscript 300 dpi printer that uses $300/120=2.5$ printer dots per screen dot. The main symptom is missing layout lines in a form printout. If this happens to you, open the **Preferences form**, select the **Print Option Preferences**, and under **Miscellaneous Options** turn on the **Integral printer dot to screen dot ratio** option. This causes the Viewer to print the form as large as possible while still maintaining an integral printer dot-to-screen ratio. See page 19 for more information.

I cannot submit my form using Netscape Navigator

When you submit forms using Netscape Navigator, the Viewer uses Netscape's web communications library. If you are unable to submit forms using Netscape Navigator, try setting the Viewer to use its own web communications library. To do this, open the **Preferences form**, select **Advanced**, and click **Override Netscape Socket**. Use this option only if you have problems submitting forms using Netscape. This option is not available in all installations of the Viewer. See the section on "Setting Advanced Options" beginning on page 23 for more information.

I cannot submit my form using Internet Explorer

When you submit forms using Internet Explorer, the Viewer uses Internet Explorer's web communications library. If you are unable to submit forms using Internet Explorer, try setting the Viewer to use its own web communications library. To do this, open the **Preferences form**, select **Advanced**, and click **Override Internet Explorer Socket**. Use this option only if you have problems submitting forms using Internet Explorer. This option is not available in all installations of the Viewer. See the section on "Setting Advanced Options" beginning on page 23 for more information.

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 (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 44 for more information.

My Viewer does not have the Check Spelling buttons.

If the Check Spelling buttons do not appear on your Viewer, it could be that you are missing an .ifx file. This might happen if you downloaded a "light" or "thin" version of the Viewer installer. Contact support@PureEdge.com for assistance.

The date field will not accept the date I enter.

To ensure a date is readable by the viewer, the month must proceed the day when you are beginning with the year. For example, entering 00 01 23 (or, 2000 January 23) and tabbing out might return 23rd January 2000 (depending on the form's default design), whereas entering 00 23 01 results in an error. If you enter a numeric date where the month day and year are all less than 12, the Viewer will read the date as month, day, and year. For example, entering 01 02 03 might return 2nd January 2003. Once you tab out of the completed date field, the form converts a readable date into its designed format. 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 inserts the current date into that field. See page 17 for more information.

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 42 for more information.

When I submit a form, I get a dialog box informing me that An Error Has Occurred.

If the email address entered into the Mail To form is incorrect (your email provider cannot locate the destination), an error dialog box opens:



Check the details of the error by clicking **Details>>**.

If you are mailing the form by email, it may be that you have made a typing error in entering the address. Recheck the Send To address and try again. If you are submitting the form using a Submit or submit-type button and you receive this error, check with your servers System Administrator to ensure the server is working correctly. If so, it could be that the form is old and was designed with a now out-dated or obsolete URL address. Try emailing the form if this is the case.

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. For instance, a .pdf file – if you have the appropriate browser plugin – will open on a browser using the Acrobat plugin. When the attached file is not compatible with the display format or plugins of your browser, the Viewer will then attempt to access your computers default program for that file type. For instance, a .doc file – if you have the appropriate software – will open in Word.

Multimedia files can appear as a broken images on your browser when your browser does not have a compatible plugin to view that file type and that browser is set to respond by showing a broken image window.

To correct this, note the location of the file (on the browsers address line) and use Windows Explorer to open that file directly. If the file still does not open, then it might be that you do not have the appropriate software.

If this happens with an image file, it could be that you are missing an .ifx file. This might happen if you downloaded a “light” or “thin” version of the Viewer installer. Contact support@PureEdge.com for assistance.

I keep getting an error message when I try to sign my form.

You might not have the proper ifx files, which can happen if you install any program other than the “full” installation. The “full” installation places signature “.ifx” files on your computer, which you use for signing and verifying signatures The **DS_capi.ifx**, **DS_Netscape.ifx**, **DS_penop.ifx**, and **DS_Entrust.ifx** files should be located in your Windows\System\ifs\43\ folder. The “full” installation also places a **DefaultSigningCeremony.ifx** in the Viewer’s **Extensions** folder. If you are missing any ifx folders, contact support@PureEdge.com.

Glossary

archive	<p>(1) A disk, tape, or directory that contains files that have been backed up.</p> <p>(2) A file that contains one or more files in a compressed format.</p>
browser	<p>A browser is an application program that provides a way to look at and interact with all the information on the World Wide Web.</p>
button	<p>An InternetForm button is a GUI device that allows the user to perform a particular task within the application. Buttons are activated by clicking them. Examples of tasks commonly controlled by buttons are: saving, printing, canceling, submitting, or signing a form. A button usually has descriptive text or an image on its face to indicate the action it performs.</p>
Certificate Authority (CA)	<p>A Certificate Authority (CA) is a recognized organization that issues and manages security credentials and public keys for message encryption and decryption. As part of a Public Key Infrastructure (PKI), a CA checks with a Registration Authority (RA) to verify information provided by the requestor of a digital certificate. If the RA verifies the requestors information, the CA can then issue a certificate.</p>
checkbox	<p>An InternetForms checkbox is a GUI item that is clicked by the user to indicate the selection of a choice. When a checkbox is selected, a check mark will appear in it.</p>
combobox	<p>An InternetForms combobox is a GUI element that combines the features of a popup list with a field. It allows the user to make a choice by selecting from a list of items or by typing the desired value.</p>
context sensitive	<p>Refers to a program feature that changes depending on what you are doing in the program. For example, context -sensitive help provides documentation for the particular feature that you are in the process of using.</p>

default

(1) In computer technology, a default (noun) is a predefined value or setting that is used by a computer program when a value or setting is not specified by the program user.

(2) Default (adjective) pertains to something that is used when something else is not supplied or specified. For example, a default printer is a type of printer that is assumed to be connected to a computer unless the computer user specifies that another type is actually connected.

Designer

InternetForms Designer, the first visual XML form creation tool, provides an easy-to-use interface for creating sophisticated InternetForms, wizards for database queries, and an editor for hand-coding XFDL.

dialog box

A box that appears on a display screen to present information or request input. Typically, dialog boxes are temporary – they disappear once you've entered the requested information.

digital certificate

A digital certificate is an electronic "credit card" that establishes your credentials when doing business or other transactions on the Web. It contains your name, a serial number, expiration dates, a copy of the certificate holders public key (used for encrypting and decrypting messages and digital signatures), and the digital signature of the certificate-issuing authority so that a recipient can verify that the certificate is real. Digital certificates can be kept in registries so that authenticated users can look up other users public keys. See public keys.

digital signature

A digital signature is generated by a digital certificate. Once something is signed, the signature can be used to authenticate the identity of the sender of a message or of the signer of a document. It can also be used to ensure that the original content of the message or document that has been conveyed is unchanged.

directory	A special kind of file used to organize other files into a hierarchical structure. Directories contain bookkeeping information about files that are within them. You can think of a directory as a folder or cabinet that contains files and perhaps other folders. In fact, many graphical user interfaces use the term folder instead of directory.
dpi	Dots Per Inch (dpi) indicates the resolution of images. The more dots per inch, the higher the resolution.
e-mail	E-mail (electronic mail) is the exchange of computer-stored messages by telecommunication. E-mail is one of the protocols included with the Transport Control Protocol/Internet Protocol (TCP/IP) suite of protocols. A popular protocol for sending e-mail is SMTP and a popular protocol for receiving it is POP3.
attachment	InternetForms terminology for files or documents that are attached within or added to a form. Form attachments serve the same function as e-mail attachments.
encryption	A method of protecting digital documents from unauthorized access by “scrambling” their contents using complex algorithms.
Entrust signatures	Digital signatures offered by Entrust Technologies. Entrust has developed its own encryption processes and does not use the standard RSA technology.
export	The formatting of data so that it can be used by another application. An application that exports data can create a file in a format that another application understands, enabling the two programs to share the same data.

extension	In computer operating systems, a file name extension is an optional addition to the file name in a suffix of the form “.xxx” where “xxx” represents a limited number of alphanumeric characters depending on the operating system. The file name extension allows a files format to be described as part of its name so that users can quickly understand the type of file it is without having to “open” or try to use it. The file name extension also helps an application program recognize whether a file is a type that it can work with. There are several filename extensions that can be used with InternetForms files. The default extension is .xfd. Other supported filenames are .frm, .xfd, .ufd and .ufdl.
extract	In InternetForms terminology, extracting an attachment means to copy a file that is attached within a form and save that file to disk.
field	An InternetForms field is a GUI element in which a user can type and edit text. This input text is then available for processing by the form.
form	See InternetForm.
GUI	A Graphical User Interface (GUI) to a computer. A GUI sometimes uses one or more metaphors for objects familiar in real life, such as the desktop, the view through a window, or the physical layout in a building. Elements of a GUI include such things as: windows, pull-down menus, buttons, scroll bars, buttons, images, wizards, the mouse, and no doubt many things that haven’t been invented yet.
HTML	Short for Hyper Text Markup Language (HTML), the authoring language used to create web pages.
button	<p>(1) In a computers graphical user interface (GUI), a button is an image that represents an application, a capability, or some other concept or specific entity with meaning for the user.</p> <p>(2) On a Web page, a button is often a graphical image that represents the topic or information category of another Web page. Frequently, the button is a hypertext link to that page.</p>
identity filter	An identity filter filters out unwanted signing certificates, preventing them from appearing when the user is presented with a list of signing identities.

IMAP	Internet Message Access Protocol (IMAP) is a standard protocol for accessing e-mail from your local server. IMAP is a client/server protocol in which e-mail is received and held for you by your Internet server. IMAP requires continual access to the server during the time that you are working with your mail.
import	Importing refers to the ability of an application to receive and use data produced by a different application. When importing data the receiving application reformats the data received from another application.
InternetForms	An InternetForm is an electronic version of a paper-based form. It is used to collect, record, and present information and is easily transmitted over the Internet. It is viewed, filled out, and edited using the InternetForms Viewer. InternetForms also include additional features that do not exist in the paper versions, such as data validation, context sensitive help, and spell-checking.
InternetForms Commerce System	ICS is a powerful suite of forms software. It includes InternetForms Viewer, InternetForms Designer and InternetForms Link, which enable the user to create and view InternetForms as well as link the forms to databases.
label	An InternetForms label is the GUI element used to display text and images on a form. Labels cannot be edited by the user of the form – they appear as fixed components of the form, such as titles, headings, captions, and instructions.
Link	InternetForms Link is a light, low-development application that allows users to store and retrieve data and legally-binding forms from ODBC-compliant databases on your server or desktop. Link provides a graphical Wizard interface for form design professionals.
MAPI	A Messaging Application Programming Interface (MAPI), is a system built into Microsoft Windows that enables different e-mail applications to work together to distribute mail. As long as two applications are MAPI enabled, they can share mail messages with each other.

MIME	A Multipurpose Internet Mail Extension, is a specification for formatting non-ASCII messages so that they can be sent over the Internet
offline	Not connected to the Internet. Offline is the opposite of online.
online	(1) involving a computer (but not necessarily networked) – as opposed to doing something by hand or on paper (2) involving a network – as opposed to a stand-alone computer (3) being connected to or participating in a network (4) connected to the Internet.
PenOp signatures	Digital signatures offered by PenOp Systems, which allow handwritten signatures to be used to sign forms. PenOp has developed its own encryption processes and does not use the standard RSA technology. Specific hardware and drivers are required.
plug-in	Plug-in applications are programs that can easily be installed and used as part of your web browser. A plug-in application is recognized and used automatically by the browser.
popup list	An InternetForms popup list is a GUI element that enables the user to click or select an option from a list of choices. It differs from a normal list in that the entire list is not visible until it is clicked by the user. Then, the entire list of choices appears or “pops up”.
predictive input checking	Predictive input checking checks input for errors as you type. For example, Microsoft Word allows predictive input checking for spelling and grammar.
preferences	A dialog box that displays options that affect the appearance or the usage of the entire form.
private key	In InternetForms, a private or secret key is an encryption key known only to the user. See public key.

protocol	A protocol is an agreed upon format for transmitting data between two devices, such as computers. A computer must support the same type of protocol as another computer is order to communicate.
public key	<p>A public key is a decryption key that is provided by a designated authority to anyone who needs to decrypt and authenticate a message or digital signature.</p> <p>The use of combined public and private keys is known as asymmetric cryptography. A system for using public keys is called a Public Key Infrastructure (PKI). See private key and digital certificates.</p>
Registration Authority (RA)	A Registration Authority (RA) is an authority in a network that verifies user requests for a digital certificate and tells the certificate authority (CA) to issue it. RAs are part of a public key infrastructure (PKI), a networked system that enables companies and users to exchange information and money safely and securely.
radio button	An InternetForms GUI element that allows the user to select one of several options by clicking a small circle next to the desired choice. Radio buttons are always presented in logical groups of at least two or more. Only one radio button in a group can be selected at any one time.
RSA	A public key encryption technology developed by RSA Data Security, Inc. The RSA algorithm has become the de facto standard for industrial-strength encryption, especially for data sent over the Internet. It is built into many software products, including Netscape Navigator and Microsoft Internet Explorer.
security profile	In InternetForms, a security profile is a users collection of digital signature certificates.
smart cards	A smart card is similar in appearance to a traditional credit card, but stores information, such as digital certificates, on an embedded circuit chip, rather than a traditional magnetic stripe. Specific hardware and drivers are required.

SMTP	A Simple Mail Transfer Protocol (SMTP) is a TCP/IP protocol used to send and receive e-mail. Users typically use a program that uses SMTP for sending e-mail and either POP3 or IMAP for receiving messages that have been received for them at their local server.
socket	A socket is a software object that communicates with another socket. A protocol determines when and what type of socket is created. In Unix, for example, a program can send and receive TCP/IP messages by opening a socket, reading, and writing data to and from the socket.
SSL	A Secure Sockets Layer (SSL) is a program layer used by Netscape and Internet Explorer for managing the security of message transmissions in a network. SSL uses the public-and-private key encryption system from RSA, which also includes the use of a digital certificate.
toolbar	A separate window pane that appears at the top of an InternetForms page. It groups special function buttons for the form.
Viewer	InternetForms Viewer provides a single interface for all users to fill, save, sign, and submit legally-binding XML InternetForms from their web browsers.
wrapper form	In InternetForms, a wrapper form is an archive file that stores files while the user is working offline. The files remain within the archive until the user goes online and sends them.
XFDL	The Extensible Forms Description Language (XFDL) is a high-level computer language created for use with XML forms. By providing non-repudiation, XFDL also makes it possible for such documents to be legally-binding.
XML	The Extensible Markup Language (XML) is a flexible way to create common information formats and share both the format and the data on the World Wide Web, intranets, and elsewhere. XML is “extensible” because, unlike HTML, the markup symbols are unlimited and self-defining. XML is actually a simpler and easier-to-use subset of the Standard Generalized Markup Language (SGML), the standard for how to create a document structure. It is expected that HTML and XML will be used together in many Web applications.

Index

A

about the Viewer, 31

adding and deleting words to dictionary, 47

adjusting color, 24

advanced options, setting, 23

archiving files. *See* working offline

attachments

- adding, 71
- attaching files in forms, 70, 71
- displaying, 75
- saving, 75

audience, 2

B

basic Viewer preferences, 15

browser

- application extension files, 8
- clearing the cache, 35
- plugin, 8

browser configuration, 15

C

cache, clearing the, 35

checking

- field input, 19
- signatures, 96
- spelling automatically, 17
- spelling in all text fields, 31, 46
- spelling in text fields, 30, 44
- spelling options, 55

clearing the web browser cache, 35

closing forms, 30, 61

color, adjusting, 24

configuring email, 66

contacting PureEdge, 12

- by mail, 12
- by phone, 12
- electronically, 12

copying documents. *See* extracting attached documents

copying text, 40

creating new dictionary files, 52

current date function, 43

cutting and pasting text, 40

D

dates

- automatically adding current date, 18, 43

- formatting, 17

- deleting documents. *See* removing attached files

- deleting signatures, 99

- deleting text, 40

- Designer, 4

dictionary

- adding and deleting words, 47

- creating new files, 52

- exporting word lists, 50

- importing word lists, 48

digital signatures, 82

- checking, 96

- deleting, 99

- how to sign with Microsoft signatures, 87

- how to sign with Netscape signatures, 87

- identity filters, 24

- obtaining Microsoft signatures, 85

- obtaining Netscape signatures, 85

- RSA signatures, 82, 84

- security profile, 24

- using Entrust signatures, 93

- using PenOp Signatures, 90

- using Smart Cards, 95

- displaying attached files, 75

documentation

- for other PureEdge products, 12

documents

- as attachments, 70

- attaching, 70

- copying, 70

- deleting, 70

- extracting, 70

- removing, 70

E

- email, configuring, 66

- emailing forms, 30, 68

- entering dates in certain format, 17

Entrust signatures

- signing a form, 94

- software requirements, 94

- using, 93

- error messages, 42
- exporting word lists to dictionary, 50
- extensions, filename, 4
- extracting attached files from forms, 70
- F
- fields
 - checking spelling in, 44
 - error messages, 42
 - input checking, 19
 - invalid, 42
 - moving through, 38
 - numeric, 43
 - optional, 42
 - text, 43
 - using, 42
 - with red background, 42
 - with white background, 42
 - with yellow background, 42
- filename extensions, 4
- files, attached. *See* attached files
- filling out forms
 - keyboard commands, 38
 - filters, identity, 24
 - form title. *See* viewer title bar
 - formatting dates, 17
 - forms
 - as attachments to email, 68
 - attaching files in, 71
 - closing, 30, 61
 - displaying attached files, 75
 - emailing, 30, 68
 - error messages, 42
 - filename extensions, 4
 - filling out, 38
 - opening, 30
 - opening from a web browser, 34
 - opening from an email, 36
 - opening from Windows, 33
 - printing, 30, 63
 - queuing for submission, 78
 - saving, 30, 58
 - saving attached files, 75
 - sending as email attachments, 69
 - sending queued submissions, 79

- sending with email, 68
- submitting, 59
- toolbar icons, 29
- using fields, 42
- working with, 33
- functions
 - current date, 43
- G
- GAMMA correction, 24
- getting help, 11
- H
- help, 31
 - online help, 11
 - tooltips, 11
- I
- ICS. *See* InternetForms Commerce System
- identity filters, 24
- importing word lists to dictionary, 48
- input, checking field input, 19
- installing the Viewer, 6
- InternetForms. *See* Forms
- InternetForms Commerce System (ICS), 4
- InternetForms Designer, 4
- InternetForms Link, 5
- InternetForms Viewer. *See* Viewer
- invalid fields, 42
- K
- keyboard commands, 39
- L
- licensing the Viewer, 7
- Link, 5
- location of installed Viewer files, 8
- M
- mail configuration, 16
- manual, audience for, 2
- Messaging Application Programming Interface (MAPI), enabling, 67
- moving and copying text, 40
- moving through fields, 38
- N
- numeric fields, 43
- O
- off line, working, 77
- online help, 11
- opening forms, 30

- from a web browser, 34
 - from an email, 36
 - from Windows, 33
 - opening the preferences form, 14
 - optional fields, 42
 - options
 - advanced, 23
 - settings for print, 19, 65
 - spelling, 55
 - override
 - Internet Explorer socket, 24
 - Netscape socket, 24
 - P
 - Pen-Op signatures
 - signing a form, 91
 - software requirements, 90
 - using, 90
 - plugin
 - browser, 8
 - predictive input checking. *See* checking field input
 - preferences. *See* Viewer preferences
 - printing forms, 30, 63
 - PureEdge contact information, 7
- Q
- queuing
 - forms for submission, 78
 - sending queued submissions, 79
- R
- red background, fields with, 42
 - registering the Viewer, 7
 - removing documents, 70
 - RSA signatures, 82, 84
- S
- saving attached files, 75
 - saving attachments. *See* saving attached files
 - saving forms, 30, 58
 - security profile, 24
 - sending forms, 68
 - setting
 - advanced options, 23
 - email, 66
 - print options, 19, 65
 - Viewer, 13
 - Viewer preferences, 30

- shortcuts, keyboard, 39
 - signatures. *See* digital signatures
 - signing
 - with Entrust signatures, 94
 - with Microsoft signatures, 87
 - with Netscape signatures, 87
 - with Pen-Op signatures, 91
 - with Smart Cards, 95
 - Simple Mail Transfer Protocol (SMTP), 67
 - Smart Cards
 - hardware requirements, 95
 - software requirements, 95
 - using, 95
 - SMTP. *See* Simple Mail Transfer Protocol
 - spelling
 - checking automatically, 17
 - checking in all text fields, 31
 - checking in all text fields, 46
 - checking in text fields, 30, 44
 - options, 55
 - submitting forms, 59
 - support
 - PureEdge's support web site, 12
 - getting
 - by mail, 12
 - by phone, 12
 - electronically, 12
 - system requirements, 6
- T
- text
 - cutting and pasting, 40
 - deleting, 40
 - fields, 43
 - moving and copying, 40
 - title bar, 28
 - toolbar icons, 29
 - tooltips, 11
- V
- Viewer
 - about, 2, 27, 31
 - as extension for web browsers, 4, 8
 - definition, 4
 - installing, 6
 - overview, 2, 27

-
- purchasing a license, 7
 - purpose, 2
 - registering, 7
 - running, 9
 - running as a browser plugin, 10
 - running as a stand-alone application, 10
 - running with all versions of Windows, 9
 - setting up, 13
 - starting, 9
 - title bar, 28
 - toolbar icons, 29
 - using, 63
 - Viewer form, 31
 - Viewer window, 31
 - where files are installed, 8
 - working offline, 77
 - working online, 15
 - Viewer preferences
 - advanced, 23
 - basic, 15
 - browser configuration, 15
 - checking field input, 19
 - checking spelling, 17
 - date formats, 17
 - emailing, 66
 - mail configuration, 16
 - opening, 14
 - print options, 19, 65
 - setting, 13, 30
 - viewing InternetForms, 4
 - W
 - web browser
 - clearing the cache, 35
 - viewing forms in, 34
 - word lists
 - adding and deleting words, 47
 - creating a new word list, 52
 - exporting, 50
 - importing, 48
 - working offline, 77
 - queuing forms for submission, 78
 - sending queued submissions, 79
 - working online, 15
 - working with forms, 33