

Informed Filler®

Getting Started

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Contents

About This Guide iii

Installing Informed Filler 1-2

What Comes with Informed Filler 1-2

System Requirements 1-3

Installing Informed Filler 1-3

 Installing on Windows 1-4

 Installing on Macintosh 1-4

 Easy Install 1-4

 Custom Install 1-5

Licenses and Registration 1-5

 Registering the Application 1-5

 Using an Unregistered Application 1-6

 Registering Later 1-7

Registering With Shana 1-7

Using On-line Help 1-8

Contacting Support 1-9

 Before you phone Shana Corporation's Support Team... 1-10

 Read The Manuals 1-10

 Check our Home Page on the Internet 1-10

 Contact Us 1-10

 Training on Informed products 1-10

Welcome to Informed Filler

Welcome to Informed Filler by Shana Corporation. Informed Filler is sophisticated yet easy to use forms management software that allows you to fill out, route, approve, and submit forms electronically.

About This Guide

Whether you're using Informed Filler for the first time or upgrading from a previous version, this guide contains important information that you should read. You'll find information on each step of the installation process from the system requirements to installing and registering Informed Filler. You'll also learn about the various installation options that come with Informed Filler, and how to use on-line help.

In addition to this Informed Filler Getting Started Guide, the manual set on your Informed CD also contains the *Informed Filler User's Manual* which gives you comprehensive, wide-ranging coverage of Informed Filler's powerful yet easy to use forms management features.



Installing Informed Filler

In this chapter:

- What Comes With Informed Filler 1-2
- System Requirements 1-3
- Installing Informed Filler 1-3
- Licenses and Registration 1-5
- Registering With Shana 1-7
- Using On-line Help 1-8
- Contacting Support 1-9

Installing Informed Filler

Informed offers seamless cross-platform inter-operability between Windows and Macintosh. This chapter gives detailed instructions on how to install the Informed Filler application and associated files on both Windows and Macintosh computers.

What Comes with Informed Filler

Informed Filler ships on a CD-ROM that contains both the Windows and Macintosh versions.

Note The CD-ROM contains third party applications that are needed to view the on-line manuals and product presentations.

Here's what comes with Informed Filler:

For Windows:

- Informed Filler application and related files

For Macintosh:

- Informed Filler application and related files

Along with the CD-ROM, your Informed Filler package also contains:

- Informed Filler Getting Started Guide
- license certificate
- registration card and registration number labels
- pre-registration card (if software is pre-registered)

The CD-ROM also includes Informed Designer. If you've purchased Informed Designer, installation instructions can be found in your *Informed Designer Getting Started Guide*. Your peel-off registration number labels will include an Informed Designer registration number. If you've purchased only Informed Filler, do not install Informed Designer.

System Requirements

To use Informed Filler, you'll need a form template created with Informed Designer, and the following hardware and software:

Windows

- 486 or better
- Windows 95 OSR2 / Windows NT 4 SP3 or later / Windows 98 / Windows 2000
- Hard drive with at least 9MB of free disk space

Macintosh PowerPC™

- PPC
- Mac OS 8.5, 9.0 or 9.1
- 2.5MB of free RAM
- Hard drive with at least 7MB of free disk space

The form designer can link your form templates to different types of systems such as other databases, signing services, and e-mail systems. Some external systems have additional system requirements. For example, to perform a data lookup to an Oracle database, the SQL*Net client software must be installed on your computer. For the system requirements of the systems that your forms are linked to, see the system's accompanying documentation.

Installing Informed Filler

Installation of Informed Filler is done with easy to use installer applications that you'll find on the CD-ROM.

While the installation process itself differs slightly between Windows and Macintosh, the installation options are the same.

Installing on Windows

The following sections explain the procedures for installing Informed Filler on Windows 95, 98, 2000 or Windows NT. It is recommended that you exit all Windows programs before running the installer.

1. Insert the CD-ROM into your computer, then double-click your 'D' drive to show the contents of the CD-ROM. If your CD-ROM drive uses a different drive letter, double-click it in place of 'D.'
2. Open the Informed Filler folder.
3. Open the second Informed Filler folder, then double-click the Setup.exe icon to launch the Setup program.
4. The Setup program leads you through the installation process. Follow the instructions on the screen.

After installation, a dialog appears informing you that installation was successful. If you have installed all the items you need, click 'Quit' to quit the installer. If you wish to install more items, click 'Continue' and repeat the installation process to install the desired items.

Installing on Macintosh

1. Insert the CD-ROM into your drive.
2. Double-click the 'Informed[®]' icon on your desktop to display the contents of the CD-ROM.
3. Open the "Informed Filler[®]" folder.
4. Open the second "Informed Filler[®]" folder, then double-click the "Informed Filler Installer" icon to start the installation process.
5. The Setup program leads you through the installation process. Follow the instructions on the screen.

The installer allows you to specify either "easy" or "custom" installation. You select either of these options from the drop-down list at the top of the main installer window.

Easy Install

The default method of installation is the Easy install. If you select this method, the installer application automatically installs the following items:

- Informed Filler application appropriate for the computer you're installing on
- all Informed plug-ins
- spell checking and on-line help

If you're an advanced user or network administrator and wish to change the installation configuration, you can choose the 'Custom Install' option instead.

Custom Install

- When you choose the 'Custom Install' option, the installer window changes to display installation options for you to select.
- Select an item by clicking its checkbox. Some items have additional options that you can view by clicking the triangles to the left of the item names. You can obtain information about each option by clicking its corresponding 'information' button to the right.

After installation, a dialog appears informing you that installation was successful. If you have installed all the items you need and wish to quit the installer, click 'Quit.' To install more items, click 'Continue' and repeat the installation process to install the desired items.

Licenses and Registration

Informed Filler can be used in a registered or unregistered state. If you register the Informed Filler application with an Informed Filler User Registration Key, you can fill out any Informed e-form. If you don't register your Informed Filler application, you can still fill out Informed e-forms that have been registered with a Form Registration Key.

Registering the Application

When you run Informed Filler for the first time, the Licenses and Registration dialog appears.

Licenses and Registration

 Please enter your user registration key for Informed Filler below.

Name:

Organization:

Registration Key:

Choosing "Use Form Now" will allow you to fill out registered forms immediately without entering a user registration key.

1-6 : Installing Informed Filler

1. Enter your name in the 'Name' text box.
2. Enter the name of your organization in the 'Organization' text box
3. Enter the registration key in the 'Registration Key' text box.

Note

Your Informed Filler User Registration Key can be found on the stickers included in your Informed Filler package.

4. Click 'OK.' The Informed Filler License Agreement appears. If you accept the terms of the agreement, click 'Agree.'

You can now use Informed Filler with any Informed e-form.

Using an Unregistered Application

If you did not purchase an Informed Filler User Registration Key, you can still use Informed Filler to fill out e-forms that have been registered with a Form Registration Key.

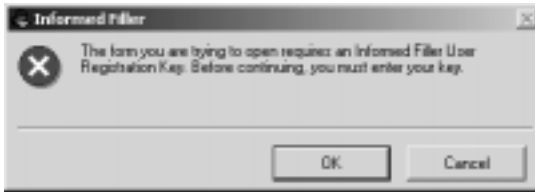
When you run Informed Filler for the first time, the Licenses and Registration dialog appears.



1. Enter your name in the 'Name' text box.
2. Enter the name of your organization in the 'Organization' text box.
3. Click the 'Use Form Now' button. The Informed Filler License Agreement appears. If you accept the terms of the agreement, click 'Agree.'

You can now open and fill out Informed e-forms that have been registered with a Form Registration Key.

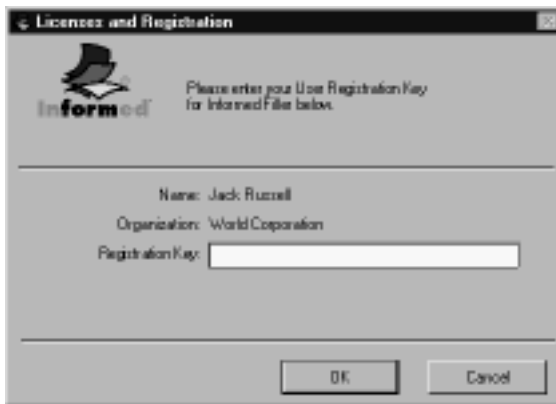
If you're using an unregistered copy of Informed Filler and you try to fill out a form that has not been registered with a Form Registration Key, you'll be alerted with a message.



Registering Later

If you've been using an unregistered copy of Informed Filler, and later purchase an Informed Filler User Registration Key, follow these steps to register the application:

1. Choose **Register** from the Help (Windows) or Apple (Macintosh) menu. The Licenses and Registration dialog appears.



2. Enter your User Registration Key in the 'Registration Key' text box, then click 'OK.'

Registering with Shana

If you purchased Informed Filler direct from Shana, your software is pre-registered. If you received Informed Filler from another source, please contact us and register your software. As a registered Informed Filler owner, you're eligible for:

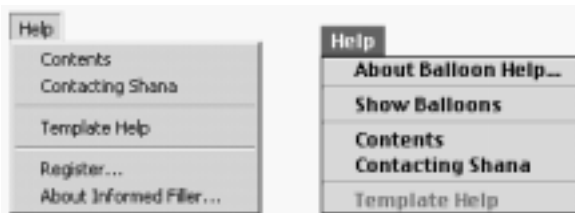
- technical support and software updates (from our web site)
- special upgrade pricing
- news about products and promotions (if you subscribe to our e-mail list)

To register with Shana, you can call us toll free at 1-800-386-7244, or fill out the registration card that's included in your Informed Filler package and mail or fax it in to us.

Using On-line Help

In addition to your Informed Filler manual set, reference information and instructions are available through Informed Filler's on-line help feature. If you choose to install on-line help, installation will include the necessary help files. Help files are installed in a folder named "Help" inside the Informed folder. The help files must remain in this location.

The commands you use to access on-line help are found under the Help menu.



Choosing **Contents** displays the Help window.



The left pane of the Help window contains a table of contents, an index and a search engine to help you find the topics you need. Click any topic to display its corresponding information.

Note On Macintosh, the Help files consist of HTML pages that look and act like the Help files on Windows. You must have a web browser in order to view the Help files on Macintosh.

Contacting Support

Shana Corporation has made every effort to make Informed Filler as easy and straight-forward to use as possible. However, there are times when a feature or function does not seem to perform as expected. In such cases, Shana Technical Support is available.

Note Technical support is available only to registered users of Informed software.

If you have not already faxed, e-mailed, or mailed your registration form to us, please have the following information ready (or include it with your fax/e-mail) when you contact Technical Support for the first time:

- full name
- company name (if there is one)
- full address, including office/apt. number, street, city, state/province, country, and zip/postal code
- phone and fax numbers
- e-mail address (if available)

Also, whenever contacting Technical Support, please make sure you have (or include) the following information about your computer and software:

- serial number of the Informed product you are using (this can be found by selecting **About Informed Filler** under the Help (Windows) or Apple (Macintosh) menu when the application is the active.
- type and version of the operating system your computer is using (Win98, WinNT, Mac OS 9 and so on)
- type of computer you are using (Pentium 300, i-Mac and so on)
- the details of your question such as the commands you are using and the desired task that you are seeking to accomplish. If possible, please be sitting in front of your computer so that the support technician can talk you through the solution.

Before you phone Shana Corporation's Support Team...

Read The Manuals

The Informed manual set covers all of Informed's features and tools. Sometimes the answer you need is in the manuals. Be sure you are consulting the correct manuals for the application you are using.

Check the indices to see if you are looking in all the right places. If you still can't find the answer you are looking for...

Check our Home Page on the Internet

We are constantly upgrading and adding to our web-based technical support services. Point your browser (URL) location to <http://www.shana.com/> and visit the support section of the Shana web site. Searching our Technical Notes you will find many sub-sections covering things like functions, calculations, e-mail enabling, tips and tricks and many examples of how to set up common forms and settings. As well, there are many forms and examples you can download and try out yourself.

Contact Us

In the support section of the Shana web site you will find information on how to contact our technical support staff by e-mail (preferred), fax, mail and telephone. Please keep in mind that you may be charged for accessing our technical support. Please review the Technical Support Credits Policy and their related Terms and Conditions on the web site for more information.

Training on Informed products

Shana Corporation also offers training on Informed products through Shana's Professional Services group. Further information can be obtained by contacting Shana's Professional Services at training@shana.com.