



602XML Form Server 2.0

Quickstart Manual

Table of Contents

Table of Contents	2
Introduction	3
Create a form using Print2Form	4
Add form elements with 602XML Designer Express.....	5
New form implementation	8
Fill the new form	10
Analyze data collected from form	11

Introduction

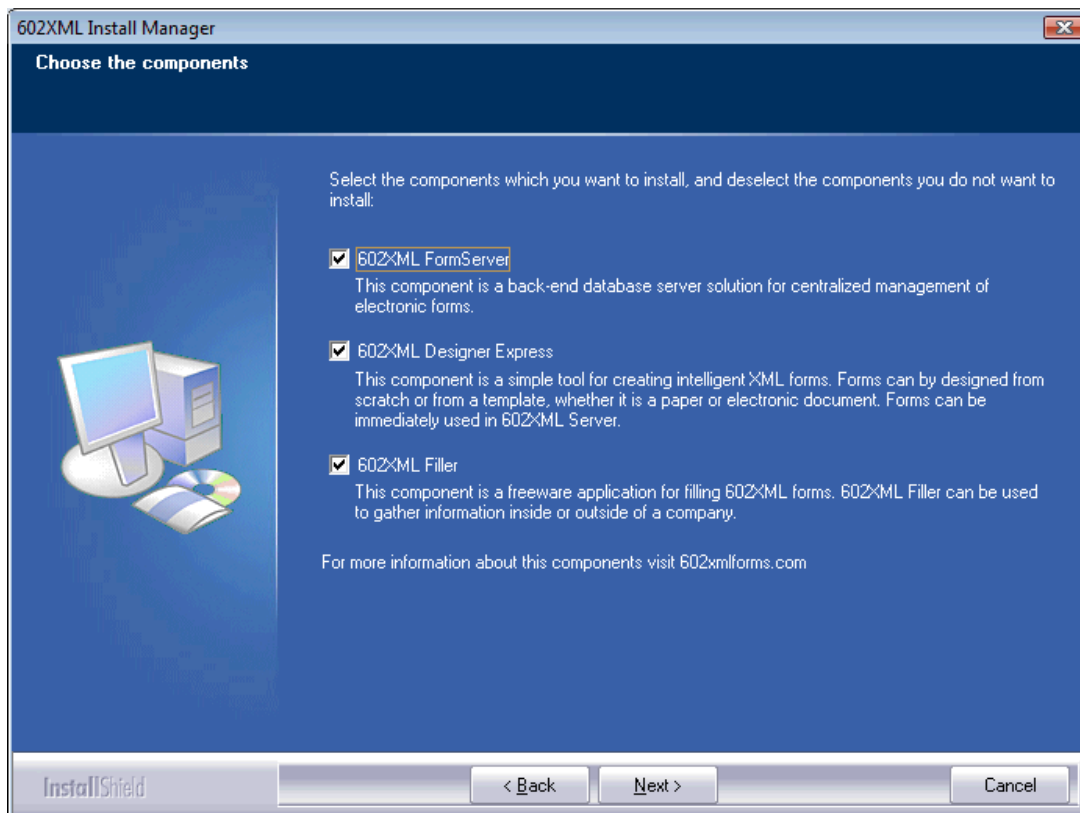
602XML Form Server is a back-end server solution for centralized management of electronic forms. Forms that flow through an organization for approval or data collection bring advantages in significant decrease of human resources and material costs. 602XML Form Server can collect data from anonymous or named users. 602XML Form Server ensures that users always have the most up-to-date version of a form through version management. 602XML brings an inexpensive way to integrate, control and manage information in an organization. The open architecture enables integration with any business process and data interoperability with existing systems.

Components of the 60XML framework:

- **602XML Filler:** Freeware application used to fill 602XML forms.
- **602XML Designer Express:** Freeware application used to quickly design intelligent 602XML forms.
- **602XML Form Server:** Back-end server solution for the centralized management of electronic forms.

Download the 602XML framework from the following URL:

<http://download.software602.com/xmlframework2.exe>

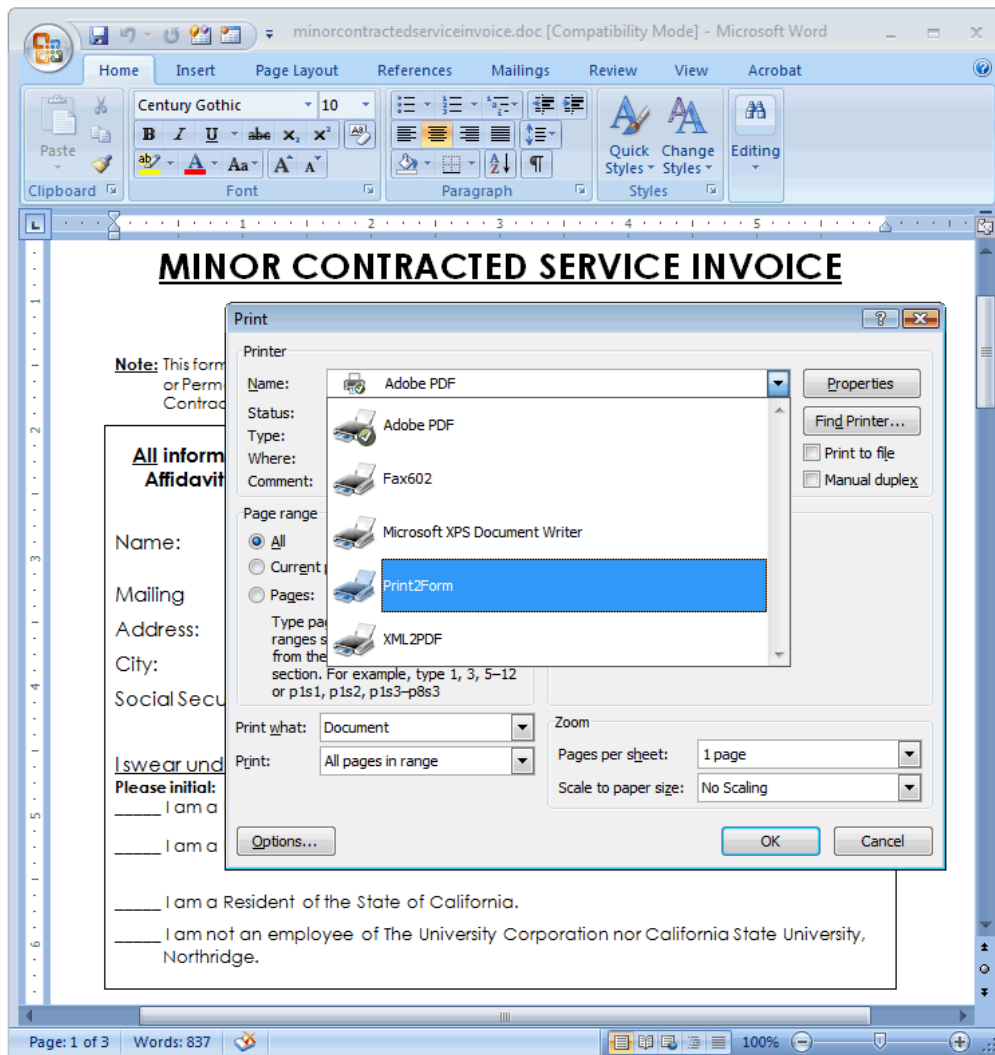


Create a form using Print2Form

602XML Designer Express includes a virtual printer called Print2Form that provides quick and easy conversion of any source document to the .TIFF graphic format which will be used as a background picture for the 602XML form.

The Print2Form printer is installed automatically with 602XML Designer Express. It serves to convert any document formats (.DOC, .PDF, .RTF, .XLS, .ODT, etc. – typical documents from Microsoft ® Office, OpenOffice.org or Adobe) to multipage .TIFF images to create background image for form development.

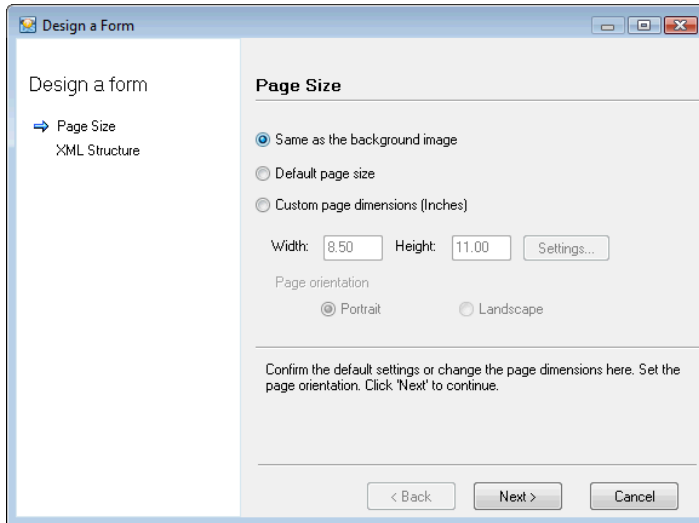
You can set printing properties, DPI resolution, and to choose whether the background will be in color or grayscale, paper orientation and many more. After conversion, 602XML Designer Express will start the **Design a Form** wizard skipping the background image selection dialogue as Print2Form has done this work for you.



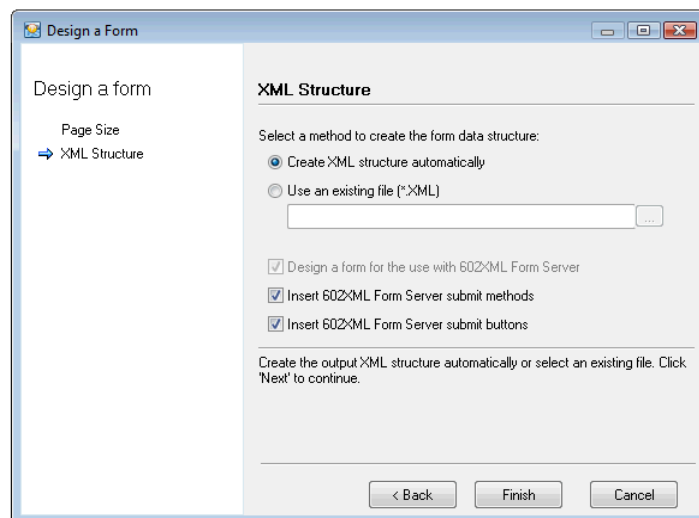
Add form elements with 602XML Designer Express

Once you print a document to the Print2Form printer, 602XML Designer Express will automatically launch the **Design a Form** wizard.

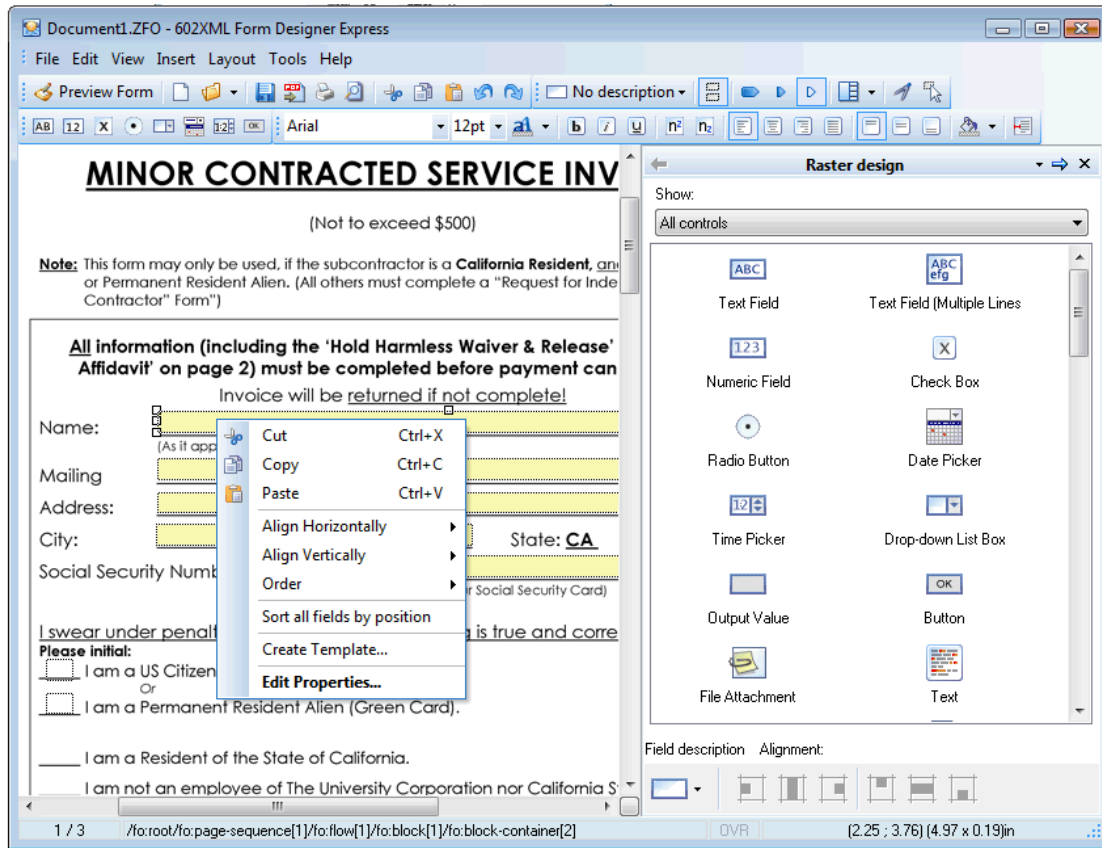
1. This step of the wizard will ask you for the page dimensions. You can either manually specify these values, or select **Same as the background image** to avoid any confusion, then click **Next**.



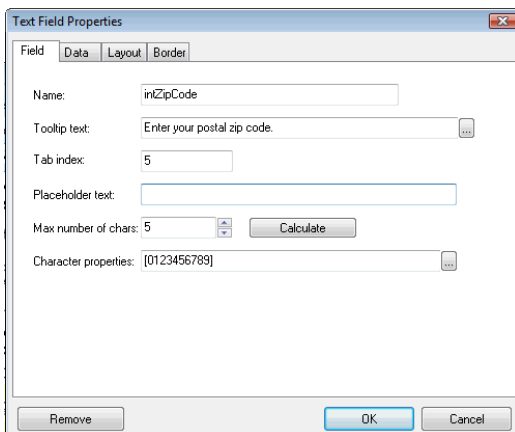
2. Now you can either choose to let the designer create the data structure from the form elements or open an existing XML file that will be used for the structure. Make sure that the **Insert 602XML Form Server submit methods** and **Insert 602XML Form Server Submit buttons** are checked. Click **Finish** to begin working with the form.



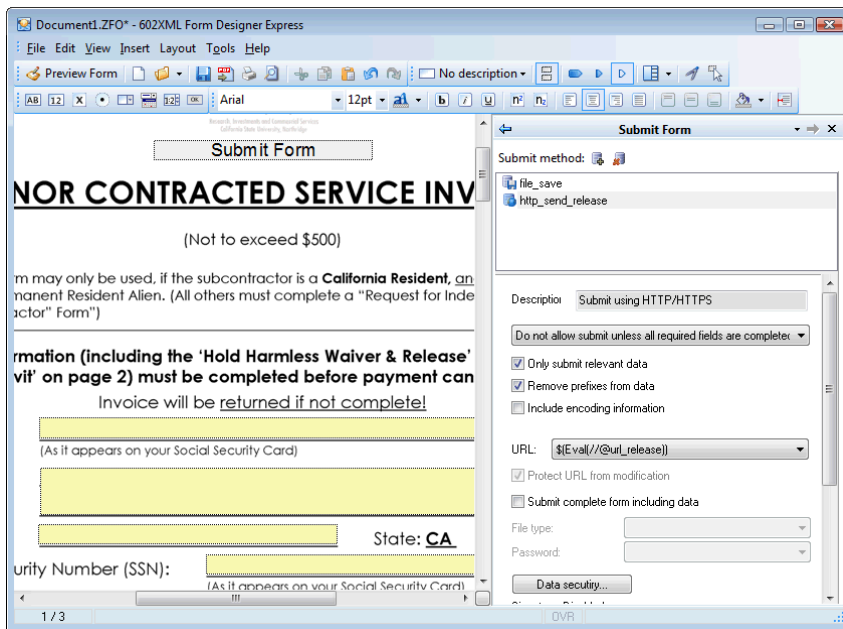
3. Drag and drop form elements onto the form. Click the elements and use the **arrow keys** to align them as you see fit. You can also hold down the **SHIFT** key while pressing the **arrow keys** to fine tune the elements on the page.



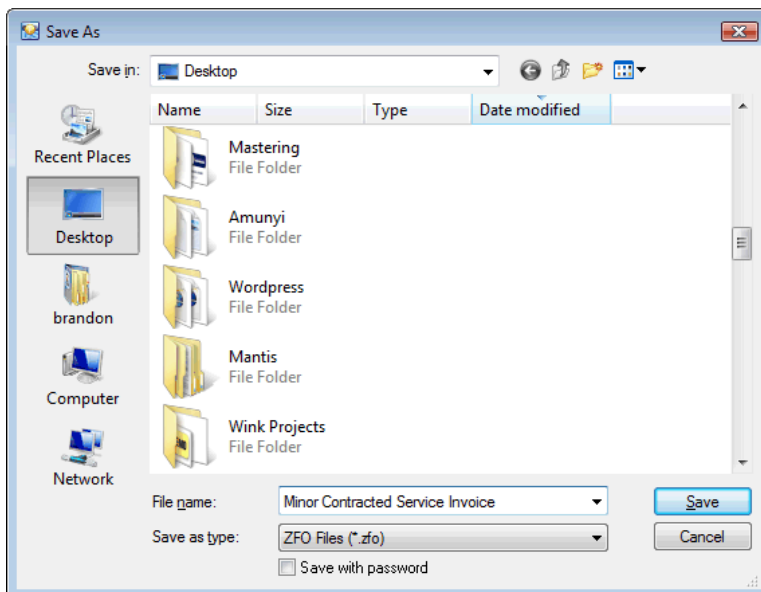
4. Make sure each form element has a unique **Name** (e.g. intZipCode). You can also enter **Tooltip text** that will show for context-sensitive help in 602XML Filler, the **Tab index** will help people navigate the form using the **TAB** key, **Max number of chars** defines the number of characters that can be entered into the element, and the **Character properties** (e.g. [0123456789]) will only allow the digits 0-9 to be entered).



5. Verify the **Submit Form** button at the top of the form. This button should be created automatically and have the action `SendAppEvent (submit, http_send_release)`.



6. When you are finished, make sure you save the form as **.ZFO** and not **.FO**, this will ensure that you are using a compressed (zipped) file format that will yield a smaller file size.



New form implementation

This section will guide you through the process of uploading your new form to the 602XML Form Server and making it ready to begin data acquisition. You will see that it is not difficult and that you do not need any deep programming knowledge.

Every form created in the 602XML Form Server is published by creating a version. Versions have estimated time when to become available and how long it is possible to download them and to collect data. Multiple versions with time management can be used.

- **Default 602XML Form Server URL:** <http://localhost/>
- **Default Administrator login:** admin
- **Default Administrator password:** admin

Follow these steps to upload a new form:

1. Login to the 602XML Form Server as the Administrator.
2. Navigate to the folder you want to publish the form (e.g. Home), and click **Forms Administration**.
3. Now click the **Create Form** sub-tab.
4. In this example we will use our Minor Contracted Service Invoice form. For **Form Code** enter **MCSI1** and for **Form Name** enter **Minor Contracted Service Invoice**.
5. Click **Browse...** and select the .ZFO form to upload.
6. Click **Create Form** to create the form instance in 602XML Form Server.

The screenshot shows the 602XML Form Server administration interface. The top navigation bar includes 'Forms', 'Search', 'Forms Administration', 'Administration', and 'Preferences'. The main content area is titled 'Folder: Home' and contains several sections: 'Form Identification' with fields for 'Form code' (MCSI1) and 'Form name' (Minor Contracted Service Invoice); 'Data Collection' with radio buttons for 'the form will collect data into database tables' (selected) and 'the form will not collect data into database tables'; 'Numbering Scheme Parameters' with a dropdown for 'Number is assigned' (on request to fill in), fields for 'Prefix' (\$YYYY\$MM\$DD\$), 'Suffix' (\$xtName\$), 'Macros in prefix and suffix' (\$YYY\$ four-digit year number, \$YY\$ two-digit year number), 'Number of digits' (6), and 'Start with' (1); and 'Version 1' section with a text box for 'XML form definition' (C:\Users\brandon\Desktop\Document1.ZFO) and a 'Browse...' button. At the bottom, there is a checkbox for 'use advanced installation of the XML form' and a 'Create Form' button.

7. Once the form has been created, you will be taken to the **Versions** area of the form. Click **Version 1** on the left bar, and click **Release**.

- Click **Release the Version** to enable access to this form.

The screenshot shows the 602XML Form Server interface. The top navigation bar includes 'Forms', 'Search', 'Forms Administration', 'Administration', and 'Preferences'. The user is logged in as 'Hello, Administrator'. The left sidebar shows a tree view with 'Form' expanded to 'Version 1', where 'Release' is selected. The main content area is titled 'Release the Version - (MSCI1) Minor Contracted Service Invoice'. It contains a 'Version Summary' section with the following details: Form name: Minor Contracted Service Invoice, Form code: MSCI1, Version number: 1, and Version status: installed. Below this is a 'Release the Version' section with a 'Release the Version' button. The 'Edit Version Availability' section has two dropdown menus for 'Available from' and 'Available to', both set to 'unrestricted'. Each dropdown menu has date and time pickers (2008-05-09 and 16:40:57). A 'Save Changes' button is at the bottom of this section. At the bottom, a 'Versions' table shows one version:

Type	Ver.	Status	Available From	Available To
	1	installed		

- Click the **Forms** tab and you should now see the form available under the **Templates** sub-tab. To fill the form, just click the FO icon.

The screenshot shows the 602XML Form Server interface with the 'Forms' tab selected. The left sidebar shows 'Home' selected under 'Forms In Progress'. The main content area is titled 'Folder: Home'. It has a search filter for 'Filter on Form Code or Name' with 'Apply' and 'Clear Filter' buttons. There is a 'show description' checkbox. Below this are sub-tabs for 'Templates', 'Archive', and 'Work In Progress'. The 'Templates' sub-tab is active, showing a table with one form:

Type	Code	Name
	MSCI1	Minor Contracted Service Invoice

Navigation buttons for '<< Previous', '1', and 'Next >>' are at the bottom.

Fill the new form

Follow these steps to fill a new form:

1. Login to the 602XML Form Server.
2. Navigate to the folder that contains the form.
3. Click the form link to open the form in 602XML Filler.
4. Fill the form as normal, and click the **Submit Form** button when ready.

MCS11[2].zfo - read only - 602XML Form Filler

File Edit View Data Tools Help

602XML Filler 2 602

MINOR CONTRACTED SERVICE INVOICE

(Not to exceed \$500)

Note: This form may only be used, if the subcontractor is a **California Resident**, and a U. S. Citizen or Permanent Resident Alien. (All others must complete a "Request for Independent Contractor" Form")

All information (including the 'Hold Harmless Waiver & Release' and 'Sworn Affidavit' on page 2) must be completed before payment can be made!
Invoice will be returned if not complete!

Name: **Brandon Sturgeon**
(As it appears on your Social Security Card)

Mailing Address: **555 Oak Street**

City: **Beverly Hills** State: **CA** Zip: **90210**

Social Security Number (SSN): **555-55-5555**
(As it appears on your Social Security Card)

I swear under penalty of perjury that the following is true and correct:
Please initial:

I am a US Citizen.
Or
 I am a Permanent Resident Alien (Green Card).

I am a Resident of the State of California.
 I am not an employee of The University Corporation nor California State University, Northridge.

I hereby invoice The University Corporation for the services described as follows:
Lawn service

Form Properties

Identification

Form ID: 1952529922
Date: 5/9/2008

Security

Form has been modified
This form was completely or partially filled out

Fill Out

Help

Enter your social security number.

1 / 3 Enter your social security number. OVR

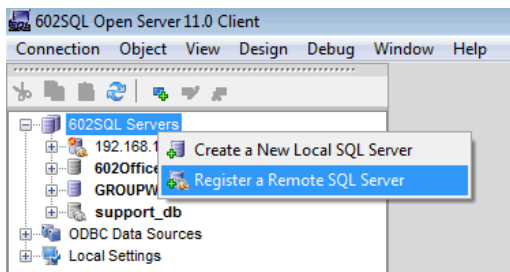
Analyze data collected from form

Once the collected form data has been archived, it will be available for analysis from the database table. With the included 602SQL ODBC driver you will be able to access the data on the server or over a network using TCP/IP.

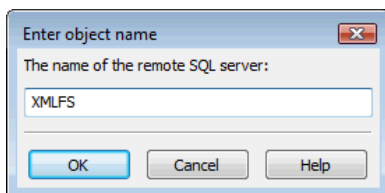
- **Default 602SQL Administrator login:** admin
- **Default 602SQL Administrator password:** fs_admin

Follow these steps to provide ODBC access to the 602SQL Server:

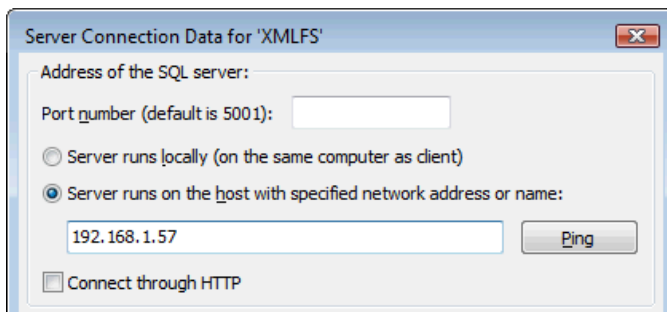
1. Install the 602XML Form Server ODBC driver.
2. Open **Programs - 602SQL - 602SQL Client**.
3. Now you will need to register a remote server. Just right-click the root **602SQL Server** and select **Register a Remote SQL Server**.



4. Enter a name for this remote server (e.g. **XMLFS**).

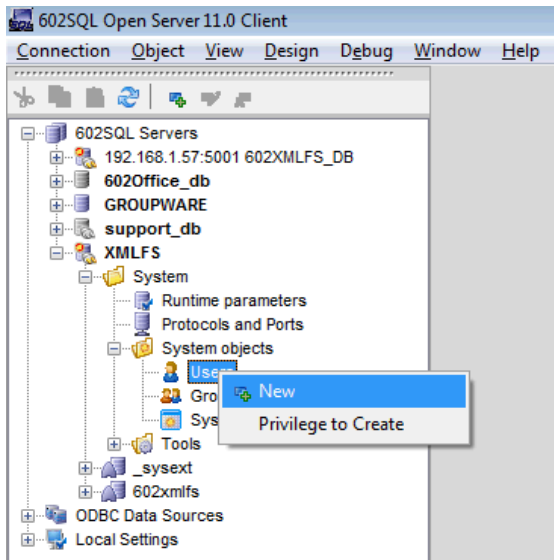


5. Enter the IP address of your 602XML Form Server (e.g. 192.168.1.57), and click **OK**.

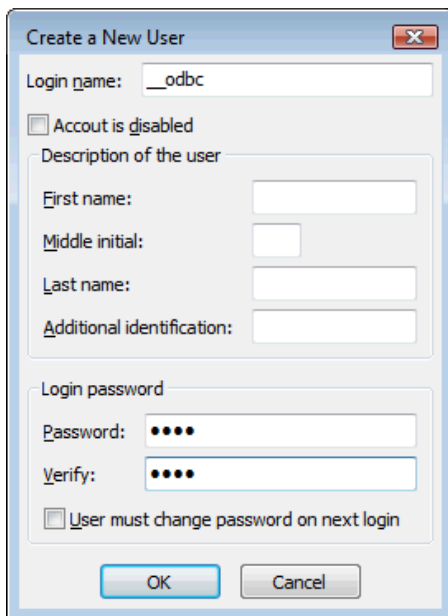


6. Double-click the newly created server on the left (e.g. **XMLFS**), and login as the administrator.

- Open the **System** folder, then the **System objects** folder, right-click **Users** and click **New**.



- Create a user named **__odbc**. The two underscores in the login name will prevent the password from expiring.



- Now you will need to login to the 602XML Form Server and give the new **__odbc** user **READ** access to form data. To do this, click **Forms Administration**, then click the **Display details of the form** icon, and finally click **Data**.
- Make sure the user **__odbc** has **READ** access then click **Save Changes**.

11. This screen will also show you which database table holds the form data. The table structure is **FX_Y_TROOT**, **X** = Internal Form ID, **Y** = Form Version. In the example below the table **F2_2_TROOT** contains the data.

The screenshot shows the 602XML Form Server administration interface. The main content area is titled "Database Objects And Data Managers - (MCSI1) Minor Contracted Service Invoice". It displays the following information:

- Version Summary:**
 - Form: Minor Contracted Service Invoice
 - Form code: MCSI1
 - Version number: 2
- Database Objects:**
 - Following database objects were created for this version:
 - tables: F2_2_TROOT
 - transport scripts: f2_2_dad
 - sequences: f2_2_td_generator, f2_2_ttop_generator
- Data Managers of the Version:**

Subject Type	Subject Name	Privileges
group	EVERYBODY	none
user	ADMIN	none
user	ANONYMOUS	none
user	__ODBC	read
user	__PHP	none

At the bottom of the interface, there is a "Save Changes" button and a navigation bar with "« Previous 1 Next »".

12. The final step involves creating an ODBC DSN for access from Microsoft Excel or OpenOffice.org Calc. Open **Windows Control Panel - Administrative Tools - Data Sources (ODBC)**.
13. Create a USER DSN or SYSTEM DSN based on your needs.